

Chapter 5 – Customizing the Data

By John Cardinal

Introduction

Chapter 4 described customizing TMG's user interface to suit your needs. The focus of this chapter is customizing data to achieve particular results. Some tips and techniques will be discussed in detail in this chapter. Other, more complex techniques will be introduced in this chapter and then explained in greater detail in a subsequent chapter.

Some of the customizations described here produce effects that are similar to customizations covered in Chapter 4 in that they change the behavior of the program. An important distinction is that the customizations described in this chapter are specific to a particular project and/or data set whereas the customizations in Chapter 4 are not. Other than that exception, however, you do not have to concern yourself with the difference.

Why Customize?

How Versus Why

Intermediate users understand *how* to customize TMG. Expert users understand *why*. Both intermediates and experts alike will strive to follow sound genealogical practices and both will have a specific goal in mind. The expert, however, will also consider the abstract or more general goal. TMG is a very powerful program and there is often more than one way to achieve a certain result. Knowing the more general goal is often the best way to choose from among the available methods.

The following is my list of abstract goals. Yours may differ. I will explain mine in hopes that it will help you discover or define yours.

- Consistency
- Efficiency
- Usability
- Practicality
- Cultural Suitability
- Personal Suitability

Consistency

Customizations often improve consistency. Done properly, they capture the result of a thought process that yields the best or most appropriate way to achieve a result and help you easily achieve the same result in the future. Consistency only for consistency's sake is unwise,¹ whereas consistency for the purpose of conveying a particular meaning is fundamental to genealogy.

Efficiency

Any customization that improves efficiency leaves you more time to do other tasks.

Practicality

Some results can only be achieved through customization. In other cases, a customization is the easiest way to achieve a result.

Cultural Suitability

TMG has many features that can be customized to produce culturally appropriate results.

Personal Suitability

If you want TMG to work a particular way for no reason other than it makes you happy, that's a great reason for a customization!

Customization Basics

One of the most basic questions is, how much customization is too much? When should you customize, and when should you run away and return to customize another day? In general, you should review the standard ways of doing things to make sure that you are not reinventing the wheel. Take advantage of the knowledge of TMG's designers and beta testers!

Once you decide that a customization is the best way to achieve the goals, you should test the

¹ Consistency is often attacked using a partial quote from Ralph Waldo Emerson, "consistency is the hobgoblin of little minds". His sentence actually began, "A foolish consistency is the hobgoblin of little minds," and the missing word "foolish" changes the meaning considerably.