Getting Started Guide

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Contents

Section 1:
Ultimate Family Tree for Windows

Welcome to Ultimate Family Tree™ and the exciting world of multimedia genealogy. Genealogy is the pursuit of knowledge about our past. It's a way to look at our families in order to better understand ourselves. With Ultimate Family Tree, you can view the past in ways never dreamed possible by your ancestors.

You can store and display video and audio recordings, pictures, drawings, and scans of important documents. You can create and organize slide shows with descriptions and music, and play them back on your computer screen. You can even scan your own photos directly into Ultimate Family Tree, edit, and modify them. Taking advantage of Object Linking and Embedding (OLE), Ultimate Family Tree provides nearly limitless possibilities for multimedia presentations.

Ultimate Family Tree's easy-to-use data entry screens, Instant Web Page Publisher, spell checker, and online capabilities are firsts for any genealogy software. Using Ultimate Family Tree, you can document events in each individual's life by drawing from a library of approximately 200 predefined events or by creating your own. Fundamental information for each person is entered through Ultimate Family Tree's powerful Individual Record window.

The online functions provided by Ultimate Family Tree are its most exciting feature. It's possible to connect directly to the program's exclusive website and converse with research experts, download useful genealogical information, and upload your own family history web page.

Soon you will be entering your own information, creating beautiful journals, and experiencing the voices and pictures of loved family members. To help you get started with your genealogical research Palladium Interactive has furnished an on-disk *Beginner's Guide to Genealogy* in Adobe Acrobat Reader

format. The *Beginner's Guide to Genealogy* is called BEGINNER.PDF and is found in the \DOCS directory of the Ultimate Family Tree CD-ROM. Also in this directory you will find complete user's guides in PDF format.

Help is Always at Your Fingertips

Ultimate Family Tree provides the following help:

- The *Ultimate Family Tree Getting Started Guide*

- The *Ultimate Family Tree User's Guide* on CD-ROM

- The Ultimate Family Tree Web Site *http://www.uftree.com*

- Online Help—an online reference guide that includes context sensitive help, extensive cross referencing, troubleshooting assistance, a guide to error messages, answers to frequently asked questions, and a glossary.

- Technical support

If you have questions about any aspects of the program, follow these steps:

1. Check the Table of Contents or the Index of the *Ultimate Family Tree User's Guide* for the subject you need help with, or from the Ultimate Family Tree menu, choose Help followed by Help Topics. In the resulting window, locate on-screen information about your topic.

2. See "Troubleshooting" in Appendix A of the *Ultimate Family Tree User's Guide* and online Help for answers to common problems.

3. Contact Ultimate Family Tree Technical Support:

- *FAX*   812-829-1020
- *Mail*   743 E. Franklin Street, Suite B, Spencer, IN 47460
- *CompuServe*   GO GENSUP
- *Internet (email)* pifamily@palladiumnet.com
- *Telephone*   812-829-4405 (8 AM–10 PM CST, M–F)

If you call for technical support, please call while you're at your computer. Technical support is offered for questions or problems using Ultimate Family Tree, but not for assistance or advice with Microsoft™ Windows™ or genealogical research. If you need assistance with Windows, please contact Microsoft Corporation or consult your *Microsoft Windows User's Guide*.

Getting Ready to Install

System Requirements

Ultimate Family Tree for Windows 3.1 (80386 CPU, 25 MHz) and Window 95 (80486 CPU, 33 MHz) is designed for systems having 8 MB or more Random Access Memory (RAM), and 16 MB is recommended. You need at least 20 MB of free hard disk space before installing Ultimate Family Tree. The files supplied with the program require approximately 15 MB of hard disk space. An additional 5 MB of disk space is required (approximately 2.5 MB for data and 2.5 MB for temporary work space) for every 1000 individuals you add. The program can use a TWAIN-compatible device such as a scanner, a sound card, and other multimedia features. Additional hard disk space may be required to use multimedia features fully. A modem is required to use the Go Online feature.

Make Sure You Have Everything You Need

Your Ultimate Family Tree package should include:

- This guide
- Registration card
- Browser setup instructions
- Upgrade instructions
- Ultimate Family Tree CD-ROM

Customer Registration

Fill out and mail the enclosed registration card immediately. This card qualifies you to receive free technical support and notification of upgrades.

Installing Ultimate Family Tree

Ultimate Family Tree can be installed as a separate program or as an update to ROOTS IV, Visual ROOTS, or Family Gathering. If you use any of these programs, you need to decide whether to install Ultimate Family Tree as an update or in a separate directory. If you have no other ROOTS or Family Gathering program, simply follow the installation instructions below. If, however, you are using one of these programs, we recommend that you install Ultimate Family Tree as an update.

If you choose to install Ultimate Family Tree as an update to Visual ROOTS, the program files for Visual ROOTS will be deleted after Ultimate Family Tree has been installed; however, all data files will remain intact. You can proceed to use Ultimate Family Tree without additional considerations.

If you install Ultimate Family Tree as an update to ROOTS IV, the Ultimate Family Tree library files will be installed in the same directory as the ROOTS IV library files, resulting in two sets of library files. When you install Ultimate Family Tree as an update to ROOTS IV, the ROOTS IV program files are deleted, the data files remain intact, and the library files retain their ROOTS IV names. If you start a new project, you have the option of choosing to create an Ultimate Family Tree or ROOTS IV project. If you choose to create a new Ultimate Family Tree project, the Ultimate Family Tree library files are used. If you choose to create a ROOTS IV project, your existing ROOTS IV libraries, containing the places and sources entered in ROOTS IV, are used. If you have been using ROOTS III or another genealogy software program, you will import your ROOTS III or GEDCOM file, and the Ultimate Family Tree library files are used.

If you are currently using ROOTS IV and want to have only one set of library files, you should install Ultimate Family Tree in a separate directory, create Event GEDCOM files of your existing data, and import them directly into Ultimate Family Tree.

> **Note**   ROOTS IV library files are named X_PLBOOK.*, X_SOBOOK.*, X_ELBOOK.*, and so on. ROOTS V, Visual ROOTS, Family Gathering, and Ultimate Family Tree library files are named V_PLBOOK.*, V_SOBOOK.*, V_ELBOOK.*, and so on.

> **Note**   When creating a new ROOTS IV project, Ultimate Family Tree looks for ROOTS IV library files in the \ROOTS4\LIBRARY directory. If the ROOTS IV library files are located in a directory other than \ROOTS4\LIBRARY, you cannot create a new project using those files in Ultimate Family Tree. If you want to continue to use ROOTS IV library files for new projects and ROOTS IV is installed in a directory other than ROOTS4, install Ultimate Family Tree as a standard installation and not as an update to ROOTS IV.

Installation Instructions

To install Ultimate Family Tree as a new program or as an update to Visual ROOTS or Family Gathering, follow these steps:

> **Note**   If you have any problems with the installation, see Installation Troubleshooting in the *Ultimate Family Tree User's Guide*. Please ensure that you have disabled all virus scanning software, screen savers, and any other software which may interfere with the installation.

1. Start Windows

2. Insert the CD-ROM in your CD drive.

3. If you are running Windows 3.*x*, choose File from the Program Manager, and then Run. If you are running Windows 95, choose Start, and then Run from the task bar.

4. Type *d:\setup* (substitute the correct drive letter for your own CD-ROM drive). Click OK.

5. The Ultimate Family Tree install program begins. It is strongly recommended that you close all running Windows applications before proceeding. Click Cancel to stop the setup program and close any running applications or click Next to continue.

6. The Setup program will search for installed components of Visual ROOTS, ROOTS IV, or Family Gathering. The installation program will ask you if you want to update an existing program or install Ultimate Family Tree in a new directory.

7. Click Yes to update the program or No to install Ultimate Family Tree as a separate program.

   Note   If you install Ultimate Family Tree as an update to ROOTS IV, Visual ROOTS, or Family Gathering, the program files for those programs will be deleted after Ultimate Family Tree has been successfully installed.

8. If you chose No, the default directory is C:\UFT. Click Browse to specify a different directory.

   Note   If you specify a directory that doesn't exist, a message appears stating that fact. Click Yes to continue the installation. *Do not* specify a directory which contains ROOTS IV, Family Gathering, Ultimate Family Tree, or Visual ROOTS unless you chose one of the update options in the previous window. If you do, Ultimate Family Tree will *not* be installed as an update to that program. The program files for the existing program will remain after Ultimate Family Tree has been successfully installed. No data files will be overwritten; however, important control files for the other program will be overwritten.

9. Choose one of the following options and click Next:

 • *Typical* — Installs the program plus the Kennedy sample project.

 • *Minimum* — Installs Ultimate Family Tree and library files without the Kennedy sample project.

- *Custom* — Allows you to install selected files. The Custom option should be used for reinstallation only.

10. You are prompted to select a program folder or group. The default is *genealogy*. You may enter a folder or group name and click Next.

11. Setup tells you that it has enough information to start copying files from the CD-ROM. Click Next to continue. Setup installs Ultimate Family Tree, Ultimate Family Tree Gateway, Family Album Maker, Records Requester, the Gazetteer, and Browser Setup.

    Note   If you need to go back to a previous step for any reason, click Back to return.

12. If you are installing over a previous version of Family Gathering or Ultimate Family Tree, the install program will ask you whether you wish to retain or copy over the following:

- Existing Spell Checker files

- Existing Event Choice lists

- Existing report configurations

- Existing Task Lists

- Existing right mouse setups

    Note   If previous REVENT, Spell Checker, or Event Choice files are found, you are prompted to install new files or use existing ones. If you have added words to the Spelling Dictionary, added new REVENT data in ROOTS IV, or added new event types in Visual ROOTS or Ultimate Family Tree, do not install the newer files.

    Note   Answering *no* will replace these files with program default files, and you will lose any changes you may have made. Before reinstalling over a previously installed version of Family Gathering or Ultimate Family Tree, please read "Reinstalling Ultimate Family Tree" on page 7.

13. Once all of the files have been updated or installed, the Readme file, containing up-to-date information not included in the manual, is displayed.

14. Close the Readme file and click Finish to end the installation.

15. In the new Genealogy Program Group, up to six icons are created, depending on the installation options you chose and the operating system you are using.

- *Browser Setup* — Identifies a browser for Ultimate Family Tree.

- *Ultimate Family Tree* — Starts Ultimate Family Tree.

- *Kennedy Sample* — Starts Ultimate Family Tree with the sample Kennedy project.

- *Uninstall Ultimate Family Tree* — In Windows 3.*x*, an additional icon is created to uninstall Ultimate Family Tree from your system. In Windows 95, Uninstall is located in the Control Panel under Add/Remove Programs. Note that Uninstall cannot remove any files created or modified after installation such as Project or Library files.

- *Ultimate Family Tree Editor* — Opens the powerful Windows word processor supplied with Ultimate Family Tree.

- *Readme file* — Opens a text file with last-minute information not available when the manual was created.

On-Line Guide and Browser Setup

In order to use the on-line features of Ultimate Family Tree, you need to run the Browser Setup program installed with Ultimate Family Tree. Browser Setup looks for an existing browser on your system and either configures Ultimate Family Tree to use this browser, or lets you install the Netscape browser from the Ultimate Family Tree CD-ROM. Browser Setup will not change your browser configuration in any way.

To use Browser Setup, exit Ultimate Family Tree and follow the Browser Setup instructions in the On-Line Guide included separately in the Ultimate Family Tree box.

Reinstalling Ultimate Family Tree

To reinstall Ultimate Family Tree, follow these steps.

1. Start Windows.

2. Insert the CD-ROM in your CD drive.

3. If you're running Windows 3.*x*, choose File from the Program Manager, and then Run. If you're running Windows 95, choose Start, and then Run from the task bar.

4. Type *d:\setup* (substitute the correct drive letter for your own CD-ROM drive). Click OK.

5. In the Welcome dialog, read the information and click Next.

6. Setup will search for installed components and display a message if an existing Ultimate Family Tree installation is found. Click OK.

    Note   The directory in which the Ultimate Family Tree executable file was found is displayed in the Destination Directory box. Click Browse to change to another directory.

7. Three installation options are available. Select Custom and click Next.

8. Deselect the options you do not want reinstalled with Ultimate Family Tree.

9. Highlight Ultimate Family Tree by clicking once on the program name. Notice that the Change box turns from gray to black. Click Change to select the modules of Ultimate Family Tree that you wish to reinstall.

    Note   If you have added your own images, do not select Image Libraries. Choosing Program Files and Printing Support Files reinstalls program files only and will not affect any data files. If you have added your own images, places, or sources, do not select the image libraries, place libraries, or source libraries. Intstalling these options will destroy your data by installing default libraries.

Creating an Ultimate Family Tree Icon in Windows 95

In Windows 95, Ultimate Family Tree can be accessed from the Start, Programs list. If you want to create an Ultimate Family Tree icon on the Windows 95 Desktop, follow these steps:

1. Click the right mouse button on the Desktop.

2. Choose New.

3. Choose Shortcut.

4. Click Browse.

5. Change to the \UFT directory and choose UFTREE (UFTREE.EXE).

6. Click Open. UFTREE.EXE appears in the Command line.

7. Click Next.

8. Type *Ultimate Family Tree* in the name field and click Finish.

Starting Ultimate Family Tree

Before starting Ultimate Family Tree you should be familiar with Microsoft Windows, have Ultimate Family Tree installed on your computer, and have your printer correctly installed and configured under Windows. If your printer is not set up, consult your Windows manual for assistance.

To start Ultimate Family Tree, follow these steps:

1. Start Windows.

2. Open the Genealogy program group (or whichever group or folder in which you installed Ultimate Family Tree).
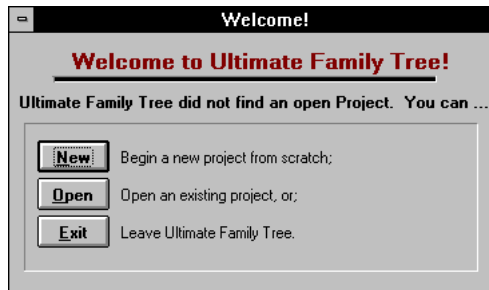
Figure 1-1: Welcome Window

3. Double-click the Ultimate Family Tree icon. If you are starting Ultimate Family Tree for the first time, the Ultimate Family Tree Title window appears, followed by the Welcome window with a message stating Ultimate Family Tree did not find a project. You are offered the following options:

- *New* — Begins a new project
- *Open* — Opens an existing Ultimate Family Tree project
- *Exit* — Leaves Ultimate Family Tree

Ultimate Family Tree Desktop Display

Ultimate Family Tree provides two styles for desktop display. They are Graphics and Windows Colors. Graphics provides wallpaper on the desktop and windows. Windows Colors establishes desktop and window colors from the Windows Control Panel. If your monitor is set to 16 colors, the Windows Colors are used.

Using the graphics display can reduce the performance of the program. If you suspect that Ultimate Family Tree is running more slowly than it should, refer to page 196 for instructions on how to switch to the Windows color mode. Choose the colors option for Ultimate Family Tree according to your personal preference and system performance.

Open Miscellaneous, Medical, and Multimedia windows

Go to top of event list
Move up one event
Move down one event
Go to bottom of event list
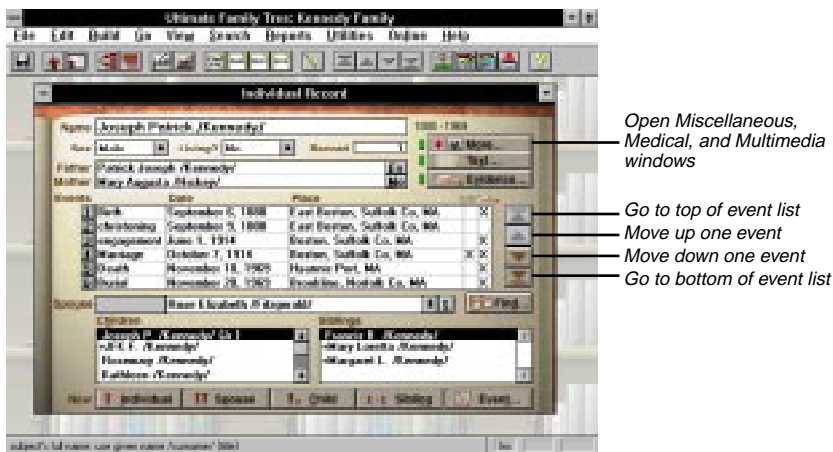
Figure 1-2:   Ultimate Family Tree with Graphics Desktop Display

Click to edit event evidence

Click to edit event text
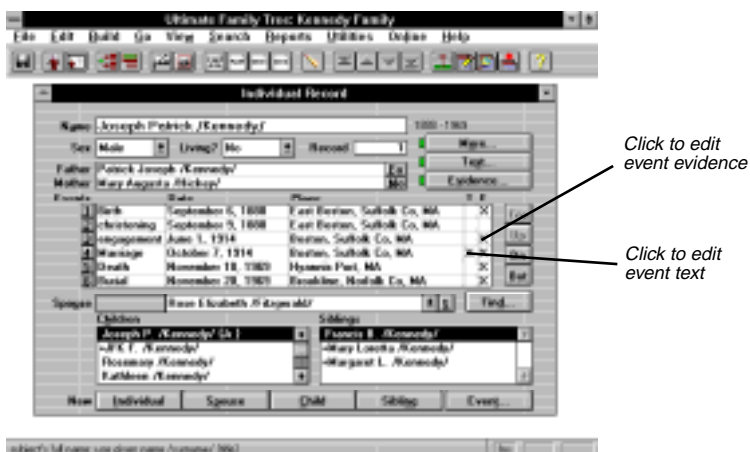
Figure 1-3:   Ultimate Family Tree with Windows Colors Desktop Display

Note   The illustrations in this User's Guide use the Windows Colors option to display screen shots.

Creating a New Project

To start a new project in Ultimate Family Tree, follow these steps:

1. In the Welcome Window or from the File menu, choose New.

Figure 1-4:   New File Window

2. In the File Type list, select Ultimate Family Tree and choose Open.

3. In the File Name field, type a file name (up to eight characters) for the new project.
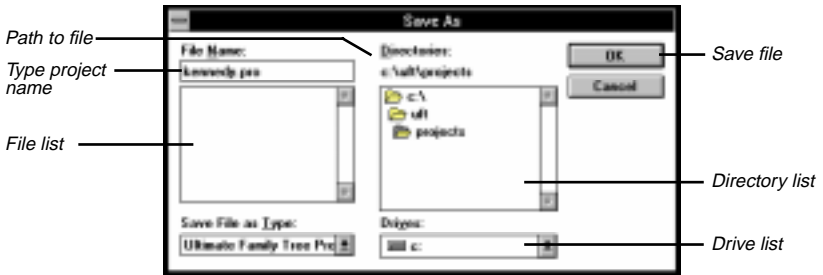
Figure 1-5:   Save As Dialog Box

4. Select the drive and directory for the new project. Typically, it's \UFT\PROJECTS. The current directory name appears above the directory list box.

Note   Do not save to a floppy disk. Be sure you have sufficient disk space on the hard drive before starting a new project. You need at least 2.5 MB of free disk space and 2.5 storage space for every 1,000 individuals.

5. Choose OK. The Project has now been created and the Project Information window is displayed.

Path to the Project Control file
The date the project was last edited
Update Key Family list
Version number of project
Version number of Ultimate Family Tree
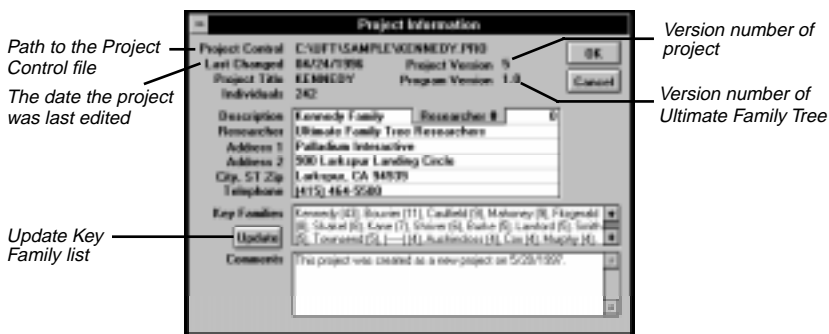
Figure 1-6:   Project Information Window

Note   To open the Project Information window at any time, choose Project Info from the File menu.

6. Enter a short description of the project, such as a family name, on the Description line. The description appears on the title bar of the Ultimate Family Tree window.

7. Enter the name of the principal researcher for this project in the Researcher Field. This field is optional, but you can have the researcher's name appear in the footer on printed reports by typing a name here and choosing Preparer in the Page Setup window. See the note below.

8. Enter the address of the researcher. This information can be included in the footer with the preparer's name, if you want. You might include *Prepared by:* before the name to have the footer of your reports printed in this way.

Note   To print the relationship of the preparer on Family Group reports when Preparer Info is checked, enter the Researcher's record number in the Researcher # field. For a new project, enter an Individual Record for the preparer and then return here by choosing Project Info from the File menu.

9. Key Families is a list of surnames in the project arranged in the order of frequency of occurrence. Ultimate Family Tree keeps track of the number of times each surname is encountered and displays it to the right of the name. This field is blank for a new project. Choose the Update button to update the Key Families surname list. When new individuals have been entered into Ultimate Family Tree, choose Update to get a new count of the surnames.

10. The Comments box displays the source of the data used in this project, including import method, date, and time. Enter general information about the project in this box.

11. Choose OK to close the window and save changes. The Individual Record window appears and you're ready to begin.

To open an existing project, follow these steps:

1. From the Menu Bar, choose File.

2. Choose Open.
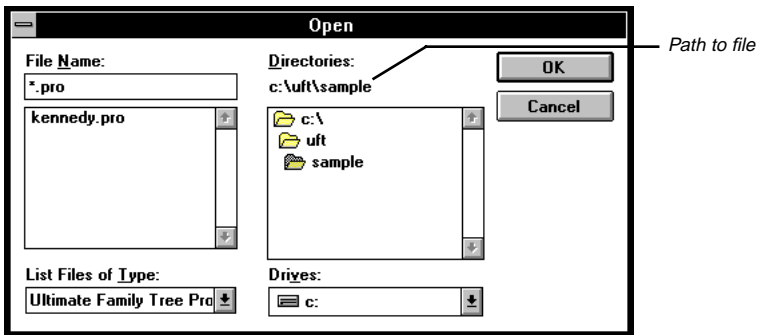
Figure 1-7:   Open Dialog Box

3. In the File Type drop-down list, select Ultimate Family Tree Project.

4. Select the drive and directory of the existing project. Select \UFT\SAMPLE directory if you want the Kennedy sample project, or the \UFT\PROJECTS directory if you've already converted or saved a project that you'd like to open.

5. Make sure that the proper drive, directory, and subdirectory appear above the directory list box.

6. Select the project filename to be opened (for example, KENNEDY.PRO).

7. Choose Open. The Individual Record window appears and is ready to accept information about an individual.

See Section 8 of the *Ultimate Family Tree User's Guide* for information on importing GEDCOM and ROOTS III files.

Getting Familiar with Ultimate Family Tree

You can use a mouse or keystrokes to execute commands in Ultimate Family Tree menus and windows. To use the mouse, position the pointer over a desired option and press the left mouse button. If a selection is required, double-click the left mouse button. To use the keyboard, press the Tab or reverse Tab (Shift+Tab) keys to position the selection bar. If a selection is required, press Enter or the appropriate shortcut key.

Menu Bar

The Menu Bar contains a list of words extending across the main window. It provides easy access to all aspects of the program.

Ultimate Family Tree: Kennedy Family — Title bar
File Edit Build Go View Search Reports Utilities Online Help

Figure 1-8:   Menu Bar

To view a menu, click once on the menu name. A menu drops down under the menu name. You can also use the keyboard to display menus. There are two keyboard methods:

• Press the Alt key to activate the menu bar and then use the right or left arrow keys to move across the bar to the menu name you want. Press the down arrow key to open the menu.

• Press the Alt key followed by the underlined letter in the menu name.

A similar approach is used to choose options within each menu. Use one of the following options:

• Press the left mouse button

- Press Alt plus the underlined letter

- Press the combination of shortcut keys indicated next to an option

    Note   At certain times during operation of the program, some menu selections are not available and a short menu appears. When the short menu bar is displayed, the Toolbar is not active.

    The menu items access a wide range of functions. For a description of each menu item, see Online Help.

Function and Shortcut Keys

Several of the keyboard function keys help you enter data more efficiently. Others are used to move up and down lists, to find people or places, and to access context-sensitive help. In combination with the Shift key or the Control (Ctrl) key, the function keys perform a wide variety of additional tasks.

Shortcut keys are a combination of the Ctrl or the Alt key with a letter key. Similar to the function keys, these specialized key strokes facilitate many essential tasks, such as copy, paste, build, and help.

Here are helpful and frequently used keyboard shortcuts:

- *F5* — To view an Individual Record, highlight a person's name anywhere in the program and press F5.

- *F8* — To open the Events window for an event, select the event and press F8 or choose the numbered button to the left of the event name.

- *F9* — To save data in a window, press F9, or in an Individual Record click the Save button on the Toolbar.

- *F10* — To find an individual, press F10. Type in that person's record number or first few letters of the name and choose Find to display the full name. Choose OK.

    See the back of the *Ultimate Family Tree User's Guide* for a list of function and shortcut keys.

Toolbar

Below the Menu Bar is the Toolbar. It contains a set of buttons and icons that you click to perform specific functions. These functions are also accessible from the Menu Bar, but the Toolbar provides a shortcut if you use a mouse. The Toolbar is not active when the short Menu Bar is displayed.

You can turn the Toolbar on and off, and you can disable the balloon (command description) help associated with each Toolbar button. See page 196 of the *Ultimate Family Tree User's Guide* for instructions.
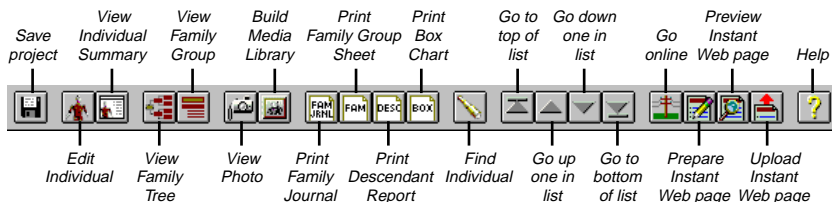
Figure 1-9:   Toolbar

The arrow buttons on the Toolbar serve two functions. They are used to move up and down lists opened from the View menu. They are also used to change from one individual to another in windows where the Find button is active. You can move to the previous, the next, the first or last person in the project. The next person is determined by the order in which you last selected and viewed an individual list. If the last individual list you opened resulted from a search, the focus will change to those individuals in the search list.

Reserved Characters

The following characters are reserved for use by Ultimate Family Tree and must be considered when entering data:

- / — Used to mark surnames. On ROOTS III import, the pipe symbol (|) is substituted for extra forward slash characters in names. Do not use the forward slash character in names except to mark the beginning and end of the surname.

- # — The number sign is used in role sentence codes. Do not use the number sign in name, event detail, place, or date fields.

- { } — Used to mark a title in a person's name. Can be used in other fields, subject to the restrictions under Rich Text Format listed in the next section, "Rich Text Format Printing."

Rich Text Format Printing

Rich Text Format (RTF) is a data exchange format developed by Microsoft to allow formatted text to be moved from one application to another. Fonts, underlining, index information, footnotes, and most other format instructions are preserved.

- \ — Used for control codes in RTF files. Do not use the backslash character in Ultimate Family Tree if you will be using the RTF feature.

- { } — Used for control codes in RTF files. Do not use the left or right brace character (except to mark a title in a name) if you will be using the RTF feature.

International Characters

If your keyboard does not have the accented keys you want for special characters, position the cursor in the location where you want the character to appear. Hold down the Alt key and use the numeric keypad to type the three-digit ASCII number for the character, or copy and paste the character from the Windows Character Map. Ultimate Family Tree uses the MS Sans Serif font in name fields. Use the Arial font setting in the Windows Character Map. See your Windows manual for help with Character Map.

Quick Start Tutorial

The Quick Start Tutorial is designed to help you learn how to perform the following tasks:

- ✓ Add a new individual
- ✓ Add parents
- ✓ Create a birth event
- ✓ Create a marriage event and add a spouse
- ✓ Create other events such as a graduation
- ✓ Create a divorce or an engagement event
- ✓ Move around the Individual Record window
- ✓ Add evidence and text
- ✓ Add a child
- ✓ Add a sibling
- ✓ View a family in a Family Tree (Pedigree) window
- ✓ View an individual

For additional hints and tips, see "Did You Know?" on page 27.

Creating an Individual Record

All information about an individual is entered in the Individual Record window. This is a simple, fill-in-the-blanks screen where an individual's name, sex, parents, spouse, children, siblings, and life's events are entered, as well as any text and footnotes for that person.

Other windows are for medical information, miscellaneous information such as nationality, languages, aliases, and social security numbers. A media window is used to attach images or audio recordings to the record for the individual.

In the following exercise, you'll add a new individual and parents, and create birth and marriage events.

Creating a New Record for Yourself

1. If this is a new project, the Individual Record window displays record number 1. If not, choose the New Individual button to display a new Individual Record window with the next available record number.
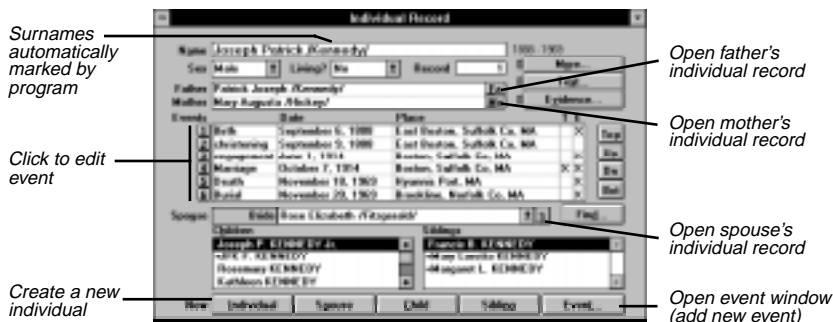
Figure 1-10:   Individual Record Window

2. In the Name field, type your full name given at birth. Ultimate Family Tree automatically marks the surname with slash (/) characters.

3. See Section 2, page 29 of the *Ultimate Family Tree User's Guide* for more information on entering names which include titles.

4. Tab to the Sex field. Type M, F, or U. Alternatively, you can press the down arrow and select Male, Female, or Unknown from the drop-down list.

5. Tab to the Living field. Type Y(es), N(o) or U(nknown). Alternatively, you can use the mouse to select one of these options from the drop-down list.

   Note   Use the mouse or the Tab key to move forward from field to field in the Individual Record window. Shift+Tab moves you in the opposite direction.

Adding Parents

1. Tab to the Father field and type the name of your father.

2. Tab to the Mother field and type the name of your mother.

   If you enter a full name in either the Parents or the Spouse fields for an individual that has already been entered into Ultimate Family Tree, a message appears when the window is being saved stating that this name has already been entered. If it is a different person, choose New. If the person has already been entered, highlight the person's name and choose List to link that individual. If you want to make changes, choose Cancel to return to the Individual Record window.

   To edit the parents records, choose the associated button to the right of the parent name. Choose *Fa* to edit the father's record. Choose *Ma* to edit the mother's record.

Creating a Birth Event

1. Tab to the Birth event date field.

2. Type your birth date using any format you want. See Section 8, page 195 of the *Ultimate Family Tree User's Guide* for information on setting date preferences.

3. Tab to the Place field and type the place of birth.

   Note   You can select an event name and press F8 or click the numbered button to the left of the event name to open the Events window where you can enter more detailed information. See page 30 of the *Ultimate Family Tree User's Guide* for more information on the Events window.

Creating a Marriage Event and Adding a Spouse

1. If your spouse is not yet in the project, choose the New Spouse button to create a new Individual Record along with a marriage record. If a marriage event has not yet been created for your parents, you are given the option to add one now.

2. A new Individual Record opens. Type the name of your spouse in the Name field.

3. Press Tab to move to the date field of the newly created marriage event and type the date on which the marriage took place.

4. Tab to the Place field and type the location of the marriage.

5. Click the "S" button to the right of the spouse's name field to return to your Individual Record.

Creating Other Events

1. Choose the New Event button to add another event. The Events window opens.
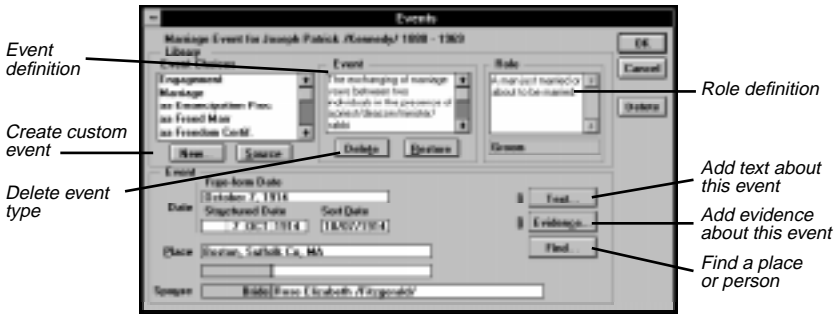
Figure 1-11: Events Window

2. Select any event from the list. To scroll the list, use the down arrow on the scroll bar or type the first letter of the event you want to move to.

3. With the event highlighted, type the free-form date in the Date field. The structured and sort date fields are automatically calculated and entered when you Tab out of the Free-form date field.

4. Tab to the Place field and type the place name where the event occurred.

5. When certain events are created, an event detail line becomes available. For example, in the case of graduation, the detail is the institution or school from which you graduated. Type the detail information in the event detail line and press Enter. A marriage or divorce type event activates the Spouse field where you can enter the name of the other individual linked to this event.

These events use the Event Detail field:

Event	Detail
burial	cemetery
graduation and education events	institution or school
resides	street address
resided	street address
employment	occupation
emigration	point of origin
immigration	destination
baptism	religion
LDS events	temple code

6. Choose OK to return to the Individual Record window.

Adding Evidence, Text, and Other Information

1. Practice using the Tab key to move around the Individual Record window. Notice the context-sensitive help that appears at the bottom of your Ultimate Family Tree window as you move from field to field.

   Note   Use the buttons to the right of the Events list to move up or down the list. An individual can have a virtually unlimited number of events recorded for his or her life. Next to the Place field in the Events list are two columns of status boxes for Event Text and Event Evidence. An X in the status box indicates Text, Evidence, or both are present.

2. Select the Birth event you created for yourself and click the Text Status box to open a window where you can type free-form notes about this event. Up to 65,000 characters of text can be entered here. Type a few words and choose OK to save the data and close the text window. An X shows that text is present for this event.

3. Choose the Event Evidence Status box to open a window where you can enter evidence to support the event, such as a birth certificate. See page 40 of the *Ultimate Family Tree User's Guide* for information about entering sources.

4. Choose the Text and Evidence buttons to type notes about an individual (up to 65,000 characters) and attach evidence documenting your knowledge of that individual. The Individual Text and Individual Evidence buttons work the same way as the Event Text and Event Evidence Status boxes.

5. Choose the More button to open an Individual More window and then choose Miscellaneous to open the Miscellaneous Individual Information window. Record miscellaneous information about yourself. Type your Social Security number in the last field and choose OK to close the window.
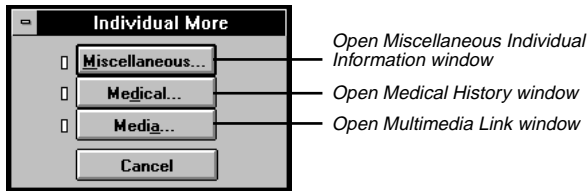
Figure 1-12:   Individual More Window

6. Choose the More button, and then Medical to open the Medical History window in which you can enter physical details and medical conditions. Choose a medical condition to open a second window where you can type up to 65,000 characters of information about that condition. Choose OK and return to the original Medical History window. Type your weight, height, and hair and eye color in the Physical characteristics group. Choose OK.

7. Choose the More button, and then Media to open the Multimedia Link window where you can attach and display or play image or audio recording files linked to an individual. See Section 7 of the *Ultimate Family Tree User's Guide* for information about adding and linking Media.

8. Choose Cancel to close the Multimedia Link window and return to the Individual Record window.

Adding a Child

The Children box lists all children of the selected individual.

1. Add a child by choosing the New Child button at the bottom of your Individual Record window.

2. In the Parent window, specify the name of the other parent and choose Selected. A new Individual Record window opens with the child's surname already entered and the parent's names in the Mother and Father fields.
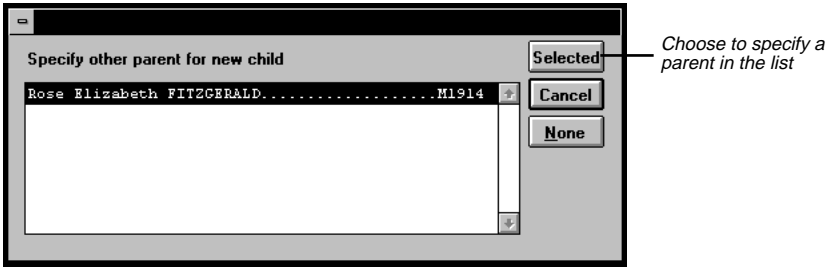
Figure 1-13:   Other Parent Window

> **Note**   If the correct parent is not listed in the Other Parent window, choose None. A new Individual Record window opens. Enter the correct parent (if known) in the Father or Mother field.

3. Type your child's given name before the surname in the name field and complete the rest of the information.

Adding a Sibling

The Siblings window lists all siblings of the subject, including half-siblings.

1. From a child's Individual Record window choose the New Sibling button to add a brother or sister. A new Individual Record window opens for your child's brother or sister with the sibling's surname already entered, along with your name and your spouse's name in the parent fields.

2. Complete the sibling's name field and the rest of the Individual Record.

> **Note**   To use the Sibling button on the Individual Record, you must have entered a parent. If you do not know the parents for a group of siblings, enter a name for the father or mother in one of the parent fields. For example, for an individual named *John Smith*, you could enter a father or mother named *Unknown /Smith/*, or *(-----) /Smith/*.

You have just entered three generations of individuals in your project and familiarized yourself with the Individual Record window. Now you can view your data.

Viewing Ancestors in the Family Tree (Pedigree) Window

1. From the View menu, choose Family Tree to leave the Individual Record window and open the Family Tree window, which is also known as a Pedigree chart.
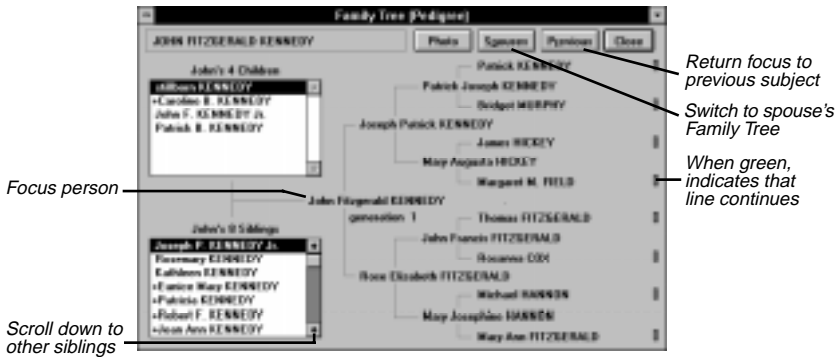
Figure 1-14:   Family Tree (Pedigree) Window

2. Click the Find Individual button on the Toolbar or press the Find Key (F10) to open the Find individual window. Type the number 1 and press Enter (or choose Find) to find your name. Choose OK.

    The Family Tree window opens with your name in the focus position with generation 1 displayed beneath it. You can view up to five generations of a family at once. Your children are listed at the top left and, if you have entered any of your siblings, they are listed at the bottom left. A plus (+) sign to the left of a name in the Child or Sibling window means that this person has descendants.

    The generation number changes depending on the generation of the focus person in relation to the original starting person displayed at the upper left of the Family Tree window.

3. Double-click your name in the upper-left corner of the window to bring yourself back to the focus position. Choose Close to close the window.

Viewing a Family Group

1. From the View menu, choose Family Group. The husband and his parents (if known) are displayed at the top, the wife and her parents are displayed in the center, and their children appear at the bottom of the window.
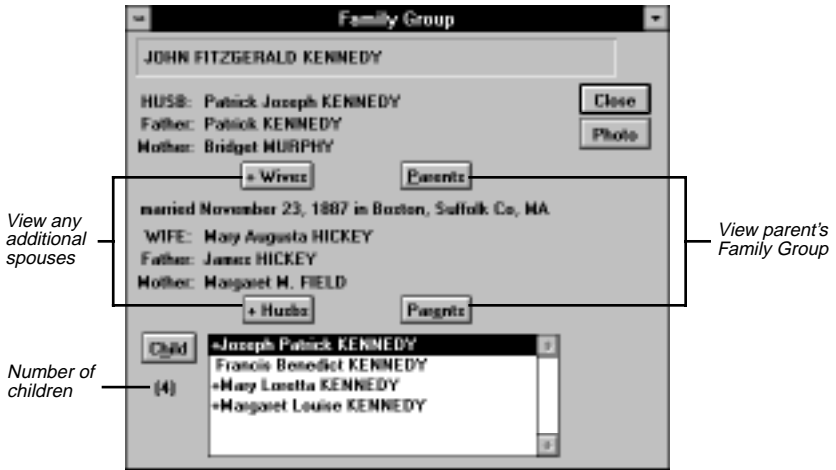
Figure 1-15:   Family Group Window

2. To change the focus of the window, click Parents to move your parents into the Husband and Wife fields. Select a child in the Child list box and choose the Child button to change the focus to that child.

3. Select your name and choose Close to close the window.

Viewing an Individual Summary

1. From the View menu, choose Individual Summary to view all the information recorded about yourself. This window can be sized smaller or larger for ease of reading.
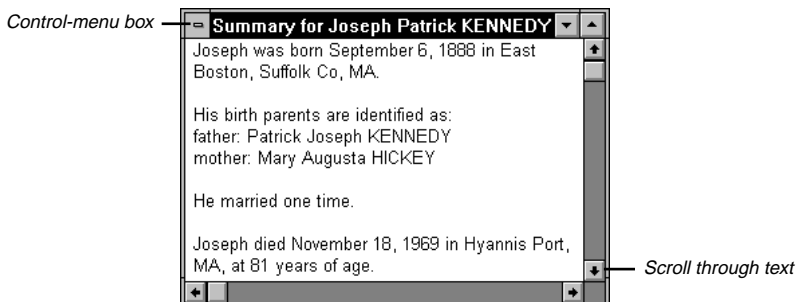
Figure 1-16:   Individual Summary Window

Note   Event details are displayed twice when viewing an Individual Summary. Because the Individual Summary shows a summary of all the information entered for an event, it displays the text that will be printed in the report as well as the basic data entered in the detail field. For this reason, you can view the more extensive event information that can be entered into ROOTS IV and then accessed in Ultimate Family Tree. What you see as a duplicate detail on the computer screen will not print in your report.

2. Scroll through the text to review the information that you entered.

3. Close the window by choosing the Close box or by pressing Escape.

If you have entered data for your family during this tutorial session, you can now add to it. If you would like to delete this tutorial project and start anew, follow the steps in the next section.

Deleting a Project

1. Choose Delete Project from the File menu. A warning window opens with this message, *ARE YOU SURE? ### records will be PERMA-NENTLY deleted if you choose OK.*
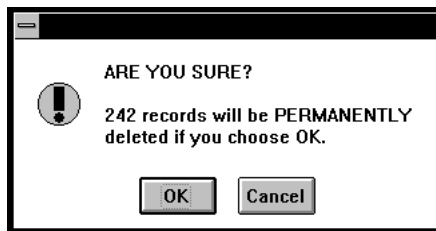
Figure 1-17:   Delete Project Warning

2. Choose OK.

3. Another window appears with this message: *ARE YOU SURE? This project will be PERMANENTLY erased if you choose OK.* Choose OK.

Did You Know?

There are some important features and short cuts built into Ultimate Family Tree designed to make entering your data easy. Read through this section for a description of some of these features. See "Frequently Asked Questions" on page 206 of the *Ultimate Family Tree User's Guide* for answers to common questions.

Go Menu

The Go menu has two functions. It gives you the ability to move through lists and to quickly return to recently edited records. Choose Go Top to move to the first person in the project. Choose Go Bottom to move to the last person. Choose Up or Down to move to the next person in the list. The person's position in the list is determined by the order in which you last selected and viewed an individual list. If the last list you opened resulted from a search, the focus will change to those individuals in the search list.

     Up to ten individual names are displayed in the Go List. Each time you open an Individual Record, the name of that individual is moved to the top of the list. From the Go menu, choose any name in the list to return to that individual's record.

The New Spouse Button

To enter a new spouse for an individual, choose the New Spouse button. An Individual Record window opens allowing you to enter the name and other information for the new spouse. You can return to the first spouse by choosing the "S" button to the right of the name on the Spouse field or by selecting the name from the Go menu. The marriage information can be entered in either record.

     If the spouse is already in the project, choose New Event rather than New Spouse. Select Marriage from the list and type part of the name in the Spouse field. Choose Find to open the Candidate Individuals list with individuals whose names begin with the letters you typed in the list. Select the name and choose OK. If you type the complete name instead of choosing Find, a message appears when you save the record asking if the person is an existing person from the list. If so, choose List. If it is a new person, choose New.

Text and Evidence Status Boxes

Event text and evidence can be added in the Events window or in the Individual Record window. Two columns to the right of the Event Place field in the Individual Record window contain Text and Evidence status boxes. Click the

Text or Evidence status box to open the associated window. An *X* in the status box indicates that data is present.

Choose the numbered button next to an event name to open the Events window where you can choose the Text or Evidence button to enter additional information.

Using Undo

If you choose the New Individual, New Spouse, New Child or New Sibling button and decide not to create the new record, choose Undo from the Edit menu to delete the record and return to the previous record.

> **Note** Undo is not available if the record has been saved. As you enter information, the record is saved automatically. To delete a saved record, from the File menu, choose Delete Record.

Date Preferences

You can specify the date format for the free-form date field. Set your preference to have dates display and print exactly as you've entered them or set a date format default such as 12 JUL 1943.

From the Utilities menu, choose Desktop Preferences, and then Miscellaneous. Scroll through the date options and select the format you want. If you select any option other than "As entered," modifiers will be converted to full words in the free-form date field, such as ABT to about. Dates entered before selecting a date preference are unchanged.

Graphics Display

Ultimate Family Tree provides two styles for desktop display, Graphics and Windows Colors. The graphics mode can reduce the performance of the program. If you suspect that Ultimate Family Tree is running more slowly than it should, switch to the Windows color mode.

From the Utilities menu, choose Desktop Preferences and then Miscellaneous. Choose Use Window colors and "none" in the Wallpaper drop-down list to change to Windows colors. Restart Ultimate Family Tree to complete the change.

When you open certain window while in the graphics mode, the message, "Picture colors may be incorrect. Do you wish to use Windows Colors?" may appear. Choose No to ignore the message and open the window. Choose Yes to change the desktop display to Windows Colors. Exit and then restart Ultimate Family Tree to change to Windows colors. This message will appear

if your graphics monitor is set to 256 colors. If your monitor is set to 16 colors, the Windows Colors are used.

Editing Place Names

If you want to edit or combine place names, create a new Individual Record for a temporary person. Select "an unknown location" on the birth event field and choose the Find button. A list of all places in the Place Library is displayed. Scroll throughout the list to find place records you want to edit. Highlight a place name and choose OK. Edit the place name and press F9, or choose the Save button on the Toolbar or Save from the File menu. A message appears stating that the place name has been changed. Choose OK to save the spelling change. Because the Place Library is common to all projects, changing the spelling will change it globally throughout the open project and all other projects.

To edit another place, highlight the place name in the Individual Record and press the Del (Delete) key on your keyboard. Press F9 to save and then choose the Find button to reopen the Place List. Select another place from the list.

Note   See pages 192 of the *Ultimate Family Tree User's Guide* for information on combining duplicate place names.

When you have completed editing the place names, from the File menu, choose Delete Record to delete this temporary record from the project.

Finding Individuals

There are several ways to find new subjects for the Individual Record window besides using the Find Individual window. If you select the main name field in the Individual Record window and choose the Find button, a list of all individual in the project opens. The list is alphabetical by given name. Press any letter on the keyboard to move to the given names in the list which start with that letter. Select a name and choose OK to change to that person's record.

You can also choose a name from the Individual List. From the View menu, choose Individual List, and then by Surname. Scroll through the list and double-click the left mouse button on a name to open the Individual Record for that person.

From the Go menu, choose any name to move to that person Individual Record. Up to ten of the last individuals edited are displayed in the Go list.

See page 80 of the *Ultimate Family Tree User's Guide* for information on using the Find Individual window.

Using Existing Records for Parent and Spouse Fields

If you enter a full name in either the Parents or the Spouse fields for an individual that has already been entered into Ultimate Family Tree, a message appears when the window is being saved stating that this name has already been entered. If it is a different person, choose New. If the person has already been entered, highlight the person's name and choose List to link that individual. If you want to make changes, choose Cancel to return to the Individual Record window.

Section 2:
Ultimate Family Tree for Macintosh

Welcome to Ultimate Family Tree™ and the exciting world of genealogy. Genealogy is the pursuit of knowledge about our past. It's a way to look at our families in order to better understand ourselves. With Ultimate Family Tree, you can view the past in ways never dreamed possible by your ancestors.

Ultimate Family Tree's easy-to-use data entry screens, Instant Web Page Publisher, spell checker, and online capabilities are firsts for any genealogy software. Using Ultimate Family Tree, you can document events in each individual's life by drawing from a library of almost 200 predefined events or by creating your own. Fundamental information for each person is entered through Ultimate Family Tree's powerful Individual Record window.

The online functions provided by Ultimate Family Tree are its most exciting feature. It's possible to connect directly to the program's exclusive Web site and converse with research experts, download useful genealogical information, and upload your own family history Web page.

Soon you will be entering your own information and creating beautiful journals of loved family members. To help you get started with your genealogical research Palladium Interactive has furnished an on-disk *Beginner's Guide to Genealogy* in Adobe Acrobat Reader format. The *Beginner's Guide to Genealogy* is called BEGINNER.PDF and is found in the DOCS folder of the Ultimate Family Tree CD-ROM. Also in this directory you will find complete user's guides in PDF format.

Help is Always at Your Fingertips

Ultimate Family Tree provides the following help:

- The *Ultimate Family Tree User's Guide* on CD-ROM

- The Ultimate Family Tree Web Site *http://www.uftree.com*

- Online Help—an online reference guide that includes context sensitive help, extensive cross referencing, troubleshooting assistance, a guide to error messages, answers to frequently asked questions, and a glossary.

- Technical support

If you have questions about any aspects of the program, follow these steps:

1. Check the Table of Contents and the Index of the *Ultimate Family Tree User's Guide* for the subject with which you need help, or from the Help menu, choose Help or Help Topics.

2. See "Troubleshooting" in Section 9 of the *Ultimate Family Tree User's Guide* and online help for answers to common problems.

3. Contact Ultimate Family Tree Technical Support:

- *FAX*   812-829-1020

- *Mail*   743 E. Franklin Street, Suite B, Spencer, IN 47460

- *CompuServe*   GO GENSUP

- *Internet (email)*   pifamily@palladiumnet.com

- *Telephone*   812-829-4405 (8 AM–10 PM CST, M–F)

   If you call for technical support, please call while you're at your computer. Technical support is offered for questions or problems using Ultimate Family Tree. For questions on using your computer, consult the *Macintosh User's Guide* or contact Apple at (800) SOS-APPL.

Getting Ready to Install

System Requirements

Ultimate Family Tree is a Macintosh program designed for System 7.0.1 or higher, 68040 or PowerMac, 8 MB RAM (16 MB strongly recommended for better performance), 22 MB free hard disk space (plus 5 MB per thousand

names, and an additional 11 MB if installing AT&T WorldNet℠), a color monitor, and a double-speed CD-ROM drive. A modem (9600 bps minimum; 14.4 kbps or greater recommended) and Internet access are required to use the Go Online feature.

A word processor is also required. Ultimate Family Tree prepares charts and reports to be displayed and printed with any word processor capable of importing Rich Text Format (RTF) files. Microsoft Word is recommended. Box charts are sent directly to your printer.

> **Note** If you have less than 16 MB of physical RAM you must turn on Virtual Memory to run Ultimate Family Tree. *Using Virtual Memory will significantly slow the performance of your Macintosh.*
>
> If AppleScript™ and AppleScriptLib™ are not found, they will be installed (these system extensions are required to run Ultimate Family Tree, and must be enabled by rebooting).

Make Sure You Have Everything You Need

Your Ultimate Family Tree package should include:

- This guide
- Registration card
- On-Line Guide
- Upgrade instructions
- Ultimate Family Tree CD-ROM

Customer Registration

Fill out and mail the enclosed registration card immediately. This card qualifies you to receive free technical support and notification of upgrades.

Installing Ultimate Family Tree

Installation Instructions

To install Ultimate Family Tree as a new program, follow these steps:

1. Insert the Ultimate Family Tree CD-ROM.

2. Double-click the Ultimate Family Tree Install icon.

3. A warning will appear if you have less than 16 MB of RAM, and you will be prompted to continue or quit (if you have more than 16 MB of RAM you will not see this warning). It is possible to complete the installation with less than 16 MB of RAM, but the product will suffer performance problems.

4. The Ultimate Family Tree start-up logo appears. Click Continue.

5. The README box appears. The README file contains late-breaking information regarding the product that could not be included in the manual. You have the option to read, print, or save the README file to disk. Make your choice and then click Continue.

6. At the SETUP window, click Install if you have never installed the program before. This will install all of the Ultimate Family Tree Deluxe software.

7. When all products have been installed, you will be prompted to restart your Macintosh.

On-Line Guide and Browser Setup

After you have installed Ultimate Family Tree you must run the Browser Setup program to enable the on-line functionality of the program. Refer to the instructions in the enclosed On-Line Guide to configure your browser for use with the Palladium Interactive Members Only Web Site. Double-click the Browser Setup Icon and follow the on-screen instructions.

Reinstalling Ultimate Family Tree

1. Insert the Ultimate Family Tree CD-ROM.

2. Double-click the Ultimate Family Tree Install icon.

3. A warning will appear if you have less than 16 MB of RAM, and you will be prompted to continue or quit (if you have more than 16 MB of RAM you will not see this warning). It is possible to complete the installation with less than 16 MB of RAM, but the product will suffer performance problems.

4. The Ultimate Family Tree start-up logo appears. Click Continue.

5. The README box appears. The README file contains late-breaking information regarding the product that could not be included in the manual. You have the option to read, print, or save the README file to disk. Make your choice and then click Continue.

6. On the upper left corner of the SETUP window, locate the box labelled Easy Install. Click the down arrow and choose Custom Install. To remove Ultimate Family Tree from your hard disk, choose Remove.

7. Select the product or files you want to install: Application Files, Browser Setup, Extensions, Image Files, Records Requester, Family Album Maker, Social Security Death Index, Gazeteer.

8. Select Application Files to reinstall the application files only.

    Warning   If you select Library Files, any existing library files will be overwritten and result in data loss.

9. Follow steps 4–7 in "Installing Ultimate Family Tree" to complete the reinstallation.

Starting Ultimate Family Tree

Before starting Ultimate Family Tree you should be familiar with your Macintosh and have Ultimate Family Tree installed on your computer.

To start Ultimate Family Tree, follow these steps:

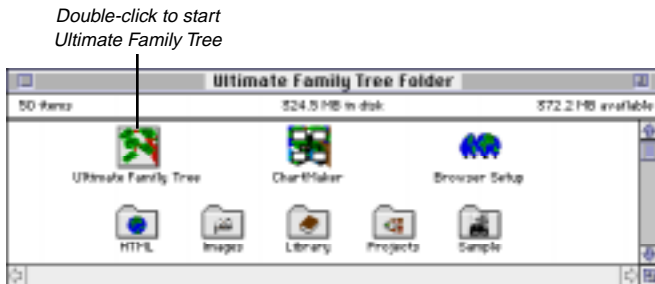1. Open the Ultimate Family Tree folder.

Figure 2-1:   Ultimate Family Tree Folder

2. Double-click the Ultimate Family Tree icon. If you are starting Ultimate Family Tree for the first time, the Ultimate Family Tree splash screen appears, followed by the Welcome window with a message stating that Ultimate Family Tree did not find an open project.

3. You are offered the following options:

Figure 2-2:   Welcome Window

- *New* — Begin a new project from scratch
- *Open* — Open an existing Ultimate Family Tree project
- *Quit* — Leave Ultimate Family Tree

Ultimate Family Tree Desktop Display

Ultimate Family Tree provides two styles for desktop display: custom graphics and Macintosh colors. Using Macintosh colors establishes desktop and window colors from the Color control panel. (If your monitor is set to 16 colors, Macintosh Colors are used by default.)

Open Miscellaneous, Medical, and Media windows

Go to top of event list
Move up one event
Move down one event
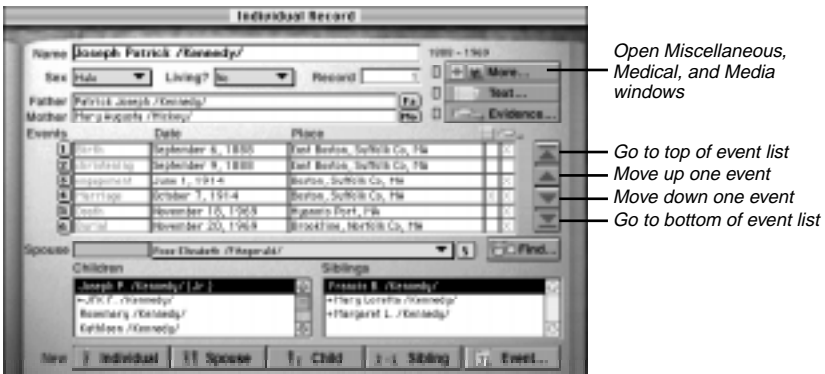Go to bottom of event list

Figure 2-3:   Individual Record with Custom Graphics Desktop Display

Using the custom graphics display can reduce the performance of the program. If you suspect that Ultimate Family Tree is running more slowly
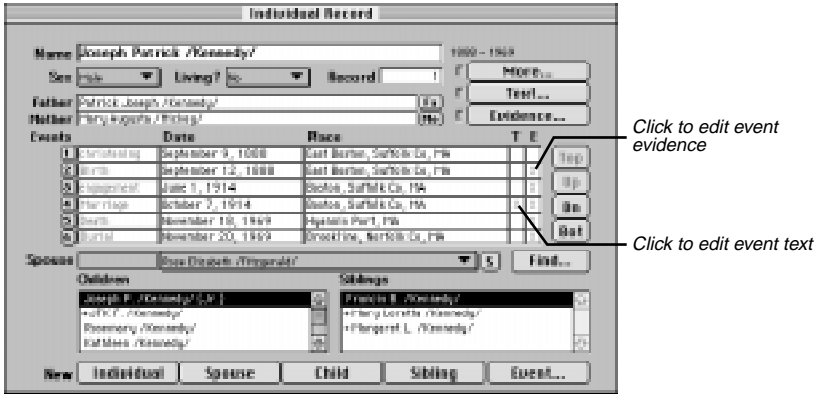
Figure 2-4: Ultimate Family Tree with Macintosh Colors Desktop Display

than it should, refer to page 163 for instructions on how to switch to the Macintosh colors mode. Choose the option for Ultimate Family Tree according to your personal preference and system performance.

> **Note** The illustrations in this *Guide* were made using the Macintosh Colors option.

Creating a New Project

To start a new project in Ultimate Family Tree, follow these steps:

1. In the Welcome window or from the File menu, choose New. A New File window opens.

Figure 2-5: New File Window

2. In the Type list, select Ultimate Family Tree and click OK.

3. In the Specify a New Project Name field, enter a name for the new project.

Path to file

File list

Type project name

Save file

Figure 2-6:   New Project Name Window

4. Select the folder for the new project. Typically, it's called Projects. The current folder name appears above the file list.

   Note   Do not save to a floppy disk. Be sure you have sufficient disk space on the hard drive before starting a new project. You need at least 2.5 MB of free disk space for every 1,000 individuals.
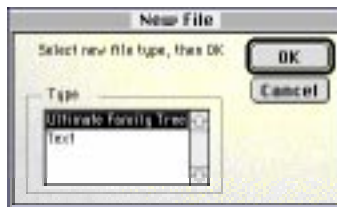
5. Click Save. The project has now been created and the Project Information window is displayed.

Path to the Project Control file

The date the project was last edited

Update Key Family list

Version number of project

Version number of Ultimate Family Tree
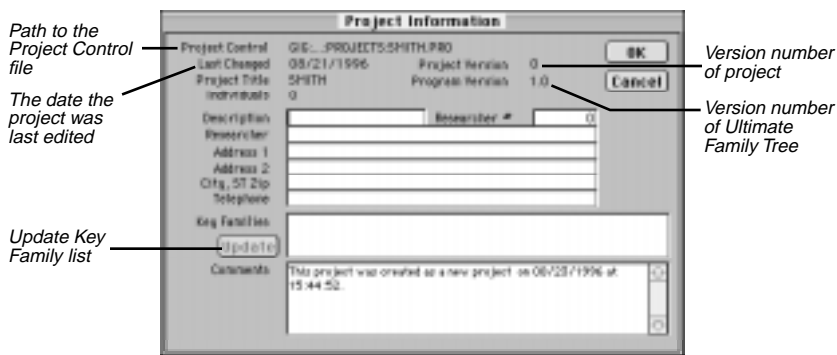
Figure 2-7:   Project Information Window

   Note   To open the Project Information window at any time, choose Project Info from the File menu.

6. Enter a short description of the project, such as a family name, on the Description line.

7. Enter the name of the principal researcher for this project in the Researcher field. This field is optional, but you can have the researcher's

name appear in the footer on printed reports by typing a name here and checking the Preparer box in the Page Setup window. See the note below.

8. Enter the address of the researcher. This information can be included in the footer with the preparer's name, if you want. You might include *Prepared by:* before the name to have the footer of your reports printed in this way.

   Note   To print the relationship of the preparer to the husband and wife on Family Group reports when Preparer Info is checked, enter the Researcher's record number in the Researcher # field. For a new project, enter an Individual Record for the preparer and then return here by choosing Project Info from the File menu.

9. Key Families is a list of surnames in the project arranged in the order of frequency of occurrence. Ultimate Family Tree keeps track of the number of times each surname is encountered and displays it to the right of the name. This field is blank for a new project. Click the Update button to update the Key Families surname list. When new individuals have been entered into Ultimate Family Tree, choose Update to get a new count of the surnames.

10. The Comments field displays the source of the data used in this project, including import method, date, and time. Enter general information about the project in this box.

11. Click OK to close the window and save changes. The Individual Record window appears and you're ready to begin.

Opening an Existing Project

To open an existing project, follow these steps:
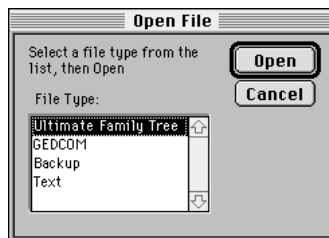
1. Choose Open from the File menu.

Figure 2-8:   Open File Window

2. In the File Type list, select Ultimate Family Tree and click Open.
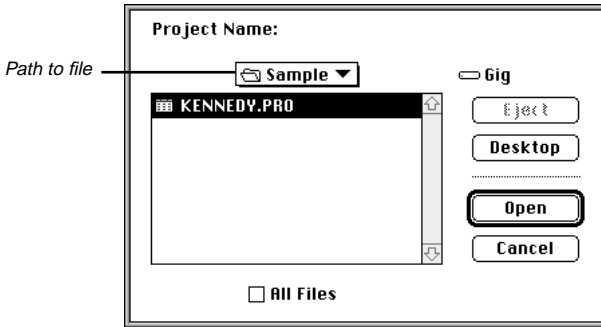
Figure 2-9: Open File Window

3. Select the folder for the existing project. Select the Sample folder if you want to open the Kennedy sample project, or the Projects folder if you've already converted or saved a project that you'd like to open.

4. Select the project you want to open.

5. Click Open. The Individual Record window appears and is ready to accept information about an individual.

Getting Familiar with Ultimate Family Tree

You can use your mouse or keyboard to execute most commands in Ultimate Family Tree menus and windows. To use the mouse, position the pointer over a desired option and press the mouse button. If a selection is required, double-click the mouse button. To use the keyboard, press the appropriate shortcut key.

Menu Bar

The menu bar contains a list of words extending across the main window. It provides easy access to all aspects of the program.

To view a menu, point on the menu name, hold down the mouse button, move the pointer to highlight your choice, and release the mouse button. At

Online help

Figure 2-10:   Menu Bar

certain times during operation of the program, some menu selections are not available and appear grayed out. At other times, a different set of menu items will appear, depending on your activity in Ultimate Family Tree.

The menu items access a wide range of functions. For a description of each menu item, use Online Help by choosing Help from the Help menu.

Shortcut Keys

Several of the keyboard keys help you enter data more efficiently, find people, and access context-sensitive help.

Shortcut keys are a combination of the ⌘ (Command) key with a letter key. These specialized keystrokes facilitate many essential tasks, such as copy, paste, and help.

Here are some helpful and frequently used shortcuts:

- ⌘-A — Select All

- ⌘-B — Spell Check

- ⌘-C — Copy

- ⌘-D — Delete Record

- ⌘-F — Find Text

- ⌘-G — Find Text Again

- ⌘-I — Project Information

- ⌘-L — Locate (Find) Individual

- ⌘-P — Print

- ⌘-Q — Quit

- ⌘-R — Redo

- ⌘-S — Save

- ⌘-V — Paste

- ⌘-X — Cut

- ⌘-Z — Undo

- ⌘-/ — Help

See the back of the *Ultimate Family Tree User's Guide* for a handy list of shortcut keys.

Reserved Characters

The following characters are reserved for special use by Ultimate Family Tree and must be considered when entering data:

- / — The forward slash is used to mark surnames. Do not use the forward slash character in names except to mark the beginning and end of the surname.

- # — The number sign is used in role sentence codes. Do not use the number sign in name, event detail, place, or date fields.

- { } — Braces are used to mark a title in a person's name. Can be used in other fields, subject to the restrictions under Rich Text Format listed in the next section, "Rich Text Format Printing."

Rich Text Format Printing

Rich Text Format (RTF) is a data exchange format developed by Microsoft to allow formatted text to be moved from one application to another. Fonts, underlining, index information, footnotes, and most other format instructions are preserved. For more information on RTF and printing in Ultimate Family Tree, see Section 5 of the *Ultimate Family Tree User's Guide*. Please be aware of the following special characters:

- \ — The backslash is used for control codes in RTF files. Do not use the backslash character in Ultimate Family Tree.

- { } — The braces are used for control codes in RTF files. Do not use the left or right brace character except to mark a title in a name.

Ultimate Family Tree and WindowShade

The Apple system extension WindowShade is incompatible with Ultimate Family Tree. WindowShade allows you to roll up an open window into its title bar by double-clicking the window's title bar. Using WindowShade in Ultimate Family Tree may cause screen redraw problems. However, it will *not* corrupt your data or cause Ultimate Family Tree to crash.

Quick Start Tutorial

The Quick Start Tutorial is designed to help you learn how to perform the following tasks:

✓ Add a new individual

✓ Add parents

✓ Create a birth event

✓ Create a marriage event and add a spouse

✓ Create other events such as a graduation

✓ Create a divorce or an engagement event

✓ Move around the Individual Record window

✓ Add evidence and text

✓ Add a child

✓ Add a sibling

✓ View a family in a Family Tree (Pedigree) window

✓ View an individual

For additional hints and tips, see "Did You Know?" on page 52.

Creating an Individual Record

All information about an individual is entered in the Individual Record window. This is a simple, fill-in-the-blanks screen where an individual's name, sex, parents, spouse, children, siblings, and life events are entered, as well as any text and footnotes for that person.

Other windows are for medical information and miscellaneous information such as nationality, languages, aliases, and social security number. A media window is used to attach images to the individual record.

In the following exercise, you'll add a new individual and parents, as well as create birth and marriage events.

Creating a New Record for Yourself

1. If this is a new project, the Individual Record window displays record number 1. If not, click the Individual button at the bottom of the window to create a new record with the next available record number.
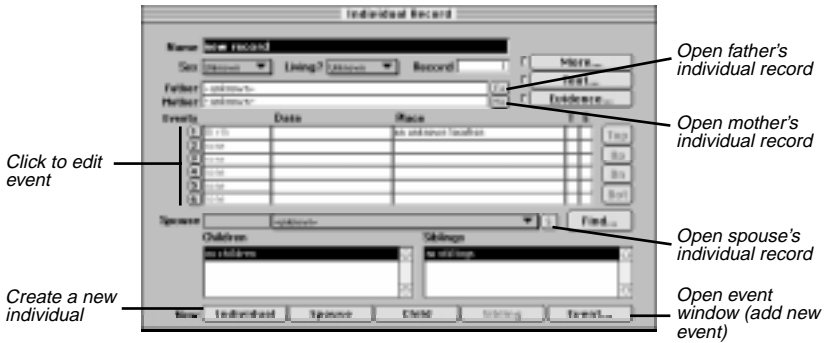
Figure 2-11:   Individual Record Window

2. In the Name field, type your full name given at birth. Ultimate Family Tree automatically marks the surname with slash (/) characters when you move the cursor to the next field or click a button.

    Note   See Section 2, page 27 of the *Ultimate Family Tree User's Guide* for more information on entering names which include titles.

3. Set the sex of the individual by selecting Female, Male, or Unknown from the pop-up menu.

4. Choose No, Yes, or Unknown from the Living pop-up menu.

    Note   Press Tab and Shift-Tab or use the mouse to move from field to field in the Individual Record window.

Adding Parents

1. Put the cursor in the Father field and type the name of your father.

2. Press Tab to move to the Mother field and type the name of your mother. If either parent is already in the project, type the first name of the parent in the appropriate field and click the Find button next to the Spouse field. A list of everyone with that name will appear in the Candidate Individual window. Select the correct individual and click OK.

    If you enter a full name in the Father, Mother, or Spouse field for an individual that has already been entered into Ultimate Family Tree, a message appears when the window is being saved stating that the name has already been entered. If it is a different person, click New. If the person has already been entered, highlight the person's name and click List to link that individual. If you want to make changes, click Cancel to return to the Individual Record

window. To edit the parents' records, click the associated button to the right of the parent's name—click *Fa* to edit the father's record or *Mo* to edit the mother's record.

If a marriage record is not found for the parents, a message appears when saving, "The marriage event for the parents of … has not been recorded. Do you wish to add a marriage event now?" Click Yes to create a marriage, No to save the record without creating a marriage, or Cancel to return to the Individual Record window without saving.

Creating a Birth Event

1. Move the cursor to the Birth event date field.

2. Type your birth date using any format you want. See Section 8, page 164 of the *Ultimate Family Tree User's Guide* for information on setting date preferences.

3. Press Tab to move to the Place field and type the place of birth.

   Note   You can select an event name and click the numbered button to the left of the event name to open the Events window where you can enter more detailed information. See page 28 of the *Ultimate Family Tree User's Guide* for more information on the Events window.

Creating a Marriage Event and Adding a Spouse

1. If your spouse is not yet in the project, click the Spouse button at the bottom of the window to create a new Individual Record along with a marriage record. If a marriage event has not yet been created for your parents, you are given the option to add one now.

2. A new Individual Record opens. Type the name of your spouse in the Name field.

3. Move the cursor to the date field of the newly created marriage event and type the date on which the marriage took place.

4. Press Tab to move to the Place field and type the location of the marriage.

5. Click the *S* button to the right of the spouse's name field to return to your Individual Record. (For additional information, see "Creating a New Marriage Event" on page 33 of the *Ultimate Family Tree User's Guide*.)

   Note   Use the transport buttons to the right of the Events list to move up or down the list. An individual can have a virtually unlimited number

of events recorded for his or her life. Next to the Place field in the Events list are two columns of status boxes for Event Text and Event Evidence. An *X* in the status box indicates text, evidence, or both are present.

Creating Other Events

1. Click the Event button at the bottom of the window to add a new event. The Events window opens.

Event definition

Create custom event

Delete event type

Role definition

Add text about this event

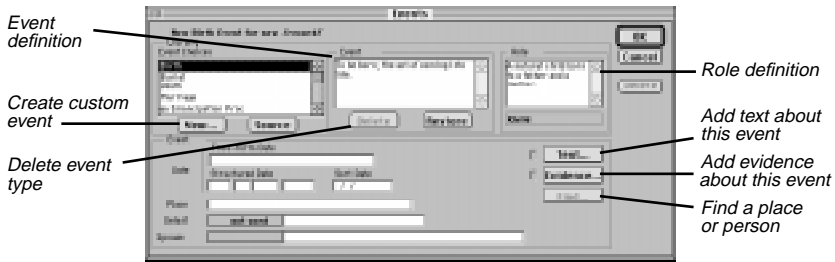*Add evidence about this event*

Find a place or person

Figure 2-12:   Events Window

2. Select any event from the list. To view the entire list of events, use the scroll bar or type the first letter of the event you want.

3. With the event highlighted, type the free-form date in the Date field. The structured and sort date fields are automatically calculated and entered when you select another field in the Events window.

4. Move the cursor to the Place field and type the place name where the event occurred.

5. When certain events are created, an event detail line becomes available. For example, in the case of graduation, the detail is the institution or school from which your subject graduated. Type the detail information in the event detail line and press Return. The marriage and divorce events activate the Spouse field where you can enter the name of the other individual linked to this event.

6. Click OK to return to the Individual Record window.

These events use the Event Detail field:

Event	Detail
burial	cemetery
graduation and education events	institution or school
resides	street address
resided	street address
employment	occupation
emigration	point of origin
immigration	destination
baptism	religion
LDS events	temple code

Adding Evidence, Text, and Other Information

1. Select the Birth event you created for yourself and click the Text status box to open a window where you can type free-form notes about this event. Up to 65,000 characters of text can be entered here. Type a few words and click OK to save the data and close the text window. An *X* shows that text is present for this event.

2. Click the Event Evidence status box to open a window where you can enter evidence to support the event, such as a birth certificate. (See page 39 of the *Ultimate Family Tree User's Guide* for information about entering sources.)

3. Click the Text and Evidence buttons on the Individual Record window to type notes about an individual (up to 65,000 characters) and attach evidence about that individual. The Individual Text and Individual Evidence buttons work the same way as the Event Text and Event Evidence status boxes.

4. Click the More button to open an Individual More window and then click Miscellaneous to open the Miscellaneous Individual Information window. Record miscellaneous information about yourself. Type your Social Security number in the last field and click OK to close the window.

5. Click the More button, and then click Medical to open the Medical History window in which you can enter physical details and medical conditions. Click a medical condition to open a second window where you
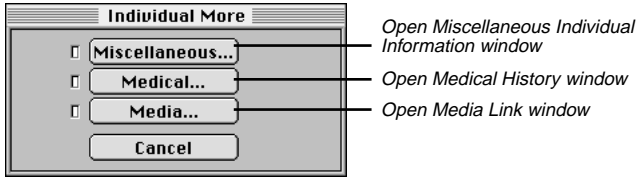
Open Miscellaneous Individual Information window

Open Medical History window

Open Media Link window

Figure 2-13:   Individual More Window

can type up to 65,000 characters of information about that condition. Click OK and return to the original Medical History window. Type your weight, height, and hair and eye color in the Physical characteristics group. Click OK.

6. Click the More button, and then click Media to open the Media Link window where you can attach and display image files linked to an individual. (See Section 7 of the *Ultimate Family Tree User's Guide* for additional information about adding and linking media.)

7. Click Cancel to close the Media Link window and return to the Individual Record window.

Adding a Child

The Children field lists all children of the selected individual.

1. Add a child by clicking the Child button at the bottom of your Individual Record window.

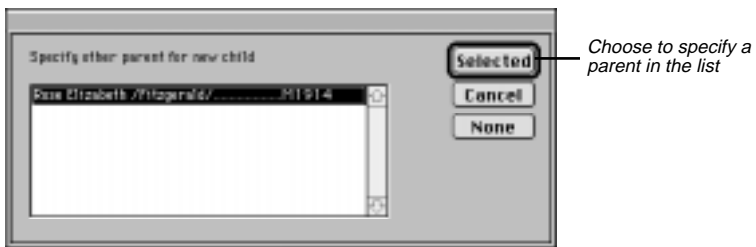Choose to specify a parent in the list

Figure 2-14:   Parent Selection Window

2. In the parent selection window, choose the name of the other parent and click Selected. A new Individual Record window opens with the child's surname already entered and the parent's names in the Mother and Father fields.

Note   If the correct parent is not listed in the parent selection window, click None. A new Individual Record window opens. Enter the correct parent (if known) in the Father or Mother field.

3. Type your child's given name before the surname in the name field and complete the rest of the information. (For additional information on editing children, see "Changing Parents" on page 53.)

Adding a Sibling

The Siblings window lists all siblings of the subject, including half-siblings.

1. From a child's Individual Record window click the Sibling button at the bottom of the window to add a brother or sister. A new Individual Record window opens for your child's brother or sister with the sibling's surname already entered, along with your name and your spouse's name in the parent fields.

2. Complete the sibling's name field and the rest of the Individual Record.

   Note   To use the Sibling button on the Individual Record, you must have entered a parent. If you do not know the parents for a group of siblings, enter a name for the father or mother in one of the parent fields. For example, for an individual named *John Smith*, you could enter a father or mother named *Unknown /Smith/*, or *(-----) /Smith/*. See "Adding Parents" on page 27 of the *Ultimate Family Tree User's Guide* for more information.

   You have just entered three generations of individuals in your project and familiarized yourself with the Individual Record window. Now you can view your data.

Viewing Ancestors in the Family Tree (Pedigree) Window

1. From the View menu, choose Family Tree to open the Family Tree window, which is also known as a Pedigree chart.

2. To locate an individual, choose Locate from the Search menu or press ⌘-L to open the Find Individual window. Type the number 1 and press Return (or click Find) to find your name. Click OK.

   The Family Tree window opens with your name in the focus position with generation 1 displayed beneath it. You can view up to five generations of a family at once. Your children are listed at the top left and, if you have entered any of your siblings, they are listed at the bottom left. A plus (+) sign to the left of a name in the Child or Sibling window means that this person has descendants.
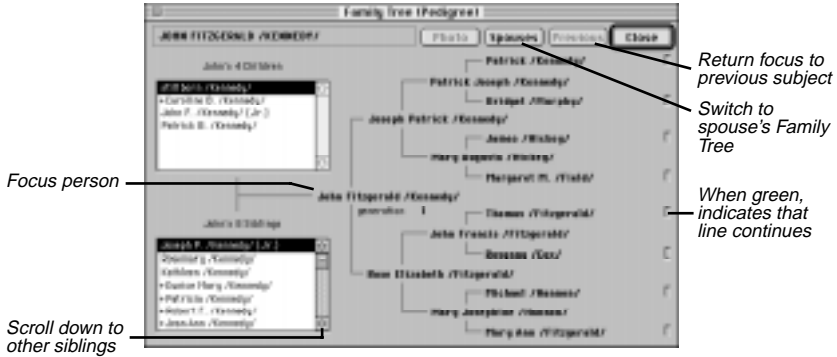
Figure 2-15: Family Tree (Pedigree) Window

The generation number changes depending on the generation of the focus person in relation to the original starting person displayed at the upper left of the Family Tree window.

3. Double-click your name in the upper-left corner of the window to bring yourself back to the focus position. Click Close to close the window.

Viewing a Family Group

1. From the View menu, choose Family Group. The husband and his parents (if known) are displayed at the top, the wife and her parents are displayed in the center, and their children appear at the bottom of the window.

2. To change the focus of the window, click the Parents button to move your parents into the Husband and Wife fields. Select a child in the Child list box and click the Child button to change the focus to that child.

3. Select your name and click Close to close the window.

Viewing an Individual Summary

1. From the View menu, choose Individual Summary to view all the information recorded about yourself. This window can be sized smaller or larger for ease of reading.

   Note   Some event details are displayed twice when viewing an Individual Summary. Because the Individual Summary shows a summary of all the information entered for an event, it displays the text that will be printed in the report as well as the basic data entered in the detail field.
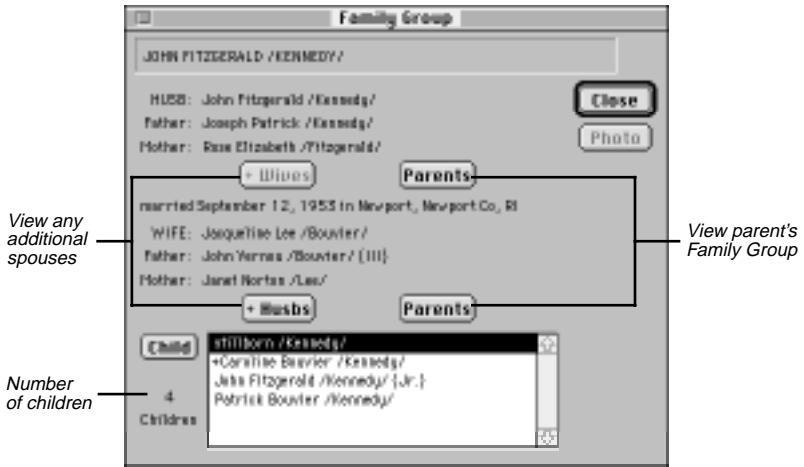
Figure 2-16: Family Group Window

View any additional spouses

View parent's Family Group

Number of children

Figure 2-17: Individual Summary Window

Close box

Scroll through text
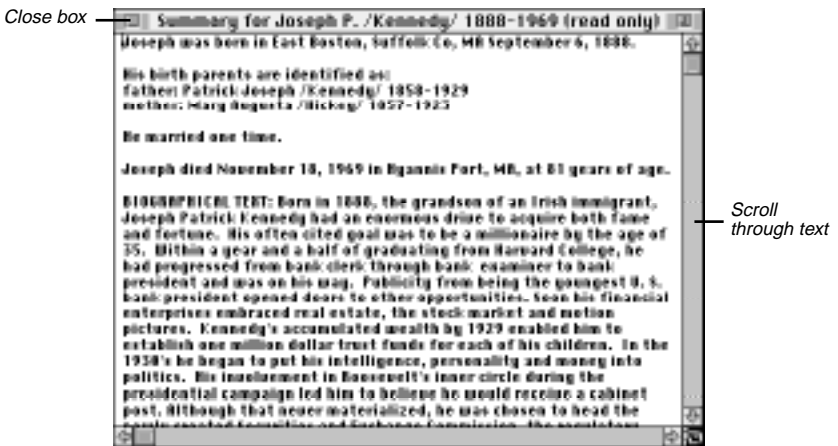
What you see as a duplicate detail on the computer screen will not print in your report.

2. Scroll through the text to review the information you entered.

3. Close the window by clicking the Close box or by pressing Escape.

If you have entered data for your family during this tutorial session, you can now add to it. If you would like to delete this tutorial project and start anew, follow the steps in the next section.

Deleting a Project

1. Choose Delete Project from the File menu. A warning window opens with this message, "ARE YOU SURE? ### records will be PERMA-NENTLY deleted if you choose OK."
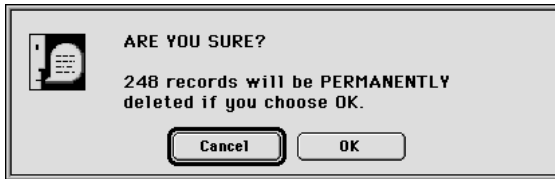

Figure 2-18:   Delete Project Warning

2. Click OK.
3. Another window appears with this message, "ARE YOU SURE? This project will be PERMANENTLY erased if you choose OK." Click OK.

Did You Know?

There are some important features and short cuts built into Ultimate Family Tree designed to make entering your data easy. Read through this section for a description of some of these features. See "Frequently Asked Questions" in the Appendix of the *Ultimate Family Tree User's Guide* for answers to common questions.

Go Menu

The Go menu has two functions. It gives you the ability to move through lists and to quickly return to recently edited records. Choose Top to move to the first person in the project. Choose Bottom to move to the last person. Choose Up List or Down List to move to the next person in the list. The person's position in the list is determined by the order in which you last selected and viewed an individual list. If the last list you opened resulted from a search, the focus will change to those individuals in the search list.

Up to ten individual names are displayed in the Go List. Each time you open an Individual Record, the name of that individual is moved to the top of the list. From the Go menu, choose any name in the list to return to that individual's record.

Changing Parents

In the course of your research, you may find that you have the wrong parent(s) attached to a child's record. To change a parent for a person, follow these steps:

1. From the Build menu, choose Individual Record.

2. To find the individual whose parent(s) you want to change, click the main Name field, and click the Find button to the right of the Spouse field.

3. Scroll through the list by pressing the first letter of the given name of the person you want to find.

4. Select the name and click OK.

5. Highlight the entire name of the parent you want to change.

6. Press the Delete key on the keyboard.

7. Choose Save from the File menu to save this record.

   Note If you attempt to change the parent before saving the record, you'll get a message stating what the person's name was and what it is now. You are asked if this is the same person or a new individual. To avoid confusion, save the record after deleting the wrong parent and before entering the correct parent name.

8. Enter the correct parent by following the steps on page 27.

The New Spouse Button

To enter a new spouse for an individual, choose the New Spouse button. This button automatically creates a new marriage event. An Individual Record window opens allowing you to enter the name and other information for the new spouse. You can return to the first spouse by clicking the *S* button to the right of the name on the Spouse field or by selecting the name from the Go menu. The marriage information can be entered in either record.

If the spouse is already in the project, choose New Event rather than New Spouse. Select Marriage from the list and type the first part of the given name in the Spouse field. Click Find to open the Candidate Individuals list

with individuals whose names begin with the letters you typed in the list. Select the name and click OK. If you type the complete name instead of choosing Find, a message appears when you save the record asking if the person is an existing person from the list. If so, click List. If it is a new person, click New.

Changing a Spouse in a Marriage Event

In the course of your research, you may find that you have the wrong spouse attached to a marriage record. To change a spouse, follow these steps:

1. Open the Individual Record for the person who is correctly connected to the marriage event.

2. Click the numbered button to the left of the marriage event you want to edit. This will open the Events window.

3. Highlight the name in the Spouse field and press the Delete key on your keyboard to remove the spouse.

4. Click Save from the File menu.

5. Type the spouse's name in the Spouse field. If the spouse is already in your project, enter a partial name (or simply highlight -*unknown*-) and click the Find button to open the Candidate Individuals list. Highlight the name and click OK.

   Note   If you enter a full name in the Spouse field for an individual that has already been entered in Ultimate Family Tree, a message appears when the Individual Record is being saved stating that this name has already been entered. If it is a different person, click New. If the person has already been entered, highlight the person's name and click List to link that individual. If you want to make changes, click Cancel to return to the Individual Record window.

Text and Evidence Status Boxes

Event text and evidence can be added in the Events window or in the Individual Record window. Two columns to the right of the Event Place field in the Individual Record window contain Text and Evidence status boxes. Click the Text or Evidence status box to open the associated window. An *X* in the status box indicates that data is present.

Click the numbered button next to an event name to open the Events window where you can choose the Text or Evidence button to enter additional information.

Using Undo

If you click the New Individual, New Spouse, New Child, or New Sibling button and decide not to create the new record, choose Undo from the Edit menu to delete the record and return to the previous record.

> **Note** Undo is not available if the record has been saved. As you enter information, the record is saved automatically. To delete a saved record, from the File menu, choose Delete Record.

Date Preferences

You can specify the date format for the free-form date field. Set your preference to have dates display and print exactly as you've entered them or set a date format default such as 12 JUL 1943.

From the Utilities menu, choose Desktop Preferences, and then Miscellaneous from the submenu. Scroll through the date options and select the format you want. If you select any option other than "As entered," modifiers will be converted to full words in the free-form date field, such as *ABT* to *about*. Dates entered before selecting a date preference are unchanged.

Graphics Display

Ultimate Family Tree provides two styles for desktop display, custom graphics and Macintosh Desktop Colors. The custom graphics mode can reduce the performance of the program. If you suspect that Ultimate Family Tree is running more slowly than it should, switch to the Macintosh Colors mode.

From the Utilities menu, choose Desktop Preferences and then Miscellaneous from the submenu. Choose Use Macintosh Desktop Colors to change to Macintosh colors. Restart Ultimate Family Tree to complete the change.

When you open certain windows while in the graphics mode, the message, "Picture colors may be incorrect. Do you wish to use Macintosh Colors?" may appear. Choose No to ignore the message and open the window. Choose Yes to change the desktop display to Macintosh Colors. Exit and then restart Ultimate Family Tree to change to Macintosh colors. This message will appear if your graphics monitor is set to 256 colors. If your monitor is set to 16 colors, the Macintosh Colors are used.

Editing Place Names

If you want to edit or combine place names, create a new Individual Record for a temporary person. Select "an unknown location" on the birth event field and click the Find button. A list of all places in the Place Library is displayed. Scroll through the list to find place records you want to edit. Highlight a place

name and click OK. Edit the place name and choose Save from the File menu or press ⌘-S. A message appears stating that the place name has been changed. Click OK to save the spelling change. Because the Place Library is common to all projects, changing the spelling will change it globally throughout the open project and all other projects.

To edit another place, highlight the place name in the Individual Record and press the Delete key. Choose Save from the File menu and then click the Find button to reopen the Place List. Select another place from the list.

> **Note**   See page 161 of the *Ultimate Family Tree User's Guide* for information on combining duplicate place names.

When you have finished editing place names, choose Delete Record from the File menu to delete this temporary record from the project.

Finding Individuals

There are several ways to find new subjects for the Individual Record window besides using the Find Individual window.

- Put the cursor in the main name field in the Individual Record window and click the Find button to the right of the spouse field to open a list of all individuals in the project. The list is alphabetical by given name. Press any letter on the keyboard to move to the given names in the list which start with that letter. Select a name and click OK to edit that person's record.

- To choose a name from the Individual List, from the View menu, choose Individual List, then By Surname from the submenu. Scroll through the list and double-click a name to open the Individual Record for that person.

- From the Go menu, choose any name to move to that person's Individual Record. Up to ten of the last individuals edited are displayed in the Go list.

> **Note**   See page 76 of the *Ultimate Family Tree User's Guide* for information on using the Find Individual window.

Using Existing Records for Parent and Spouse Fields

If you enter a full name in either the parents or the Spouse fields for an individual that has already been entered into Ultimate Family Tree, a message appears when the window is being saved stating that this name has already been entered. If it is a different person, click New. If the person has already been entered, highlight the person's name and click List to link that individual. If you want to make changes, click Cancel to return to the Individual Record window.