Contents

Welcome to the Custodian 4 Manual

This manual consists of two parts. In the first are the "how to" Tutorials. Each "how to" Tutorial contains step by step instructions of how to accomplish certain tasks with Custodian 4. It does not explain everything you could possibly do with Custodian 4, but clearly explains basics so you can get up to speed quickly.

To follow the Tutorials, it is best to use the Tutorials dataset (some use data already added, others require you to enter data). Instructions for opening this dataset are given at the beginning of the first Tutorial.

The second part contains a screen by screen reference of every area of the Custodian 4 software and what you can do with it. Remember that you can access help from the Help menu in the main screen in Custodian and also from many of the dialogue boxes, for example in the Shortcut Bar. This manual is built from the Help files and Tutorials but with the added advantage of screen shots in the Tutorials section.

The second part covers the contents of the menus and the navigation tabs and then goes on to describe the functions in the Shortcut Bar. Finally, the processes of data entry and methods of organising and extracting your data are laid out.

Although every effort has been made to provide complete information, if you find anything is missing, not clear or even mistaken, please use the Contact information at the end of the manual and let us know.

We hope you find Custodian 4 an invaluable aid in your research.

Phil and Sonja

PART ONE: The Tutorials

1. How to get started in the data forms

This tutorial will help you become familiar with the main screen in Custodian and the basics of opening and using data entry forms.

We will:
• Open the Tutorial Dataset
• Open a Data Entry form
• Use the pins and resize the form
• Take a quick look at the Shortcut Bar
• Take a quick look at the Tool Bar
• Enter a record
• Use the Individual Details and Source boxes
• Look at the Name and Place Indexes

Open the Tutorial Dataset

To open the Tutorials Dataset, first select the File menu, then choose Open Dataset. Click on the tick box next to the Tutorials Dataset title **(1)** and then click on Open Dataset **(2).**
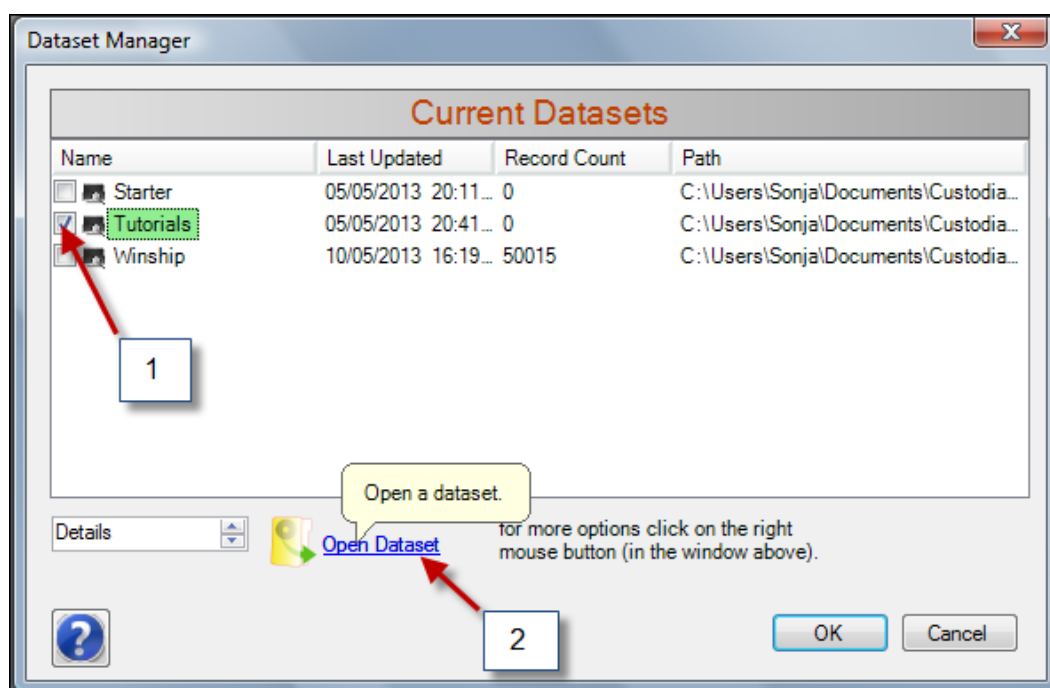
You will see a message asking if you want to backup (the dataset you were in) - select No on this occasion. You will now see the title Tutorials at the top of the Navigation Bar (below the menu items).

You can use the Tutorials dataset with all the How To .... tutorials, or as a practice area for trying things out without using your real data (but try not to delete any Winship entries as these are used in the How to build a family tree tutorial!)

Open a Data Entry Form

Down the left of the screen is the Navigation Bar - this contains a list of data entry forms in alphabetical order. Some of these have a + by them which indicates that there is another level of data
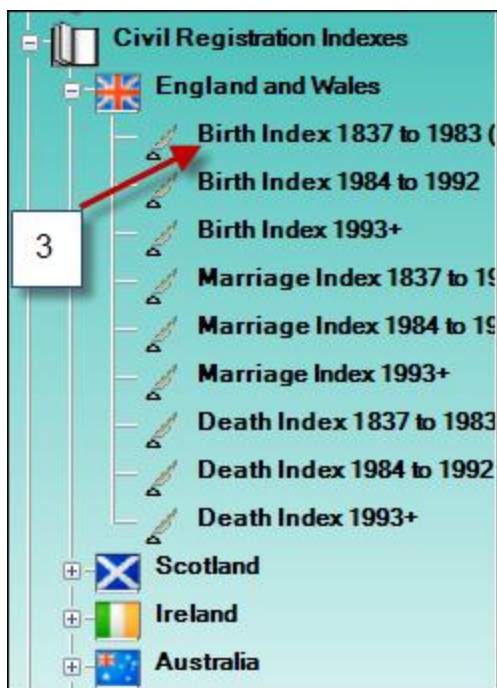
forms below. Those with a quill icon have no other levels.

Look down the list for Civil Registration Indexes and click on the + by the book icon next to it. Another list will open - this time click on the + by the England and Wales title and a third list will open containing all the data forms for the England and Wales indexes.

You probably can't see the full title of these indexes - put your cursor on the edge of the Navigation Bar until it changes to a double-arrowed cross, hold down the mouse button and drag the edge of the Navigation Bar to the right far enough so you can see the titles.

Click on the title for the Birth Index $1837 - 1983$ **(3)**. The data form will open in the space on the right.

Now reduce the size of the Navigation Bar again by using the same technique to drag the edge of the Bar to the left.

Use the Pins and Resize the Form

The first thing you will notice is that the form is not at maximum width, depending on the size of your monitor and your screen resolution. There are a number of things you can do to maximise the space on your screen.

At the top of the Navigation Bar is a pin icon (at the same level as the Tutorials title). If you place your cursor over it the cell tip it says Auto Hide. Click on the pin - it will change its aspect to a "flatter" version. Now move your cursor away from the Navigation Bar and the Bar will slide to the left, leaving a small tab entitled Forms on the left of the screen**(4)**. Place your cursor over the Forms tab and it will slide back.
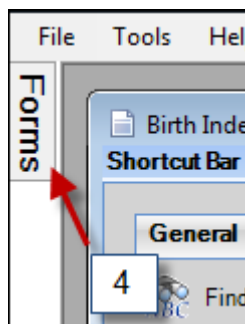
We will leave it like this for the moment, but just click on the pin icon again to fix the position of the Navigation Bar whenever you want to.

Now reposition the form by placing the cursor on the blue title bar at the top, holding the mouse button down and dragging it to the left of your screen. Resize the form by using the drag technique you used on the Navigation Bar to drag the right edge of the form to the right, as far as you would like. There aren't many fields in this particular data entry form, so you probably won't need full screen width, but others will have many more. You can resize the top and bottom of the form too.

To the left of your data form is the Shortcut Bar - to the right of the title is another pin and this works

in exactly the same way as the one on the Navigation Bar. Click on the pin and move your cursor away to see the effect. You now have virtually full screen size for your data. Put your cursor over the Shortcut Bar tab to recover the Shortcut Bar and click on the pin to fix it back into position. We'll leave this fixed for now as this form is not a large one.

Tip: It is as well to be aware that when you fix the Shortcut and Navigation Bars back again with the pins, your form will still be at its large size and you will need to drag the form to the left so you can access the right hand edge and reduce the size according to how your screen is now.

Tip: Your data form size will be remembered when you close it and return to it later, but not the pinning - this will revert to the fixed position.
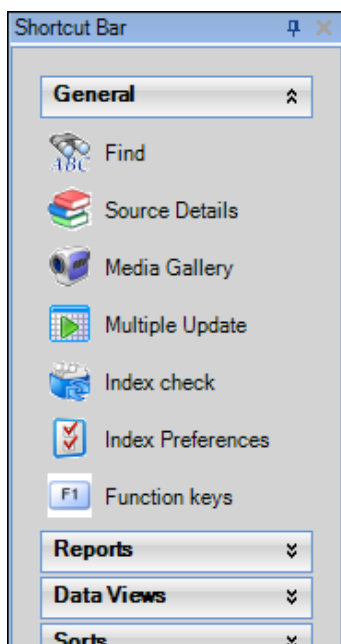
Take a Quick Look at the Shortcut Bar
The Shortcut Bar to the left of your data consists of several options, the General option being the one that is open when you go into the form.

Left click on the small double arrows to open and close the different options. You will also find some extra functions when you right-click the arrows for the Data Views, Sorts and Styles.

Take A Quick Look at the Tool Bar
The tool bar at the base of the data form is used for simple functions - saving & deleting records and clearing sorts and filters for example. Place your cursor over each icon to see the cell tip and a brief description of the function.
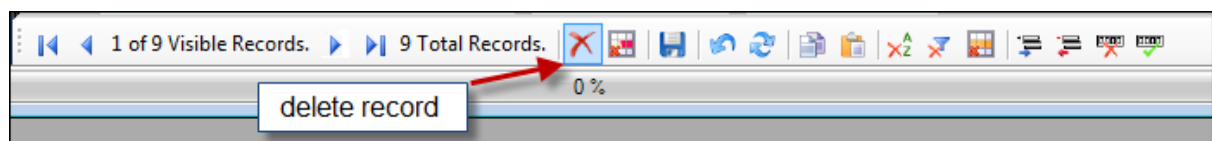
Enter a Record
Now to enter a simple record. Next to the "Add" at the base of the form is a large button with the title of the data entry form - place your cursor over it and the cell tip will tell you this is "Add a New Birth Index 1837-1983 entry". Click on this and a new row is opened in the data form.

You will see a number in the first column (your record number) and a * to indicate it's a new record. If you are using the Tutorials, there will probably be some records already entered.

The Quarter and Year field is a date field and requires the format to be MmmYYYY, for example Mar 1840. Be aware that if you enter 3 1840, the program will convert it to Mar 1840, not the third quarter

of 1840 (ie Sep).

Now enter something in each of the fields, using the tab key to move to the next field. It doesn't have to be actual data, just something you'll recognise when we look at the Name Index.

9	Dec 1874	Rosalind Price	WINSHIP		Nantwich	8a	340	CHS
10	Mar 1880	Jane	WINSHIP					

When you get to last field press the tab key again to save the record and open another row. If you don't want to enter another record move your cursor over the tool bar along the bottom until you find the icon with the cell tip "Undo Changes" and click on this icon. This will close the new row. If you know you don't want another row, another way to save your record is to use the disc icon.

Use the Individual Details and Source Details Boxes

Every name in a record has an associated Individual Details box. Click on the forename or surname field in your new record and you will see a button. Click on this button to open the Individual Details Box. Some of the fields in this box will be populated with data from your record, if it is relevant - in this particular case only the forename and surname are. The purpose of this box is really to summarise the information about the person in the record from the information given in the record. Some will inevitably be more complete than others and it would take a lot of space to show all of these fields all of the time in the grid.

For more information about specific fields, see the section Name Fields and the Individual Details box.

Click on OK to close the box.

Every record has an associated Source Details Box. In the Shortcut Bar, choose the General Option by clicking on the double arrows if it isn't open. Now click on Source Details and the Source Details Box will open. Again, some of these fields will be populated with data from the record. Other fields about the source information can be completed here. The purpose of this box to keep most of the source information (ie non-genealogical) separate from the main grid.

Click on OK to close the box.

With both of these boxes fields can be shown in the main grid, further information about which is in the main Help file.

Look at the Name and Place Indexes

Let's look at your new record in the Name Index.

You can leave the Births form on the screen. In the Navigation Bar, click on the + by the Master Indexes title, then click on the Name Index title.

The Name Index will open - it has a similar appearance to a data entry form and you can pin back the Shortcut Bar in the same way. If you use the slide bar at the bottom of the Index, you'll see that the forename and surname are also pinned so they stay in position as you look at the rest of the Index entry.

If your entry included the mother's maiden name (from 1911) there will be two records associated with the entry - one for the child and one for the mother. Every individual in a record will have a separate entry in the Index and your Index will build up so that you can spot links in your data amongst the different record types.

Leaving the Name Index on-screen, click the Place Indexes title in the Navigation Bar and the Place Index will open. The registration district for your birth entry should be listed. This Index will include Residence, Registration District, Address, City Town or Village and will help you find links as you build up the volume of data.

	Place	Record Source	Year	Type of Place	County	Country
62	Nantwich	Birth Index	1869	Registration District	CHS	ENG

To finish this tutorial, click on the X in the top right corner of the Place Index, Name Index and Birth Index form to close them. You are now ready to start another tutorial if you wish.

2. How to rename the Starter dataset

When you are ready to begin entering your real data, you can either create a blank dataset or you can use the Starter Dataset (which is also blank) and rename it to something more meaningful to your research. This tutorial shows you how to do the latter.

We will:
• Open the Dataset Manager
• Select the Starter Dataset, open the title change menu and change the title
• Open the newly renamed dataset

Open the Dataset Manager
Click on the File Menu, then choose the Open Dataset menu option. This will open the Dataset Manager window.

Select the Starter Dataset.....
Locate the Starter Dataset title and click on the box next to it to place a tick in it (**1**).
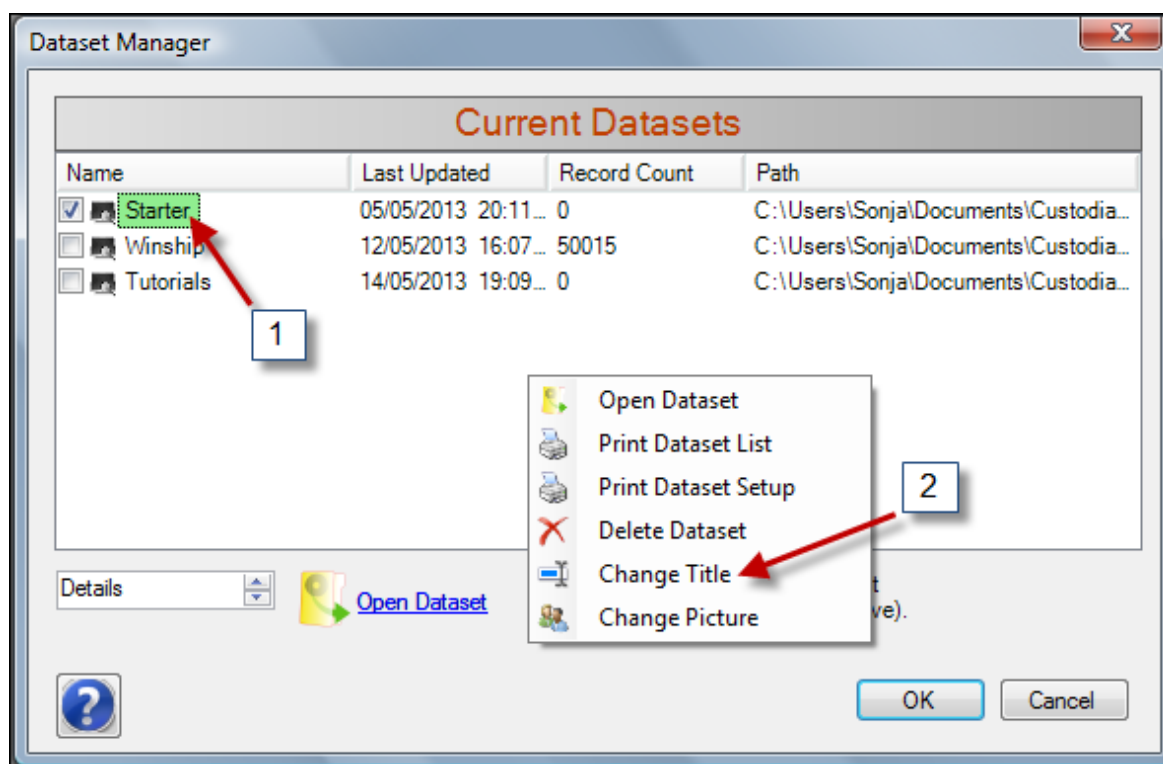
Place your cursor in the white space of the Dataset Manager window and right-click the mouse button. This opens a new menu of options - click on Change Title (**2**). The title of the Starter Dataset will now be in edit mode and you can key in a new name. Now press Return and you will see a message informing you that the title has been changed.

Open the newly renamed dataset
With the new dataset still "ticked", click on the Open Dataset link. You will see a message asking if you wish to backup - this is the autobackup message for the dataset you are leaving but as there is no data in here yet, choose "No". The newly renamed dataset will now open and you are ready to begin data entry. Remember to change to the Tutorials dataset if you wish to work through another tutorial.

3. How to set preferences for dates, capitalization and other options

This tutorial will help you set your preferences for date and time, capitalization and other options.

We will:
• Open the Dataset options window
• Choose the options required
• Apply and close the window

Open the Dataset Options window

From the main screen in Custodian, click on the Tools menu item, then the Options menu, then the Dataset Options menu. The Options window will open. All the options you choose here are for the current dataset only i.e. you can set different options in each dataset.
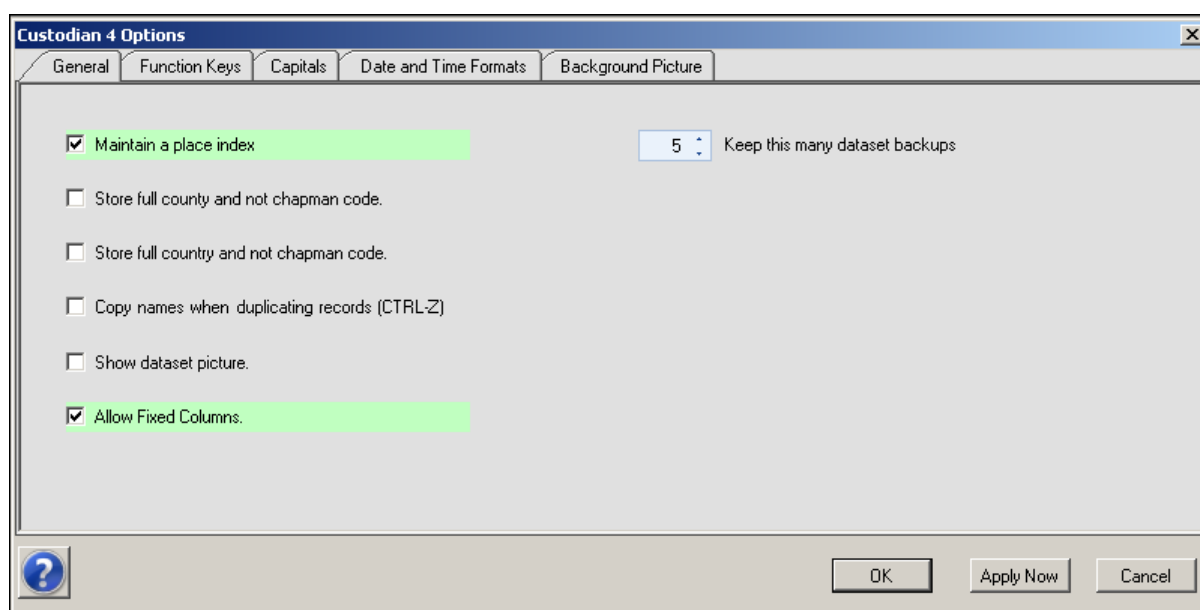
Choose the options required

The Options window has several tabs. We'll look at them in turn.

The General Tab:

Do not maintain a Place Index: - if you do not need a Place Index, you can choose this option. Whenever a record is added or updated, or when the Index Check is run, the Name and Place Index has to be updated and this can be slowed if updating large amounts of data. You can build/update the place index later if you change your mind. If you aren't experiencing slow processing, you probably don't need to do this.

Store full county and not Chapman code:- in the County field in every form you can either choose to store the Chapman Code e.g. HAM or the full county name e.g. Hampshire. Tick this box if you want the full county. If you change your mind at any time, you can change this option but be aware that earlier records will not be updated automatically.

Store full country and not Chapman code:- this is exactly the same as the above option, but for the country.

Copy names when duplicating records (CTRL-Z):- using CTRL-Z to duplicate a row does not normally include the name field i.e. this has to be entered manually. This is because you may want to enter a batch of records from a parish register (for example) where most of the details are the same except the name and most likely the date. Even when entering records for the same person, the name may be spelt slightly different. If you want the name field to be duplicated also, choose this option. It is up to you to ensure that you are not incorporating errors in your data by doing this!

Show dataset picture:- if you added a picture for your dataset in the Create New Dataset option, your picture will show in the main screen space when you open the dataset, but you will need to turn this on by choosing this option.

Allow fixed columns:- this option allows you to turn off the pins in the column headers in the grids, thus allowing the columns widths to be smaller and creating more space on the screen. The default is "On" – that is, if this option is ticked, the pins remain (in all forms).

Keep this many dataset backups: - when you respond "Yes" to the backup message on closing a dataset, the backups will be saved according to the number chosen here. The default is 5 - i.e. the last five backups are saved and earlier ones deleted. This is to ensure that you don't use up disc space by accumulating backups. The backups are labelled numerically so that you can identify the most recent one.

If you select any of the above options, be sure to click on the Apply Now button before leaving this tab.

The Shortcuts Tab:
This is where you can set function keys to use in the data forms. Each function key can contain a surname or place or any text which you use regularly. You then use the function key to insert the text into a field. You must use the CTRL key and the function key at the same time e.g. CTRL + F2.

The ones you set in here only apply to the current dataset and you can set different ones in each dataset you have. Just key the text you want in the space.

The Capitals Tab:
In this section, you can select the format of capitalization for the forename, surname and places. The options are exactly the same for each of these. Click on each radio button and see the effect in the sample text.

NOTE: if you have surnames with a prefix e.g. le Mesurier, or places with a middle word e.g. Chester le Street and you choose Proper Case, the middle word will not be capitalized.

Date and Time Formats Tab:
In this section you can choose the date formatting you require.

The first part to complete is whether you prefer to enter your dates with the day first or the month first. This affects the next section, so choose carefully!

Next choose the format for the date - the sample given below the formats will change as you click on each radio button, so that you can see the effects. Now choose the time format you prefer - again the sample will show you the result.

The PC Culture is for your information only - it shows what your computer setting is for the date and time. If you want to change this, you will need to go into the Control Panel and then the Regional

Settings (from your desktop).

Apply and close the window

For all the above options, make sure you use the Apply Now button before you leave the relevant tab. You should also know that if you change any options when you already have data in your dataset, the program can only begin those changes from that point i.e. it cannot update any previous records. This would have to be done manually or by using the Multiple Update option.

Click on OK to close the window.

4. How to show and hide fields

This tutorial will explain what is meant by hiding and showing columns (fields) and how to do this in a data entry form.

We will:
• Open the IGI form and check which fields are showing
• Look at the fields in the Individual Details and Source Details box
• Choose one field to hide and one to show - save this View
• Move the newly shown field
• Change Views
• A quick look at the Field Chooser
• Close the form

For the purposes of this tutorial, we will use data which is ready to use in the **Tutorials** dataset. Use File from the main menu in Custodian, choose Open Dataset, click on the tick box next to Tutorials and then click on Open Dataset.

In every data entry form there are fields which are hidden. Some of these are in the Individual Details box and others are in the Source Details box - these tend to be fields which only relate to these areas, though not always. There are also others, such as formatted date fields which are populated by the date fields visible in your form and formatted for use in sorting, and User fields which are "spare" fields which can be utilise. All are hidden to save the main data entry form from being impossibly wide, but at any time you can show any of them in your form. You can also hide any fields you don't wish to use.

Open the IGI form and check which fields are showing

From the main screen in Custodian, and with the Navigation Bar open, click on the + by the title IGI & VRI. Now click on the IGI title next to the book icon and the IGI will open. For advice on using the pins to maximise your screen space, see the How to get started tutorial.

Using the scroll bar at the bottom of the data form, look at the fields which are showing in this form. Are any not being used?

Look at the fields in the Individual Details and Source Details box

Now click on the Source Details title in the General section of the Shortcut bar (to the left of your data). Notice that the County and Country fields in here are also showing in the grid. Click on OK to close the Source Details box.

In one of the records, click on a name field and then click on the button that appears in the name field. This opens the Individual Details box. As the IGI doesn't give a great deal of information other than names, there won't be many of these fields completed. Note the "Add name to Index" tick box at the bottom. Click on OK to close the Individual Details box.

Choose one field to hide and one to show - save this View

We will choose to **hide** the Region field which is currently on view in the main grid. We'll choose to **show** the Personal Reference of the first person in the record, usually termed Main. In the IGI, this person is either the individual being baptized or the first name in a marriage (the other being termed Spouse), or it could be the person who has died in the case of a death entry.

Place your cursor on the Data Views option in the Shortcut Bar and right-click the mouse button. In the next drop down, select the View Manager.
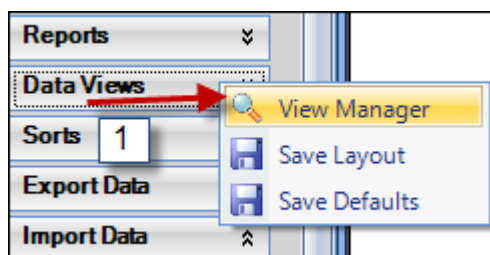
In the View Manager window is a list of all the fields in the data form, both hidden and showing in the main grid. Those with a tick in the box are the ones showing in the grid. The Region field is near the top but if you need to, you can use the scroll bar on the right to move down the list. Click on the tick box - this adds a tick if there isn't one and removes it if there is **(2)**.
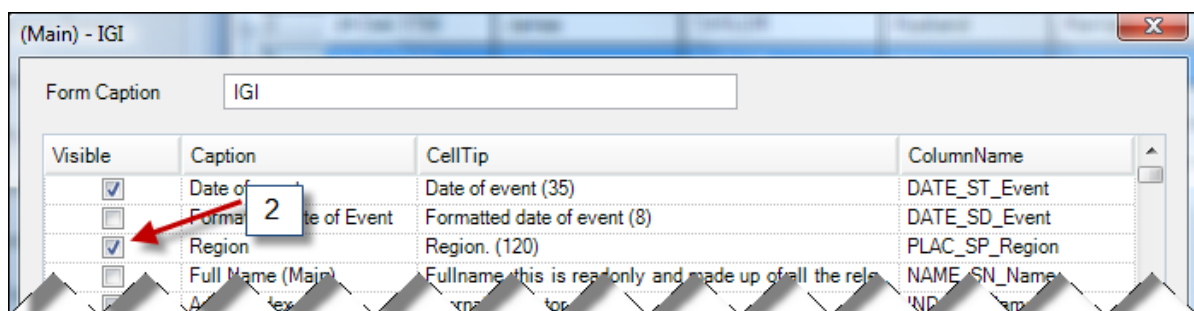
Now search for the Personal Reference field for the Main record. You will find all the fields for Main together, all the fields for Spouse together etc.... Click on the tick box to add the tick **(3).**

Note that in the View Manager you can see the field names belonging to the field captions.
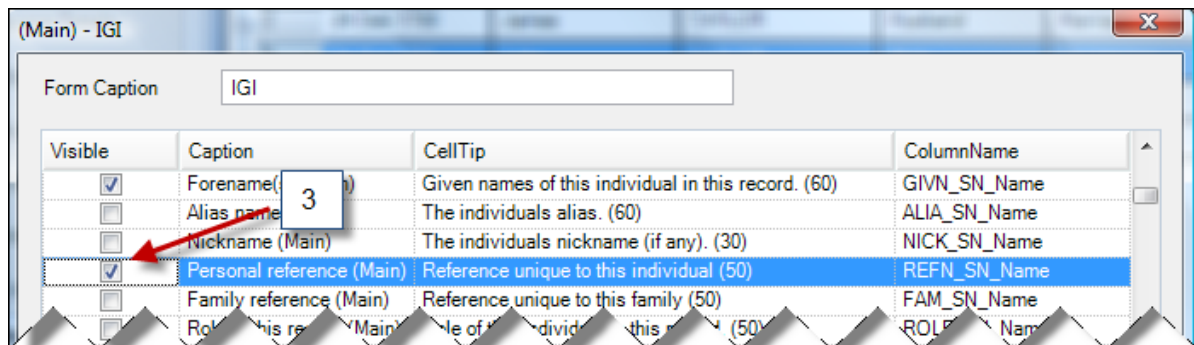
You can save this view as your Main View i.e. overwrite the original one. To do this, click on the Disc icon and then on OK. However, if you are radically changing a view for a specific reason, you may want to save the new layout as a separate View and select each one as you require it.

We will save this one as a new View. Put your cursor on the end of the title Main and use the back-delete key on your keyboard to delete the title. Then key in a new name for your View **(4).** The sun icon (where the disc icon was) indicates that the name is unique and therefore alright. Click on OK.
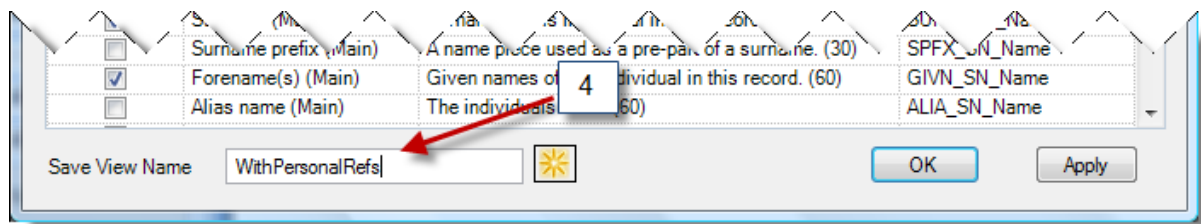
Move the newly shown field

The Personal Reference field that you selected to show in the main grid will be inserted at the end of the other fields. To move it to a more appropriate position, place your cursor over the field header, hold down the left mouse button and drag the field to the position you want. Adjust the width of the field by placing your cursor on the right edge of the field header until you see the double arrow cursor, hold down the left mouse button and drag the edge of the field to the left to the size you want.

This new layout needs to be saved - right-click on the Data Views option and then select Save Layout **(5)**. Your new View is now updated with the latest change.

Change Views

You should now see your new View listed under the Main View in the Data Views tab **(6)**. You can change Views at any time by clicking on the one you want to use. The program will remember the last one you used when you open the data form again and open it with that View.
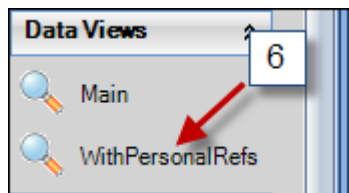
A quick look at the Field Chooser

This is a quick method for hiding and showing columns within your current View. The Field Chooser icon is found above the record number in the data form **(7)**.

Clicking on the Field Chooser opens a list of all the fields in the form, including the Source Details and Individual Details boxes, in alphabetical order.

The scroll bar allows the whole list to be searched but only column titles are visible, not the field names behind them. You should find the entries in brackets useful in identifying the fields you require. Those entries which are ticked are the fields which are already showing in your data form. If you wish to hide any of these, click on the tick-box to remove the tick. If you wish to show any other fields, click on the tick box to add the tick.

When you are finished, click on the X in the top right corner of the Field Chooser to close it. Any newly shown fields will appear at the end of the other fields but you can drag and drop them to another position (see Move the newly shown field above).

If you would like to save this new layout as your current View, right click on the Data Views option and select Save Layout - you should see a message to say your current View has been saved. If you only want the layout whilst you are currently using the form, don't save it and the previous layout of your View will be returned on closing the data form.

Close the form

When finished with the data entry form, click on the X in the top right corner of the form to close it, or click the - symbol to minimise the form.

5. How to enter a certificate

This tutorial will help you enter data from a paper certificate into the relevant certificate form.

Certificate forms are a little different to the others as you have a choice of using the main grid part of the form or the certificate view to enter the data. The certificate view is laid out in a similar way to an actual certificate and is therefore more intuitive when transferring data from paper to screen. Whichever you use, one will populate the other - there is no need to enter data twice. All certificate forms work on the same principle, though some contain more information than others so when you have used one type, the others will be easy!

We will:
• Open the England & Wales marriage certificate form
• Open the certificate view and enter data
• See how to change the font size in the certificate
• See how print a certificate
• Review the information in the grid and save the record

For the purposes of this tutorial we will use the **Tutorials** dataset. Use File from the main menu in Custodian, choose Open Dataset, click on the tick box next to Tutorials and then click on Open Dataset.

Open the England & Wales marriage certificate form
In the Data Navigation Bar, click on the + next to the Civil Registration Certificates option, then the + next to the England and Wales option and then the + next to Marriage Certificate. When the form opens, you will see there is already an entry in the grid - this is used in the How to Build a Family Tree tutorial, so we won't use this one.

First resize the grid form to fit your screen, if required, by dragging the bottom right corner diagonally to the right and downwards. Use the top edge to place the form where you want it on the screen (this is all remembered the next time you open the form).

To begin a new record, click on Add Marriage Certificate entry and a new row will open in the grid.

Open the certificate view and enter data
Now click on View Certificate in the General Section of the Shortcut Bar and a blank certificate form will open. You can increase the size of this too - drag the bottom right corner down to the right and the certificate resizes proportionally, making it easier to see all the text you enter.

Work through the fields in the form by comparing them with those on your paper certificate. Note that the field Number is the certificate number which is usually found just before the date of marriage. If you are unsure of the required contents of a field, hold the cursor over the field and the cell tip will give a brief description. Move from field to field by using the tab key or click on the field by using the mouse.

Field information:-

Registration District - This field has a drop-down list - as you begin to key information the program will try and locate your entry in the list. You can continue keying or click on the correct entry when you see it. Alternatively you can click on the button and locate the district you want, though if you know the district this is a slower option.
Year - this field is above column 1 and requires only the year e.g. 1884

Solemnized at - key in what it has on the certificate, for example: the Parish Church

In the - most commonly this will just be the word Parish but check carefully what is on your certificate. It is not usually a place name.

Of - this is usually the name of the Parish, for example St John

In the - this is usually the name of the village or town accompanied by some other words, for example Town of Newcastle upon Tyne - key all the words in so the on-screen certificate reads as the paper does

When married - enter the date of marriage. Be aware that the date format you have chosen for Custodian is the one that will be used in the certificate when you save it. To change or check the format you have, see the Tutorial How to set preferences for dates....

Forename then surname - you have two choices for entering name details. Either key in the names into the fields you see on the screen, or click on the button and open the Individual Details box. You can complete several fields in the Individual Deatils box, such as Age, Occupation, Residence as well as Surname and Forename, but you don't have to - you can just use the certificate if you wish. This is also the place to enter the Personal and Family References.

Age - enter what it gives on the certificate. If it just has Full Age, enter this - the program completes the Calculated Year of Birth as 21 years as it's not possible to be any more accurate.

Condition - this is usually Bachelor, Spinster or Widow

Rank or Profession - this is the occupation, not always completed for the bride

Residence at the time of marriage - enter the address as given on the certificate. This field populates the Place Index.

Father's name and surname - unlike the bride and groom names,the father's name is a Fullname field (not separate forename and surname) and you must click on the button in the field to open the Individual Details box. Complete forename, surname and occupation also, if you wish. This is also the place to enter the Family and Personal References too.

Rank/profession of father - as with bride and groom, enter the occupation as given on the certificate

Married in the - this will be Parish Church if the marriage is a church one, or Register Office in the case of a civil marriage

According to the rites and ceremonies of - the words in this section will vary according to the denomination of the church or if it is a civil ceremony - enter what you see on the certificate

By or After - put your cursor over the next field and the cell tip should be "By or After" - enter either By or After according to whether the marriage was by Licence or after Banns.

Banns or Licence - you will need to hover the cursor over this field, as above, to see the cell tip "Banns or Licence" - key in whichever one is on the certificate.

By me or Before me - as above, hover the cursor over the field to see the cell tip "By me or Before Me" and enter which one is on your certificate.

Solemnized between us - in these fields, the names of the bride and groom are entered. This is the part which they both sign the certificate so if you have, for example, John Smith X his mark, you can key this in exactly - these names are not used in the index as the bride and groom are already completed. The information is saved in the Brief Notes field in the Individual Details box.

In the presence of - these four fields are for the name of the witnesses. As these are the only fields for witnesses they may also have "X " in them, they have to be handled in a slightly different way. Click on the button to open the Individual Details box and enter the forename and surname in the fields provided. Then use the Brief Note field to enter what you see on the certificate, for example John Smith X his mark. Whatever you key into the Brief Note field is shown in the Witness field on the screen.

Registrar - enter the name on the certificate - this is a general text field and not a name field so doesn't go to the Name Index.

Dated - enter the date on the certificate. The registrar and date may be that at the time of original certificate issue or later, if the certificate is a copy.

See how to change the font size in the certificate

If you are working with a small screen or a very large one, you may wish to change the size of the text which is entered into the certificate (the certificate text is proportionally resized along with the certificate, but the text you enter isn't). To do this, right-click anywhere on the certificate and in the resulting menu, choose the option you require.
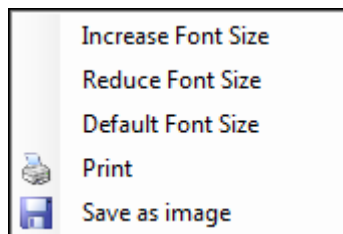
See how to print a certificate

To print your certificate, right-click anywhere on the certificate and in the resulting menu, choose Print (see image above). In the next window, check settings for margins etc and click on Preview and Print. If you are happy with the preview, click on the printer icon to print the certificate.

Review the information in the grid and save the record

When you have completed your certificate view, click on the x in the top right corner (of the certificate view window). You will now see the fields in the grid completed with the information from the certificate view. Although the grid is not as easy to see certificate information as in the certificate view, the grid is very useful when doing searches and sorts.

You should still the pencil icon at the beginning of the row, indicating that the record is in edit mode. Click on the Save icon (disc) in the bottom toolbar to save the record and you can now begin a new entry if you wish.

1. Example of completed certificate

6. How to add pictures, sound & video

You can add family pictures or images of documents, and also sound recordings and video to Custodian and link them to records. You must first have your pictures, sound or video files saved somewhere on your computer or CD/external drive etc.

This tutorial will explain how to add a picture to the Pictures form and link it to a record, then look briefly at the other two options. You will need to have a picture ready somewhere on your computer – it doesn't have to be a family picture, just something to practise with!

We will:
• Open the Pictures form and open a new record
• Find your picture and complete the fields
• Save the record, leave Pictures and go to link record
• Close the form and look at the Sound and Video forms

Using the Tutorials dataset is a good idea, as this is a good practice area, but try not to delete any Winship entries as these are used in the How to build a family tree tutorial! To open the Tutorials dataset, use File from the main menu in Custodian, choose Open Dataset, click on the tick box next to Tutorials and then click on Open Dataset.

Open the Pictures form and open a new record
To add a picture, choose Pictures, Video and Sound from the Navigation Bar and then select the Pictures form. Click on the Add Pictures Entry button near the bottom of the screen. A new record row will open.

Find your picture and complete the fields
In the first field, Picture, click on the button and navigate to where your picture is saved on your computer. Click on your picture file and select Open. The file name will appear in the Picture field. The cross next to this field will change to a tick to indicate that the file exists and is valid. If you click on the tick, the picture will be shown.

NOTE: the picture file is saved in the database

Complete the other fields:
Place relating to the picture;
Forename and **surname** if the picture is of a person. If more than one person is in the picture, add one name and use More Names to add the others;
Date the picture or image was taken or made;
Image information - any background history regarding the image or contents, use the button to open a Notes field and click on the disc icon to save the information you have entered
Image Caption - a title for your picture
Notes - any other notes you want to add.

The second **Picture** field has a thumbnail of your picture. Click on the thumbnail and the picture will pop up larger in a Picture Viewer. This window can be expanded, by dragging the sides or corners, if you wish to see a larger image.
You can also click on the narrow column containing a tick (at the front of all the other fields) to access the pop up viewer.

	Picture	Place	Forename(s) (Main)	Surname (Main)
1	ImagesofEngland1.j...	Corbridge	Lionel	WINSHIP

Date of Picture	Image Information	Image Caption	Picture	Notes
1990	From Images of England...	The Angel Inn		

Save record, leave Pictures and go to link record

Click on the Save icon (disc) in the toolbar to save your record.
Close the Pictures form by clicking on the X in the top right of the form.

Find the record you want to attach the picture to - you can either use the Name Index to go to the record or go straight to the data form locate it that way.

Click on the record so that the row is highlighted. Now click on the Media Gallery icon in the General section of the Shortcut Bar.

In the Media Gallery window, click on the Add Picture button; all the pictures you have in the Pictures form will be shown in thumbnail form. Scroll down if necessary and find the picture you want. Click on the picture and then click OK. The picture will be transferred to the Media Gallery window. You can repeat this and add as many pictures as you like to this record.

To see a larger image of any of the pictures in the Media Gallery window, click on a picture and click on Preview.

Close the record form and open the Sound form

When you have added the pictures you require, click on OK to close the window, and close the form that the record is in.

From the Navigation Bar choose the Sound Recordings option. You will find the fields in this form are very similar to the Pictures form.
To begin, click on Add Sound Recordings Entry. As with the Pictures, a new row will open - click on the first field, Sound File Name, to navigate to your sound file on your computer.

When the file name is added to the field, complete the rest of the fields and save the record. NOTE: The sound file is added to the Media folder in your dataset. You can listen to the sound file by clicking on the tick in the first column - this will open Windows Media and begin playing the file. NOTE: If you ever have an X in the column, instead of a tick, the file can't be found in your Media folder and you will need to locate it and save it back to the folder.

When you have added sound files, follow the instructions above in .... **and go to link record** to link your sound file to a record, if you wish.

Close the record form and open the Video form

When you have linked your sound file to a record, click on OK to close the window and close the form that the record is in. From the Navigation Bar choose the Video Clips option. You will find the fields in this form are very similar to the Pictures and Sound forms and the instructions are the same as in the Sound form above.

7. How to use multiple update

This tutorial will help you use the powerful function multiple update, which allows to change or add to a lot of data in one go.

We will:
• Open the baptisms form and decide on records to update
• Select records to update and open the multiple update window
• Set the update query using Copy - check the results
• Clear the query, set another using Append
• Return to the form and clear the filter

For the purposes of this tutorial, we will use data which is ready to use in the **Tutorials** dataset. Use File from the main menu in Custodian, choose Open Dataset, click on the tick box next to Tutorials and then click on Open Dataset.

Open the baptisms form

From the Data Navigation tab, choose the Parish and Non-Conformist section by clicking on the + by the title. Then choose the Baptisms form by clicking on the Baptisms title.

In the form, you will see a number of records. Do not use the Winship records as these are used for the How to build a family tree tutorial. For this tutorial, we will use the Taylor records.

Some of the records have been incorrectly keyed as Startford in the Village or Town field. We will change them to Stratford to match the others. Note that the sample is very small for the purposes of the tutorial - you would really only use Multiple Update when you need to alter a lot of records at once.
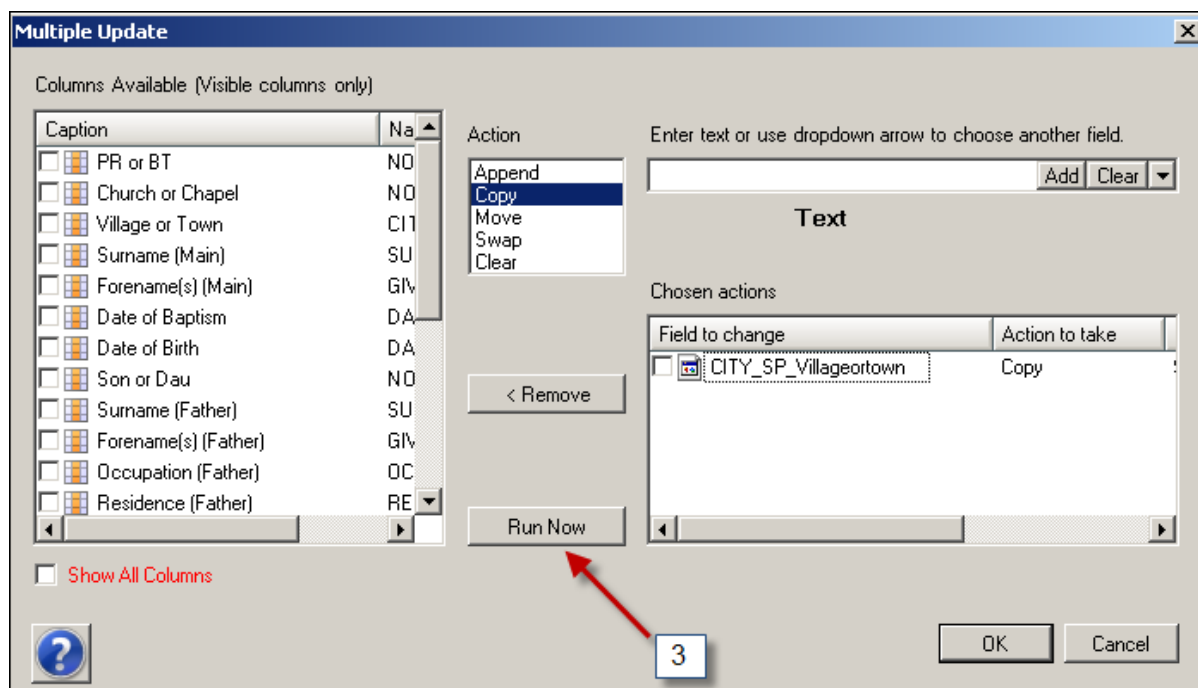
Select records to update
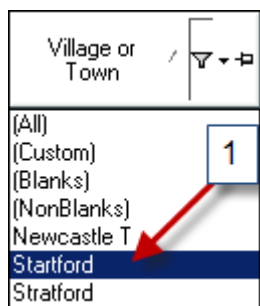
In the Village or Town column header, click on the small filter-funnel shaped icon - in the drop down list which follows, select Startford. Only the records with Startford will now show - these are the filtered records.

Now click on the Multiple Update icon (in the General section of the Shortcut Bar) and open the Multiple Update window.

Set the update query using Copy - check the results

The key to using this window is to **always begin at the left and work clockwise round the items**: First find the Village or Town field listed in the left hand section and click on the tick box to select it.

We are going to change the contents of this field by copying something different into it, so we will use the Copy option. If this is not selected in the Action box, click on Copy so it is highlighted. Next, key in Stratford in the Text box and then click on the Add button.

A summary of the multiple update is shown in the Chosen Action (3 in this case). Select OK and then close the Multiple Update window and check the results.

Clear the filter and return to your complete records by clicking on the clear filter icon on the Tool Bar

 .

This time, select all the Stratford entries for updating to Stratford on Avon. In the Village or Town column header, click on the small filter-funnel shaped icon - in the drop down list which follows, select Stratford.

Clear the query, set another using Append

Open the Multiple Update window again. You will see that the Actions box still has the previous entry in it but there is no tick in the check box. Click on the check box to add the tick, then click on the Remove button. This clears the query so that you can begin a new one.

We will add "on Avon" to all the Stratford entries:

Click on the tick box next to Village or Town, then click on Append, then in the text box key in **a space** and then on Avon (don't forget the space or you will end up with Stratfordon Avon). Click on Add, then click on Run Now. Choose OK to confirm the update and then check the results.

Return to the form and clear the filter
Close the Multiple Update window by using OK or the x in the corner. Clear the filter and return to your complete data as you did above.

NOTE: You can run several updates at once - for example, you can change the Village or Town field to Stratford on Avon and change the Residence to Stratford, all in the same update. Just add each to the list as above and then use Run. Just be aware that your update will change all the records showing on the screen and it's important to remember to filter only the records you want updating first.

8. How to sort and filter data

This tutorial will summarise the different ways you can sort and filter your data, from simple requirements to more complicated ones. Sorting organises all your data according to date, parish, names etc, or a combination according to your needs. Filtering involves extracting and showing only the records you want to locate and look at.

We will:
• Sort using column headers
• Sort using the Sort Manager
• Sorting on date fields
• Filter using column headers
• Filter using drag-a-column
• Filter using Find

Using the Tutorials dataset is a good idea, as this is a good practice area, but try not to delete any Winship entries as these are used in the How to build a family tree tutorial! To open the Tutorials dataset, use File from the main menu in Custodian, choose Open Dataset, click on the tick box next to Tutorials and then click on Open Dataset.

Sort using column headers

This is useful for quick sorts, for example if you want to look at all the John's in your baptisms form.

On the Data Navigation bar, choose the Parish and Non-Conformist section, then click on the Baptisms title to open the Baptisms form.

There should be a number of entries in this form. To carry out a simple sort, for example to sort the entries in forename order (of the person being baptised), click on the column header for Forename (Main). This will put them in A-Z order - if you click again, they will be sorted in Z-A order. You should see a small triangle in the column which is pointed either up or down, according to whether the sort is A-Z or Z-A.

Note: you can't use the date of baptism field to sort the data in date order - see the section below about sorting on date fields.

To clear the sort and return to the original order, click on the Clear Sort icon in the toolbar . Sorts by column headers cannot be saved and will be lost when the form is closed.

Sorting using the Sort Manager

This is used for more complicated sorts and these can be saved. You can save a number of sorts that you might use regularly and then choose the one you want as you need it.

There is a default Sort already set up in each data entry form. It is generally a sort based on place and date or name and date, depending on the nature of the data form (for example, in a census form all the records are from the same date so date is not used in the Sort). As a default Sort, it cannot be deleted, but you can overwrite it or create your own and when selected, the program will remember the last Sort used and maintain this one until you change it.

Open the Baptisms form as you did in the previous section. Look for the Sorts section on the Shortcut Bar and click on the double arrows to open it. You should see a sort already created called "By place and date" **(1).**
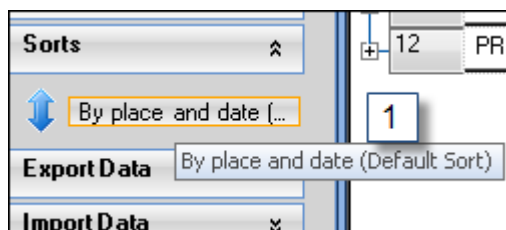
Now right-click on the Sorts bar and then select Sort Manager. In the Sort Manager window, you can see that the columns chosen for this sort are "Village or Town" and " Formatted Date of Event" **(2)**.
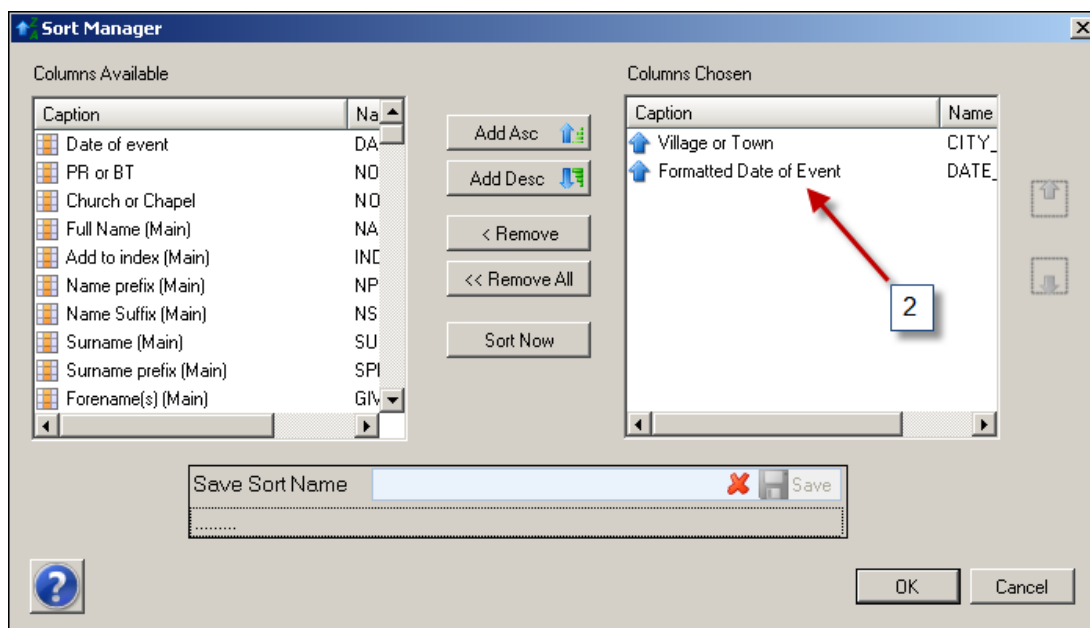
We will create a sort "By date and forename" so we won't need the "Village or Town" - click on this in the Columns Chosen and select Remove. This field is now returned to the list on the left (it will appear at the bottom). Now find the Forename (Main) field in the list on the left - click on it and select Add Asc. This field now appears in the Columns chosen list. The blue arrow next to each field in this list denotes whether the sort is ascending or descending - arrow up for ascending and down for descending.

Now click on the Save Sort Name and key in By date and forename **(3).**
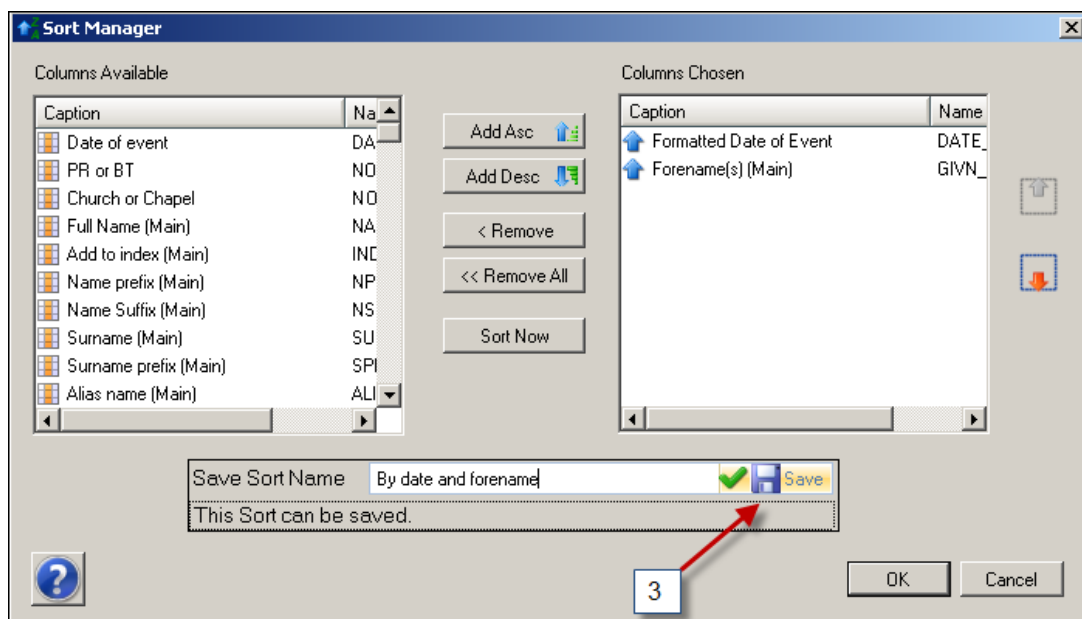
Click on the disc icon to save it and you should see a message that it has been saved. Click on OK to close the box - the sort name will now appear below the other one in the Sorts section. You can now click on either sort to change the data order according to that particular sort. Bear in mind that sorts will be more useful when there is a lot of data - it's not so easy to see the pattern with only a few records.

If you want to delete a sort, click on the title in the Sorts section of the Shortcut Bar and then right-click and select Delete.

Sorting on date fields

The Formatted Date of Event is a field populated by the most important date field in the form (in the baptisms form it is the date of baptism, then the date of birth if no baptism is present). It is then formatted so that correct date sorting is possible. Thus the Formatted Date of Event is the field to be used for sorting by dates.

This field is not normally shown in the main data form but is listed with all the other fields in the Sort Manager window so you can select it for sorting on. If you wish to show it in the main data form, this is covered in the Data Views topic.

Filter using column headers

Go back into the Baptisms form. You will see the filter function in the column header - a small funnel icon.
Choose the "Village or Town" field and click on the funnel icon. A drop down list of all the unique entries in that particular field opens (**4**). Select Newcastle T and only those will be shown on screen. The filter icon will be coloured blue to indicate that there is a filter present on your data form.
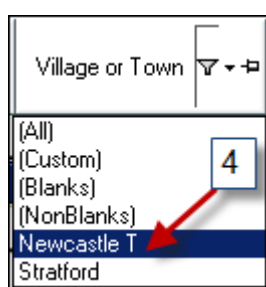
You can carry out a further filter on these records. Click on the funnel icon in the "Forename (Main)" field and select George Gilchrist. This removes all but the George Gilchrist entry. Obviously, the more data you have, the more useful this function is. You can also filter on more than one criteria using this function but the data in the Tutorials is not comprehensive enough to show this clearly. If you wish to do this, instructions are in the Filtering Data topic.

To clear any filters, click on the Clear Filter icon on the tool bar .

Filter using drag-a-column

This is another quick filter method which allows you to pick a column, see how many entries you have for each value and choose to see the ones of a particular value.

Go back to the Baptisms form. Choose the "Village or Town" column header and drag it to the section at the top of the grid where it says "Drag a column header here to group by that column" **(5).**
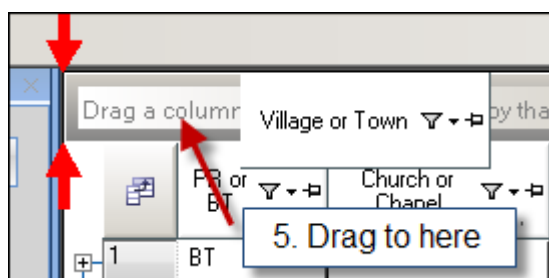
When you see two red arrows at the beginning of "Drag a column header...." release the mouse button and you should see a list of all the different entries you have for this column and how many there are.
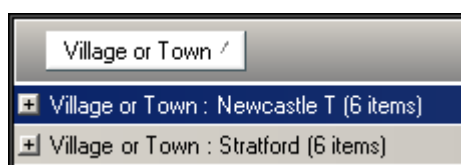
If you find you have just moved the column, then drag the column header a little higher (above the other column headers).

Now click on the + symbol next to Newcastle T and all these entries will be shown. Click on the - symbol to close it and then the + by Stratford on Avon to open these entries. You can now use the column header function on the open entries if you wish. Again, this is a very useful function when you have a lot of data.

To return to your full data, put your cursor on the area "Drag a column header..." and drag it back to roughly where the "Village or Town" header was before. Release the mouse button and the original layout and data will be returned.

Filter using Find

This functions helps you locate specific records in a data form - for example, all records containing the forename John .

Go back to the Baptisms form. Look for the Find icon in the General section of the Shortcut Bar and click on this.

In the Find and Goto window, key in John in the "Look for" box, then select the field you want the program to search for the text in - in this example it is the Forename (Main). Note: other forenames

will have (Spouse), (Mother), (Father) etc after them according to their role in the record.

Now click on the button in the "Look How" field and choose the type of search you want. In this case, choose "Contains" so that if John is a middle name, it will also be selected.

To begin the search, click on the "Find from Beginning" button. This will begin the search from the beginning of the data entry form, regardless of where you are in the form **(6).**
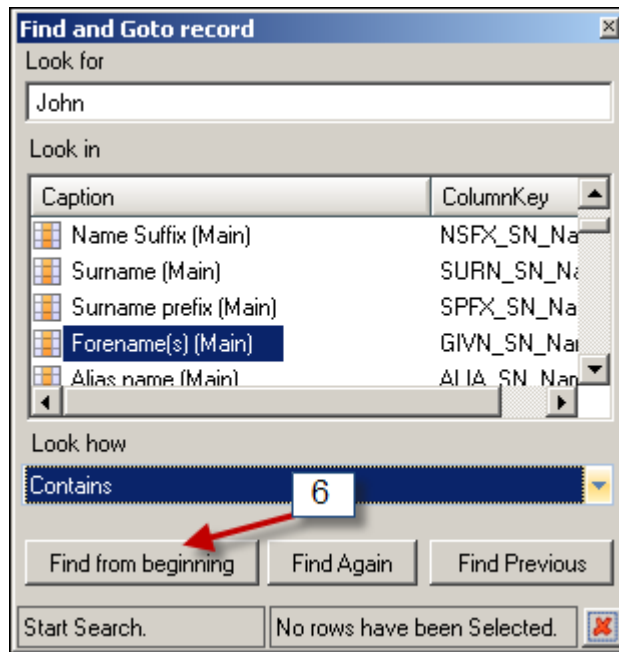
The program highlights the first row with John as the Main name and the window notifies that a row is selected. To find the next record, click on "Find Again". Continue using "Find Again" to find each record in turn. Click "Find Previous" if you want to go back to a previously found record. The number of rows selected will increase as each record is found. You should have found one John and two John Henrys - note that all the other data remains on the screen.

When no more records can be found, this will be noted along with the number of records found.
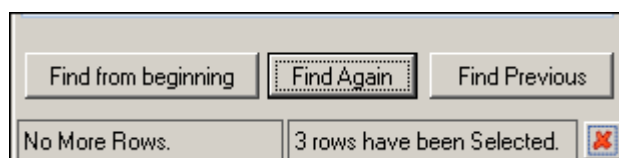
To de-select the records, click on the red cross next to the number of records selected. You can then begin another Find if you wish.

Note: Don't use CTRL-Z and CTRL-R in filtered records – these work by replicating data in the sibling row (the one above) in the database, which is not necessarily the one you will see in the filter.

9. How to build a family tree

This tutorial covers building a family tree from scratch. This tutorial will take about 30 minutes to complete

For the purposes of this tutorial, we will use data which is ready to use in the Tutorials dataset. Use File from the main menu in Custodian, choose Open Dataset, click on the tick box next to Tutorials and then click on Open Dataset.

Note that before you begin your own family tree build, you must have some records in the data-entry forms and you must have entered Family and Personal References for the people in the records. The Family References are used to group individuals in a tree and the Personal References are unique to the person and help you to choose the correct person when building the tree. You only need to enter them for people you know are linked and are to be included in a family tree. If you have any of the above missing, follow the tutorial How to get started and also look at the topic on Personal and Family References.

In this tutorial, we will:
• Open the Manage My Families section and add a new family to the list, ready to build the tree
• Choose the new family, open the tree building screen and take a look round this screen
• Add a spouse
• Add children
• Add siblings
• Add a cousin marriage
• Add a parent

Open the Manage My Families section and add a new family to the list

From the main screen in Custodian, choose the My Families tab.

In the space underneath the dataset name, right-click and select Manage My Families. A box called "Current Families" will open - this will be empty until we add a new family.

Right-click in the Current Families box and select Add New Family.

In the Choose New Family window, click on the button in the first box and select NBL26.

In the next box change "Family of NBL26" to "Henry and Jane".

Now click on the button in the last box to choose a person to start the tree. Click on the Code header - this will sort the Personal References alphanumerically. Search the list for NBL26/4 William Crawford Winship. You will notice that there are two of them - the program will show you each unique version of the name for that Personal Reference. It doesn't matter which one you choose, as the program will use the earliest record it finds for that person (in this case, it happens to be William C Winship. If it is not the spelling you want, you can change this in the next step **(1).**
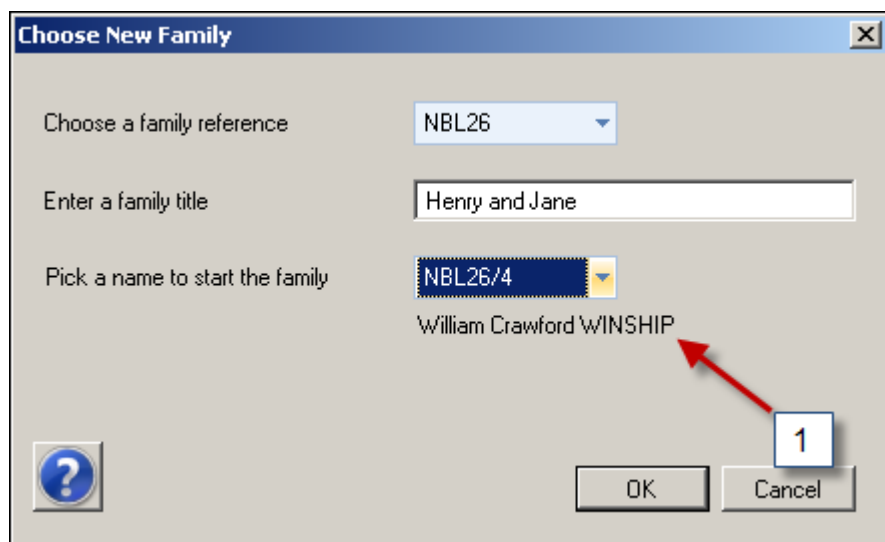
Now you can click on OK to exit the window.

You should now see Henry and Jane listed in the Current Families window and also in the section at the left of the screen. Click on OK in the Current Families window to close this window.

Choose the new family and open the tree building screen

The next step is to open the family tree building screen. Click on "Henry and Jane" listed in the left section **(2)** (note that when you have added more families, they will all be listed here in alphanumerical order according to the Family Reference).
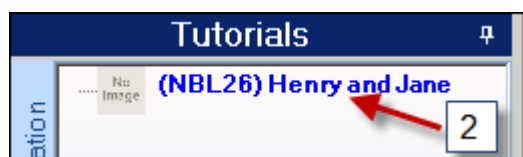
The screen will change to the family tree screen and William Crawford Winship will be the only person in this tree so far. The first thing to do is resize the screen, if you need to, by dragging the bottom edge of the family tree screen downwards and the right-hand edge further right. You can also click on the pin in the Family List section to slide this out of the way - you will find this more useful when your tree starts to become large.

As William Crawford is the current focus of the tree, his details are in the Family Panel to the left of the tree:

No Image - if you have a photo of your person, this will show here when it has been added (more details later)

Main Dates - this will show dates and places for birth, baptism, marriage, death and burial **if you have these records** for the person

Relations - this will show parents and siblings of the person once they have been added to the tree - at this point they haven't for William Crawford

Sources - this shows the records you have in Custodian for the person, providing you have added the Personal and Family References

My Story - this contains basic biographical data compiled from your records and you can edit and add to this as much as you like. Click on Create to begin the story – this adds the source data you have for the person.

Family Names - this section lists all the people added to your tree - at the moment there is only William Crawford but as each new person is added, this list is updated.

The Tool Bar across the bottom has options for zooming in and out and preferences for line colours and printing options, which we won't cover in this tutorial.

Now we can begin to build the tree. When you are ready to build your own tree, you might find it helpful to have a hand-drawn version of the tree in front of you, but for this tutorial stick to the order of adding the relatives and it will be correct.

All the tree-building tools are in the right-click function on a person's name box. A drop-down list shows all the relationships and functions that can be added to this person. **If, at any time, you make a mistake during the tutorial, right-click on the "incorrect" person and select Remove Person. Remember that there is no Save person - once you have added a person, they are saved in the tree unless you remove them.**

Adding a spouse

Right-click on the box for William Crawford in the tree.

Select Add a Spouse. A new window opens with all the people in Family Reference NBL26. They are listed in alphanumerical order of Personal Reference, but if you click on the Name header, the list will be ordered by name in alphabetical order. The name we want is Ann Winship NBL26/4a and she will be at the top if you have sorted the names alphabetically. Click on the tick box next to her Personal Reference and then choose OK **(3).**
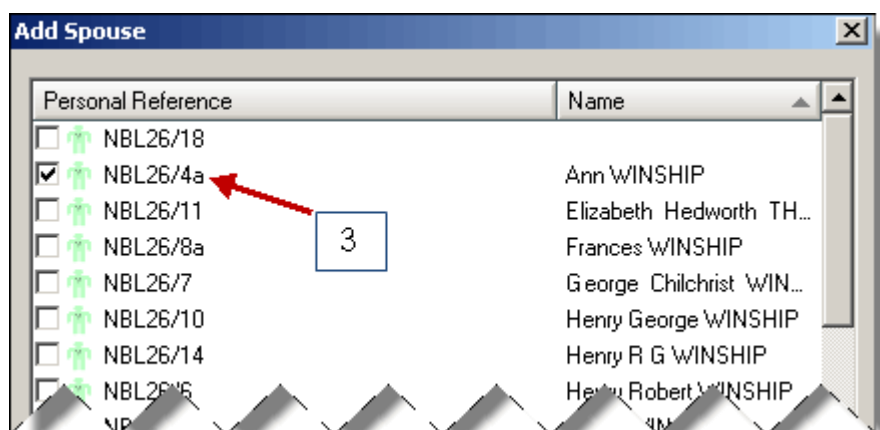
Ann will be placed to the right of William Crawford. The equals symbol between denotes marriage and this one has a line through it because there is no marriage record in the database. When a marriage is found and details (including Personal and Family References) entered into Custodian, this will update the tree with the marriage date and remove the line through the equals.

Notice that Ann does not have a maiden name in this tree - this is not known because her marriage is missing and the records for her are from the census. It would be misleading to leave this as it is (ie looks like William Crawford Winship married Ann Winship), so we will change her name to an unknown.

Right-click on Ann's name box and select Change Name. Click on the button in the surname box and select Unknown, then OK. This will change the name to Ann Unknown.
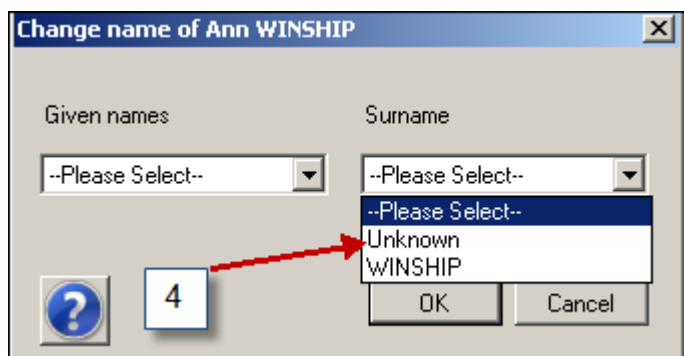
Tips:

1.When you add a person to the tree and then add new records for that person, you will need to go back to the tree to change names where appropriate. So in the case of Ann Winship who was changed to Ann Unknown, when a marriage is found and her maiden name is known, you would need to return to the tree and use Change Name again. You will be able to select a surname from the list which is from the new record (as long as you added her Personal and Family Reference to the record).

2. If you need to add a second spouse, do this in the same way as the first spouse. The spouses will be numbered 1 and 2 in chronological order if there are marriage dates, or as you enter them if not.

Adding a child

Now we will add children to this relationship. You can add them to either father or mother - for this tutorial, we'll add them to the father. Right-click on William's name box and select Add Child.

Look for Henry Winship NBL26/10, tick the check box next to his name and then click on OK. Henry will appear on the tree underneath William and Ann and a line is drawn from the equals symbol. Note that the list shows the earliest spelling of the name in the database and this is the one added to the tree. If there are other, more complete names, this can be altered.

In this case, we can change the name from Henry to Henry George. Right-click on Henry and select Change Name. Click on the button in the Forename box and choose Henry George, then OK. You should now have the following:
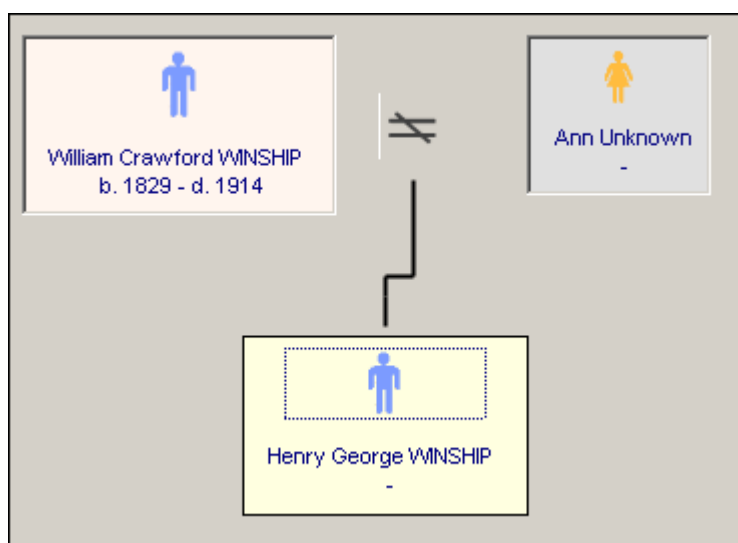
Next, right-click on William again and select Add Child. Find Elizabeth Hedworth Winship NBL26/11 and tick the check box, selecting OK when done. The line is now redrawn to add Elizabeth to it.

Now add the following two children: James Winship NBL26/12 and William Winship NBL26/13. Note that baptism or birth dates are added if they are known from your records. If dates are known, they will be placed on the tree in order. Any entries without dates will appear after ones with dates.

Adding a sibling

Next we will add some siblings to William Crawford. You don't need to add them all in the instructions below, but you must add NBL26/6 and NBL26/8 as these are required for adding a cousin marriage in a later step. Adding them all gives you a chance to see how the tree layout changes dynamically as more people are added.

Right-click on William Crawford's name box and select Add Sibling.

In the list of names, select John Hny NBL26/2 and then OK. The tree is redrawn and a line drawn between William Crawford and John Henry. You can change John Hny to John Henry - right-click on his name box and select Change Name. Click on the button in the forename box and choose John Henry from the list; click OK and the name box is updated.

Here are the other siblings to add - for each one, **right-click on William** then choose Add Sibling and select the correct person from the list. If any have different spellings, change them to the ones given below. If any have a green person icon and a question mark, this means the gender field in the record is not set to M or F. Right-click on that person's name box and select the relevant Change Gender to ... option.

Isabella Winship NBL26/3
Henry Winship NBL26/5
Henry Robert Winship NBL26/6
George Gilchrist Winship NBL26/7
Thomas George Winship NBL26/8
Robert Gilchrist Winship NBL26/9

You might find that you would like more screen space – click on the pin in the top right corner of the list of families. This will slide the list to the side, allowing you to resize the tree-building screen to show more. Put your cursor over the Forms tab to return the list and re-pin, whenever you wish. You can also use Zoom out to make the tree images smaller, but you will lose some ease of visibility if you make it too small.

You should also notice that each person you add to the tree is also added to the Family Names section in the Family Panel.

The tree so far:
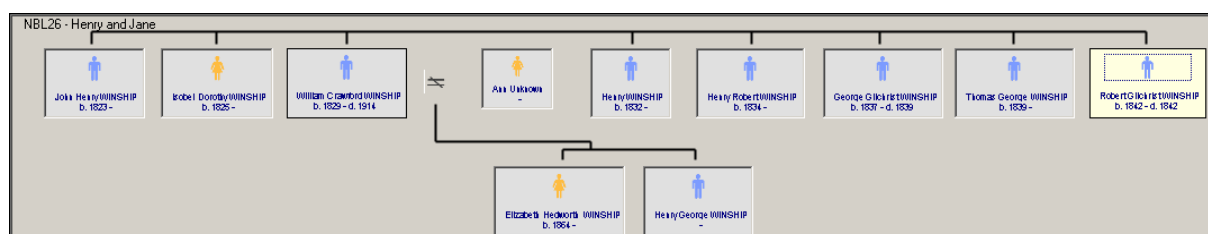
Before we add a cousin marriage in the next step, we need to add two marriages and a couple of children.

Right-click on Henry Robert Winship's (NBL26/6) name box to open the menu and select Add Spouse. In the list of names, choose Sarah Price NBL26/6a.

Right-click on Henry's name box again and select Add Child. In the list of names, choose Rosalind Price Winship NBL26/17.

Now right-click on Thomas George Winship's name box to open the menu and select Add Spouse. In the list of names, choose Frances Winship NBL26/8a. Right-click on Frances' box and select Change Name. Change her surname to Unknown, just as we did in the Add a Spouse section.

Right-click on Thomas's name box again and select Add Child. In the list of names, choose Llewellyn Thomas Winship NBL26/18 (abbreviated to Llew.). Click on Llewellyn's name box to put the focus on him and select Change Name. Select Llewllyn Thomas from the list and then OK.

We are now ready to add the cousin marriage.

Adding a cousin marriage/partnership

It is quite common to find cousins marrying in a family. In Custodian, you cannot use Add a Spouse when the spouse is already in the family tree; instead we use the Add Cousin Partnership instead.

Right-click on Llewellyn Thomas's name box and select Add Cousin Partnership - the resulting name list should only show cousins to select from. Choose Rosalind Price Winship NBL26/17 and then OK.

A lighter grey spouse name box will be added to each person and a dotted line drawn between the two relationships to denote that they appear twice in the tree but are the same partnership. We aren't adding any children to this relationship in this tutorial but if you have an example of your own, add the children to the leftmost (as you look at the screen) couple. Children will only appear once on the tree.
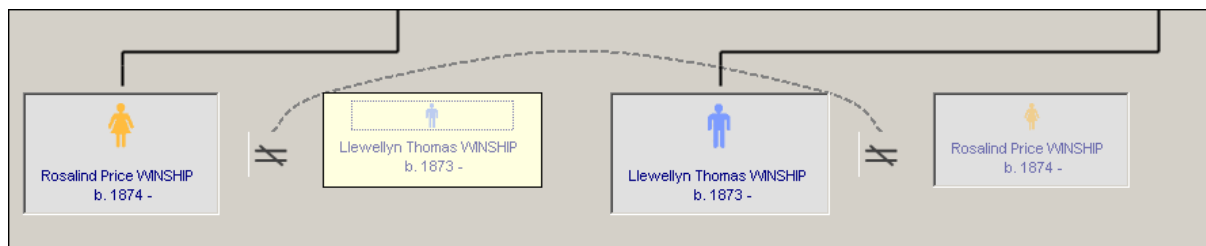
Adding a parent

Adding a previous generation is done through adding parents to a person. Here we will add parents to all the siblings currently at the "top" of the tree. It doesn't matter which sibling you add the parents to - the line will be redrawn to add all the children to the same parents.

Right-click on one of the siblings and choose Add Parent. In the name list, choose Henry Winship NBL26/1. As this is a Winship tree, we will add the father first, then the mother. Always add the main family name first and the spouses second. This is because you can only show one family line at a time. If you want to add all the mother's ancestors, you do this when you **change the focus of the tree** to her not when you are looking at the main name's tree (see Building family trees with Multiple Names). This way each family name has its own tree.

You should now have Henry Winship shown as the father of all the siblings and the mother currently Unknown. Now right-click on the mother's name box and select Change to Known. The name list will appear - choose Jane Gilchrist NBL26/1a. You have now completed the tree in this tutorial and you are ready to build your own trees. This tree is actually part of a real Winship family tree, albeit one small section. Some information is deliberately missing so you can see how the program deals with a lack of information as well as when records are fairly complete.
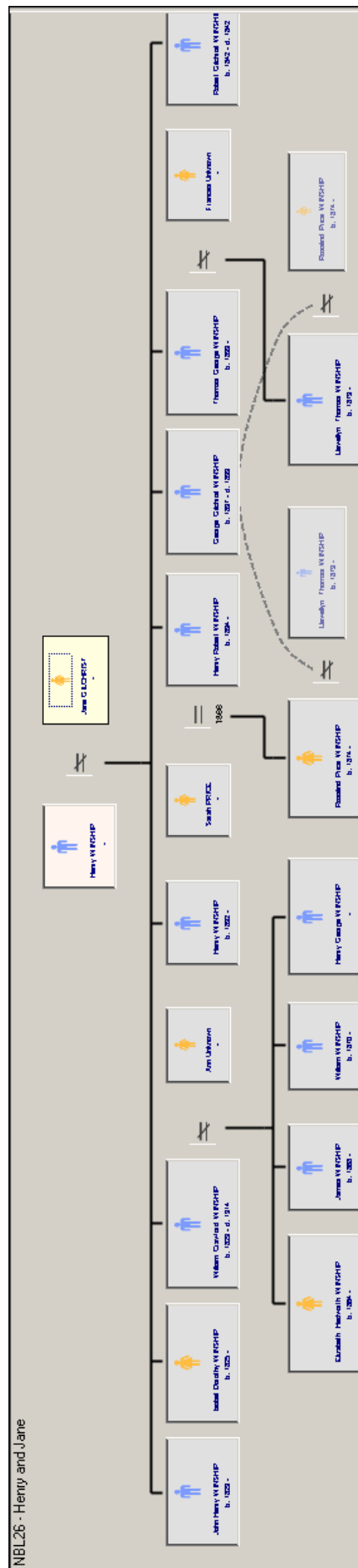
PART TWO: Reference Section

Custodian 4's Opening Screen and the Menu Items

On opening Custodian 4, the first screen will display the Main Menu Items across the top. Below this is the Navigation Bar; this is the place from where you can navigate to all the other parts of the program.

At the top of the Navigation Bar is the name of the dataset you are in. This will be the Starter dataset if it is the first time you have opened Custodian 4, or the last dataset you were in if you have used or create other datasets. Shown left is the Tutorials dataset.

There are four tabs down the left hand side, each of which you can select to enter that part of the program. These are: the Data Navigation Tab (shown left), My Families Tab, the My Research Tab and the Information Tab (only the first is showing as they are all dealt with more fully in the section *The Navigation Tree and itsTabs).*

At the base of the Navigation Bar are three further options:

Expand Tree - this opens all the + symbols by the titles to reveal all the forms available (clicking on individual + symbols will open just that section).
Compact Tree - this closes all the - symbols by the titles to reduce the size of the tree.
Style - this opens a window in which you can change the style of the Navigation Bar if you wish.

The File Menu

File, Create Dataset

This process will create and name an empty dataset which you can use for a new set of data. You can create as many datasets as you like, for example for each surname you are researching. Follow the information below in sequence as this is the sequence for creating a new dataset, though you may not need to take action at each stage (adding a picture is optional, for example). Click the Next button in the Create Dataset form to move to the next stage and the Previous button if you need to return to an earlier stage.

The Starter and Tutorial Datasets

As you begin the wizard, you will see there are already two datasets created; Tutorials and Starter Dataset (see figure below). The Tutorials dataset will already contain a small amount of data for use with the tutorial in the the Quick Start Guide. It can also be used with any of the other tutorials provided.
The Starter Dataset is an empty dataset which you can use as a "practice room" for your own data if you wish to try out a function before using your live data. You can also rename the Starter Dataset and use it for your current data (do this in the Open Dataset menu option).

NOTE: the two datasets mentioned above cannot be deleted; they are system datasets. Any datasets created by yourself are not system datasets and can be deleted.

Name	Last Updated	Record Count	Path
☐ 🖥 Tutorials	09/11/2009 19:28...	0	C:\Users\Sonja\Documents\C4Data\...
☐ 🖥 Starter	09/11/2009 19:28...	0	C:\Users\Sonja\Documents\C4Data\...

Changing the View

You can change the way the list of datasets is shown by using the buttons in the small box underneath the list; the default is Details, but you can choose Tiles, List, Icons or Thumbnails. The differences between them will be more obvious if you have a picture with your dataset.
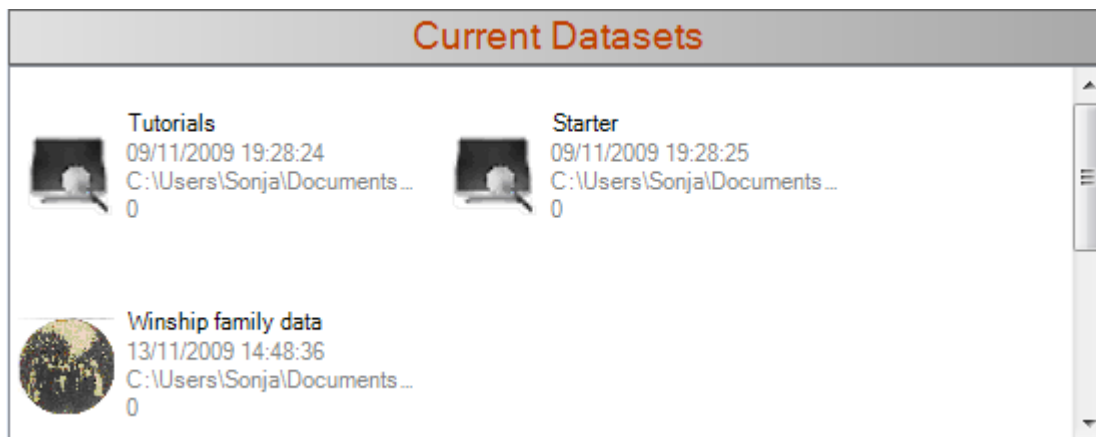
Printing the Datasets List

This is something you might find useful if you have created a number of datasets. You can also do this later in Custodian 4 so it is not essential to do this during creating datasets and migrating.

To begin the print process, click on Print List by the printer icon. This will open the Print Preview window where you can set page orientation and margin sizes, for example. You will find it helpful to maximize the the Print Preview window to see the whole page.
NOTE: the first column in the report, System, denotes whether or not the dataset is a system dataset - that is, one of the two already setup for you (Tutorials and Starter Dataset).
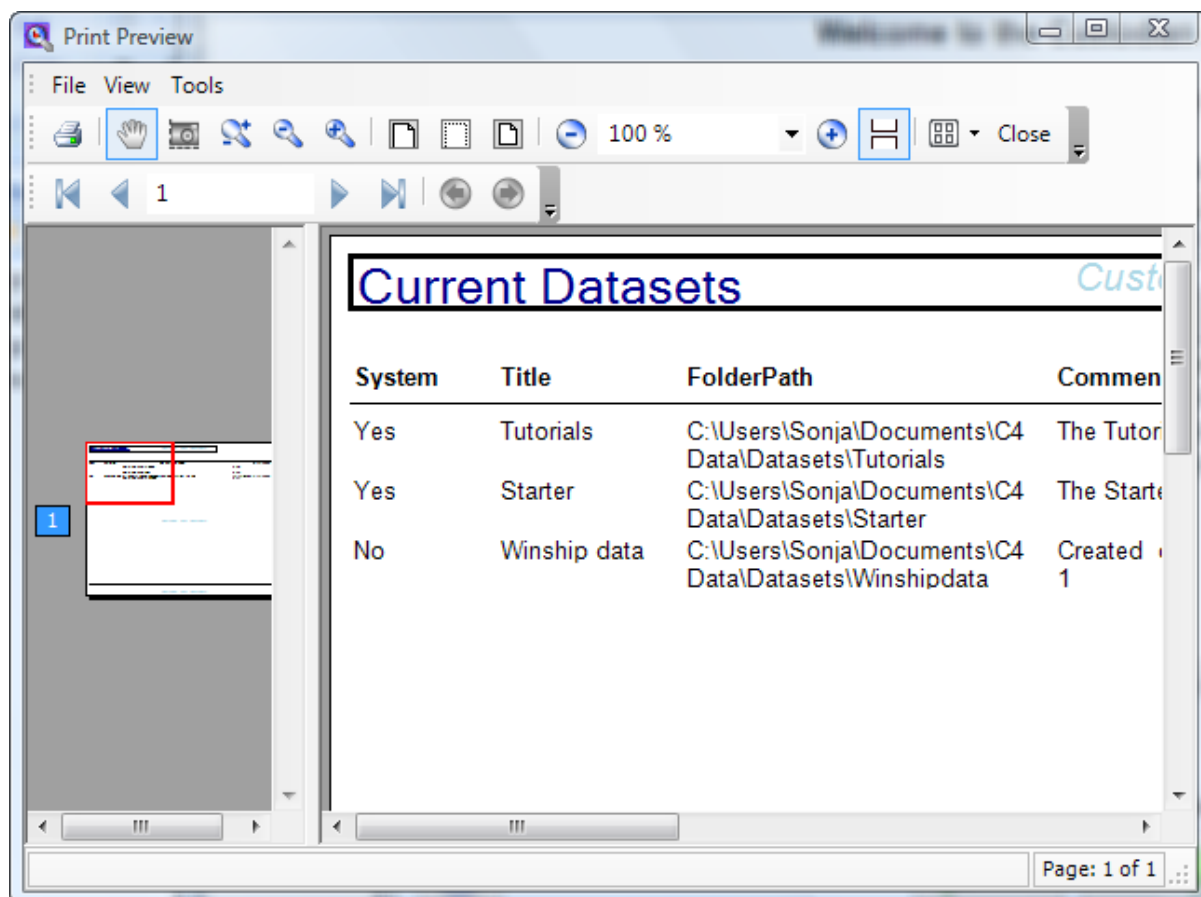
Deleting a Dataset

If you change your mind about a dataset you have created, you can delete it. You can also do this later in the File, Open Datasets menu which opens the same window.

Click on the dataset you wish to delete so that the name of the dataset is highlighted (there will also be a tick in the box if you are in Details mode).

Click on the Delete Dataset icon. You will be asked if you are sure and on confirming this, the dataset will be deleted and removed from the list. This process will also delete the path and the folder. (However, if you have an error, it may be that the folder was open at the time the process was trying to operate. In this case, you will need to use Windows Explorer to locate the folder and delete it manually).
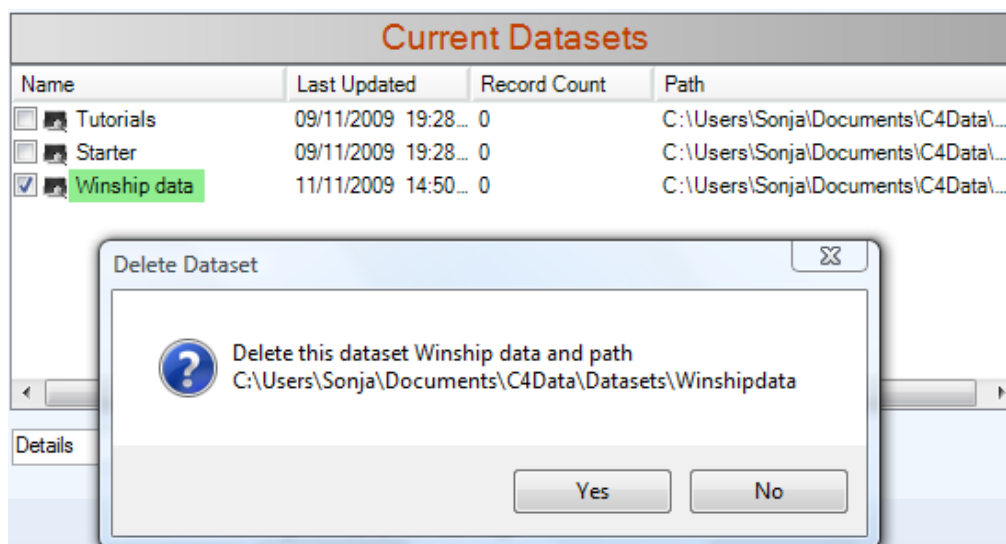
Entering a Title for your Dataset

When you enter a new title for your dataset, the red cross should change to a green tick - this indicates that your title is unique. If you enter a title you have already used, the red cross will remain and you will not be able to continue. In this case, delete what you have entered and use a different title.

Attaching a Picture to your Dataset

You can add a different picture to each dataset, if you wish (optional). The picture will form the background of the main screen in Custodian and will be shown against the dataset title in the dataset list. You can do this later in the File, Open Dataset menu, if you wish.

Your picture can be of any format and any size - it will be resized to fit the window.
To begin adding a picture, click on the people icon. Use the next window to navigate to where your picture file is on your computer (or CD etc). Click on the file and click on Open - a small version of the picture will be placed into the picture box for that dataset.
If you wish to change your picture, click on the people icon again and repeat the above.
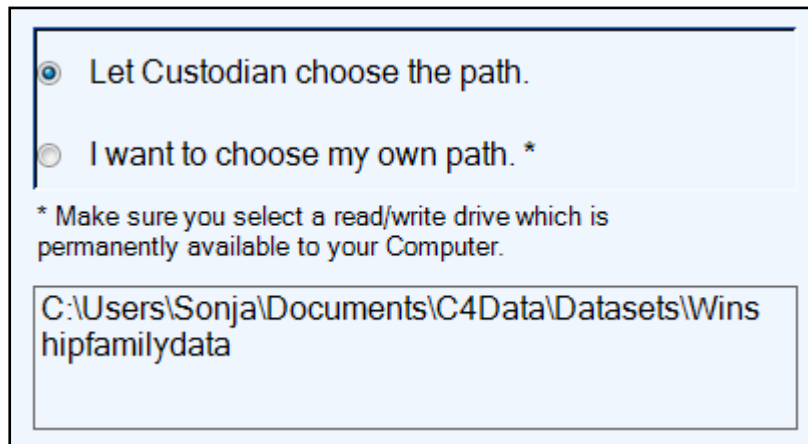
Choosing a Path for your Dataset

You have two choices - either accept the default path for your new dataset, or choose your own path. The former is recommended unless you have a particular requirement for storing your data. You

might find it useful to make a note of the path for future use. The path is included if you print a list of your datasets (see above).

If you wish to choose your own path, be aware that the data must reside on a read/write drive which is always available to your computer (you must have read/write permissions to the folder). If you choose this option, you will need to use the next window to navigate to where you want your dataset to be stored. As with the default, you may find it useful to make a note of your dataset path.
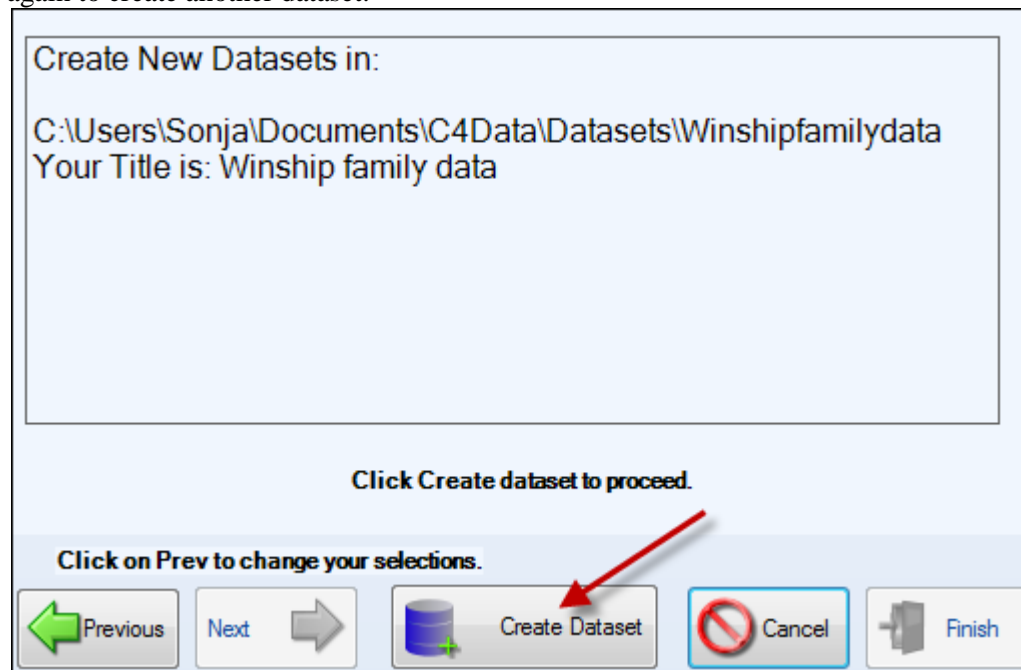
NOTE: you should be aware that Windows Vista and Windows 7 do not allow data files to be saved in the Program Files folder, which is where the Custodian program is installed by default.

Check the Path Settings and Create Dataset
The last screen in the process will ask you to check the path - you can return to any of the previous screens to make changes by using the arrows at the bottom of the screen. When you are ready, click on the Create Dataset button. The process is very quick and you will have the option of beginning again to create another dataset.

File, Open Dataset

The Open Dataset menu is the place where you can change to a different dataset, either one you have already created or one of the system datasets (Starter and Tutorial datasets). Selecting the Open Dataset menu opens the Dataset Manager.

In the Dataset Manager, you can also:
• check the path for your dataset
• change the title of a dataset
• delete a dataset *
• attach a picture to a dataset *
• print the dataset list *
• change the view of the dataset list *

* These last four are explained in File, Create Dataset section above (see p30-34)
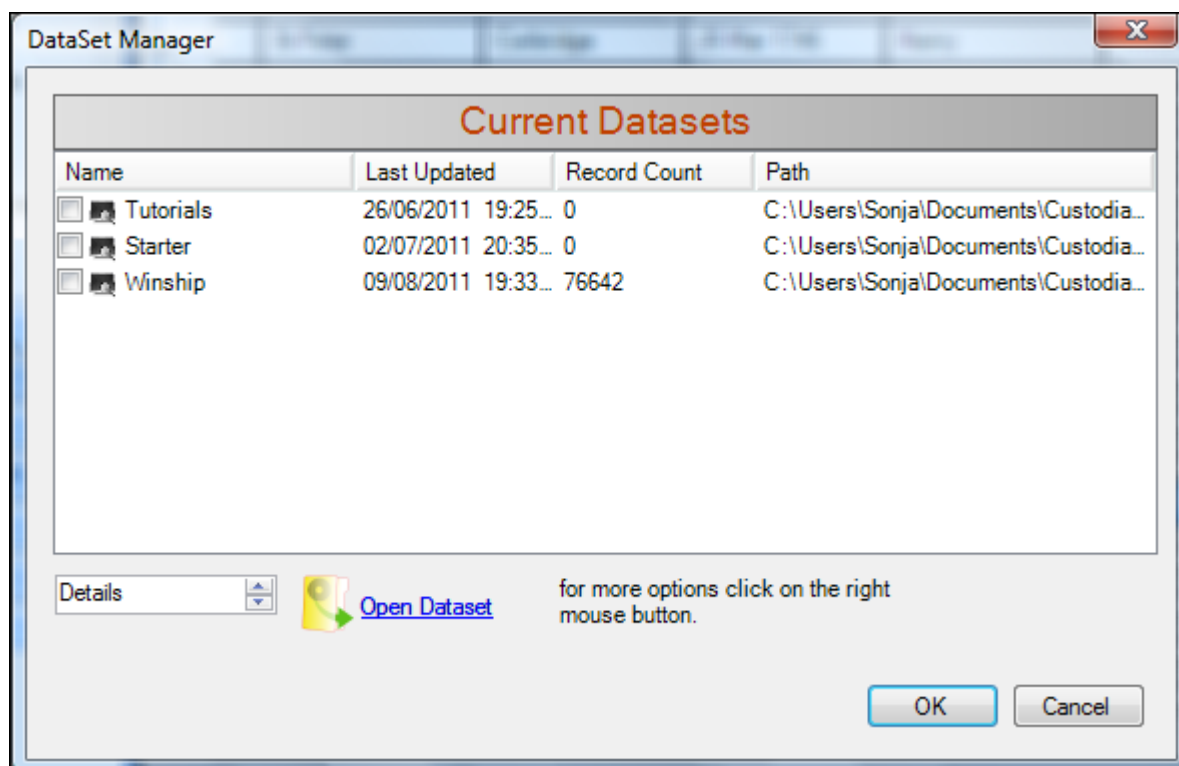
Open a Dataset

Select the dataset you wish to open by clicking on the tick-box in the Name column. Then click on the Open Dataset icon in the lower section of the Dataset Manager. You will be asked if you wish to backup the dataset you are leaving. Once backup is complete, or immediately if you chose not to backup, the selected dataset will open. The title of your newly opened dataset will now be shown above the Data Navigation area.

Check the Path for your Dataset

The full path name may be partially obscured if it is long - if you hover the cursor over the path field for your dataset, the full path name is shown in the cell tip. You can also see these details in the cell tip of the dataset name.

Change the Title of a Dataset

You do not need to be "in" the dataset you want to change, but you will need to select the dataset you want to change first, so that the tick box is selected. Then right-click on the white space in the Dataset Manager window and a new menu will appear. Click on the option Change Title and the cursor will now be in the title box for the dataset. Change the title and press the return key on your keyboard. You should see a message confirming the title has been changed.

File, Backup

There are two types of backup - 1) autobackup, which you will have the chance to run at the end of each Custodian session and 2) backup from the Backup Menu, which you can run at any time.

Autobackup

Each time you close Custodian (and also when you open a new dataset), you will be prompted to make an autobackup file. You can choose not to, particularly if you are just toggling between datasets or have not added any new data.

If you choose to autobackup, the program will:-

a) backup the research datasets (system.c4b) into backup folder in Program Data/Custodian4

b) backup the data files (dataset name.c4b) into the dataset folder in Program Data/Custodian4.

Each backup will have an incremental number included in the title. The program will keep the five latest backup files by default - there is an option to change this to a higher number in the Dataset and System Options.

Backup from the Backup Menu

Clicking on the Backup Menu opens the Backup Dataset window.
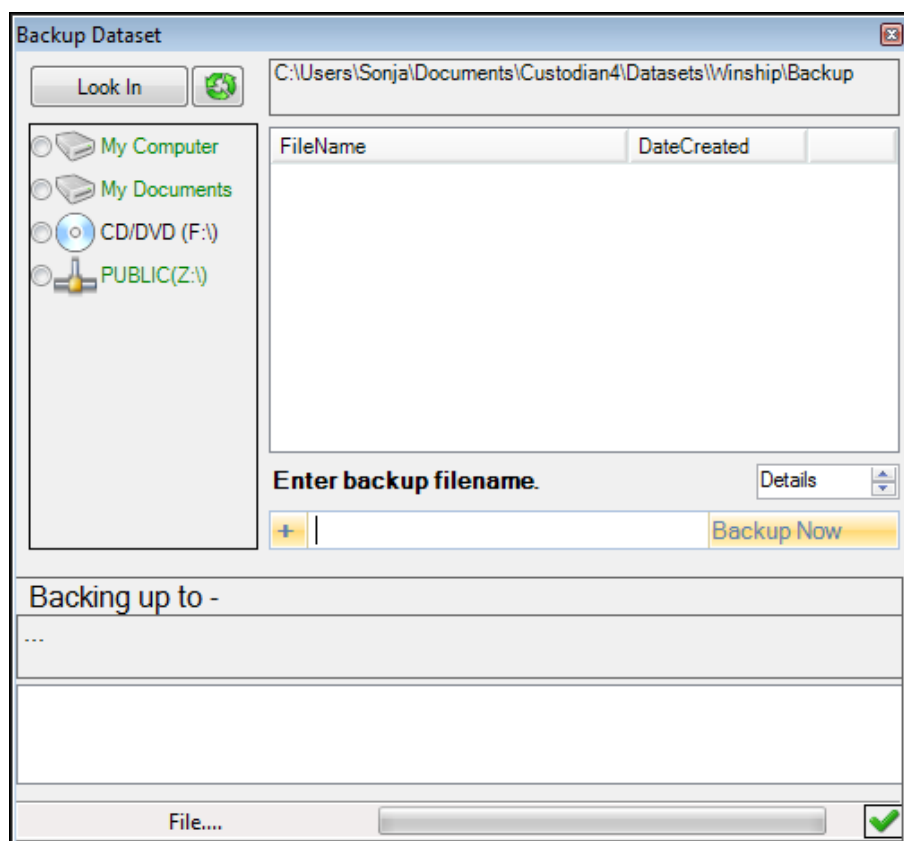
On the left side of the window is a list of all the drives available to you, and also Computer and My Documents on your hard drive. Click the radio button for the one you require - in this example, the backup will be to a dataset folder in My Documents so the My Documents is selected.
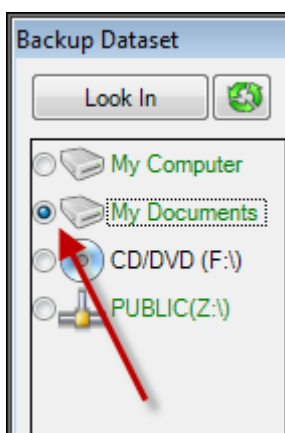

If you add a networked drive or memory stick at this point, click on the Refresh button to show this new drive in the list.
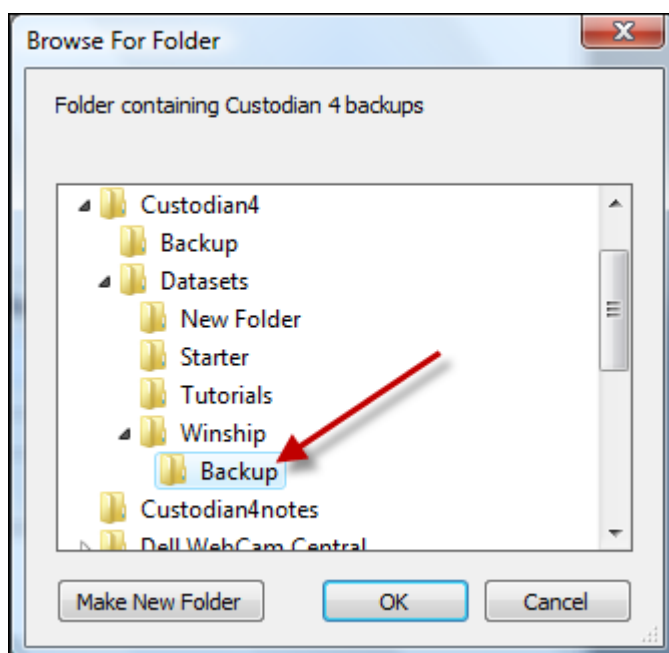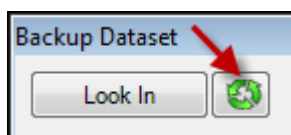
Now click on the Look In button and a browser window will open for the drive you have chosen (or My Documents) and you can navigate to the folder you wish to backup to.

Click on OK and the path for that folder will show in the top section of the backup window (this path will be remembered the next time you backup and will already be there).
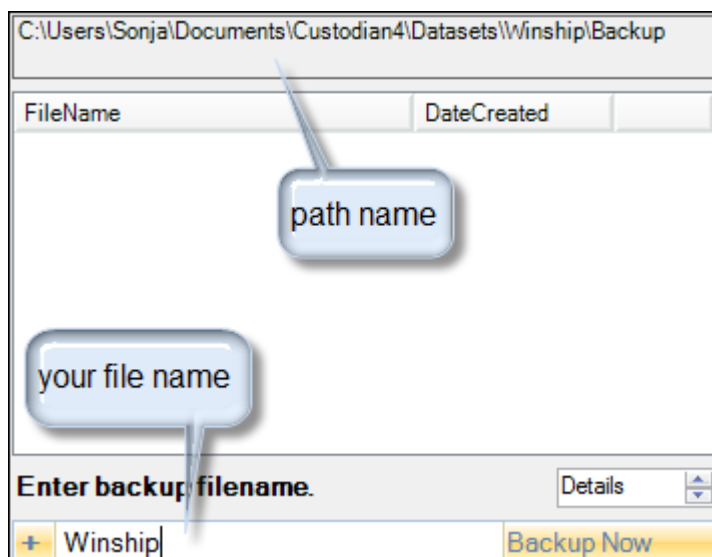
Under the Enter Backup File name, enter a name for your backup. The program will check the path and if there is already a backup with that name, it will add a digit to your backup file name. This ensures that your backup doesn't overwrite a previous one. Clicking the + symbol next to the file name increments the digit (optional).

Click on the Backup Now button and backup will begin - the file extension .c4b will be added to every backup file to distinguish them as Custodian 4 backup files. When finished, click on OK to the finished backup message. Your backup file and the date it was created will now appear in the centre window. Click on the X in the top right corner of the window to close it.
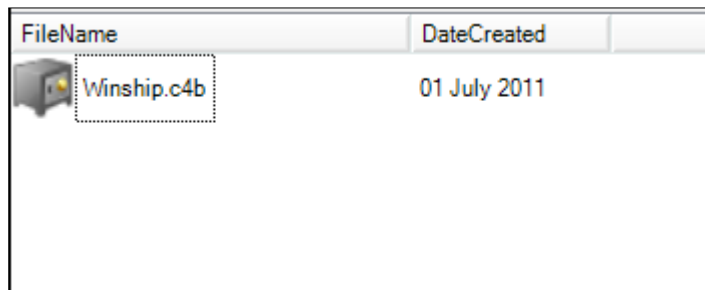
File, Restore

Restoring data can be done after loss of data during a hard drive or other problem, or to transfer data to a new computer. On selecting the Restore Menu, the Restore Options window will be shown, with three possibilities - see the Figure below:
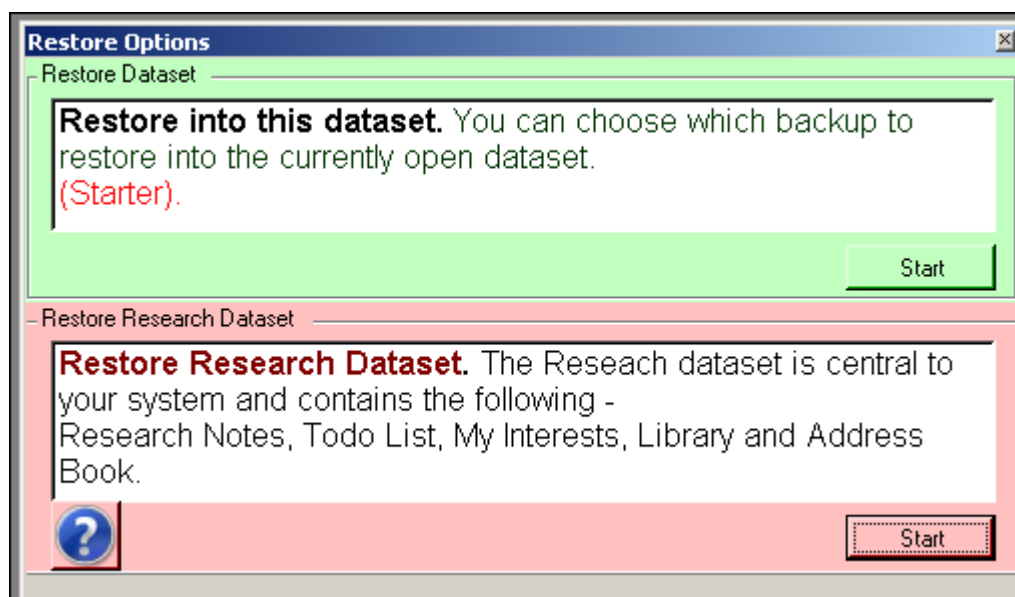
Restore into this dataset

The first option allows restore into the current dataset and the dataset name will be shown in brackets and in red. Before you begin, ensure this is the correct dataset and the restore process will overwrite any data already in the dataset. If you need to change to a different dataset, click on the X in the top right hand corner of the window to close it. Then use the File and Open Dataset menus to open the correct dataset.

To begin Restore, click on the Start button and choose Yes to confirm your choice. The Restore Dataset window will open; this window is very similar to the Backup Dataset window.
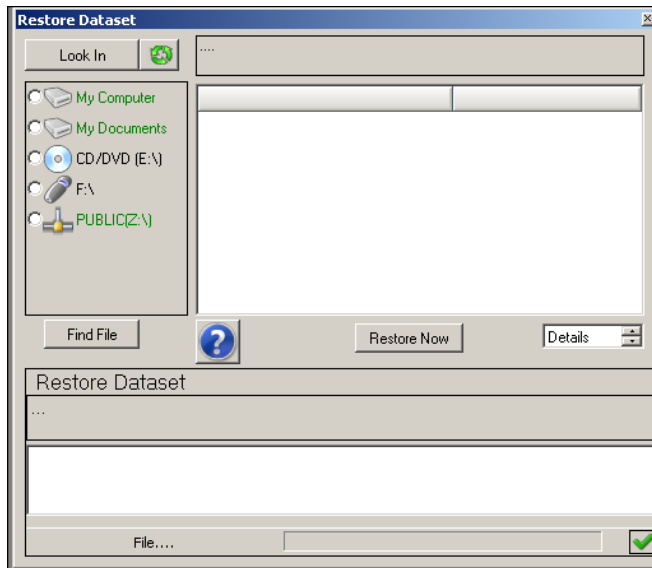
On the left side of the window is a list of all the drives available to you, and also Computer and My Documents on your hard drive.
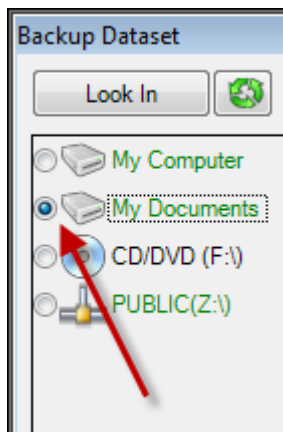
Click the radio button for the one you require - in this example, the backup file to restore will be in My Documents so the My Documents is selected.

If you add a networked drive or memory stick at this point, click on the Refresh button to show this new drive in the list.
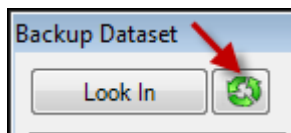
Now click on the Look In button and a browser window will open for the drive you have chosen (or My Documents) and you can navigate to the folder you where your backup file is.
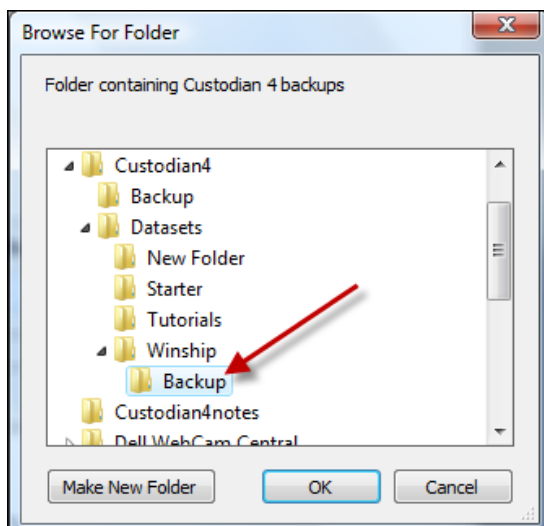
Click on OK and the path for that folder will show in the top section of the backup window and the backup file will show in the centre part of the window. You may have several backup files - if your view is in Details mode, you will be able to see which is the latest backup (the view changer is centre right of the window and Details is the default view).

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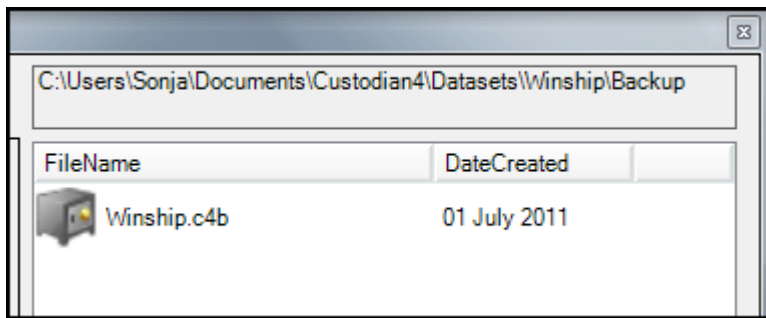
NOTE: Find File - you can also use this button to locate your backup file:- after clicking the radio button to select the drive or My Documents, click on Find File and navigate to your backup file

When you are ready, click on the **Restore Now** button - you will be informed when the process is finished and the window can be closed.

Restore Research Datasets

The Research Dataset contains data which applies to every one of your datasets as well as some system information and is therefore located in the main Custodian folder. Should this become corrupted for any reason, it will need to be restored separately.

The Research Dataset is only backed up during Autobackup and not when you backup your dataset from the Backup menu. Choosing the Restore Research Dataset option automatically retrieves the file from the last autobackup and it will always be called System.c4b with a cumulative number after System (ie System(1).c4b). Click on Restore Now and the process will run.
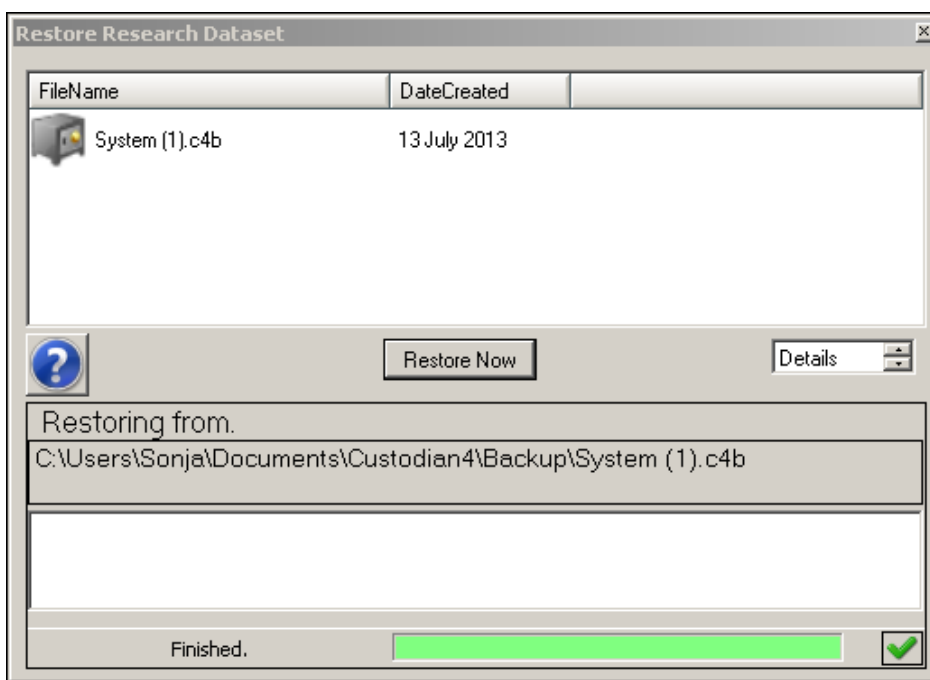
File, Custom Forms

Custom Forms are those you create yourself, if you find that you have records which don't easily fit into any of the existing ones (remember you can also use the Miscellaneous form for any type of record). The process works by cloning the existing Custom form and then adding fields to fine-tune the form to your requirements. You will find it helpful to make a list of the fields you will need before you begin creating a new form.

Create a New Form

To start the new form, choose File from the main menu, then Custom Forms, then Create Form.
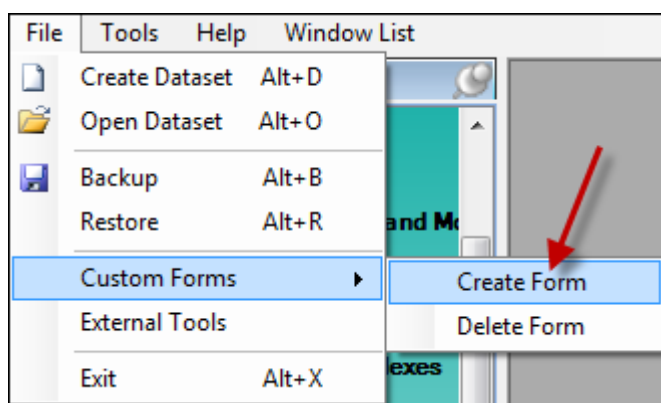
In the Create New Form window, enter the title of your new form and choose an event type which fits (the list of events is the Gedcom standard). Below is an example for creating a form for the Californian Death Indexes:

If you are happy with the navigation title name, click Next to go to the next step.

The Compulsory Fields

The next window shows all the compulsory fields that are in the new form (the same as those in the Miscellaneous form). Remember that you are shown every field, even those in the Individual Details and Source Details boxes which are normally hidden from view. You may not want all of these, but any you don't want can be hidden from view using Data Views at a later point.

You can change the captions (middle column) and the cell-tips (this is the text which shows when you hover the cursor over the column header in the grid) but not the Field name as these are constant thoughout Custodian.

Note that there are two dates fields - Date of Event and Formatted Date of Event. The first date field populates the second which is then used for correct sorting on date fields. In the Californian Death

Indexes example, I have changed these to Date of Death and Formatted Date of Death.

You are unlikely to need to change many of the other captions and cell-tips, if any, as they are mostly the block of fields behind each name field and block of source information fields. Below, the image shows the changed date caption and cell-tips.

Before you move to the next stage, tick off those fields on your list that have been catered for by the compulsory fields. Then choose Next.

Adding New Fields

The next stage is to add new fields. The sequence is 1) choose the field type (a date or place or name, for example) then 2) key in a field name (no spaces) then 3) click on Add Field and finally 4) edit the caption and cell-tip as you did in the first section.

Notes:

Name fields - if you choose a Name field, you will automatically have the block of names you usually find in the Individual Details box but you won't see them until the form is complete and in Custodian. The point is, you don't need to select an occupation field separately, for example, for the same person. If you make your field name simply "Father" or "Mother" etc, this will be added after the other details - Forename (Father), Surname (Father), Age (Father) ... etc and will be consistent with other forms in Custodian.

Date fields - if you choose a Date field, you will automatically have the Formatted Date field, and as above, this will be found once the form is completed.

Note fields - this is the only field type with a 0 field size in the list and the only one which you can be edited to a field size of your choice.

Field size - only a Note field can have the field size changed

Default - not all fields types allow this to be edited. In those that allow it, whatever you enter here will be completed in the actual form if you do not enter any data the field

Role - not all field names allow this to be edited. The Name field is the most likely one you will use. For example, if you create a name field for a Father, you should enter the Role as Father and this is the participant shown in the Name Index.

Below is an image which shows some more fields added for the Californian Death Index form:

When you have added all the fields you require, click on Next and in the next window choose Create New Form. Click on Finish and you should now see your new form in the Custom and Miscellaneous category.

Showing/Hiding Fields

You will now need to fine-tune your form using Data Views - right-click on this and choose View Manager.

Check the Captions and Cell-tips of the fields you added and tick or untick check-boxes to add or remove fields you want to show in the grid.
New Name fields in particular will show everything in the grid - if you only want to show a forename, surname and age, for example, untick all the other boxes in the new name field. Click on Apply and close the window when you've finished.

The last task is to alter the column headers to fit the titles evenly and changed the order of the columns if you wish by using drag and drop in the column headers. You can also re-visit the View Manager if you spot any mistakes (see above).

When you are ready to leave the form, right-click on Data Views again and choose Save Layout. Your form is now ready for data entry.

Deleting a Form

• You can only delete forms you have created, not any of the ones supplied as standard
• You can only delete a form if there is no data in it

If you make a mistake and want to begin again or change your mind and want to delete a form, first make sure there is no data in the form and click on File, Custom Forms and Delete Form. Deleting data first ensures the integrity of your name and place index.

In the Delete window, there is a list of the forms you have created - tick the one you want to delete and click on Delete. The form will be removed.
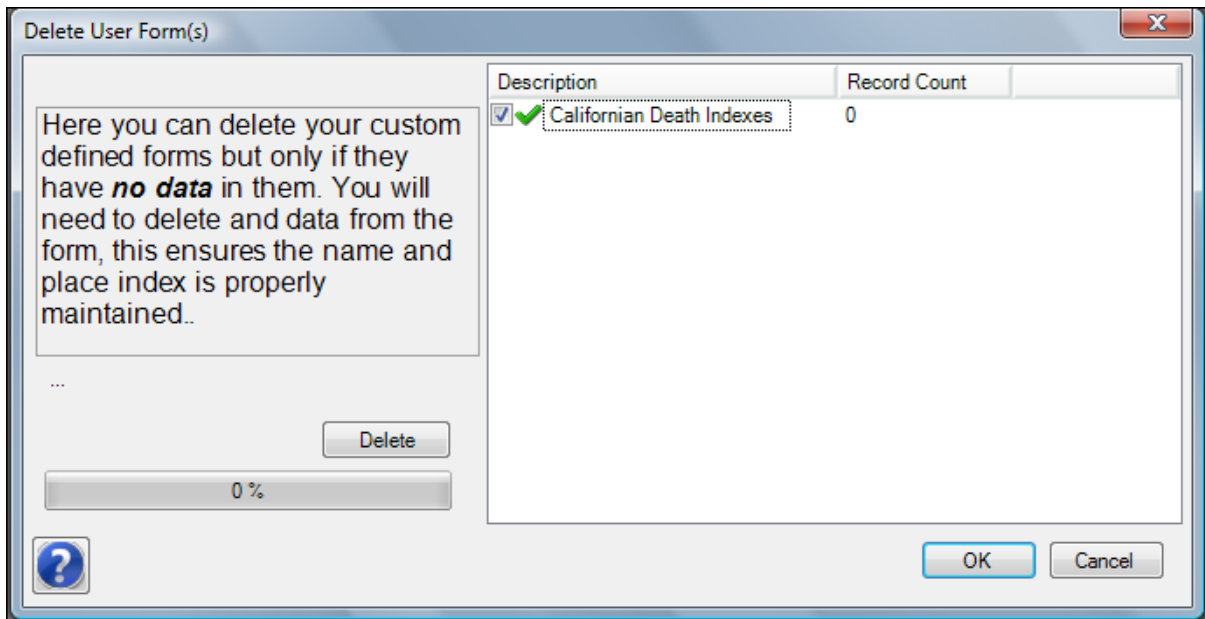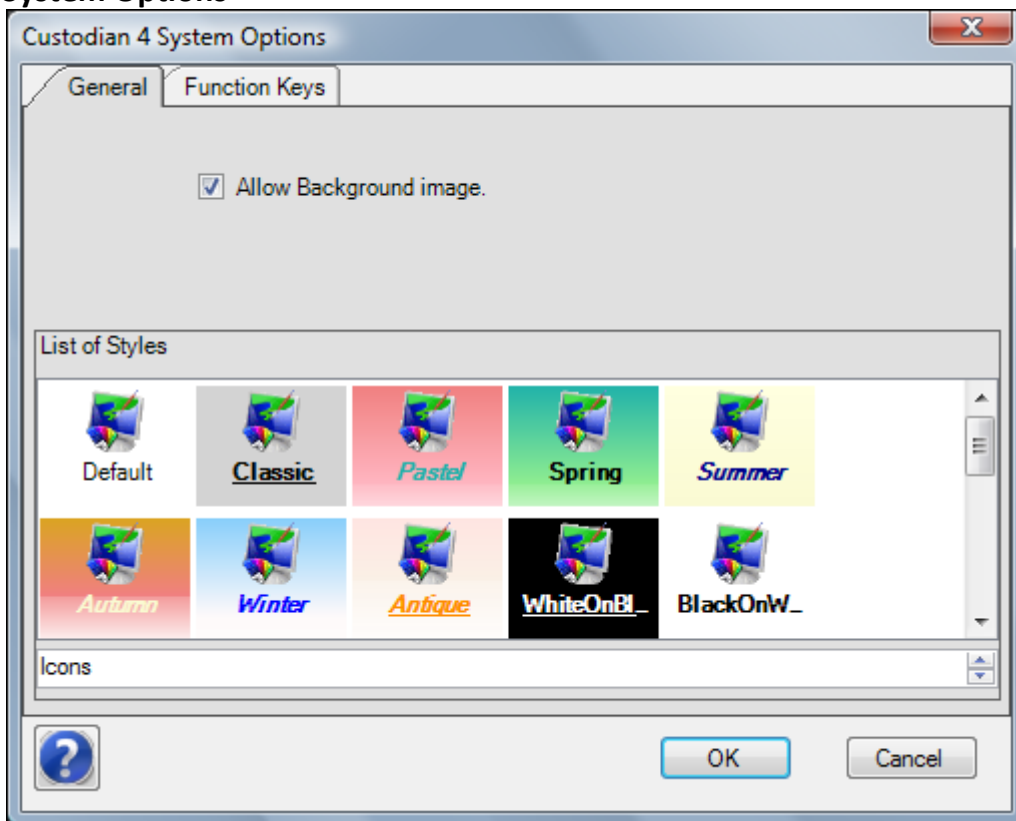
The Tools Menu

Tools, Options

There are two sets of options in this menu - one which applies to the whole system and the other which works at dataset level only.

System Options

General

In this section you can choose an alternative style for the data entry forms. Click on the icon of the style of your choice and an example will be shown in the text above. Note, however, that if you have previously changed the style of a form from the Style Manager in the Shortcut Bar, you will need to re-edit the style for that form in the Style Manager.

If you have allocated pictures to one or all of your datasets (see Attaching a picture to your Datasets, in the Create Dataset Option), click on the tick-box to Allow Background Image. Note that you will need to also set the option to Allow Background Image in each of the Datasets you want them in (see General, Dataset Options, below).

Function Keys
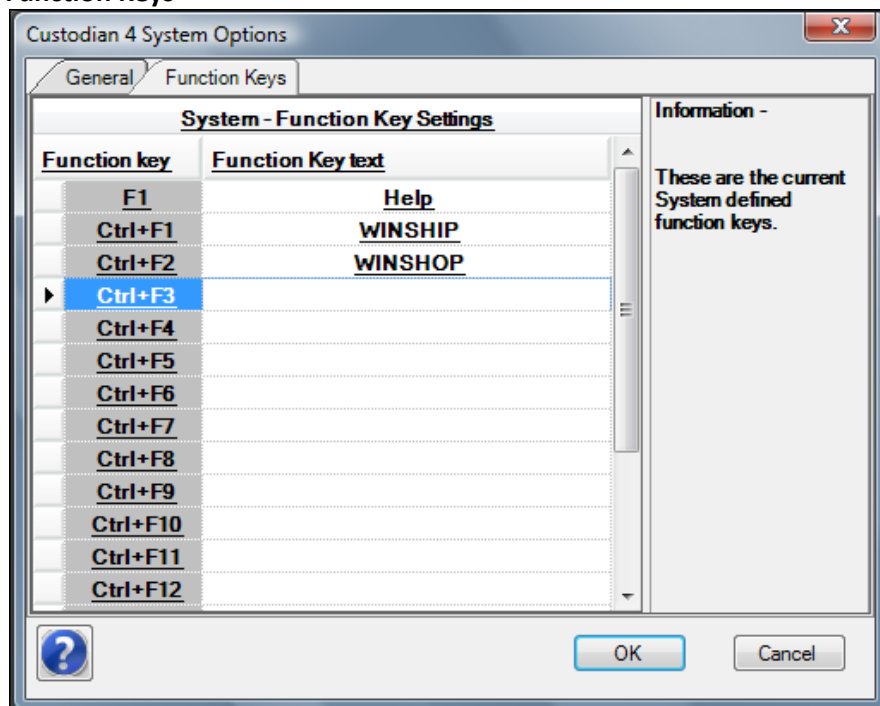
In this section, you can set the function keys for the whole system. For example, if you enter a surname or a place name by Function CTRL-F1, each time you want to key in that surname or place name, use CTRL-F1 and the text will be inserted. The System keys set here will overide those set in Dataset Options (see below).

Dataset Options
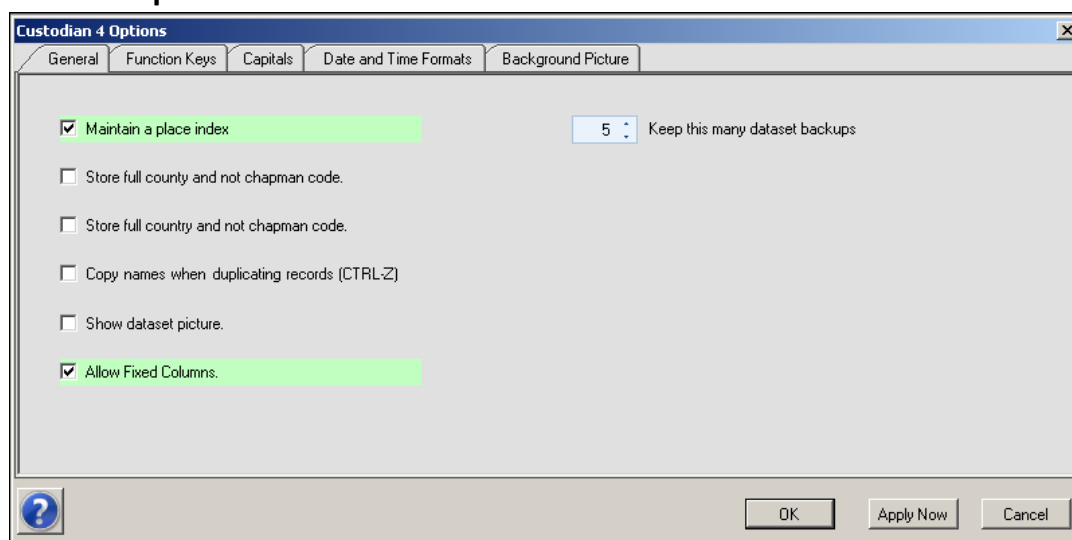
This section allows you to set options at the dataset level i.e. only for the dataset you are in.

General

Do not maintain a place index - this makes the Index database smaller, opening the forms and updating records quicker. For most Custodian users there would be no need to do this, but for a particularly large dataset where data loading seems slow, this option can be selected.

Store full county/country and not Chapman code - select these is you prefer to have the full county and country name rather than the three letter Chapman County code. If you use this whilst you have a data entry form open, you will need to close the form and re-open it for the Apply button to work.

Copy names when duplicating records (CTRL-Z) - using CTRL-Z repeats the previous record but not usually the name field, thus allowing you to enter lots of records from a register for different people. If you do want to repeat the name also, select this option.

Do not show dataset picture - select this if you have added a picture to your dataset (in Create Datasets or Open Datasets) but do not want to show it in the opening screen of your dataset.

Keep this many dataset backups - the default number of autobackups kept in your backup folder is five. The earliest will be deleted as each extra backup is saved. You can change the default to whatever you wish.

Show dataset picture - the default for this is "On" ie the box is ticked. This allows you to show a dataset picture in the space in the main screen - see Background Picture, below.

Allow fixed columns:- this option allows you to turn off the pins in the column headers in the grids, thus allowing the columns widths to be smaller and creating more space on the screen. The default is "On" – that is, if this option is ticked, the pins remain (in all forms).

Whenever you change your selection, ensure you click the **Apply Now** button before leaving this tab.

Function keys
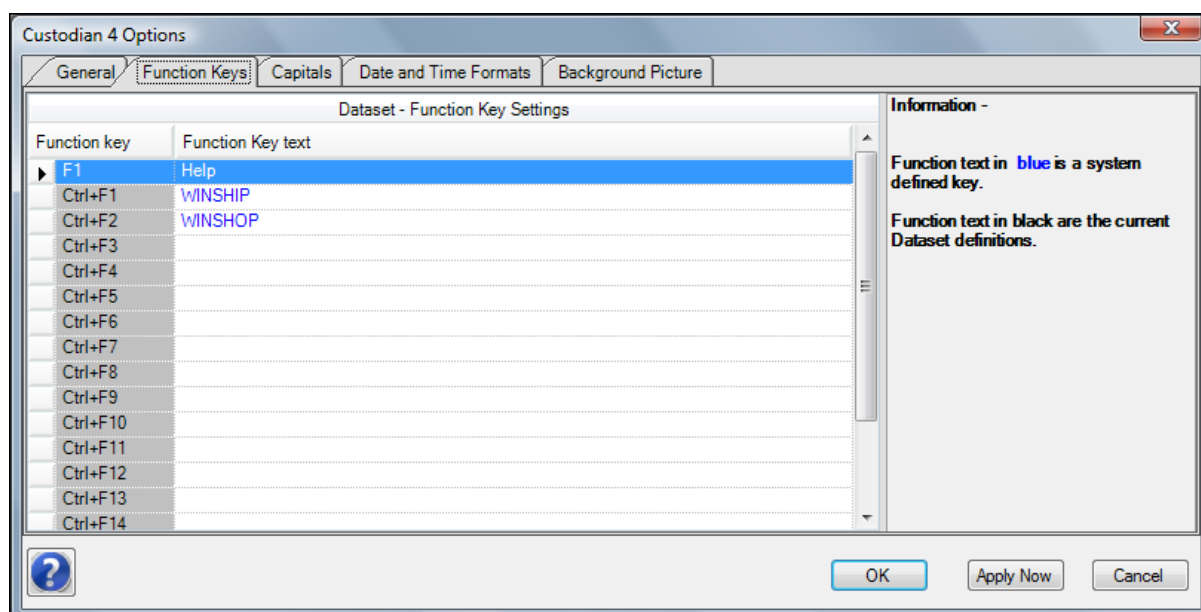
In this section, you can set the function keys for this dataset. For example, if you enter a surname or a place name by Function CTRL-F1, each time you want to key in that surname or place name, use CTRL-F1 and the text will be inserted. The dataset function keys set here will overide those set in System Options which are shown in blue text (see above). You can also set function keys from the General section of the Shortcut bar in a data entry form.

Whenever you change any function keys, ensure you click the **Apply Now** button before leaving this tab.

Capitals

In this section, you can set your choices for capital letter formatting for forenames, surnames and place names. Tick the radio button for the option you want and and the effect is shown in the Sample Text. Note that if you use Proper Case, "middle" words will be formatted too; for example Chester le Street will be formatted as Chester Le Street and John de Langlands will be formatted as John De Langlands.

Whenever you change your selection, ensure you click the **Apply Now** button before leaving this tab.

Date and Time Formats

In the first part of this section, choose the way you enter your dates (month first or day first) then select the preferred date formatting option offered. A sample will be shown at the base of the window. Choose also the time format you prefer. The PC culture is for your information only and depends on the settings on your computer.

Whenever you change your selection, ensure you click the **Apply Now** button before leaving this tab.

Background Picture
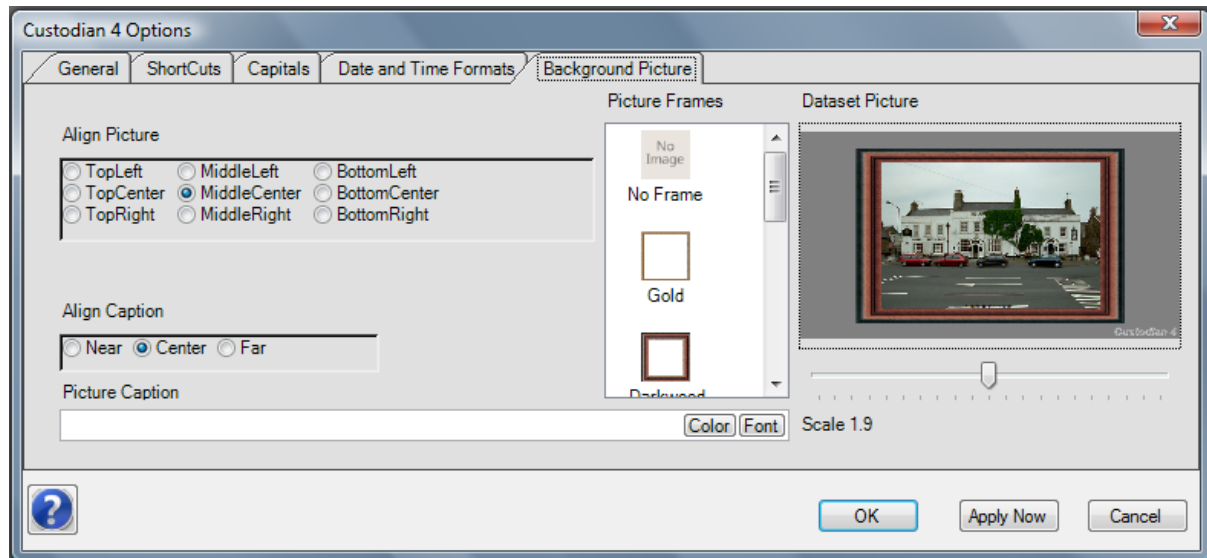
Before you can use this section, make sure you have selected a picture for your dataset. This is done in the File, Open Dataset menu and instructions are in the Attach Picture to Dataset section.

In the Background Picture tab, your picture should now show in the window on the right hand side. You can use the slide bar to alter the size - the aspect ratio is kept so you may not be able to fill the whole space with the picture. Be aware that you will lose quality if you enlarge a small picture too much.

The other options in this section allow you to align the picture and caption. Enter your caption where indicated and choose a font size and style. Then choose a frame style if you would like one. Click on Apply Now and then OK to leave the Dataset options. Your picture should now be in the background.

Note: The default picture options in System and Datasets is "ON". If you wish to turn pictures off, i.e. not show them, untick the check box in the System Options for the background picture (see System Options above) - if this is not ticked, you cannot show a background picture in any dataset. Or, untick the check box in the General tab of the Database Options - this turns off the picture in the current dataset only.

Whenever you change your selection, ensure you click the **Apply Now** button before leaving this tab.

Help, Contents, Index and Search Menu

Help can be accessed at any time when you are using Custodian. Clicking on the Help menu gives you the standard choices for Help:-

Contents

This section provides you with a contents table of the Help available. Click on + symbol by a title to open it and see the topics available. Click on any topic to open it.

Index

This section provides you with an index of the complete Help file. Key in a word or phrase and the program will search the index as you type. When you find an index entry of interest, click on it and then click on the Display button to show the topic.

Search

In this section, key in a key word or words and click on List Topics. The program will locate and show topics containing the key word. Select a topic of interest and then click on Display.

About Menu

The About box gives you information on the version number of your copy of Custodian. When requesting help, please tell us your version number.

Activate Menu

This is the place to register your copy of Custodian and receive a software key to activate it. You need to have internet access on your computer - if you don't have this, you can use the Registering form on the Custodian web page (with another computer) or e-mail your registration details to support@custodian4.co.uk, or you can telephone your registration on 01432 839108. Make sure you have all the required information to hand, whichever method you use.

If you are using the Activate form or the registration page on the web site, enter the details requested:

Notes: You will find the Serial number on the back of the Quick Start Guide.
The Security Code is taken from your computer and will be automatically completed.

You will not be able to enter your Activation Key just yet - when you've completed all required fields, click on Send Security Code.

When your registration details are received, you will be sent an e-mail with your Activation Key - enter this in the Activation window and click Save Details. You are now ready to begin using Custodian.
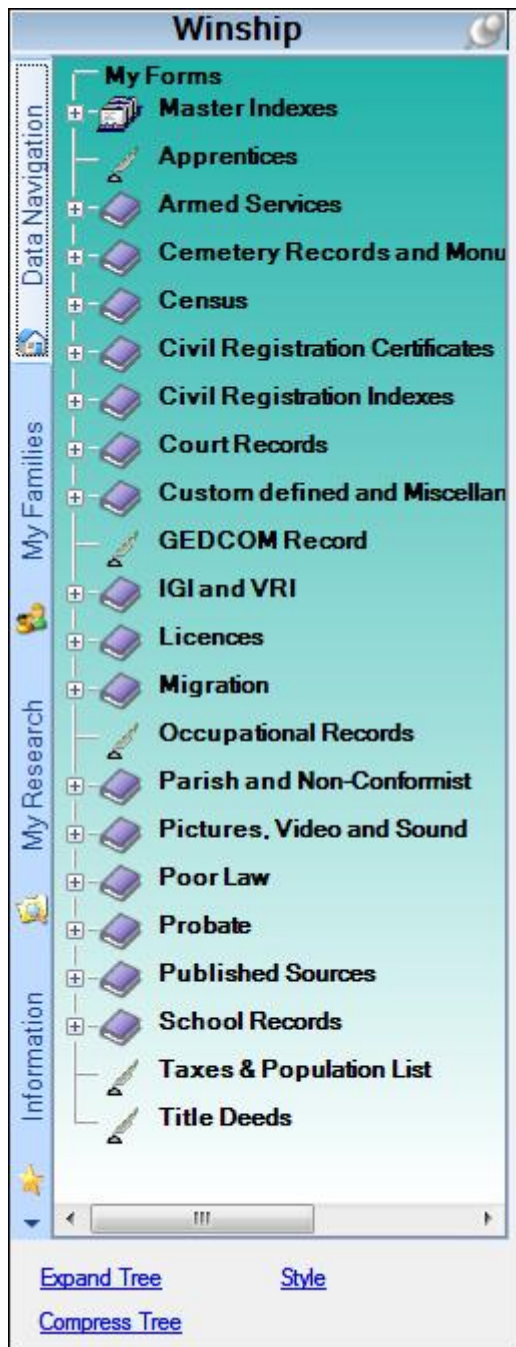
Window List

This option lists all the data-entry forms you have open and the last one you opened (the one that is in the foreground) will be "ticked". You can toggle between the forms by selecting them from the list. It doesn't matter if the forms are maximised or minimised on the screen.

The Navigation Tree and Tabs

The Data Navigation Tab

This is the area in Custodian 4 where data entry forms are accessed.

The title of your dataset is at the top of the Data Navigation Tab.

Using the Data Navigation Tree

The tree (list) in the Data Navigation Tab shown left is not expanded - that is, only the top level is showing. Those items with a + and a book icon have one or two more levels of title. Clicking on the + opens the next level. Titles with no + and a quill icon are the last level - clicking on the title opens the data entry form. Titles in the Data Navigation Tab with no + and only a quill icon have no lower levels - the data entry form is opened from the title. When you have records in a data entry form, the number of entries in the form is shown in brackets after the form title (the Apprentices form has 15 entries in the example shown left). When you delete records in a form, the number count in the brackets will only be updated when the form is closed (this includes the Name and Place Index).

Below the tree in the Data Navigation Tab are the options Expand Tree and Compress Tree. Clicking on Expand Tree will show all the levels and all the data entry forms. Clicking on Compress Tree will close any levels which are open and return to the top level view.
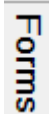
Also below the tree is the Style option in which you can change the style of the Navigation Tree.

Pinning/unpinning the Data Navigation Tab

In the top right hand corner of the Data Navigation Tab is a pin . In the position shown left, the pin holds the Data Navigation Tab in position. When a data entry form is open, you can create more space on your screen by hiding the Data Navigation Tab. Click on the pin so it changes to then move the cursor away from the Data Navigation Tab. The Tab will slide to the left and be hidden leaving only in the margin. Holding your cursor over this will reveal the Data Navigation Tab again so it can be used. To pin the Navigation Bar back into position,

click on the pin again so it returns to .

Renaming Titles

Titles can be changed by right-clicking on them and keying the new text. For example you may want to change the Migrate title to Migrate and Travel. Right-click the mouse on Migrate and the title will change to edit mode. Place your cursor at the end of the word Migrate and key in a space then "and Travel". Press Return to save the change.

TIP: For Help on opening and entering data in the forms, a good place to start is the first tutorial *How to get started in the data entry forms.*

The My Research Tab

Note that your data in the forms in this section are common to all your datasets i.e. the same data will show whichever dataset you are in.

Note that the My Research Tab and the Shortcut Bar can be "pinned" to allow more screen space if you require it. More information is in the Shortcut Bar help.

The forms in the My Research Tab have a similar appearance to any of the other data entry forms, in that they have a Shortcut Bar and the same options for record saving, sorting and filtering. However, they are not otherwise connected to the databases and anything you enter here will not be included in the Name or Place Indexes.

In each of the following forms there is a field entitled Dataset. If your data has been migrated from Custodian 3, this will contain the dataset name from which it was migrated. The button in the Dataset field accesses a drop-down list and you can select a different dataset name if you wish (see the image for the Research Notes), including None if this is appropriate. If you are entering data from scratch, the same option is available.

Research Notes

This is a form for recording anything to do with your research - particularly research done rather than to do (see To Do Tasks, below).
To add a new entry in this form, click on the (Add) My Research Notes Entry button near the bottom of the screen. Complete are the fields that are relevant, then click on the Save icon in the toolbar to save the record.

	Date	Repository	Type of record	If Found	General Information	Notes	Dataset
1	30 Oct 1998	Hereford RO	1881 Census Index	☑		These are the counti...	Winship
2	27 Jul 1999	Hereford RO	IGI	☑		These are the counti...	Winship
3	May 1998	Internet web site	Marriage indexes	☑		Muggleswick Marria...	Winship

To Do Tasks

This is a form for recording research tasks to be done.

To add a new entry in this form, click on the (Add) My To Do List Entry button near the bottom of the screen. Complete are the fields that are relevant, then click on the Save icon in the toolbar to save the record. Note that when a task is marked as completed, the entry appears struck through.

	Task Complete	Subject	Priority	Status	Repository	Category	Task Due	Task Completed	General Information	Notes	Dataset
1	☐	Wills	Normal	Waiting on someone...	Family Search Site	Internet search	25/12/2010		waiting for release	Delayed several mo...	Winship
2	☑	~~Burials~~	~~Normal~~	~~Completed~~	~~National Burials Ind...~~	~~CD search~~	~~01/10/2010~~	~~04/10/2010~~			~~Winship~~
3	☐	Burials	High	In Progress	Family search site	Data entry	20/11/2010		work in progress	Some duplication - n...	Winship

My Library

This is a form for recording your books, CD's, fiche and other media. To add a new entry in this form, click on the (Add) My Library Entry button near the bottom of the screen. Complete are the fields that are relevant, then click on the Save icon in the toolbar to save the record.

	Type of Resource	Title	Author	Publisher	Year of Publication	ISBN	Comments	Location	Shelf Reference	Notes
1	CD	National Burial Index 3rd ed		FFHS	2010	978-0-9564721-...		3rd shelf	3A	
2	Book	Yorkshire Family Histories & Pedi...	Stuart A Raymond	FFHS	2000	1-86006-112-5	Yorkshire Librar...	3rd shelf	3B	part of set
3	Book	A Clearer Sense of the Census	Edward Higgs	HMSO	1996	0-11-440257-4		1st shelf	1A	

My Interests

This is a form for keeping a note of all your surname and place interests and even your membership numbers for family history societies. To add a new entry in this form, click on the (Add) My Interests Entry button near the bottom of the screen. Complete are the fields that are relevant, then click on the Save icon in the toolbar to save the record.

	Name of Interest	Place of Interest	County	Country	Dates of Interest	Correspondent	Notes	Dataset
1	Winship	All	All	All	All		One Name Study	Winship
2	Weaver	Bosbury	Worcestershire (WO...	United Kingdom (UK)	1750-1800	1	Possibly Coddington	Winship
3	Smith	Hill Croome	Worcestershire (WO...	United Kingdom (UK)	1800-1900	138		Winship

My Address Book

This is a form for keeping details of contacts, institutions and organisations.

Note that the Reference number is automatically assigned and that it is incremental - that is, if you delete any records, the next reference will still be used and previously deleted ones will not be re-used.

To add a new entry in the Address Book, click on the (Add) Address Book Entry button near the bottom of the screen. Complete are the fields that are relevant, then click on the Save icon in the toolbar to save the record. To add an activity (contact by e-mail or letter for example), click on the Activity button near the bottom of the screen. Complete the fields and save your record, as above. You can add as many Activities as you like for each entry in the Address Book.

Click the minus symbol next to the main record to close the Activities and click on the plus symbol to open them again. The Expand and Compress Rows buttons in the toolbar will open or close all of the Activities. The image below shows (part of) one record entered with one Activity.

	Reference	Category	Organisation Name	Contact Name	Second Contact Name	Address 1	Address 2
1	148	Correspondent		Mrs S Jones		The Old House	Main Street

	Activity					
	Date	Activity	File Reference	Page Reference	Notes	Dataset
1	10/01/2011	E-mail	Winship folder		E-mail contained details of her fam...	Winship

The My Families Tab

This is the area in Custodian 4 where the family trees are built, accessed and managed.

The dataset title is given at the top.

If you have migrated data from Custodian 3, the families which had Personal and Family References allocated and for which you have built a tree will be listed underneath. If you had allocated references but not yet built a tree, you will be able to do the latter by using the Manage my Families section (see below). The image to the left is how the list will look after migration from version 3.

If you are starting from scratch, or have data but not added the References, you will not see any families listed. In this case, work through the "How to get started in the data forms" tutorial and/or the Import Data topic and/or the Personal and Family References topic, ensuring the References are included in your data where you can, before returning to the My Families topics to begin building the family trees. Family trees in Custodian are built from source data in the data forms so you must have some data in these first. The image to the left is how the list will look when you have added references to your records **and** added families to the list.

There are three topics associated with this Help section. The first is Manage My Families which covers adding to and maintaining your list of Family Groups, and which you need to be able to do first. The second is Building Family Trees which covers the use of the family tree section of the software. The third is The Family Panel which discusses the sections in the panel to the left of your family tree.

Manage My Families

This section includes topics about managing the list of your family trees (family groups): Changing the title of a Family Group, Adding an Image, Adding a New Family, Deleting a Family, Printing a Family List....

To access Manage My Families, first right-click in the space within the My Families navigation area:
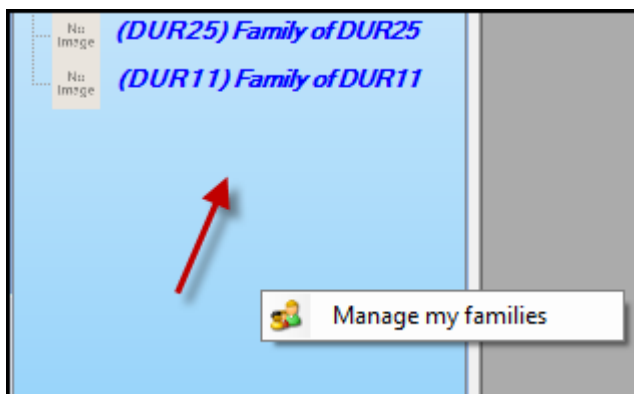
Click on the Manage my Families label and the window will open:
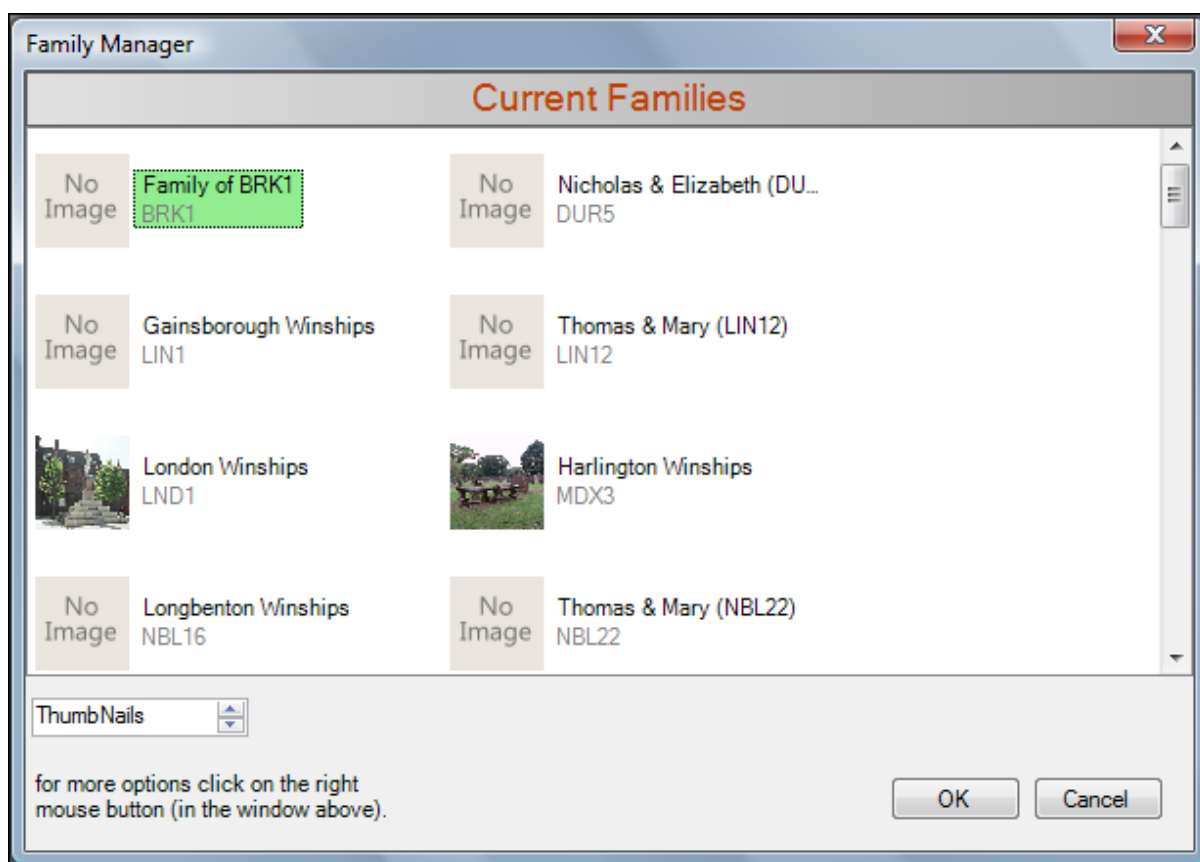
Your list of family trees can be shown in a variety of formats and these can be selected using the menu underneath the list of families; the default is Thumbnails.

Changing the Title of a Family Group

A family will be listed with its Family Reference number and be entitled Family Group (unless you had changed the title in version 3). To change the title, right-click anywhere in the My Families navigation area and select Manage My Families.

In the Family Manager window, find the Family Group you wish to change and click on it to select it.

Now right-click anywhere in the Family Manager window and a menu will appear - click on Change Title. The Family Reference number will be kept so you don't need to included this in your title. Key in the title you require and click on OK. The window will close and the new title is now shown in the list, along with an image thumbnail, as shown in the image to the left.

Adding or Changing an Image
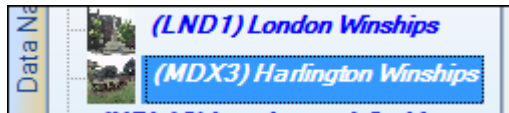
If you have images in your Pictures form (see the Tutorial entitled "How to add pictures, sound and video"), you can add an image to your family title.

To add an image (or change it), right-click anywhere in the My Families navigation area and select Manage my Families. Click on the family you want to add an image to and then right-click anywhere in the Family Manager window. Select Change Picture and a new window will open. Click on the tick box to show all media and all your pictures will be shown in thumbnail form. Choose the image you require and click on OK. The window will close and the picture is shown in the image thumbnail.

Adding a New Family

This is the first step in the process of building a family tree from your source data (you must have Personal and Family References in records for people you want in the family tree).

Right-click anywhere in the My Families navigation area and select Manage My Families. In the Family Manager window, right-click again and select Add a Family.

Choose the Family Reference you wish to work on. If you haven't given the family a name, it will be displayed as Family of .... (Family Reference). You can change this now or do this at a later stage. Next, click on the button to select a person to begin your tree. It doesn't have to be the head of the tree as you can add spouse, sibling, child or parent to an Individual, but you may find it easier to work in a methodical manner from top down.
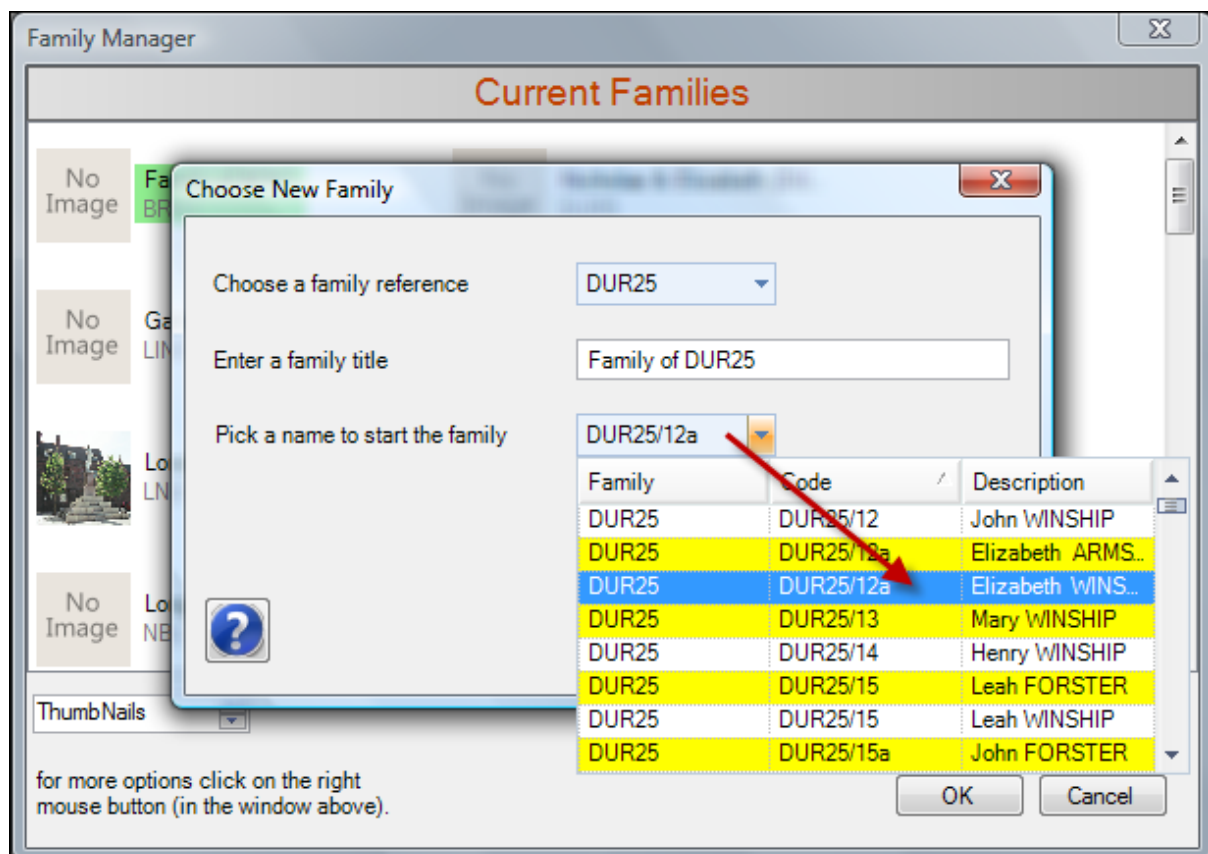
After clicking on OK, the new family will be added to the Family Manager window and to the list in My Families. Close the Family Manager Window and click on the family in the My Families list to open it. The tree opens to show the person (previously selected) in the tree and in the Family Names list. You can now begin to build your tree (see next topic Building Family Trees) and as each person is added to the tree, his or her name is added to the Family Names list.

Deleting a Family

If you wish to delete a family from the list, you do not need to delete the entries in the tree first.

Right-click anywhere in the My Families navigation area and select Manage My Families. In the Family Manager window, right-click again and select Delete a Family. Make sure you have clicked on the correct family before selecting Delete - the box surrounding the title will be highlighted. You will be asked to confirm that you are sure - check the Family Reference again - once you select "Yes", be aware that the delete process cannot be undone.

Print the Family List

You may wish to print a list of the trees you have built, particular when you have a large number of them.

Right-click anywhere in the My Families navigation area and select Print Family List. See the Reports topic for information about the options you can choose in the settings window. Click on Print Preview and maximise the Preview window to see your report clearly. When ready, click on the printer icon to print the list report.

Building Family Trees

This section includes topics about building and editing your family trees and the information they contain:

Opening the Family Tree Screen

Click on the Family Group title to open the family tree screen. You can reposition and enlarge the tree screen by dragging the blue title bar and the bottom and right borders. You can also use the pinning method to slide the Family List out of the way whilst you are working on the tree, to give you full maximum screen space. The resize and position will be remembered when you next open this family.

If you have migrated data from Custodian 3, your Family Groups will also be migrated and you can open the trees immediately (see the section Trees which have been Migrated from Custodian 3). If you have just entered your data (including Personal and Family References), your families will not be listed yet and you will need to use Add a New Family first to add the Family Reference to the list (see Manage My Familes).

Building the Tree from the Beginning

Unless your data was migrated from version 3, you will just have one person in the tree to begin with - the one you specified as a starting point in Add a New Family (Manage My Familes). This person will be the first name in the Family Names list in the panel to the left of your tree and it will be "ticked" to show this person is the current focus of the tree. There is a cell tip for the person in the tree - hover the mouse over the person's icon and details are shown about them.

Where dates of birth or baptism and dates of death or burial are known, these will be included in the name box for the person and shown on-screen.

Note on gender: If the gender was completed in the source records for this person, their icon will be

blue for male and yellow for female. If the program couldn't determine the gender from the source records, the icon will be green and show a question mark. You can change this by right-clicking on the person's icon and select the relevant "Change Gender to..." option (see image below).

From this person, you can now add a spouse, a child, a sibling or a parent. Right-click on the box of the person you are going to add a relative to. The person's name will be in the top of the Family Panel to the left of the tree and the name box of the person changes to a different colour. You can now choose one of the options (see left).
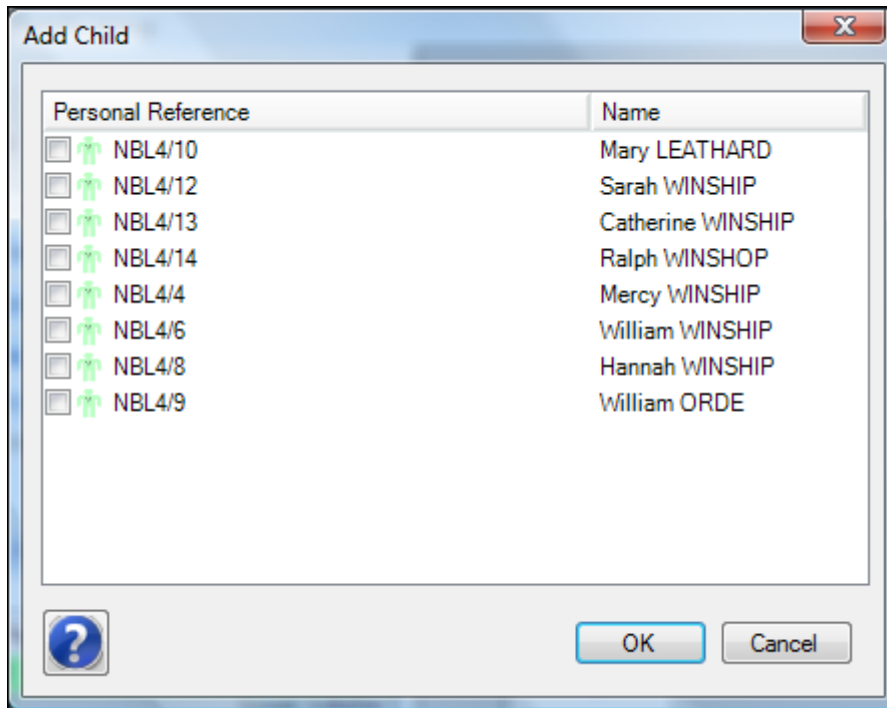
When you choose to add an individual to the tree, a list of all the individuals in the Family Group will be shown. Select the person you want by clicking the tick box by the name. Note that you must have a record in your source data for this person and the record should include the Personal and Family References or they will not appear in the list.
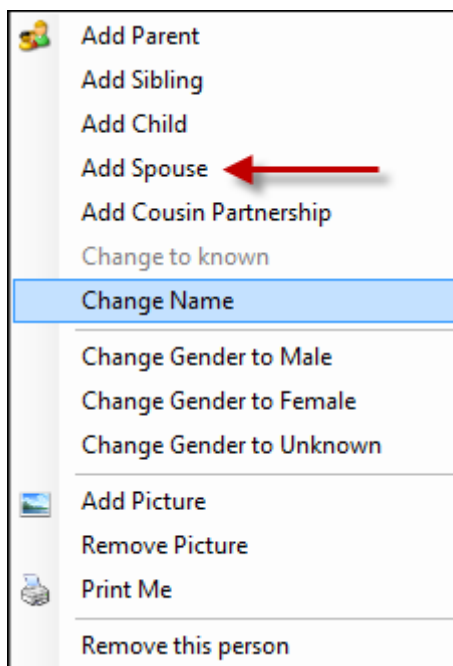
Note: you can order this list alphabetically by clicking on the header Name - useful when you have a large list.

Below the tips are some notes on adding each of the relatives and the other options.

Tips:

1. There is no Save button - every change you make is automatically saved.

2. Always be sure to click on the person you are going to add a new relative to (to put that person in focus) otherwise you may add the relative to the wrong person.

3. The Sources box shows the source records you have for the person who is in focus on the tree. If you return to the data entry forms and enter a new record or add the Personal and Family References to an existing one, this list will be updated. Thus, if you add a burial record later, you can return to the tree and see the date has been added to the person's record.

Adding a Parent

Parents can be added at any time. You will most likely need to do this when tracing a family line further back.

Adding first parent
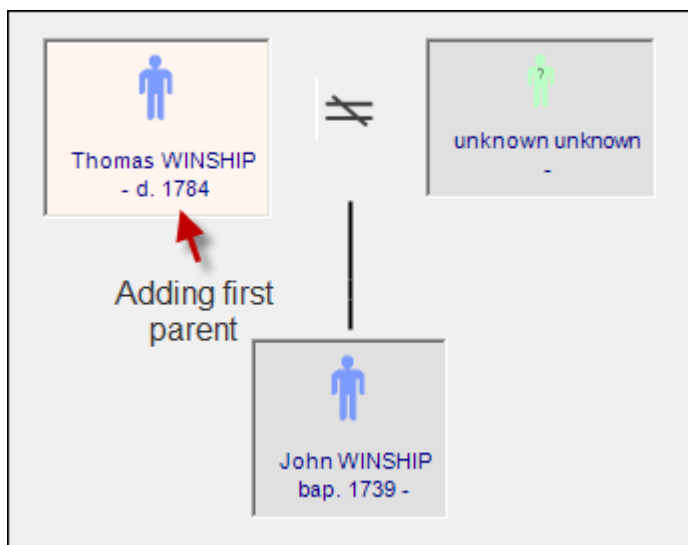
It is important to note that the first parent you add must be the one **whose line you are following in the tree you are working on**. This is usually the father but not always. For example in a Smith family tree (and you are following the Smith family line), you must enter the father before the mother. If only a mother is known and you are following her family line (as sometimes happens with the case of illegitimacy), then she can be added first. This is important as you can only see one family line at a time on-screen (see section below, Building a Tree with Multiple Family Names, for more information).

After second parent is added
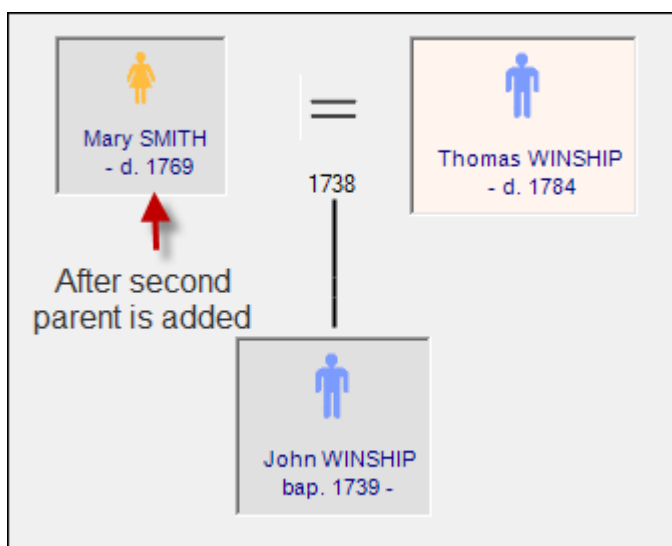
Adding the first parent will then add the spouse as Unknown. Right-click on the Unknown box and choose Change to Known - the drop-down list of names will re-appear and you can select the second parent. If, in the case of illegitimacy, the father is not known, the second parent can be left as Unknown. It cannot be removed as subsequent children are linked to a relationship symbol (the equals or equals with line through) not an individual.

Tip: The spouse's name box is always slightly smaller than that of the main name, which is another reason to add the main named parent first.

Adding a Sibling

A sibling can be added even if parents are not known; in this case, the sibling's box will be shown in the same row but without any lines. If parent's are known, the line is continued from the other sibling/s.
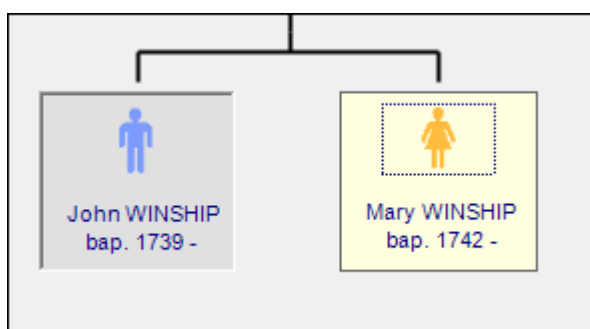
Tip: Where there are a lot of children from a marriage, you can also add them as siblings to each other instead of children to the parents.

Adding a Child
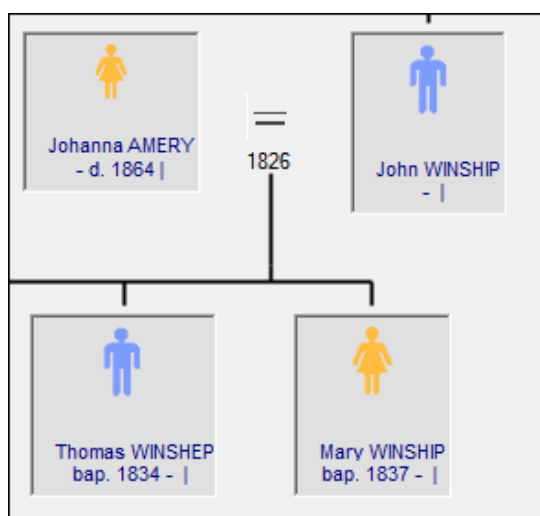
A child can be added from the father's or the mother's box. Selecting a child adds them underneath and draws a line from the marriage to the child. For subsequent children, the line is redrawn to incorporate them all. Children will be ordered by age, eldest first - a later addition will be inserted in the correct sequence, provided that birth or baptism dates are in the source records. Any children without known dates are arranged to the right of the others. See the section below, Adding a Cousin Marriage, for adding children to a cousin marriage.

Adding a Spouse

Selecting a spouse adds the person to the left hand side of the original entry and their name box will be slightly smaller. An equals symbol is added between the pair. A marriage date will be included as long as there is a record containing both names and a date and the Personal and Family References.

If there is no recognisable date, a line will be drawn through the equals symbol. If a second spouse is added, this one will be to the right of the first one and another equals symbol added for the second couple. The same rule applies to subsequent marriages. Where more than one marriage is added, the spouses will be numbered in order of marriage.
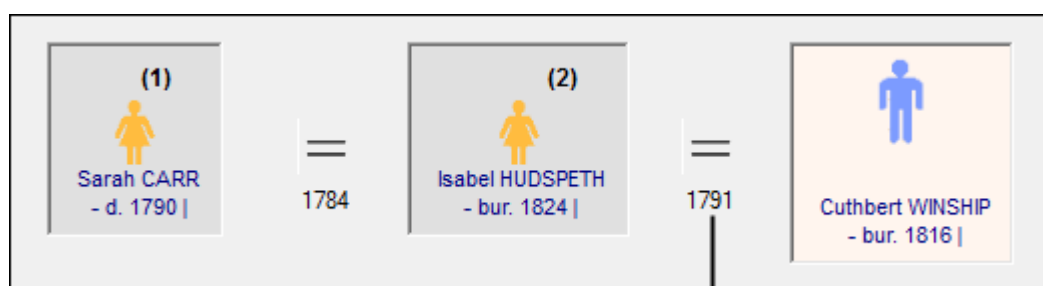
If there are two spouses, children can be added by using the correct mother's box. If the father's box is used to add the children, you will be asked to choose which couple to add each child to, once you have selected the child.

If the spouse is unknown and you therefore have no records in your database for that person, you will need to create an "Unknown" spouse. This is because the tree is drawn from the partnership symbol between two individuals. Right-click on the person and select Add Spouse, as before. When the list of names opens, select the entry marked Unknown and this will be added to the tree. If you later find and add records to the database for this person, right-click on the person's box and select Change to Known. You can now select the correct person for the spouse's entry on the tree.

Adding a Cousin Marriage/Partnership

Occasionally, a family will have a marriage between two cousins and the program has to handle this in a slightly different way as both parties already appear in the family tree. When you have entered all the siblings from each branch, click on one of the people in the cousin marriage. Right-click on one partner to access the menu and choose Add Cousin Partnership. You should be given a list of all the cousins to choose from. Select the correct cousin and allow a few moments for the tree to be redrawn. Spouse boxes will be added to both partners in the tree and a dotted line drawn between the two to

donate that they are the same couple. Spouses are greyed out slightly as they already have their own name boxes (which aren't greyed out).

When adding children to the marriage, add the children to the left-most couple. Children will only be shown once.
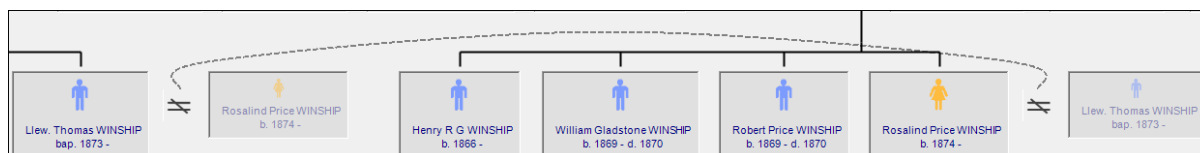
Change to Known
This is used when adding parents - see section above on Adding a Parent.

Change Name
The list of names you are given to choose from are compiled from your data. They are comprised from the earliest record the program finds for each person with a different Personal Reference in the family (those with the same Family Reference).

There are occasions when you may want to change this choice of name:
1) When the first record is not the usual spelling of the surname and you would prefer the usual one to be shown in the tree;
2) When the only record you have for a wife is in the census or another record which only shows the married name and you do not have any record of the marriage (and hence no maiden name). In this case the marriage entry on the tree will give the impression that both parties had the same surname at marriage

To change the name, right-click and select Change Name. You will see two selection areas - one for the forename and one for the surname. Click on the button for the forename if you wish to change this. You will be shown all the different names that you have for this person (there may only be one or two) and also the option of Unknown. Select the one you require then click on the button for the surname and repeat the process. In this way, if a wife's maiden name is not known, this can be represented in the tree.
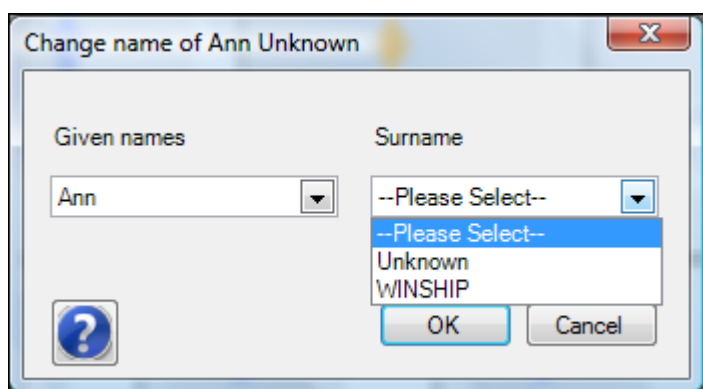
Tip: The list of names can show up errors in your data! For example, if you have two completely different names for the same Personal Reference, they will both appear in the list. Also, if you have given the same person two different references, they will both show in the list. Note that you cannot change your data here - you must go back to the source record. You can go to source records from the Source section in the Family Panel or you can go back to the Name Index and sort on Personal or Family Records.

Change Gender

If the gender was completed in the source records for this person, their icon will be blue for male and yellow for female. If the program couldn't determine the gender from the source records, the icon will be green and show a question mark. You can change this by right-clicking on the person's icon and select the relevant "Change Gender to..." option. Usually, you will just need to use Male or Female. This overides anything you might have in the records in your database.

If you subsequently add the gender to the source records and wish the program to use this to derive the gender, select Change Gender to Unknown.

Add a Picture

If you have a picture of your individual (in the media form of Custodian), you can attach this picture to the person's record in the tree. Right-click on the individual and choose Add a Picture. In the picture window, click on Show all Media. Choose the picture you would like by clicking on it and choosing OK. The picture will be shown as a thumbnail in the Family Panel. Clicking on the thumbnail will show a larger version in a Picture Viewer window.

Remove Picture

If you wish to remove a picture added, right-click on the individual and select Remove Picture.

Print Me

This option will produce a printed report on an individual. It will show birth/baptism, marriage and death/burial information and also parents and siblings. Right-click on the person and select Print Me.

There are a number of settings you can alter. Change the report title to the name of the person if you would like this to be printed. Preview your report to check all is as you want it, then click on the print icon in the Preview window to print your report.

Remove this Person

If you have added the wrong person and need to remove them, right-click on the person in the tree and choose Remove Person from the drop-down list. You will be asked confirm that you want to remove this person - check the name given before you OK this.

Note that if the person you are removing has children on the tree, these will be removed too. If there are more generations ie grandchildren, you will not be able to remove that person and will need to remove the grandchildren first. You will see a message to this effect if this is the case.

Removed persons are still in the list and can be added into the correct place later.

Building a Tree with Multiple Family Names

For those undertaking One-Name Studies, you are probably not tracing the family lines of wives (or husbands) marrying into the family. However, if you are following these lines, you can build your tree with their lines too. It is important to remember that you will need to use the same Family Reference for all the families you want to build into the tree.

The tree should be built with the main name first and the wives (or husbands) families added later. This is because you can only have one family line showing on screen at a time. To take an example, in a Smith family tree where one of the Smith men has married someone with the surname Johnson, add the Smith man first then his wife. Complete the rest of the Smiths that you can - children etc and then return to the wife and change the focus of the tree to her. To do this, find her name in the Family List (in the Family Panel to the left of your tree), tick the check-box, right-click the mouse and select Change Focus. She will now appear at the top of the tree with her descendants below. You can now add her parents, starting with the father first, and the rest of her family. When the focus is on her or one of her ancestors, her tree will be shown on-screen.

To go back to the Smith tree, change the focus again to a member of the Smith family. You can build all subsidiary family lines this way if you wish, toggling between them by changing the focus.

Trees which have been Migrated from Custodian 3.
Gender
There is an important point to note about gender, if your data and trees have been migrated from version 3. Adding gender to records in the data forms is not compulsory but for family tree building, it is essential. Males are marked with a blue person icon and females with a yellow person icon. If the gender is not known because it cannot be determined from the original record, the person icon will be green and show a question mark. If you know the gender of the person, you can edit this. Right-click on the person's icon and then select the relevant Change Gender option.

Changing the data in this way will not change any original data, nor will the program derive the gender from original data if you later edit it. If you want to the program to derive the gender from altered original data, you will need to change the person's icon back to unknown first.
Spouses
In Custodian 3, you can build a family tree without adding spouses ie there is no "unknown" spouse. In Custodian 4, all children are "attached" to two parents, even if nothing is known about one of the parents - in this case an Unknown name box is created, which can then be updated later when information about the person is found.

When built trees are migrated from Custodian 3, Unknown spouses are added where they are missing.

The Tool Bar in the Tree Building screen
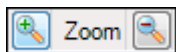
Zoom in and out - use these to increase or decrease the size of the family tree on the screen. Note that the font size has a minimum value so making the tree a smaller image will truncate the names. Be aware that when you print your tree, the view that you have on-screen is what is printed - if you zoom out so that the tree is very small on-screen, this is the way it will print.
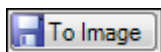
To Image - use this to save the file as an image in a number of formats.
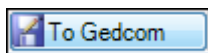
To Gedcom - use this to save the family tree as a Gedcom file

Preferences - in Preferences, change the colour of the lines on the tree and the background and the number of pages you want the tree to print on. Click on Show Pages to see the lines where the page boundaries are. The settings are changed in the tree you are in only.

Short Details and **Full Details** - this button toggles between Short and Full Details. Full Details shows more details (places) in the name boxes and marriages. This takes up more space on the screen, so you may want to keep this on Short Details whilst you are building the tree and scrolling around and then choose Full Details for printing the tree. The tree printing is What You See Is What You Get so whichever view you have on-screen is the view that will be printed.
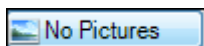
No Pictures and **Pictures** - this button toggles between No Pictures and Pictures. Pictures shows the male/female icons or your images, if you have added them to individuals. No Pictures hides icons and images, gaining a little more space on-screen. As with the Details, above, whichever view you have on-screen will be the one that is printed.

Print Tree - there are currently two options for tree printing; a drop-down tree and an indented tree. The drop-down tree is the one you use when building your tree. The indented tree is a style which should take less printed space if you have a very large tree. Choose the option you require, change paper margins inthe next window, if required, and then select Print Preview. See the notes above about Details and Pictures when printing.

Note: if you want a second printout once you have selected to Print and the Print Dialogue is shown (change margins etc), you will need to "OK" this and select print again.

The Family Panel
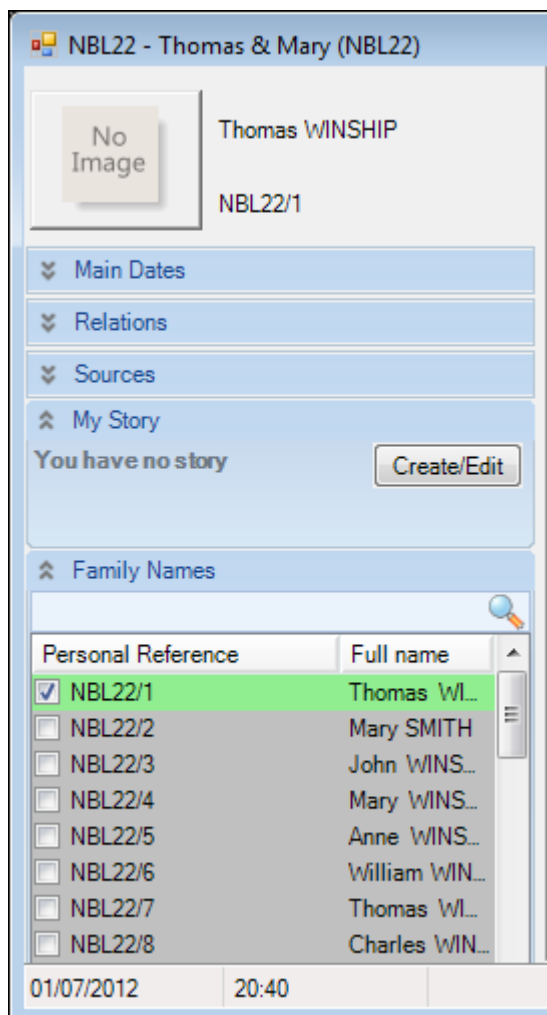
The Family Panel is located to the left of your family tree. It contains information about the individuals in the tree, the source information and even provides an area for writing an individual's story. First, open the family tree you wish to work with. Then click on the double-arrow by each section you wish to open. Clicking again will close the section to maintain a compact work area.

For each of the sections where information is given about the individual, first make sure the focus is on the correct individual by clicking on the person's icon in the tree. The person's name should be at the top of the Family Panel.

Adding an image to an individual

If you have a photo or other image of an individual, this can be attached to the information in the Family Panel. You must first have an image in the media form in Custodian - see the tutorial How to add pictures, sound and video for instructions on how to do this.

Right-click on the individual and choose Add a Picture. In the picture window, click on Show all

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Media. Choose the picture you would like by clicking on it and choosing OK. The picture will be shown as a thumbnail in the Family Panel (where there is No Image in the picture to the left). Clicking on the thumbnail will show a larger version in a Picture Viewer window.

Main Dates

The information in this section is taken from the source records in the data-entry forms and covers birth, baptism, marriage, death and burial dates and places.

Relations

This section lists the parents and siblings of the individual.

Sources

This section contains source information for the records used in compiling the tree for the person named at the top of the Family Panel.

My Story

In here you can create a biography of the person (named at the top of the Family Panel). Click on Create/Edit to open a text box. You will find some statements already in place, built from the parts of your data which are used to compile the family tree. You can edit/remove add to these - in fact anything you like to build the biography.

The first section beginning "This is the Story of..." contains statements from records used in building the tree - births, marriages, deaths etc. The second section, Recorded Sources, is a list of all the records you have for that person.

You can edit the text using the tools in the toolbar - bold, italics, text-alignment etc, change font size and colour, and export and print your storyboard. You can also add a picture, but the picture must already be in the tree (see Adding an Image to an Individual, above).

Family Names

This list is compiled as you build the tree, each person being added as they are included in the tree. The entry which is ticked shows the person who is the focus of the tree. To change the focus to another person, tick the check box next to their name then right-click and select Change Focus. This person's name should now be at the top of the Family Panel.

Changing the focus allows you to look at smaller sections of the tree. If you choose a person who is around the middle of the tree and change the focus to that person, only the family of that person is shown. For example, If the person is a woman marrying into a family and her ancestors are not in the tree, only her marriage and desendants will be shown.

The Information Tab

In this tab in Custodian, you will find links to the Custodian web site and to video tutorials.

The Shortcut Bar and Functions
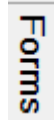
Shortcut Bar Introduction

The Shortcut Bar is on the left side of every data entry form.
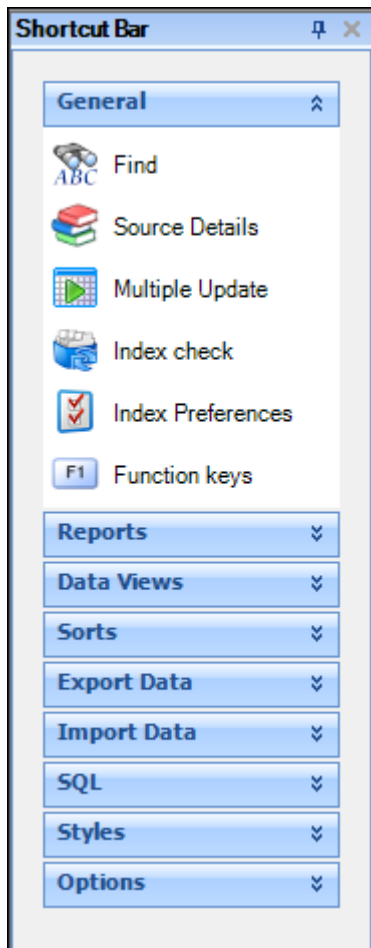
Pinning/unpinning the Shortcut Bar

In the top right hand corner of the Shortcut Bar is a pin . In this orientation, the pin holds the Shortcut Bar in position. When a data entry form is open, you can create more space on your screen by

hiding the Shortcut Bar. Click on the pin so it changes to then move the cursor away from the Shortcut Bar.

The Bar will slide to the left and be hidden, leaving only in the margin of the data entry form. Holding your cursor over this Functions-Options icon will reveal the Shortcut Bar again so it can be used. To pin the Shortcut Bar back into position, click on the pin

again so it returns to .

The Shortcut Bar contains options for General, Reports, Data Views, Sorts, Import, Export, Styles and Options all of which can be opened

by clicking on the double arrow and closed by clicking it again. Data Views, Sorts and Styles have functions accessed by right-clicking the option title - this is explained in the help section for these topics. Help can also be accessed by right-clicking the option title.

Options
You may want to change the way the icons look on the Shortcut Bar before you go any further. Click on the double arrow to open this choice and choose either small or large icons.

The General Section
There are a number of functions in this section: Find, Source Details, Multiple Update, Index Check, Index Preferences, Function Keys. There is also an extra function in the Census forms - the Record Sheet and an extra function in the Certificate forms - the View Certificate.

Find
This functions helps you locate specific records in a data form - for example, all records for the forename William.

In the Find and Goto window, key in Will (to pick up abbreviated forms of the name)in the "Look for" box, then select the field you want the program to search for the text in - in this example it is the Forename (Main). Note: other forenames will have (Spouse), (Mother), (Father) etc after them according to their role in the record.

Now click on the button in the "Look How" field and choose the type of search you want. In this case, Contains has been chosen so that if William or an abbreviated form is a middle name, it will also be selected.
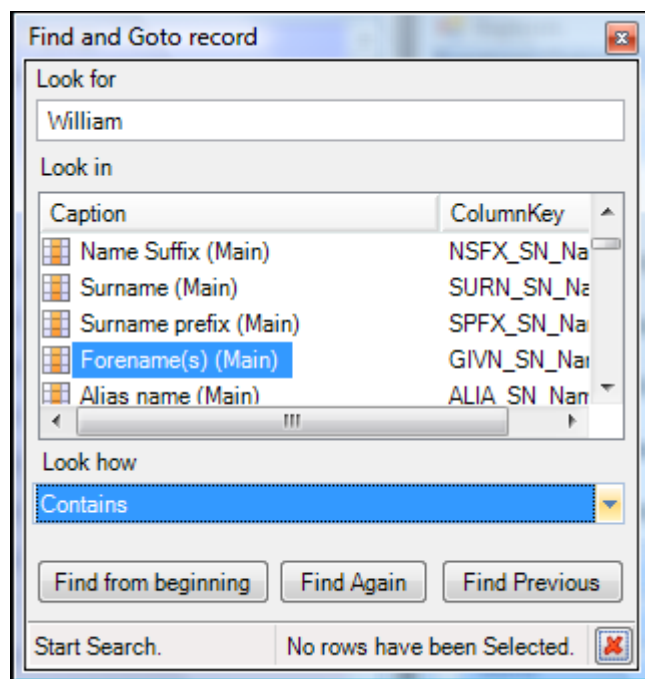
To begin the search, click on the "Find from Beginning" button. This will begin the search from the beginning of the data entry form, regardless of where you are in the form. The program highlights the row and the window notifies that a row is selected. To find the next record, click on "Find Again". Continue using "Find Again" to find each record in turn. Click "Find Previous" if you want to go back to a previously found record. The number of rows selected will increase as each record is found.

When no more records can be found, this will be noted along with the number of records found.
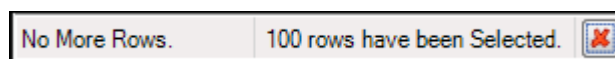
To de-select the records, click on the red cross next to the number of records selected. You can then begin another Find if you wish.

Copying these records to Excel:- there is one more feature of the Find function. Once you have some records selected, the results can be pasted into an Excel file. Click on the X in the top right of the Find box to close it (it will keep your Find selections). Now click on the Copy icon in the toolbar . Then open Excel and use CTRL-V on your keyboard - the selection results will be pasted in.

If you open the Find window again, your previous search will still be there (until you leave the form or use the red cross to remove them).

Source Details
Click on this icon to open the Source Details box which contains fields for recording source information. A separate topic has been written for this - see Source Fields and the Source Details Box.

Record Sheet
This is only available in the Census forms and is another means of entering and viewing census data. The Record Sheet handles one family group at a time, whereas in the main data form, you can enter and view numerous families. In the Record Sheet, the information common to the complete household (address and source references, for example) is shown at the top and the individuals in the household are underneath.

NOTE: in order to use the Record Sheet, it is essential that the Household Reference is used. As each row of data is an individual record, the Household Reference is required to keep the members of a household group together.

Viewing Data in the Record Sheet
If you already have data in your census form and wish to view it in a Record Sheet, click on one of the records in the household you wish to view, then click on Record Sheet in the General section of the Shortcut Bar. The Record Sheet will open in a new window and you can edit or add to any of the

entries just as you can in the data form.

If you alter any of the common information in the top fields, you will need to save the changes to all of the records in the household group - to do this, right-click anywhere in the Record Sheet window and select Update Occupant Headers from the new menu. You will also find Save Record and Print in this menu.

Adding New Data in the Record Sheet
To add a new family using the Record Sheet, click on Add Census entry. Then click on Record Sheet in the General section of the Shortcut bar. This will open the Record Sheet for the household. Now enter a new Household Reference and press the tab key.

All the source information is entered once in the top section. Once that has been entered, select (Add) Census 1851 entry and a new row opens for the individual's information. Complete this and repeat for each individual in the household.

When all individuals have been entered, click on the disc icon in the toolbar to save the record and click the X in the top right corner to close the Record Sheet. Entries from the Record Sheet will now be in the main data form.

View Certificate
This is only available in the Certificate forms and is another means of entering and viewing certificate data. If you have original or copy certificates to enter, you should find this easier to use than the grid as the fields follow the certificate closely. Whether you use grid or certificate, one will populate the other.

Viewing Data in View Certificate
If you already have data in your certificate form and wish to view it in certificate form, click on one of the records in the household you wish to view, then click on View Certificate in the General section of the Shortcut Bar. The certificate will open in a new window and you can edit or add to the information.

Adding New Data in View Certificate
To add new data using the Certificate, click on Add Certificate entry. Then click on View Certificate in the General section of the Shortcut bar. This will open a blank certificate. Data you enter here will populate the relevant fields in the grid. To finish, click on the X in the top right corner to close the Certificate View and save your record with the disc icon on the tool bar.

Multiple Update
This function allows you to make changes to a number of records at the same time. Currently, this can only be done in one data entry form at a time.

Note: If you wish to merge two families together ie change two family references to just one reference, this is better done in the My Families tab so that the Family Groups can be updated at the same time.

The first task is to filter the records you want to make changes to, so that only these are showing on screen. See Filtering Data for instructions on this.

Once you have filtered records on screen, click on the Multiple update option in the General bar. The Multiple Update window is shown below:
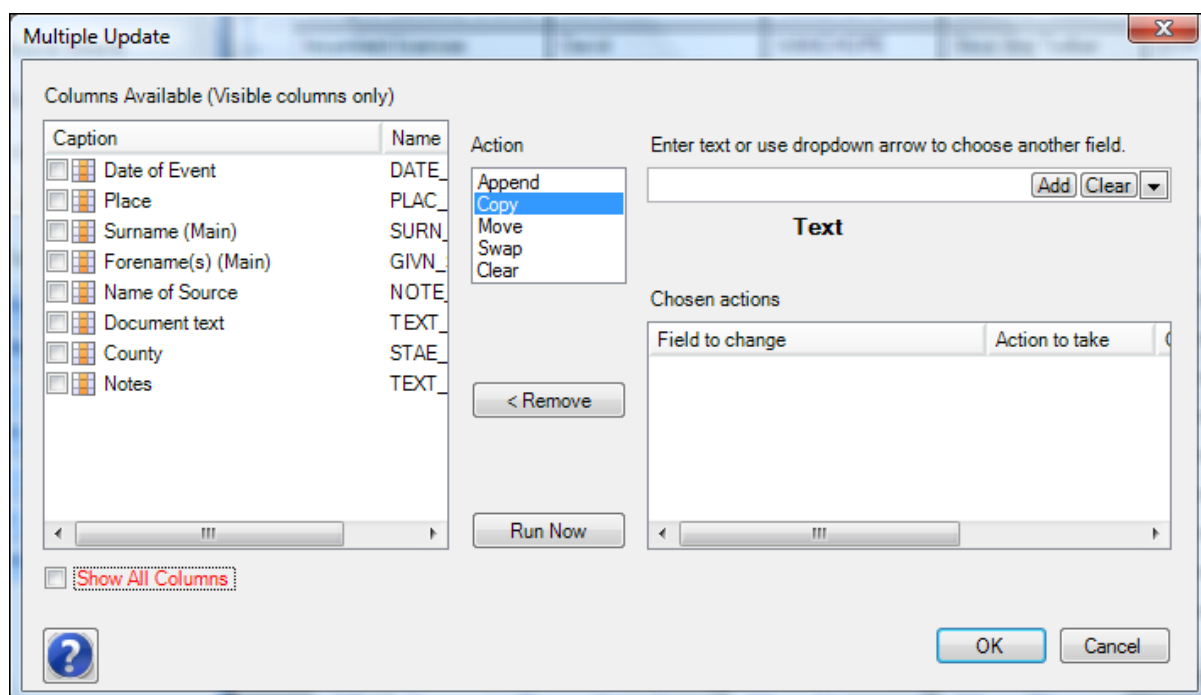
The fields in your main data form are listed in the left section. If you want to make changes to fields which are currently hidden, click the Show All Columns box and all the fields in the form are shown.

The actions you can take are as follows:
Append - add something to what is already in the field
Copy - add something to an empty field or copy something to another field
Move - move the contents of one field into another, overwriting the data and clearing the original field
Swap - exchange one field for another
Clear - empty the field
(All the above applies to all the fields in the column)

To use the Multiple Update function, select the field you want to take action on from the list on the left, then select the action you want to take from the action list. Then key in the text you want to add to a field, or use the button to select another field if you are using Swap.

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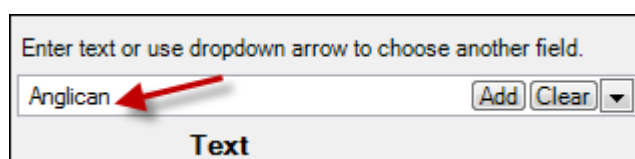
Now click on the Add button (in the text area) and the action will be added to the Chosen Actions Window.
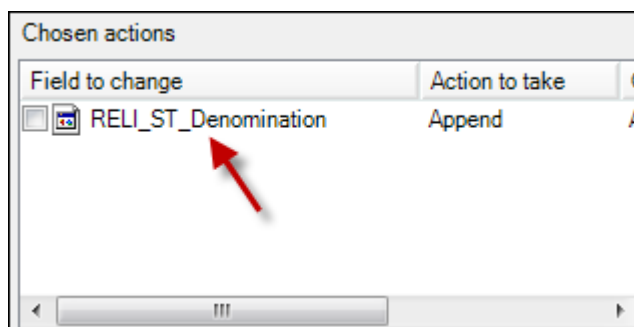
You can carry out more than one action at a time - simply repeat the above process so that the next action is also added to the Chosen Actions Window. However, you can only choose a field once - any further actions must involve different fields.

If you change your mind about any of the actions, select the tick box next to the chosen action you want to remove and then click on the Remove button. When you are ready, click on Run Now. Also use the Remove button this way when you undertake a Multiple Update straight after another (separate) one.

The update process may take a while to run if you have a large amount of data to change or multiple actions to run. The newly edited records are saved and the Name and Place Index updated as part of the process.

When complete, close the Multiple Update window by using the OK button.

Index Check

This function updates the Indexes after you have carried out an SQL update, also after making changes in Index Preferences (see section below). The program reads each record in the data form, checks the Index for a corresponding Index entry and updates or writes it where required. Be aware that the process may take a few minutes.

There are a number of options you can select to check. In the example above, there are 1082 records in the baptisms form and 36 more names giving a total of 1118 records to be checked. Only the Name Index and More Names are ticked to be checked but the Place Index and More Places can also be ticked and they will all be checked.
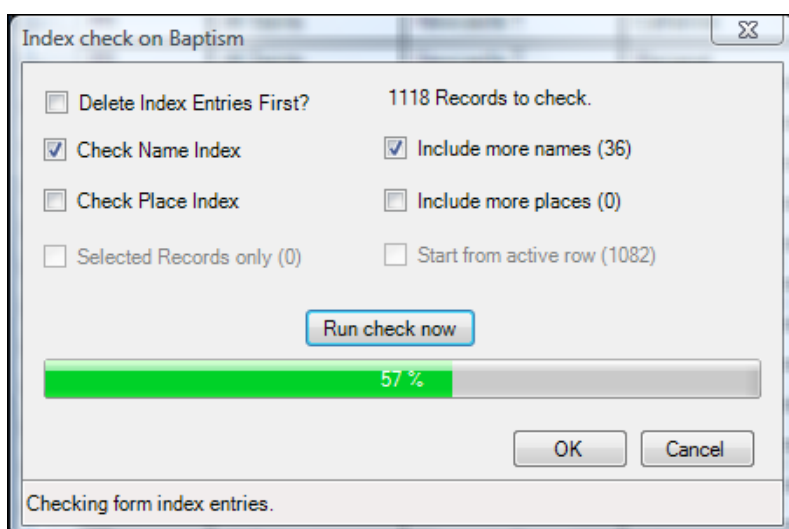
It is recommended that you tick the Delete Index Entries first box (not ticked in the example above). This will remove all Index entries for the records in the data form you are in and will rebuild them all. If you choose this option, the whole data form must be checked. If you only wish to check part of the data form, or even selected records, leave the Delete Index Entries unticked. You will need to filter the entries you want to be checked in

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your form first, before you open the Index Check box.

When ready, click on Run Check Now. The process can be aborted once running by clicking the Cancel button. However, it is not recommended as your Name Index will be incomplete and the Index Check will need to be run fully in order to rebuild it.

See also Index Check in the Name and Place Indexes section.
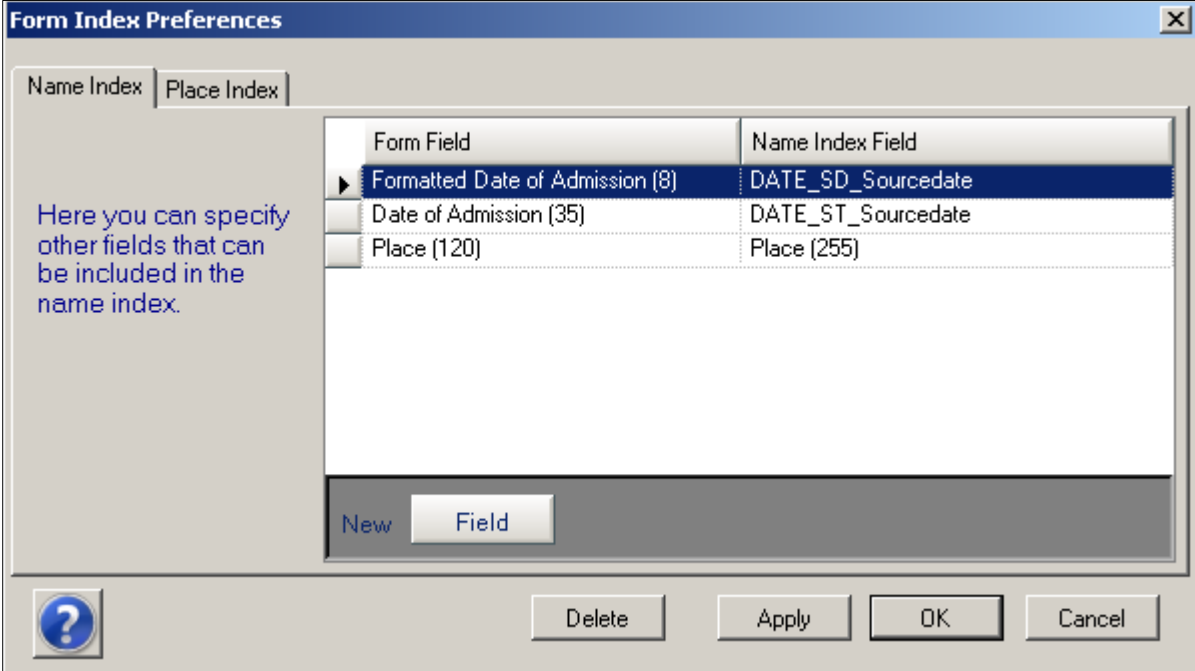
Index Preferences

This option allows you to add fields from the data entry form into the Name or Place Index which haven't already been included.

You can also specify in the Index Preferences which place field in the data form you want to populate the place field in the Name and Place Indexes. A choice has already been made and setup but you can change it if you wish.

There are three processes to adding a new field into the Name Index; first specify which field from the data entry, then show the field in the Index, finally run Index Check in the data form to update the Name Index.

In the data form, choose the Index Preferences option in General (in the example, the Alumni form in School Records is used).

There are two tabs - choose the Name or Place Index, according to where you want the new field to be. The image above shows that the Place field in the Name Index is being populated by the Place field in the data entry form. You can change this by clicking on the button in Form Field column and scrolling down the list of fields. Click on your choice of alternative place field if you wish (in the Alumni form, there isn't really another place field, so this will be left as it is in this example).

Important note: The two date fields in the Index Preferences are associated with dates in the tree building section and should be left alone.

To choose a separate field to go to the Index, first click on the New Field button. This opens a new row - click on the Form Field button in the new field and choose the College/University/Institution field. Now click on the button in the Name Index Field column and choose a User Field with a large enough character size to fit the text you expect to be in this field. The example below shows User Field 3 with 55 characters has been selected.

Click on the Apply button and then OK to leave the Preferences window.

Now open the Name Index, right click on the Data Views bar and select View Manager.

Scroll down the list of all the fields in the form until you reach the User Fields (near the bottom).

To make this field visible in your Name Index, tick the check box in the column entitled Visible. Now edit the Caption from User Field 3 to College, University or Institution. Next edit the cell tip from Additional Information to Name of college etc (or whatever you feel appropriate - this is the text which shows when the cursor is hovered over the cell caption).

Now click on Apply and Ok to leave the View Manager window. The new column will appear at the end of the others so you will need to scroll across to see it. Use drag and drop on the column header to move the column to the position you want, then right-click on the Data Views bar and select the Save Layout option. The new Name Index layout will be saved.

Now run the Index Check to update the new fields in the Index with the data.

Function Keys

The function keys are the F keys on your keyboard, usually above the numbers and number F1 to F12. The F1 key is used for Help but you can add text to any other of these functions keys so that the text is entered into a field whenever you press the CTRL key and the function key on your keyboard. They can be used for names and places - in fact anything that you are likely to key in many times - and can help save time and effort when entering data.

You can set up function keys at the form level and also at the dataset level and system level, the latter two being set in Options. **Setting up functions keys at the form level will overide any at the dataset or system level.**

In the Form Function Key window, if any of the functions keys text are in blue, these are the ones already set in at the system or dataset level. Just overtype any you want to change and the text will
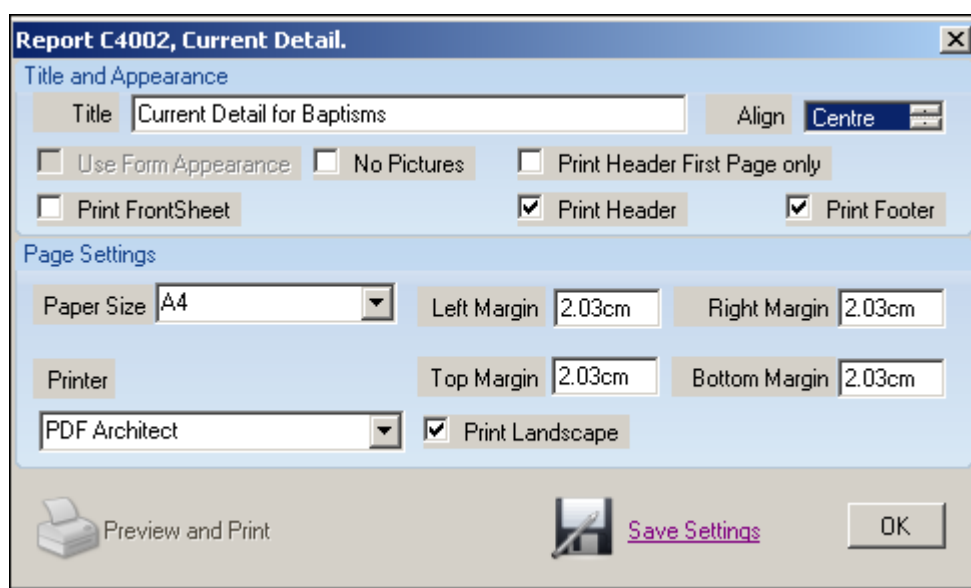
revert to black, denoting they are now set at the form level. Click on OK when finished.

The Reports Section

Reports can be run from every data entry form. Select the Reports option from the Shortcut Bar and then choose the type of report you want - WYSIWIG (what you see is what you get), Current Detail, Index Report, Text Report or Names in Record. See below for information on each report.

The Print Settings Window and Print Preview

After selecting the report you require, you have some print options you can change:

Title - this can be changed to whatever you wish e.g. Baptism for Thomas Winship.
Align - this aligns the title on the page to left, centre or right.
Use Form Appearance - you can use the style you have set in your data entry form to print in colour etc - be aware this is costly in ink! Most forms have this option greyed out but it is available in Census forms.
No Pictures - if you don't want to print pictures, this can be ticked.
Print Header - untick if you don't want the title printed
Print Footer - untick if you don't want the page number printed
Print Front Sheet - tick this if you want a cover sheet
Paper Size - change to the appropriate size if you don't have A4 paper
Margins - set the margins you require
Printer - choose your printer
Print Landscapes - untick this if you want Portrait
Save Settings - click on this to save the settings for *this* form (only)
Preview and Print - click on this to see your print preview:
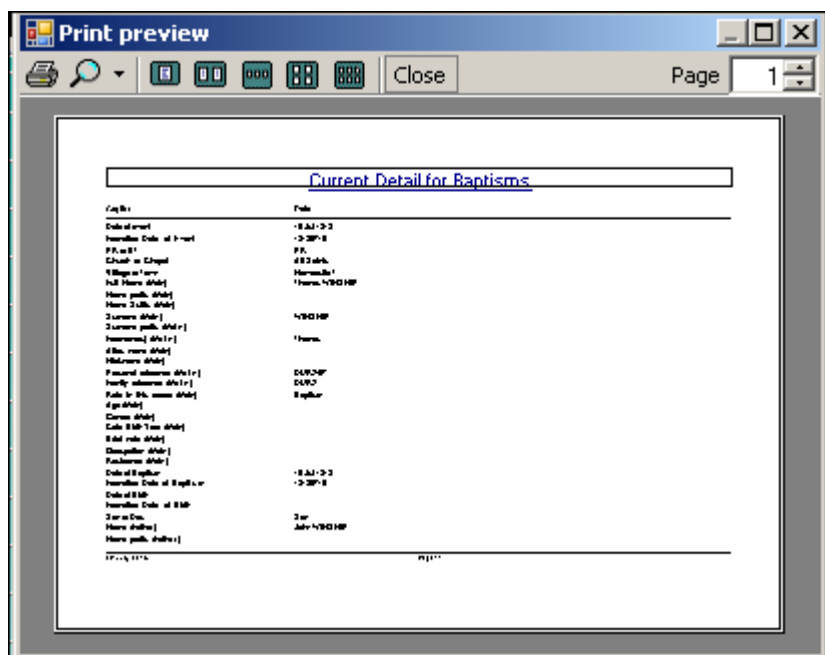
Use the maximise button to expand the preview window so you can check your report; you can also use zoom to increase the size. When you are ready to print, click on the printer icon.
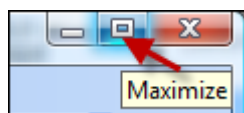
WYSIWYG
This report shows all the data you have in the current View i.e. it shows only the fields you have showing in the form and not any hidden fields. You can filter your records first to extract records of a certain criteria, or produce the report for all of your records.

Current Detail
This report shows all the columns and data for the record you are on.

Index Report
This report shows all the names in the current record which are included in the Name and Place Indexes.

Text Report
This report shows the text from a large text field, such as Document Text or Will Text for the current record. You will be asked to select which text field you wish to print.

Names in Record
This report shows all the names in the current record, including More Names.

Printing Family Trees
You must be in the My Families section to print trees and have a family tree on-screen. See the Print Tree section for more details.

The Data Views Section

This option allows you to show or hide whichever fields you like in the main data entry form (see also below Field Chooser for a quick method). Right clicking the mouse on the Data Views option will open a menu:
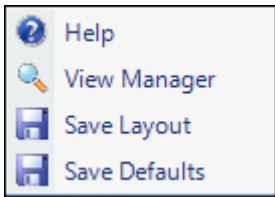
Now click on the View Manager option and the View Manager window will open.
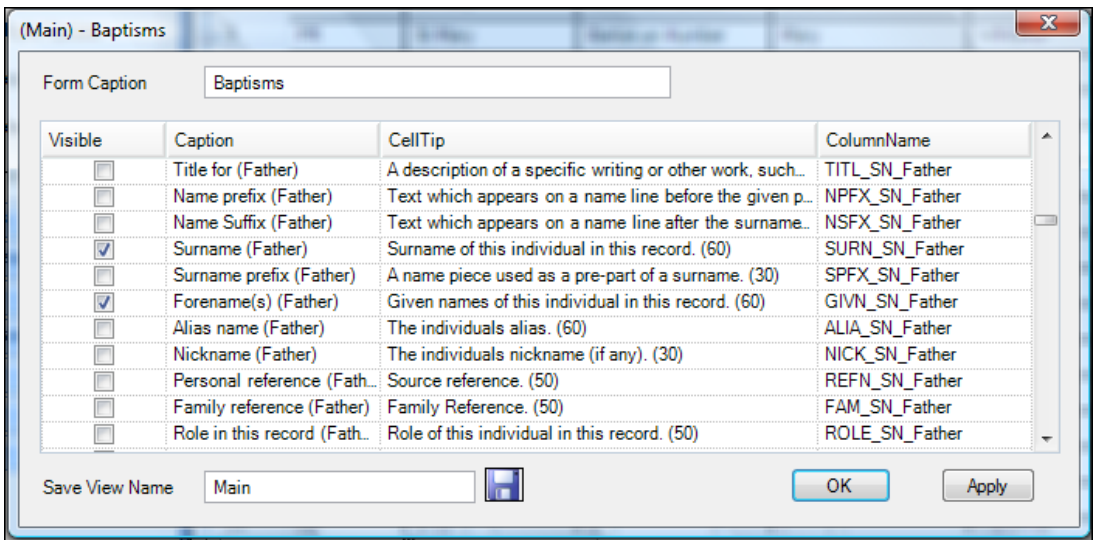
In the View Manager window above (the example is from the Baptisms form), a complete list of all the fields in the data form is given. The field captions (normally seen in the column header) are on the left. The middle section shows the cell tip text which appears if you hover over the field in form and aims to give you a guide on the content of the field. It also tells you the maximum character size of the field. The last section shows the field name (column name) behind the caption. You can edit the field captions and the cell tips, but not the field names - these are a fixed part of the program.

The list includes all the fields in the Individual Details box for every person in the record and all the fields in the Source Details box.

Changing Captions and Cell Tips

If you wish to change any of the captions, for example you might wish to change "Denomination" to "Church Denomination", click on the field caption and overtype the name. In this case, there is no need to change the Cell Tip text as the content will still be the same. However, if you were using one of the user defined fields (seen above the Denomination in the image), you would change the Cell Tip to reflect what you intend to use the field for.

Hiding and Showing Fields in the Data Form

The fields which have a tick by them are those which are visible in the main data entry grid. Add any others by clicking on the tick box next to the field you want to show and remove those you don't want visible by clicking on the tick already present. You will need to scroll down the list to see all the fields.

The User Fields

There are five "spare" fields in every data entry form which you can use if you need to add extra fields. You cannot create any more than this. To use these fields, follow the instructions in Changing Captions... and Hiding and Showing Fields.... above. The character size of the field is shown in brackets to help you choose a field of suitable size.

Saving the View

The default View, which you started with, is just called Main. If you want to resave your new View as the Main view, don't change the View name but click on the disc icon and then OK. If you would like to keep the Main view as it was and this one as a new one, key in a new name for your altered View, then click on OK (note that spaces are not allowed in the title).

Your new View will be listed under Main under the Data Views bar - click on the bar to see them.
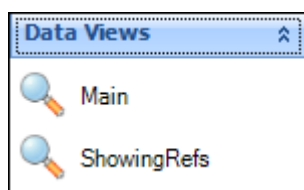
Moving shown columns

Your changes will be reflected in the form immediately it is saved. If you have ticked a field to be shown in the data entry form, it will be placed at the end of the other fields. To move it to another position in the form, use the drag and drop technique - put the cursor on the column header, hold down the left mouse button and drag the cursor to the new header position. Red positioning arrows will give guidance on location.
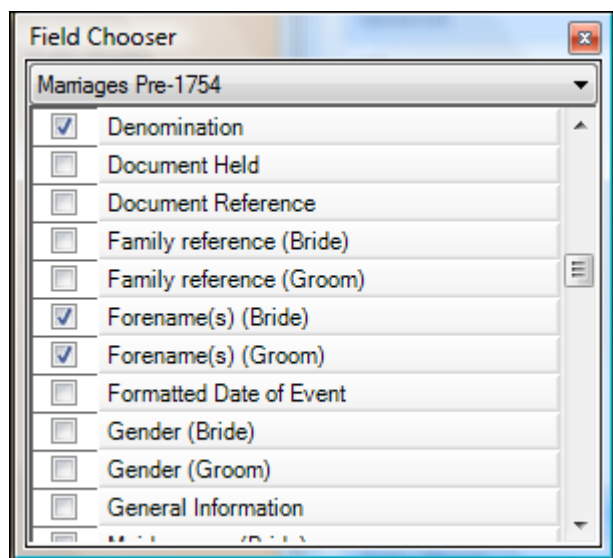
Deleting Views

The Main view is the default view and cannot be deleted. If you create other Views and subsequently delete them, the program will always revert to the Main view. To delete a View, click on the Views bar to open the list of your Views. Right-click on the View you wish to delete and click on Delete Layout.

The Field Chooser

Though not part of the Data Views section, this is a quick method for hiding and showing columns within your current View. The Field Chooser icon is found above the record number in the data form.

Clicking on the Field Chooser opens a list of all the fields in the form, including the Source Details and Individual Details boxes, in alphabetical order. The scroll bar allows the whole list to be searched but only column titles are visible, not the field names behind them. You should find the entries in brackets useful in identifying the fields you require. Those entries which are ticked are the fields which are already showing in your data form. If you wish to hide any of these, click on the tick-box to remove the tick. If you wish to show any other fields, click on the tick box to add the tick.

When you are finished, click on the X in the top right corner of the Field Chooser to close it. Any newly shown fields will appear at the end of the other fields but you can drag and drop them to another position (see Moving Shown Columns, above).

If you would like to save this new layout as your current View, right click on the Data Views option and select Save Layout - you should see a message to say your current View has been saved. If you only want the layout whilst you are currently using the form, don't save it and the previous layout of your View will be returned on closing the data form.

Note: Because the forms in the My Research tab do not have Source Details and Individual Details boxes, but do have some "spare" User fields, these will only be found in the Data View Manager and in the Field Chooser. The field sizes are shown in the cell tip if you hover the mouse over the field title. You can still show these in the research form by the same methods described above.

The Sorts Section
This option allows a Sort to be applied to your data, so that your data is automatically ordered or sorted. The Sort can be different in each data entry form and you can have any number of saved Sorts which you can apply whenever you wish.

Note: You must first show fields in the main data form that you wish to sort on ie you cannot Sort on hidden fields (you will not be able to see the results clearly, particularly if you are sorting on date fields).

The Default Sort
There is a default Sort already set up in each data entry form. It is generally a sort based date and possibly place, depending on the nature of the data form (for example, in a census form all the records are from the same date so date is not used in the Sort). As a default Sort, it cannot be deleted, but you can create your own and when selected, the program will remember the last Sort used and maintain this one until you change it.

Opening the Sort Window

Right-click on the Sorts bar and then click on the Sort Manager option.
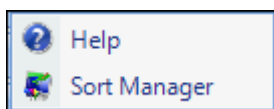
This opens the Sort Manager window:
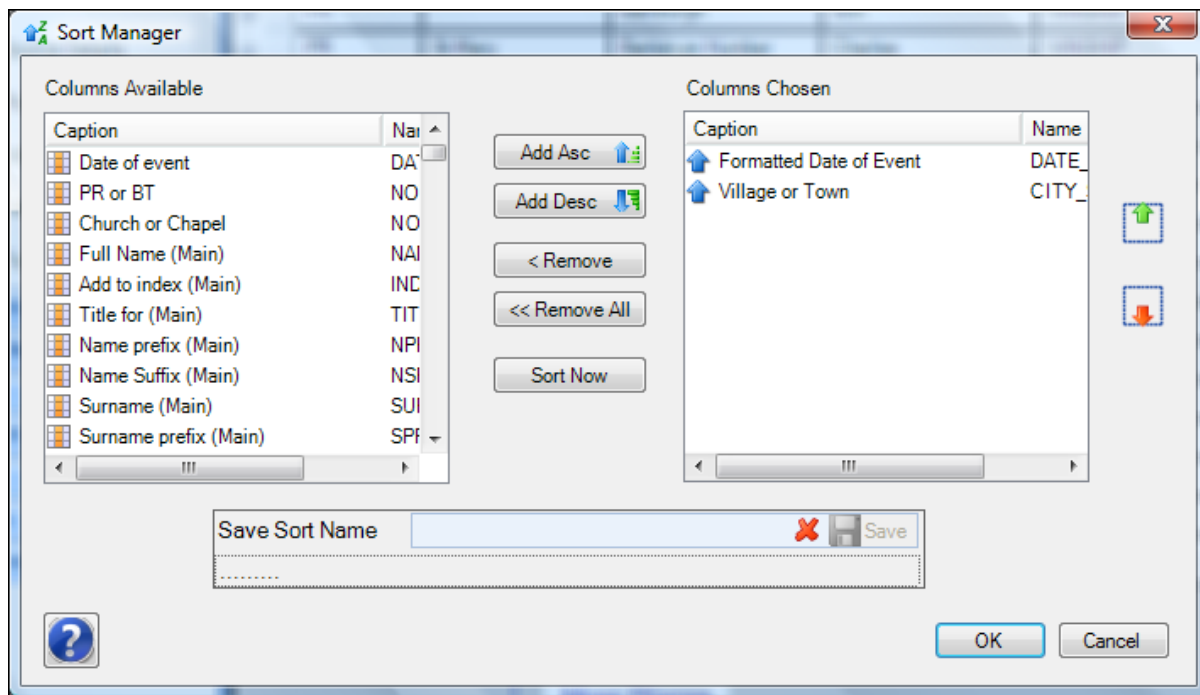
On the left hand side is a list of all the visible fields (captions) in the data entry form, in this example the Baptisms form. Use the scroll bar at the base to see the field names belonging to the captions. These are the fields you choose for your sort. On the right hand side is where your chosen fields are shown.

Click on the field you want from the left hand list, then click on Asc(ending) or Desc(ending) depending on the type of order you want, and the field name will appear in the list on the right with the Asc or Desc arrow by it.

If you change your mind about a field, click on it again and click on Remove (be aware it will then be put at the end of the original list on the left). Click on Remove All to start again completely.

In the example above, the two fields selected are from the default Sort. Each time you open the Sort window, the program will remember the last Sort you have applied and leave the fields in the right hand side for you to add to or remove. The fields should be added in the order you want them in the Sort - so in the example above, the data will be sorted by date first, then by place. You can change the order by using the arrows to the right of the window.

Clicking on Sort Now will sort your data immediately and it will be seen when the Sort Manager window is closed (but save your Sort first).

Sorting by dates

The Formatted Date of Event is a field populated by the most important date field in the form (in the

baptisms form it is the date of baptism, then the date of birth if no baptism is present). It is then formatted so that correct date sorting is possible. Thus the Formatted Date of Event is used for sorting. This field is not normally shown in the main data form but is listed with all the other fields in the Sort Manager window so you can select it for sorting on. If you wish to show it in the main data form, this is covered in the Data Views topic.

Saving your Sort

Click on the Save Sort Name box and enter a name for your sort. If your name is unique, a tick will be shown and you can click on the disc icon to save your Sort. If your Sort name has already been used, the cross will remain and you will be asked if you want to overwrite the sort with that name. If you do not, change the sort name and try again.
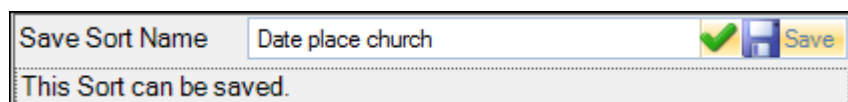
Click on Ok to leave the Sort Manager window. To see your Sort in the list, click on the Sorts bar.
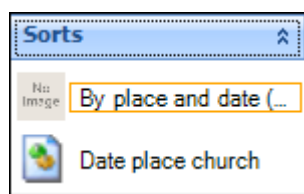
To change your Sort, click on the one you require and it will be applied. This Sort will remain until you change it.

Deleting Sorts

The default Sort cannot be deleted - this will be the first Sort in the list. If you create other Sorts and subsequently delete them, the program will always revert to the default Sort. To delete a Sort, click on the Sorts bar to open the list of your Sorts. Right-click on the Sort you wish to delete and click on Delete.

The Export Data Section

You can export your data from most data forms in the following formats - Excel, PDF, Access, CSV and HTML.

In the data form you wish to export from, first select the records you want to export by using the Filtering Data method. If you want to export all the records in your form, you can skip this step. Be aware that only the columns showing in the main data form are exported; if you want to export columns which are currently hidden, you will need to show them first.

Excel

Click on the Export option in the Shortcut bar and choose the Export Excel icon. In the export window, click on the Choose Filename button. A suggestion for your filename will be given - click on Save or choose another name and check that the folder used is the one where you want the file saved to. Also choose which Excel format you want by using the radio buttons.

The number of records and columns to export is also shown. Keep in mind that the record count will include any More Names records you have added, which only show in the grid when you expand records.

You can also choose to export field names instead of captions - this is useful if you are exporting data which you want to import into another dataset in Custodian as it is easy to auto-map the fields.
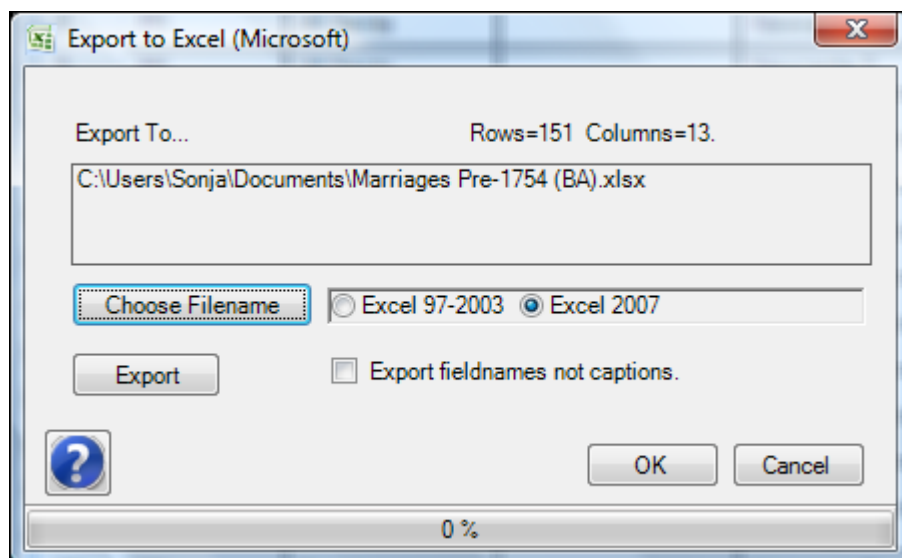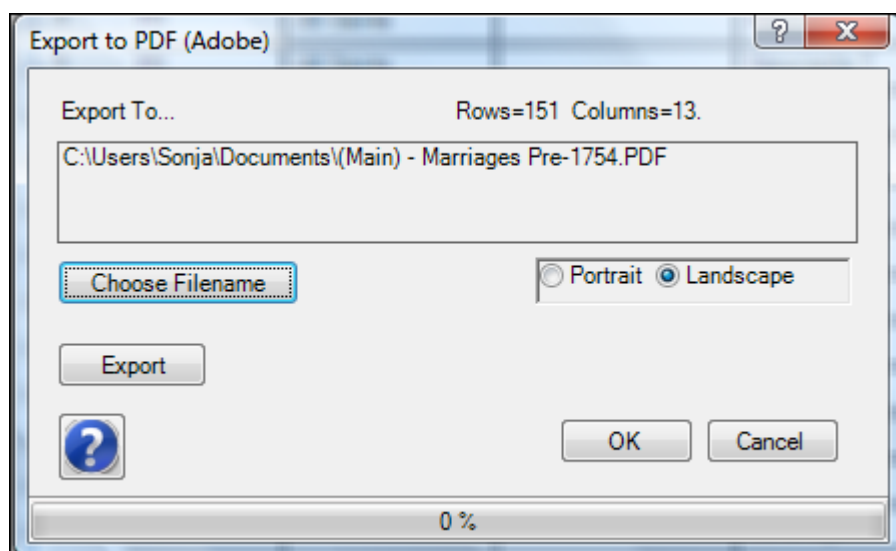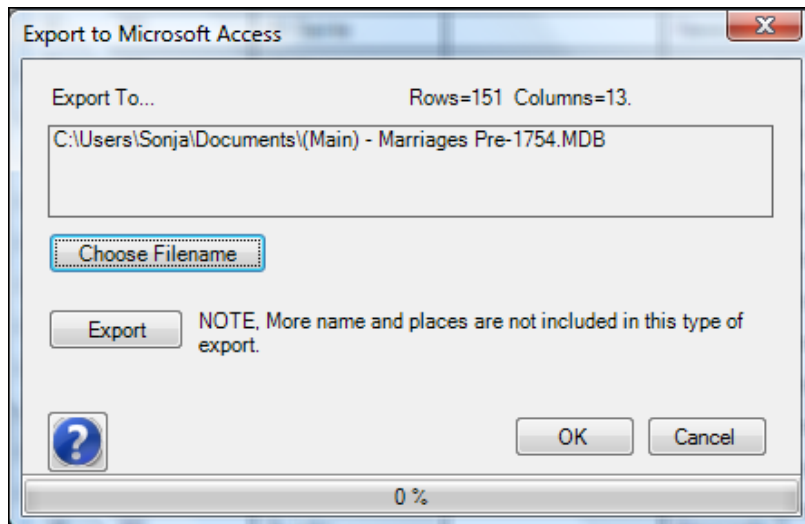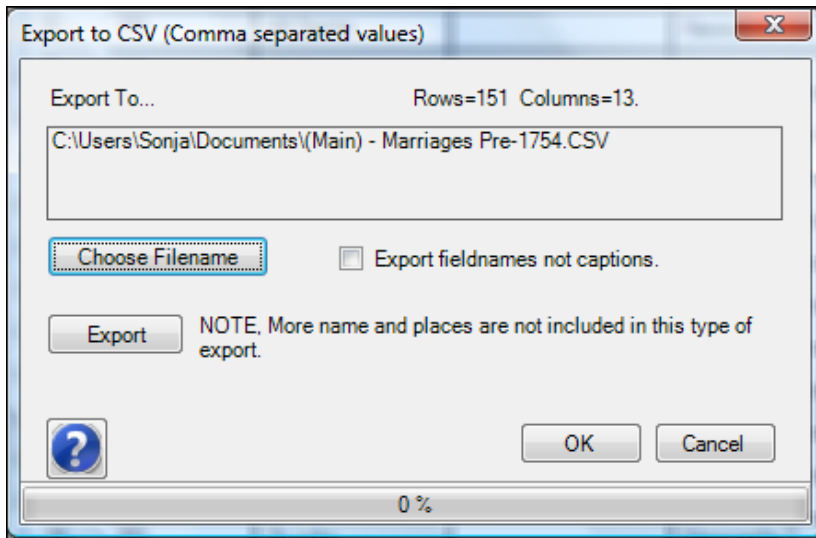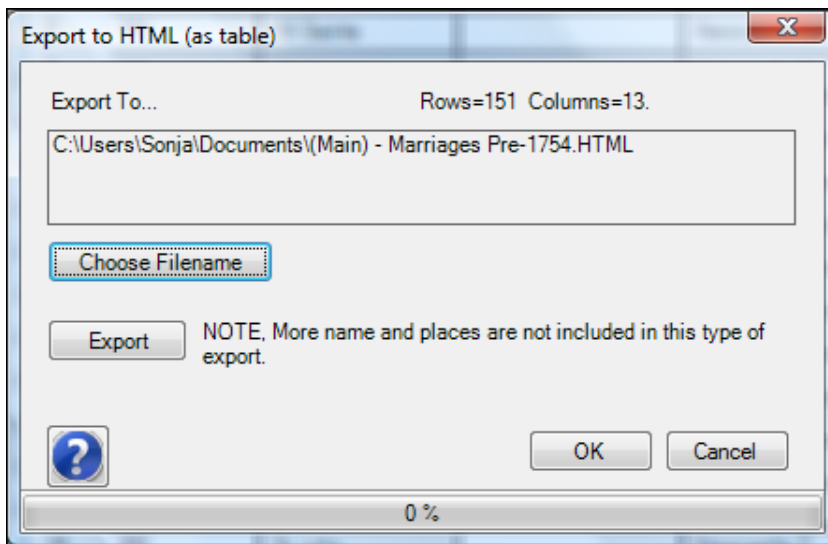

When you are ready, click on the Export button. Excel will automatically open and show your exported data.

PDF
Click on the Export option in the Shortcut bar and choose the PDF Export icon. In the export window, click on the Choose Filename button. A suggestion for your filename will be given - click on Save or choose another name and check that the folder used is the one where you want the file saved to. You can also choose whether you want the report in Portrait or Landscape by using the radio buttons.

The number of records and columns to export is also shown. Keep in mind that the record count will include any More Names records you have added, which only show in the grid when you expand records.

When you are ready, click on the Export button. Your report will automatically open to show your exported data.

Access

Click on the Export option in the Shortcut bar and choose the Export Access icon. In the export window, click on the Choose Filename button. A suggestion for your filename will be given - click on Save or choose another name and check that the folder used is the one to where you want the file saved.

The number of records and columns to export is also shown. Note that More Names and Places can not be shown in this type of report and that the field names only (ie not the captions) have to be exported.

When you are ready, click on the Export button. Your report will automatically opened to show your exported data.

CSV

Click on the Export option in the Shortcut bar and choose the Export CSV icon. In the export window, click on the Choose Filename button. A suggestion for your filename will be given - click on Save or choose another name and check that the folder used is the one where you want the file saved to.

The number of records and columns to export is also shown. Note that More Names and Places can not be shown in this type of report.

You can also choose to export field names instead of captions - this is useful if you are exporting data which you want to import into another dataset in Custodian as it is easy to auto-map the fields.

When you are ready, click on the Export button. Your report will automatically opened to show your exported data.

HTML

Click on the Export option in the Shortcut bar and choose the Export HTML icon. In the export window, click on the Choose Filename button. A suggestion for your filename will be given - click on Save or choose another name and check that the folder used is the one where you want the file saved to.

The number of records and columns to export is also shown. Note that More Names and Places can not be shown in this type of report.

When you are ready, click on the Export button. Your report will automatically open to show your exported data.

Exporting Data to Excel using Copy and Paste

If you have only a few rows of data you wish to export, for example after filtering for certain records, you can quickly export them into Excel by using this method. Click on the first record in the

Custodian form you wish to export, then hold the Shift key and select the last record. This will highlight all the required rows. Now use CTRL-C to copy the records:

	Quarter and Year	Surname (Main)	Forename(s) (Main)	Registration District	Volume	Page	Maiden Name (Mother)	County
1	Dec 1837	LEETHAM	Ann	York	23	548		
2	Jun 1838	LEETHAM	Harriet Ellen	Knaresbro	23	288		
3	Sep 1838	LEETHAM	Hannah	Howden	23	44		
4	Sep 1838	LEETHAM	Margaret	York	23	622		

Go to your Excel spreadsheet and use CTRL-V to paste the records:

	A	B	C	D	E	F	G	H	I
1	Quarter and Year	Surname (Main)	Forename(s) (Main)	Registration District	Volume	Page	Maiden Name (Mother)	County	Notes
2	Dec 1837	LEETHAM	Ann	York	23	548			
3	Jun 1838	LEETHAM	Harriet Ellen	Knaresbro	23	288			
4	Sep 1838	LEETHAM	Hannah	Howden	23	44			
5	Sep 1838	LEETHAM	Margaret	York	23	622			

The Import Data Section

Data can be imported into most of the data forms in the following the formats: Excel, Access and Text. The Text format can use either CSV (comma-separated values) or tab-delimited data. The Gedcom form can also import name information from a Gedcom file.

Excel

Click on the Import option in the Shortcut Bar and select the Excel Import icon.

In the Import window, click on the button next to the text by the number (Step) 1. A window will open which allows you to find and select your import file.

When your import file is recognised, text will appear in the box next to the text by the number (Step) 2. This is the type of import file you have - click on this once.

Now click on Next to move to the next screen.

Matching fields

In this screen, the box labelled (Step) 3 would contain all the fields in your import file. The box labelled (Step) 4 contains all the fields in the Custodian form. Each field in 3 needs to be matched to its counterpart in 4. The program will automatically match the fields it is able to and the matched fields are place in the box in (Step) 6. If there are any left in box 3, you can do this manually - select one of the fields in box 3, scroll down the fields in box 4 and select a match, then click on the > in (Step) 5. This will be added to the list in box 6. If you can't match it to anything, you can continue with the import and not use this field.

To return a matched field back to box 3, select the field and click on the < button. To return them all back to begin again, click on the << button. If you have done the latter by mistake, click on the Auto button to restore the auto-matched fields.

In the image below, all fields have been automatically mapped
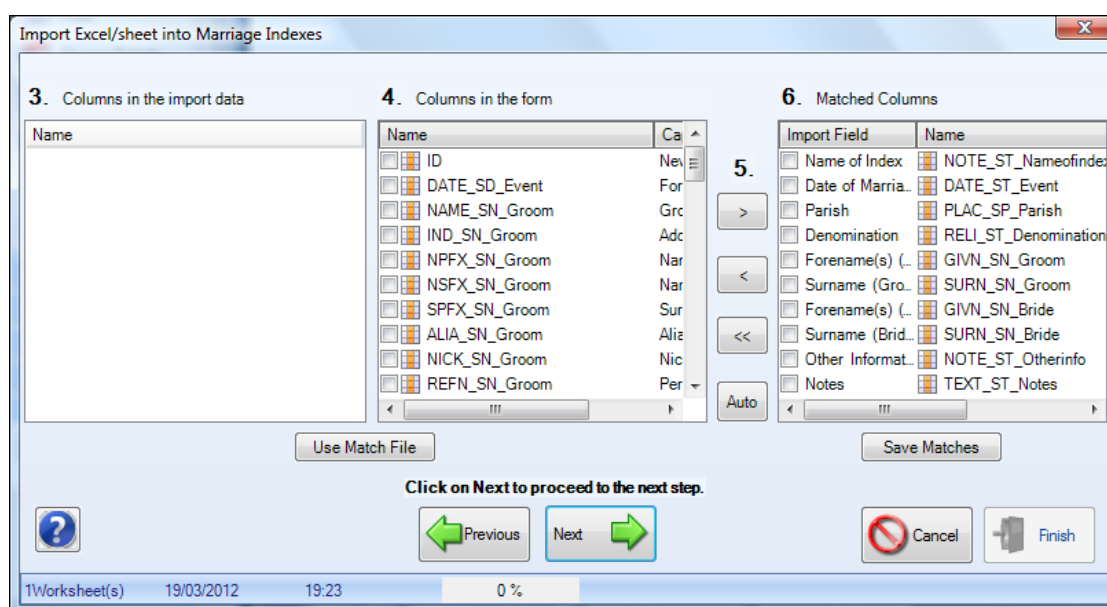
Save Matches - to Save this set of matches, click on this, give your file a name and save it to your computer.

Use Match File - the next time you import the same data type, you can select your match file by choosing this option - the program will automatically open the file and automatically make the matches. If some fields have already been matched, the saved match file will continue with the other fields.

When all fields are matched, click Next to move to the next stage.

The next window gives a summary of the import - if all looks ok, click on the Import Now button, or use Previous to return to earlier screens.

When complete, the total number of records imported will be shown (and should match the number in the import file).

NOTE: Excel can export More Names and More Places but they cannot be imported. If you have a mismatch in the number of records imported when importing a file from another Custodian dataset, check that there are no More Names or More Places.

Access

Click on the Import option in the Shortcut Bar and select the Access Import icon.

In the Import window, enter your Access Database password, if you have one, in the box by (Step) 1. If you are importing a file which was exported from Custodian 3 in Access format, tick the check box.

Next, click the button by (Step) 2 to choose your Access file. The file name will appear in the box.

When your import file is recognised, text will appear in the box next to the text by the number (Step) 3. This is the type of import file you have - click on this once. Then click on Next.

Click on Next and in the next window, the program will automatically match as many fields in your import file (column Step 3) to fields in the Custodian form (column Step 4) and place the matched pairs in column (Step) 6. Check that the matches are correct and manually match any which are left using the method described in Matching Fields in the Excel section above. The image below shows all the fields matched:

Save Matches - to Save this set of matches, click on this, give your file a name and save it to your computer.

Use Match File - the next time you import the same data type, you can select your match file by choosing this option - the program will automatically open the file and automatically make the matches. If some fields have already been matched, the saved match file will continue with the other fields.

Click on next and check the summary in the next screen. When you are ready to import, click on Import Now. When complete, the total number of records imported will be shown (and should match the number in the import file). If you have a mismatch in the number of records imported when importing a file from another Custodian dataset, check that there are no More Names or More Places in the original file.

Text
Click on the Import option in the Shortcut Bar and select the Text Import icon.

In the import window, click on the button in (Step) 1 to choose your text file to import. Once selected, the path to your file will be given in the box next to the Choose button.

Click on Next and in the next window, the program will automatically match as many fields in your import file (column Step 3) to fields in the Custodian form (column Step 4) and place the matched pairs in column (Step) 6. Check that the matches are correct and manually match any which are left using the method described in Matching Fields in the Excel section above. The image below shows all the fields matched:

Save Matches - to Save this set of matches, click on this, give your file a name and save it to your computer.

Use Match File - the next time you import the same data type, you can select your match file by choosing this option - the program will automatically open the file and automatically make the matches. If some fields have already been matched, the saved match file will continue with the other fields.

Click on next and check the summary in the next screen. When you are ready to import, click on Import Now.

When complete, the total number of records imported will be shown (and should match the number in

the import file). If you have a mismatch in the number of records imported when importing a file from another Custodian dataset, check that there are no More Names or More Places in the original file.

GEDCOM

Imports in Gedcom format can only be made into the Gedcom form. Before you begin importing a Gedcom file, it is important to be aware that large files may take some time as data is validated and names and places written to the Indexes.

Click on the Import option in the Shortcut Bar and select the Gedcom Import option.

In the Import window, click on the Choose button in (Step) 1 to navigate to and select your Gedcom file. Once selected, the path to your file will be given in the box below the Choose button.

Now click on the Load File button in (Step) 2 - once the file is accessed, the number of individuals it contains will show in the adjacent box.
Also in this step is the option to add a Family Reference to all the individuals as they are imported. It is recommended that you do this as the Family Reference identifies all the individuals within a family tree. You can add them later, but you will need to add them to each person individually and this could take some time.

Add parents as more names- this is ticked as default but untick it if you wish. If selected, parents of each individual are given as separate records and indexed in the Name Index. You may want to try this in a test dataset first to see the effect as each sibling will have the same parents and they will thus appear a number of times from the same Gedcom file. With a large file, it will also take a considerable amount of time to import.

Add individual references if missing in file - this is ticked as default but untick it if you wish. You may already have personal references allocated in the Gedcom file (from a Family Tree package, for example) and won't need this option. If you do select this option, numbers will be allocated from 0001 and prefixed with the Family Reference, for example YKS1/0001 (where YKS1 is the Family Reference and 0001 is the first Personal Reference). If no Family Reference is present, no Personal References will be added either.

Finally, click on the Import Now button in (Step) 3.
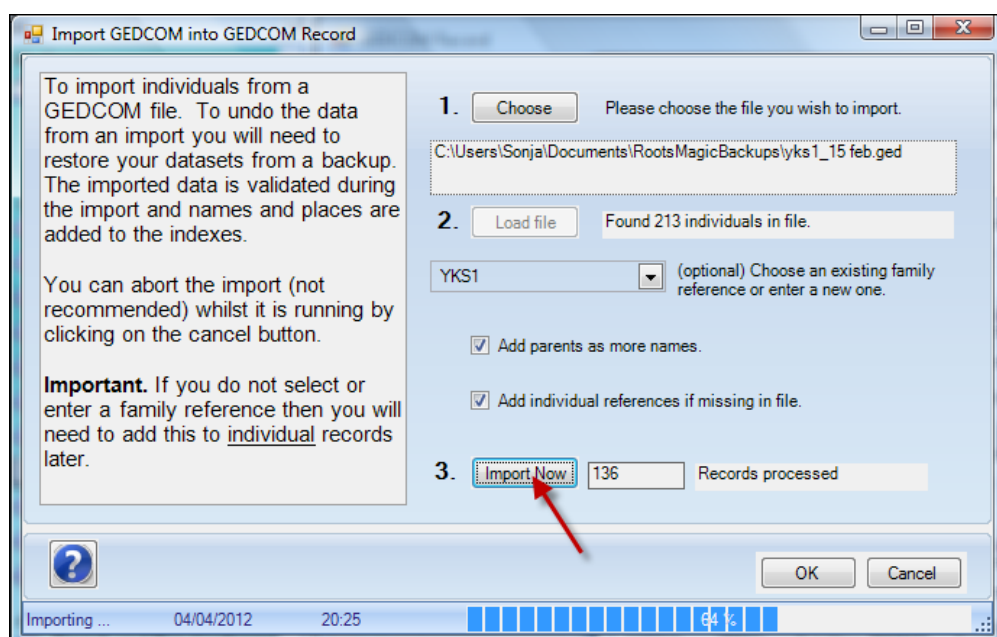
When complete, the total number of records imported will be shown (and should match the number in the import file). The Name Index will increase by more than the number of individual records if you ticked "Add Parents as More Names".

Importing Data using Copy and Paste

This method can be used for relatively small amounts of data - in practical terms, about the number of records you would fit on one screen. An example of when you might use this successfully is when downloading data from FreeBMD.

The downloaded information opens in Notepad and contains information other than data - this needs to be removed and the "columns" manipulated slightly. The Quarter and Year are separate fields and need to be put together as they are in Custodian. Delete the gap between them and add a space to separate them correctly. You also need to make sure there is nothing to the left of the data (remove the BIRTH (etc) event and then delete the column and remove spaces after the forename and after the Reg district. Later records with maiden names will need a bit of trial and error.

Below is what you should be aiming for (the highlighted area is the area to use CTRL-C (copy):

The next task in Custodian is to create "empty" rows to receive the data. Normally, you would click on Add Birth entry and get one blank row only. In order to get several blank rows, put a character in the first field, then click on Add Birth entry again, put a character in the first field again and repeat until you have enough dummy rows saved to take your new data. The text you paste in will overwrite anything. Then drag and drop the header of the surname field so it matches the position in the text file; I also moved the maiden name as there were none in these records. If you don't match like for like, you'll have data in the wrong column. Right-click on Data Views (to the left of your data screen) and click on Save Layout. Here's what it should look like:

Now make sure your top row is highlighted, as in the picture above. Then use CTRL-V to paste in:

To import records from Excel by the same method, follow the preparation routine above for Custodian to receive the records, ensuring the column orders match each other. Highlight and CRTL-C just the data rows in Excel (not the column headers), click on the first row in Custodian and use CTRL-V to paste the records into the form.

The Styles Section

The style of the data entry form can be different for each form or you can choose one style to cover all the forms. To set the style across all the forms, use the Styles section in Tools, Options, Systems Options. To set the style for an individual form, use the Style section in the Shortcut bar in the form.

Each style is also editable, so you can change colours, font styles and sizes to suit your requirements. Editing styles and choosing the style at the form level is done in the Styles section (this topic) of the Shortcut bar. Choosing a style for the all the forms at once is done in the System Options.

To try out the different styles currently set, choose the Styles section of the Shortcut bar and click on each Style in turn. If you find one you'd like to use but want to change some feature of it, right-click on the Styles bar and select Style Manager.

The Style Manager window will open:
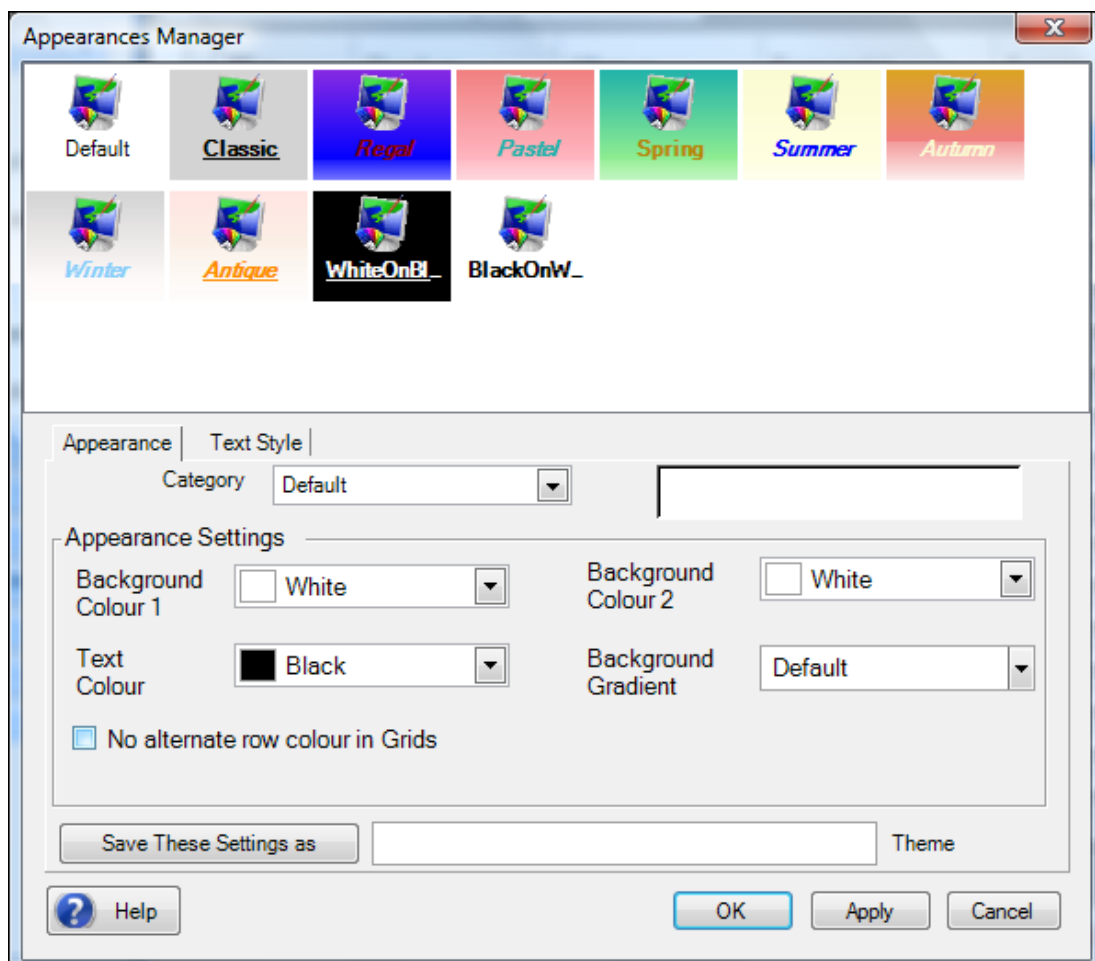
In the Style Manager window, make sure you have selected the Style you want to use from the icons listed at the top. The bottom half of the window has two tabs - Appearance, in which changes can be made to the background and text colours and Text Style, in which changes can be made font size and type and to orientation in the column headers and main data entry form.

When you have made your selections, click on the Save and Apply these Settings button. You will see the form behind the Style Manager window change to the new settings. If you wish to return to the default settings for the Style, click on Restore Default.

Note: Do not use the Default Style if you want to change the style only for the form you are in - the Default Style is the default for all the forms; changes made to this will appear in all the forms.

Adding Records, More Names and More Places in the Data Forms

The Add Entries at the bottom of the data entry form is used when manually keying a new record into Custodian 4.

Adding New Entries to the Data Form
To add a new record (ie open a new row), click on the form title button. The example below is from the Marriage pre-1754 form but other than the form title, the details will be exactly the same in each form.
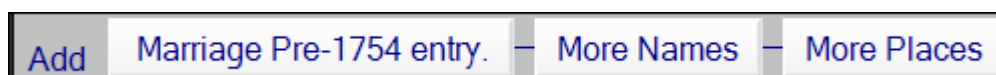
Note - new rows are always added at the end, there is not an insert row function. When you have finished a batch of data entries, click on your Sort to sort them into the order of your choice. When you close the form, the records will be inserted automatically into the correct place according to your Sort.

More Names
This option is available when you have more names in your record than there are obvious name fields. This is most common in forms such as Probate, where the name of the Testator is in the main record and the text of the will contains names of beneficiaries, executors and witnesses. These latter will be added to More Names and thus be included in the Name Index. In the Marriage form example above, names other than the bride and groom were rare, but occasionally witnesses or godparents were included and these can be added to the Name Index via More Names.

Adding New Entries to More Names
To add an entry to More Names, save your main record, then click on the More Names button. A new, indented row will open and you can add the details of your extra name. Click on More Names again to open another one if required. Save your record when finished, using the disc icon in the Tool Bar.

More Places
This option is available when you have more places mentioned in a record than there associated names fields. This is most common in forms such as the Miscellaneous, Newspapers or Court Records which have fields in which you can enter (or paste) amounts of descriptive text.

Adding New Entries to More Places
To add an entry to More Places, save your main record, then click on the More Places button. A new,

indented row will open and you can add the details of your extra place. Click on More Places again to open another one if required. Save your record when finished, using the disc icon in the Tool Bar.

Hiding or showing More Names and Places

You can hide the More Names and Places entries in each record by clicking on the - symbol by the first column of the record and show the More Names and Places entries by clicking on the + symbol.
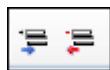
On the Tool Bar, the icons [icons] expand **all** the rows (the first icon) or compress them (the second icon).

The Data Entry Form Tool Bar

This tool bar is at the base of every data entry form, below the Add Record, More Names and More Places buttons.

| ◄ ◄ 1 of 1082 Visible Records. ► ►| 1082 Total Records. ✗ 🖬 | 🖫 | 🔄 🔄 🔄 | 📑 📋 | ×₂ 🖊 | 🖬 | 🗐 🗐 🗐 🗐

Place your cursor over any icon to see a brief description of the function of that icon. Each are explained below:

Location and record number

This part of the tool bar shows you the record count. The example below shows that you are at record number 1 of 1066 records and that there are a total of 1081 records in the form. If you carry out a filter and the filter finds 24 records, the first part of the bar will show 1 of 24 but the total records will remain at 1081.

| ◄ ◄ 1066 of 1081 Visible Records. ► ►| 1081 Total Records.
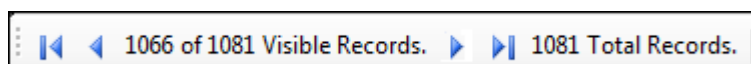
Delete a record

To delete a record, click on the record selector (the space between the + and the first field in the row) so that the whole row is highlighted. Click on the Delete Record icon in the tool bar. You will be asked to confirm your choice before the record is deleted.

To delete multiple consecutive records, hold down the Shift key on your keyboard, and click on the record selector for the first and last record you wish to delete. All the selected records will be highlighted; click on the Delete Record icon. You will be asked to confirm your choice before the records are deleted.

To delete multiple non-consecutive records, hold down the the CTRL key on your keyboard and click on the record selector for each record you wish to delete. All the selected records will be highlighted; click on the Delete Record icon. You will be asked to confirm your choice before the records are deleted.

Delete a cell (field)

To delete the data in a field, hold down the CTRL key on your keyboard, click on the field and then click on the Delete Field icon. There is no confirmation message and the data will be deleted.

To delete the data in several consecutive fields, hold the Shift key and use the right arrow key to move to the fields you want to delete. Then click on the Delete Cell icon. Be aware that the data in the cell you were on when holding down the shift key will also be deleted.

Save the Record

Using the tab key in the last field of your record will automatically save the record and open the first field of the next record. If you don't want to enter another record, click on the Save Record icon. The pencil icon at the beginning of the row will disappear when your record is saved.

Undo Last Change and Refresh

Undo last change - the first icon - this is most useful if you begin a new record but decide not to complete it. Before you save the record, click on the Undo Last Change icon and the record will be cancelled. [Note: this is equal to the function Cancel Changes in Custodian version 3.]

Refresh records - the second icon - this is only used in the Name and Place Indexes. Click on this when you have added new records in a form but your Index was also open - the Index will be updated with the records.

Cut to Clipboard, Copy and Paste

Copy to Clipboard - the first icon - highlight a row or rows in any data form, by clicking on the record number column (use shift and select rows for multiple records), then click on the Copy to Clipboard icon. Open Excel and click on Paste or use CTRL-V and the row/rows will be inserted into the Excel file. This is a quick and useful way to export records to Excel.

Paste from Clipboard - the second icon - select a row/s and use Copy in Excel and then in the Custodian data entry form, click on the Add a new record button and then on the Paste from Clipboard icon. The records will be inserted into the data form.

Note: You may see an error on using the Paste from Clipboard icon - an example: "Error performing Paste operation. Further information: 'Notes' cell is read-only." This is because Notes fields (and Full Name fields) cannot be pasted in this way. Click OK to the message and all the fields other than those mentioned in the error will be imported. In the case of a Notes field, copy and paste the actual text as a separate process.

Clear Sort, Clear Filter and Clear Selected Records

Clear Sort - the first icon - if you have carried out a Sort using the column headers or using the Sorts Manager, click on the Clear Sort icon to clear it and return to your Default Sort.

Clear Filters - the second icon - if you have carried out a filter, click on the Clear Filters to clear it and return to your complete data. This will clear all filters at once, if you have more than one.

Clear Selected Records - the third icon - if you have a series of selected records you wish to clear, for example afrer using Find, click on the Clear Selected Records. This is particularly useful if the records are non-consecutive. Note that the last selected record will retain the focus.

Expand Rows and Collapse Rows

Expand Rows - the first icon - clicking on the Expand Rows icon will open all the More Names and More Places normally hidden behind the + symbol at the beginning of the row. If you only want to open the More Names for one record, click on the + by that row.

Collapse Rows - the second icon - clicking on the Collapse Rows icon will close all the More Names and More Places showing on screen. If you only want to close one row, click on the - symbol next to that row.

Hide Add Names and Show Add Names

Hide Add Names - the first icon - if you want to create more space on your screen for browsing your data, click on the Hide Add Names icon and the program will hide the section above the tool bar which you use to add new records.

Show Add Names - the second icon - clicking on the Show Add Names icon will reverse the above action (Hide Add Names).

Name Fields and the Individual Details box

The forename and surname fields can be completed by entering data directly into them. Alternatively, click on the button in either field and the Individual Details box will open; the names can be entered in here along with other information. If the form or certificate contains a full name field (ie forename and surname are not separate), the Individual Details box must be used

The Individual Details box is present for every person in a record and contains a block of fields associated with the name. It is unlikely that all the fields will ever be completed and some will rarely be used. Those that are most often used, such as the age and occupation, will also be shown in the main part of the data entry form, especially when they are normally given in that particular kind of record. The example shown above is from a record from the British 1851 census.

If there are any fields in the Individual Details box which you would also like to show in the main data entry form, this can be done in Data Views.

When a field is also showing in the main form, it doesn't matter if you enter your data in the field in the Individual Details box or in the main form - one will populate the other.

Personal and Family References

The Personal and Family Reference fields are the only fields which contain a button for a drop down menu. As you add your own References, these will be added to a list and you can select the one you want from the list or add a new one.
When you begin to identify several records which belong to the same individual, you may wish to assign a Personal Reference to the individual, this reference appearing in each of their records. You can also assign a Family Reference to all the individuals you know belong to the same family. Assigning Personal and Family References is essential if you wish to use the Family Tree building part of Custodian.

Designing and using a reference system is a matter of personal choice. You may have already used a system in a family tree package and wish to keep the same references for Custodian. Or you may decide to start with a new system. There are any number of systems in use, based on generations or counties or spelling variations and you may like to do your own research before deciding the best one for you. One example is given below:

<u>Example</u> - Using counties.

For those who are studying particular counties or who find family groups with strong attachments to counties, this might be a useful way of organising your references.

Family Ref: Personal Ref:

DUR001 000001
DUR001 000002
DUR001 000003
DUR001 000004
DUR002 000005
DUR002 000006
DUR002 000007
ESS001 000008
ESS001 000009
ESS001 000010
ESS001 000011

The above example shows how you might assign references to three family groups, two from Durham and one from Essex. All four members of the first Durham family have the Family Reference DUR001 (using the Chapman County Code for the letters) but each individual has a unique Personal Reference, in this case beginning with 000001. The next Durham family is referenced DUR002 but the Personal References continue with the number theme. The Essex family have been given ESS001 and again the Personal References continue with the numbers. All the records belonging to the same individual should therefore have the same Family and Personal Reference. This is essential for sorting and extracting records belonging to the same individual.

Tip: Try to make your references the same size, for example always six characters long (three letters and three numbers) for the Family Reference, and always six characters long (six numbers) for the Personal Reference. This is because the references are stored alphanumerically in a drop-down menu accessed from the buttons in the reference fields and you will be able to see them in a sensible order if they are consistent. Be aware that the number of characters you have may limit you in the future if you want to keep the same system throughout your data - for example, in the above example, what will you do when you reach Personal Reference number 999,999?

This is a fairly simple example. You can custom design your own system, using your own requirements or using the references generated by your family tree package.

Tip: If you find in the future that two separate family references actually belong to the same family, you can merge them by using the Multiple Update function in the General section of the Shortcut Bar. However, if you have created a Family Group with the two Family References, these will not be merged and you will need to re-create your Tree.

The Role

The **Role in this Record** field will be completed with a default entry, but you can change it to whatever you like (but see below about The Use of Role in building Family Trees. This field is ncluded in the Name Index. In the example shown left, the default role was Occupant (from a census entry) but it has been changed to Head as this is more informative in an index. The other household members might be wife, son, daughter, mother etc. Where the record is in a more general form, such as Miscellaneous or Published Sources, the default role will just be Entry and you will need to change it to something more meaningful. In particular, see the information below about the use of Role in building Family Trees.

The use of Role in building family trees

In the family tree building section of Custodian, each person has a name box with dates of birth or baptism, death or burial where these are known. Marriages will also show a date. This information can only be taken from records which have the correct Role completed. Below is a list of the Roles currently used to add these dates. If you are entering a record in the Miscellaneous section, or are altering any existing Role, and the record relates to a birth, baptism, marriage, death or burial, use a relevant role from the list. This is especially important if you don't have any other records of the type which would be included in the family tree.

1. birth, baptism, christening, chr or birth
2. death, died, deceased, buried, burial
3. marriage, husband, wife, groom, bride, spouse

The Deceased field

The Deceased field will be struck through if it is not relevant for that record type. If you are entering data from a marriage certificate and a father is noted as deceased, enter a Y in this field for the father and the word Deceased will be added to the name on the certificate.

It is likely that you will want to index most of your records and the Add Name to Index check box (at the bottom of the Individual Details box) will be ticked by default. If the record is for someone you don't wish to be indexed, for example an official, click on the Add Name to Index box to untick it. Gender - this is not always given in a source record, but it is recommended that you complete this if you are sure of the gender as it is used in the family tree section of Custodian (My Families tab). You will be able to change it in that section later but doing it now may save you time later.

Age and Calculated Year of Birth

The Calculated Year of Birth (CYB) field is present in every Individual Details Box (the block of fields behind every Name field). It is also shown in the data entry form where an age is usually given in the record (and you can choose to show it in other forms, if you wish).

There has to be a date and an age present in the record for the CYB to be completed and it is done automatically. The date must be one which populates the Date of Event, for example in the parish burials form, the Date of Death is used if it present and if not, the Date of Burial.

Format of Ages

Dates can be entered in the following formats and they will be recognised:
Hours - h, hr/s, hour/s
Days - d, dy/s, day/s
Weeks - w, wk/s, week/s
Months - m, mo, mth/s, month/s
Years - y, yr/s, year/s

Always enter a space between the number and the letter/word e.g 6 mths.

Incomplete Dates

If no day is entered, the program will assume the 15th day.
If no month is entered, the program will assume the 6th month.
If Full Age is entered, the program will assume 21 years.
If Unknown is entered, no age will be calculated.

Source fields and the Source Details box

The Source Details Box is found in the General section of the Shortcut bar. It contains fields for recording information about the source document, such as references and when and where seen. You may not need to use all of the fields provided for every record - it is more likely that different source fields will be used in different record types. Any of these fields can be shown in the main data entry form if you wish, using the Data Views section.

The fields in the Source Details box

Country and County

Both of these fields have a drop-down menu containing the relevant Chapman County or Country Code for the place you require. Click on the button in the fields to access the menu. The Codes are in alphabetical order - you can search for the one you need or use type-ahead which will help find the correct one.

Correspondent and Relative

Correspondents and relatives are the people who you correspond with and exchange information with. When you enter their names and addresses into the address book (My Research tab), the system automatically assigns them the next available number. It is recommended that you start with yourself as number 1.

When you enter a record, for example a baptism from a parish register, enter the number of the correspondent who sent you that information into the Correspondent field. If you researched it yourself and entered yourself as correspondent number 1, enter number 1. To search the list of names and numbers, click on the button in the field to reveal them in a drop-down menu. The data in this menu is derived from the Address Book regardless of the category (correspondent or organisation).

In the Relative field, enter the number of the person to whom that record is related. So, in the earlier baptism example, you might have found the entry yourself when searching a particular parish register, but you know that the person baptised is in the family tree of correspondent number 16. If you have assigned yourself as number 1, enter 1 in the Correspondent field and 16 in the Relative field. When you return to this record in the future, you will know who researched the information and whose family tree it belongs to.

You can enter multiple numbers in either field e.g. Correspondent 1/16, Relative - 1/3/16. This entry was researched by myself and sent to me by correspondent number 16 and is a relative of myself and correspondents 3 and 16.

Be aware that if you have multiple numbers and then click on the button for the drop down list, the name for the first number will show. If you select another, it will overwrite the original i.e. you need to enter multiple numbers manually.

It is not compulsory to use these fields - they are purely an aid to identifying the origin of the research and the living descendants of the people in the entries.

General Information
This field can be used for any extra information you wish to include.

Repository
Use this field to note where the record was seen. There is a button in this field; the information in the resulting drop down menu is taken from your Research Notes form, these will appear when you click on the button and you can choose one.

Date Seen
Use this field to record the date you saw the record.

Document Reference
Use this field to record the document reference as given at the record office or repository. If you operate your own referencing system for documents you have copies of, you may wish to use one of the User Fields (see below) for this, rather than risk confusion with a record office reference.

Publication
Enter the publication type or click on the button in the field to access the drop-down menu. Choose either Book, CD/Disk, Fiche, Film, Original or Periodical.

Volume and Page
These will most likely be used for civil registration and census entries, but you may find them in other records.

Document Held
You may find it useful to note that you have a paper copy of the record - enter Yes or No in this field.

Certainty
This is how sure you are of the accuracy of the record and is based on a scoring system. For example, an original document would score high, whereas spoken evidence or family legend might be quite low. You can change the certainty score at a later date, in light of further evidence, for example. The scores are the same as those used in the Gedcom 5.5 standard, the full description being:
0 Unreliable evidence or estimated data
1 Questionable reliability of evidence (interviews, census, oral genealogies or potential
bias e.g. autobiography)
2 Secondary evidence, data officially recorded sometime after event
3 Direct and primary evidence used, or by dominance of the event
You can, of course, decide on your own wording for the certainty scores if you disagree with the above!
Either key in the number you require or click on the button to access a drop-down menu and click on your choice.

Date Last Updated
Each time you update the record, the date will also be updated. You do not need to enter any information manually.

User Fields
There are "spare" fields in every data-entry form and these are the User Fields which you will find in

the Source Details box. You can re-name these and show them in the grid if you like, using the Data Views section. You can also include them in the Name Index and/or Place Index using the Index Preferences in the General section. Hold the cursor over each field to see the character size of the field.

Toggle Check Marks

This feature allows you to enter data more quickly when keying in lots of records with the same source information. The check marks are all on by default but you can turn all or some of them off. Turn them all off (or on) by clicking on the Toggle Check Marks or turn some of them off (or on) by clicking on the individual check marks.

To use this feature, decide which fields you want to repeat in your next record - for example, if you only want to repeat the Country, County and Correspondent in the next record (the other fields might have unique information), make sure the ticks are "on" by these three fields and all others are "off". Save your record, then enter the next one and open the Source Details box. Click on the Paste button at the bottom of the Source Details box and the data from the three fields will be pasted in. You can then complete any other fields which have unique information, exit the Source Details box and save the record.

Note: If you use Paste when information is already present, it will be overwritten.

Filtering data

Filtering is used when searching for particular records amongst the whole of the data entry forms records. It is also used when undertaking a Multiple Update on a selected number of records.

Filtering on one column (or field)
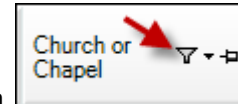
The filter function is found in the column header as a small funnel icon . Clicking on the icon opens a drop down list of all the unique entries in that particular field (all the Church and Chapel entries in the above example). Select the want you want to filter on and only those will be shown on screen. The filter icon will be coloured blue to indicate that there is a filter present on your data form.

Filtering on multiple criteria in one column (or field)

This allows you to select, for example, St Andrew and St Nicholas in the Church and Chapel field, instead of just one entry type. To do this, select the filter icon in the column header, then select Custom from the list. In the Custom window, the Field Condition is the type of criteria you want - click on the button and choose = (Equals). The Field Value is the item to search for - scroll down and select St Andrew. Now click on Add a Condition to repeat this process, this time selecting = (Equals) again as the Field Condition and St Nicholas as the Field Value.

Select the radio button for "Or" conditions as you want to select St Andrew or St Nicholas (not both in the same field). At the bottom of the Custom window is your select criteria which you can check before clicking ok (see image below).

Filtering on more than one column (or field)

First follow the instructions for filtering on one column (above), for example to find all records for one village or town. Then, with those records only showing on screen, choose another column and use the filter icon again, for example to find all the Smiths, and then again, for example to find all the

Josephs.

Removing the filter (return to your complete data)

To clear all the filters, click on the Clear Current Filter in the tool bar at the bottom of the screen ![icon]
.

Note: Don't use CTRL-Z and CTRL-R in filtered records – these work by replicating data in the sibling row (the one above) in the database, which is not necessarily the one you will see in the filter.

Grouping data

This is another means for a quick sorting of your data. The Group Sorting icon is at the top of each data entry form.

> Drag a column header here to group by that column.

Grouping by one column

As an example, in the Civil Registrations Births form, hover the mouse over the Registration District header, hold down the left mouse button, drag the header along to the Group Sorting icon and release the mouse button. Two red arrows at the beginning of the icon indicate you have the correct position.

Registration District /
⊞ Registration District : (2 items)
⊞ Registration District : ? (1 item)
⊞ Registration District : Abingdon (6 items)
⊞ Registration District : Alnwick (1 item)
⊞ Registration District : Aston (7 items)
⊞ Registration District : Auckland (86 items)
⊞ Registration District : Barnet (1 item)
⊞ Registration District : Barrow F (4 items)
⊞ Registration District : Belford (1 item)
⊞ Registration District : Beverley (2 items)
⊞ Registration District : Billercay (1 item)
⊞ Registration District : Billericay (2 items)
⊞ Registration District : Billesdon (1 item)
⊞ Registration District : Blything (1 item)
⊞ Registration District : Caister (1 item)
⊞ Registration District : Caistor (12 items)
⊞ Registration District : Cambridge (2 items)
⊞ Registration District : Castle Ward (5 items)
⊞ Registration District : Chelsea (1 item)
⊞ Registration District : Chester le st (1 item)
⊞ Registration District : Chester le St (127 items)
⊞ Registration District : Chester Le St (21 items)
⊞ Registration District : Chesterton (3 items)
⊞ Registration District : Christchurch (8 items)
⊞ Registration District : Cockermouth (3 items)

You should now see a list of all the registration districts you have in your data with the number of records of that kind in brackets. In place of the Group Sorting icon is the header you are grouping by.

Click on the + symbol next to a district for which you'd like to see the entries and these records will be shown on-screen. Clicking the + symbol closes them again.

To return to your data form, drag the Registration District column header to around the middle of the screen and release the mouse button.

Grouping by multiple columns (or fields)

Once you have selected your initial choice for Group Sorting and have a list similar to the image (left), you can sort on more levels. Click on the + symbol next to a registration district to open the records. Now drag the Forename column header up to the Registration District icon and release the mouse. You should now have two levels of headers at the top of the page

Registration District /	
	Forename(s) (Main) /

.
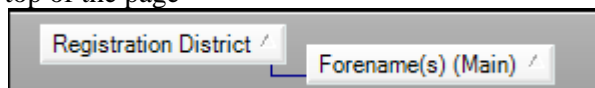
Now when you click on a + symbol by the Registration a list of all the Forenames in the District will show. Click on the plus symbol by one of the forenames and a list of the records for that forename will be shown.
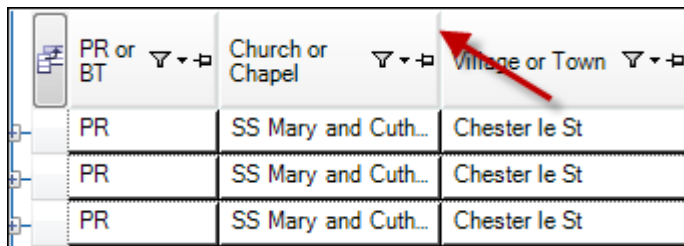
You can continue with this method as far as the information continues to be meaningful!

Incidentally, grouping in this way, allows you to spot inconsistencies in data entry - for example, look at the entries for Chester le Street in the image above!

Column and Row Formatting

Altering the width of a column

If you find a column is not wide enough for your data, place your cursor on the border between the two column headers (see position of arrow in image) until you can see a double arrow. Hold down the left mouse button and drag the double arrow to the right until you have the column width you want, then release the cursor. Drag to the left if you want to reduce the column width.
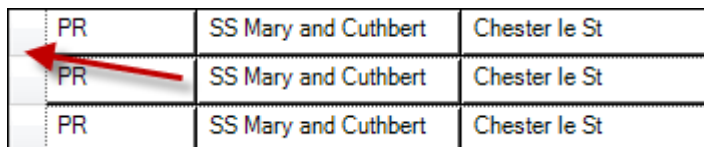
To save your column changes, click on Data Views in the Shortcut Bar and select Save Layout.
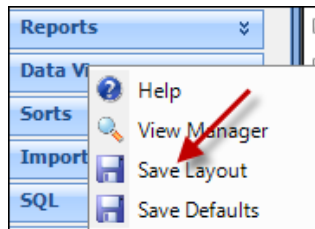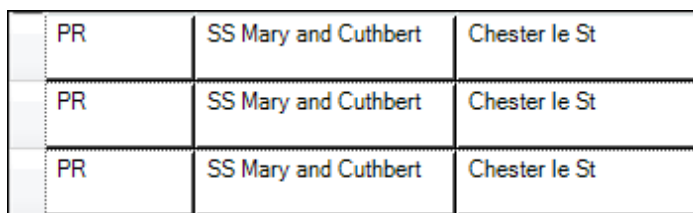
Altering the depth of a row

If you want to alter the depth of a row (make them deeper or shallower), place your cursor on the border between any two rows (see position of arrow left). Hold the left mouse button and drag downwards to make the row deeper and upwards to make it shallower.

To save your row changes, click on Data Views in the Shortcut Bar and select Save Layout (see saving column changes above).

Moving columns

You can change the order of columns to suit your data or preferences. The simplest way is to use the drag and drop method - place your cursor on the column header, hold down the left mouse button and drag the column header left or right to the position you require. Red marker arrows will act as guides when you drag the column header.

Swapping columns

Columns positions can be swapped quickly.

To swap the Village/Town and Church/Chapel fields, click on the small black triangle either of the column headers (marked with the red arrow in the example).
A drop down menu will appear - choose the other column title you wish to swap with. The change will be made immediately. To save your row changes, click on Data Views in the Shortcut Bar and select Save Layout (see saving column changes above).

Showing/hiding columns

Any of the fields in the main data entry form, the Source Details box and the Individual Details box can be hidden or shown in the data entry form. This is done using Data Views in the Shortcut bar (see the Data Views Section in the main topic The Shortcut Bar and Functions.)

Changing the font size and type

This can be done using the Styles section in the Shortcut bar in each form (see the Styles Section in the main topic The Shortcut Bar and Functions) or in the System Options for all the forms at once (see Tools, Options in the main topic Custodian 4's opening screen and the Menu Items).

The Name and Place Indexes

The Name and Place Indexes are accessed from the Master Indexes option on the Data Navigation Bar, in the same way as the data entry forms. However, you cannot add data into these - they are populated by the data you enter into the data entry forms.

To see more of the data in the Index (either one), it is recommended that you use the pins on the Data Navigation Bar and the Shortcut Bar to slide these latter out of the way. You can then re-size the Index to fit your screen. The How to get started tutorial shows you how to do this.

The Forename and Surname fields in the Name Index are also pinned by default (you can un-pin them if you wish) - when you use the scroll bar at the base of the form, the names will stay in position as you look at the other fields. You can pin as many columns as you wish - the red line is a guide to show you the edge of the pinned columns.

Most of the options in the Shortcut Bar are the same in the Indexes as in the data entry forms. However, there is an extra facility in the Indexes - View this record in the data form. There is also a facility to use your data in the mapping program Genmap and this is found in the General section of the Shortcut Bar.

View this record in the data form

Clicking on the coloured button by an Index entry takes you to the entry in the data form. This has the same effect as going to a record by opening the data entry form from the Navigation Bar and you can see all the other records in the data form.

You can edit the record and save it. When you return to the Name Index, and if you have edited the record, you will need to use the Refresh button on the toolbar to see the changes .

Index Check

Index Check in the Name and Place Index checks that each entry in the Index has a corresponding entry in the relevant data entry form. If there is no corresponding entry, the Index entry will be deleted. (This is distinct from Index Check in the data forms which checks each entry has a corresponding one in the Index and if there isn't one, an Index entry is written.) Be prepared for this check to take a long time to run if you have a large index. You can abort the process by clicking on the x in the Index Check box.

Genmap

If you have Genmap on your computer, you can use the data in the Name or Place Index and create distribution maps. The Genmap link is only found in the General section bar of the Shortcut Bar in the Indexes.
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You can create a file for Genmap using all of the data in the Index or a selection of the data. If you only want to use data on a particular surname, for example, filter the data to extract the records you want - you can then begin the Genmap link. If you want to use all of the data, go straight to the Genmap link.

Click on the Genmap icon. In the Export to Genmap window, click on the button Choose Filename. The default name is V4Cust.dbf but you can change this (to a maximum of eight characters). The default location for the file is the My Documents folder but you can change this too, if you wish.

Once the filename is selected, you will see a message asking you to locate the Genmap program. Click OK to this message and then click on the Location of Genmap program button and navigate to where your Genmap program is and click on the Genmap2.exe file. Your export window should now look similar to the image below.
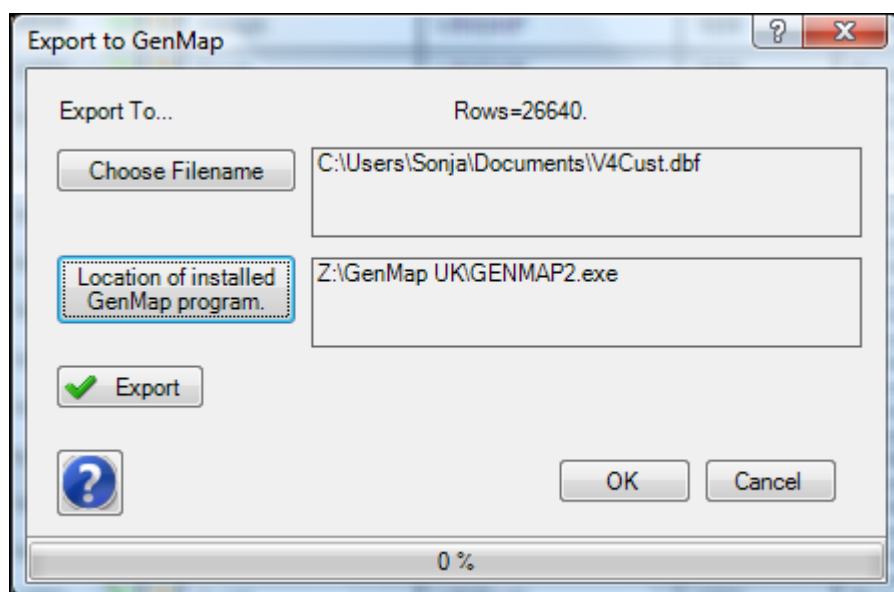
Click on the Export button when ready; the export file is created and Genmap is opened. You will then need to use Genmap to import the file - see your Genmap instructions for advice on how to use the program further.

Keyboard Interface

There are a number of keyboard shortcuts that help speed up data entry and moving about the grid:

Alt + Char
Where Char is a word with an underscore
Example: Alt + D selects Create New Dataset

CTRL-B
Replaces clicking on a button in a field
Example: CTRL-B in a name field calls up the Individual Details box

CTRL-R
Repeats the information in the field directly above, in the data entry form
Example: When entering several records from the same parish register, press CTRL-R in the second line for the names of the church and parish etc

CTRL-X
Cuts highlighted text

CTRL-C
Copies highlighted text

CTRL-V
Pastes cut or copied text

CTRL-Z
Duplicates the row above in the data entry form, excluding names but including information in the Source Details box (Set the Preference to duplicate name)
Example: When entering several records from the same source but for different people

Home
Takes you to the top of the data entry form

End
Takes you to the bottom of the data entry form

Del
When a row is selected, pressing Del calls a message asking if you are sure. If you choose Yes, the row will be deleted.

Esc
Takes you out of Edit mode in a cell

Tab
Moves you to the next cell in the current row or the first cell in the next row

Shift+ Tab
Moves you to the cell to the left in the current row

Up arrow
Moves you to the cell above

Down arrow
Moves you to the cell below

Contact Us

If you require help installing or using Custodian 4 and cannot find what you need in this Help file, contact us by:

E-mail:
This is the preferred method as it allows time to investigate; please give as much detail about the issue as you can and include screen shots where possible, if you have a problem. A note of your operating system would also be useful.

support@custodian4.co.uk

Phone:
Please be prepared to leave a message and a summary of the issue and your call will be returned as soon as possible.

01432 839108