Ultimate Family Tree User's Guide

PALLADIUM
INTERACTIVE

Contents

Foreword

How to Start Your Genealogy Project

Get the Facts First

In compiling your genealogy, you are looking for information—names, dates, relationships and places. You can be sure that you had a great-great grandmother, and that she was born and died on specific days. The facts are out there. The challenge of genealogy lies in finding them.

There are literally hundreds of sources of genealogical information which can assist you in your search, and the facts you discover can lead to exciting, and often unexpected revelations. Sometimes trivial details mask profound events which are disclosed by persistent investigation.

Now Consider the Source

Genealogy engages you in a struggle between the need for uncompromising accuracy and the natural urge for unrestrained imagination. Both imagination and accuracy are essential: without imagination, enthusiasm wanes; without accuracy, the search flounders on false leads.

It helps to keep one distinction in mind while searching. There are at least two sides to everyone's personality—a public and a private side. The private side encompasses life in the home—marriage, family, hobbies, reflections, domestic concerns. The public side emerges outside, where everyone wears a slightly different face and clothing. Sometimes records of the private and public sides of an ancestor may seem to conflict. Together they represent a whole person.

When you cease to be an eye-witness to an event, you must rely heavily on the word of others. The people on whose word you rely may not have been eye-witnesses either. The greater the distance between you and the information you seek—whether the distance is measured in miles or generations—the greater the need to rely on the word of someone else. In each transfer of information lies the opportunity for misinterpretation—a typographical error, a conscious exaggeration, an inadvertent slip of the tongue. Always look for the possibility of error in any source. Many were never meant to be used for historical research.

Be aware of biases or what a person might want to gain by telling a story one way or another. When you spend time interviewing relatives, you need to know what to believe and what not to believe. You are asking a member of the family about another member of the family, living or dead. Consider the relationship between the two. Wishful thinking or resentment or a failure of memory could color the story. Sometimes what is omitted can be of great significance. Family misunderstandings of a deeply-rooted nature can lead to the expulsion of an individual from living memory. The tenacity of a genealogical researcher can reestablish the presence of these "black sheep" and restore them to the family tree.

Cross check with as many sources as possible. Some written records are more reliable than others, but on the surface, this might not be easy to assess. Both public and private sources need to be carefully and critically evaluated. With written sources, it is important to ask the same questions you would with a living

source. What were the authors' motivations? What did they have to gain by writing this story? How did they obtain the story in the first place?

In the case of public records—military records, court records, real estate documents—the person compiling them probably had no stake in the information contained therein. Accuracy may not have been the first concern. Often, the same is true for local history books. Amateur circuit-riding historians would arrive in a community and offer to write a local history. Some are accurate, others aren't. It is the wise and prudent researcher who approaches public documents and historical accounts with a certain degree of caution.

A Note on the Slipperiness of Language

Whether listening to a story in person or consulting written texts, you are using a continually changing language. A word that looks familiar may have a completely different meaning in a 200-year-old document. Some words are no longer used. Others have acquired a new meaning. Great care must be exercised to avoid misinterpretation.

Remember too, that your family name may have changed with prevailing spelling conventions. The name *Smith* may have been spelled *Smyth*, *Smythe*, *Smeeth*, *Smithson*, or *Smithington*. Ancestors may have changed their names to avoid persecution. Quite frequently, the keepers of early church records took liberties with spellings, and there was no one to argue with the only literate person within miles.

Start With Yourself

Compiling your genealogy begins with you. Sit down and list what you know about yourself: name, date of birth, names of parents, your place of residence, the important events of your life. Then see what you know about your ancestry. Seek every last bit of information about where you have come from and who has preceded you.

To make sure from the outset that nothing is lost, write everything down. Write it all down. You don't know when you may need it again. Note the source of your information so that if you need to go back to check a fact, you can re-evaluate its source.

Home Sources

Once you have exhausted the supply of the most readily available information, there will still be holes in the pedigree chart and family group sheets. There are two directions to pursue at this point, and it doesn't matter which you choose first. You can look for evidence of ancestors in written records and also in the memories of living relatives. Shuttle back and forth between the written and the oral, seeking the most—and most accurate—information available.

The list of possible sources at home is endless. Look for family histories, family bibles, journals, diaries, letters, yearbooks and scrapbooks. Other sources include legal and financial papers, photographs, and even household items.

Conducting an Interview

After picking your brain for facts and searching your home and the homes of others looking for written sources of information, you have an opportunity to sit down and talk with people about the past. In this most rewarding part of the genealogical search, you can find out directly from relatives what their life has been like and how other people have figured in it.

You are looking for the five *W*s—Who, What, Where, When and Why—but you can come back with far more. Find out names, dates, places and relationships, and then probe. What familial traditions have disappeared over the years? What do members of the family talk about when they gather for reunions? Be patient and resist any temptation to dispute or pass judgment upon anything said.

To record your conversation, take notes or use a tape recorder. Tape is preferable as long as your interviewee doesn't object, but take along a notebook to record non-verbal messages that may not show up on the tape.

Moving Out With the Search

The resources to draw upon next are official records in libraries, archives and repositories scattered throughout the world. Start with your public library. There you will find genealogy reference books, directories and guides, information about local genealogical and historical societies and other research assistance.

The largest collections of genealogical data are found in libraries maintained by The Church of Jesus Christ of Latter-day Saints (LDS Church). While the Family History Library in Salt Lake City, Utah, is the largest, check your telephone directory for a local branch.

Enjoy Your Genealogical Pursuit

Start with the known and seek the unknown. The methods of the genealogical search are much like that of any search. First, you define exactly what you want to know, then you design a plan for locating the information. You search, return with data, and then assess whether it is accurate. Once verified, it can fit into the framework of what you already know and inspire new searches.

You are looking for as much information about your family as you can find, in as many places as you can find it. In the process, you'll encounter pitfalls and dead-ends, but care and accuracy will decrease the number of detours. Sometimes picking a path through the past may sound like traipsing through a berry patch. That is in fact exactly what it is: a sticky search with steady rewards along the way.

Credits

We'd like to thank the hundreds of customers and professional genealogists who have provided suggestions and ideas for the creation of this dynamic new genealogy software program. Ultimate Family Tree is filled with resources provided by experts from the professional genealogical community. A special thank you is extended to the following individuals:

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Section 1:
Introduction

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.

Help is Always at your Fingertips

Ultimate Family Tree provides the following help:

- The *Ultimate Family Tree User's Guide*

- 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 the Section 9 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, Indiana 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:

- *Ultimate Family Tree User's Guide*
- Registration card
- On-Line Guide
- AT&T WorldNet Guide
- 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

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

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.

Installing a Browser after Ultimate Family Tree Has Been Installed

1. Insert the Ultimate Family Tree CD-ROM.

2. Double-click the Browser Setup icon in the Ultimate Family Tree folder.

3. Click Next.

4. Select *No, please install one for me*. The AT&T WorldNet℠ Service Software including Netscape Navigator™ Internet Browser installation program opens.

5. Click Continue.

6. Read the disclaimer and click Continue.

7. Choose Easy Install and select the folder where you want to install the Browser.

8. Click Install.

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 1-1:   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.
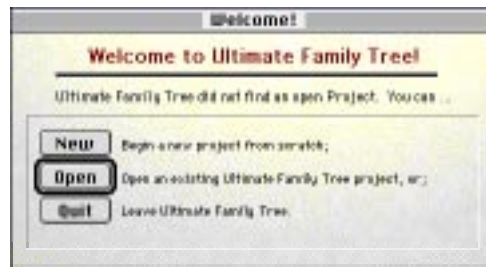
Figure 1-2:   Welcome Window

3. You are offered the following options:

- *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.)

Figure 1-3: Individual Record with Custom Graphics Desktop Display

Figure 1-4: Ultimate Family Tree with Macintosh Colors 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 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 1-5:   New File Window

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

Figure 1-6:   New Project Name Window

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

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

Version number of project

Version number of
Ultimate Family Tree

Update Key Family list
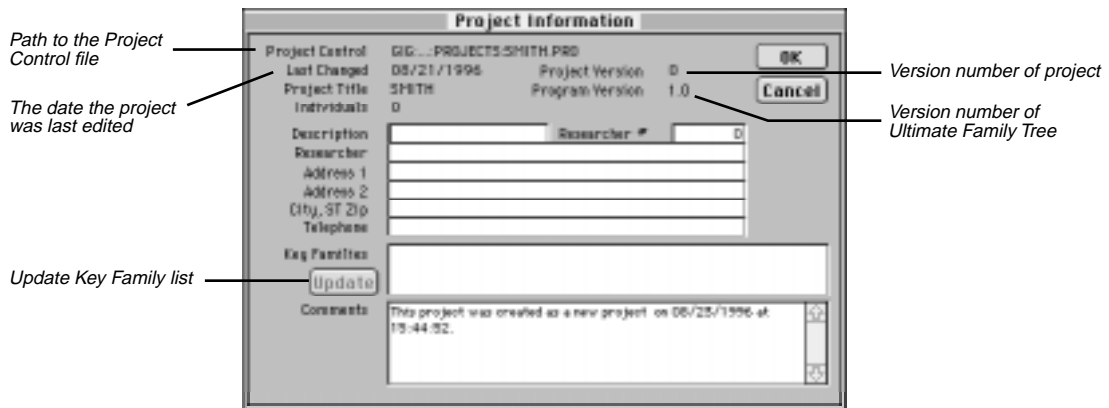
Figure 1-7:   Project Information Window

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.
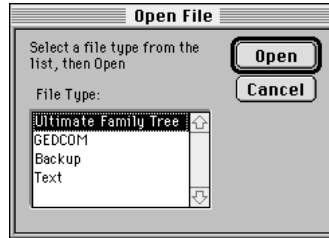
Figure 1-8:   Open File Window

2. In the File Type list, select Ultimate Family Tree and click Open.
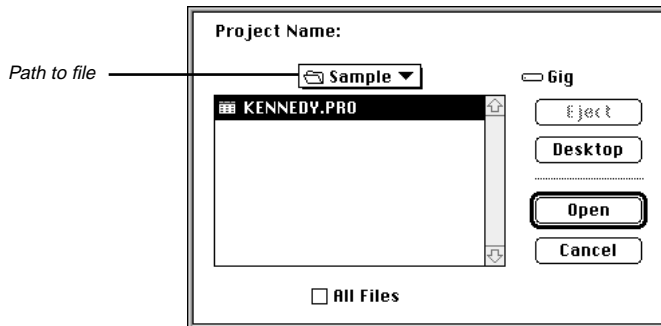
Figure 1-9:   Open File Window

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.

Figure 1-10:   Menu Bar

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 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. 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 20.

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 Individual Record window to create a new record with the next available record number.

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 for more information on entering names which include titles.
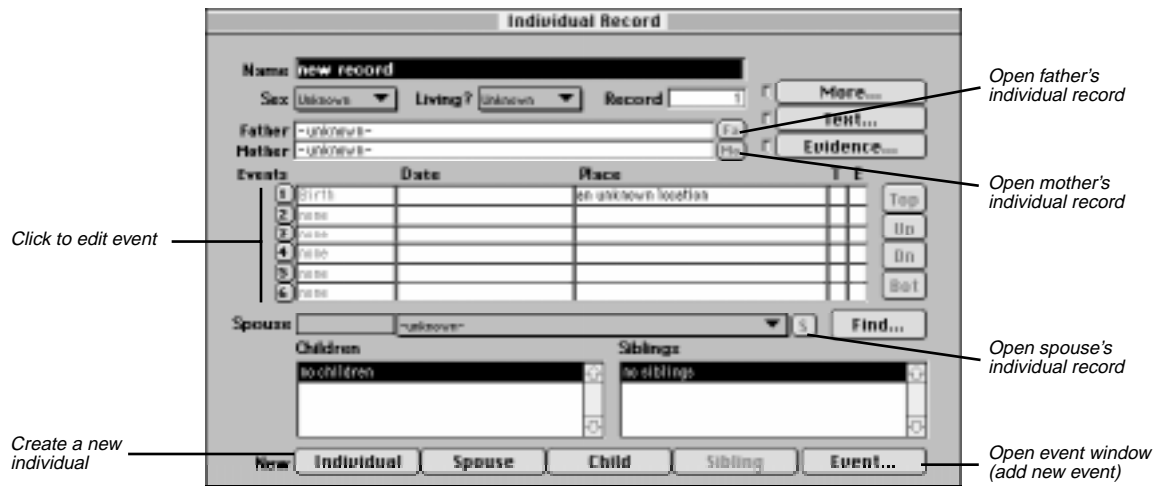
Figure 1-11:   Individual Record Window

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 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 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.)

    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.

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.

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
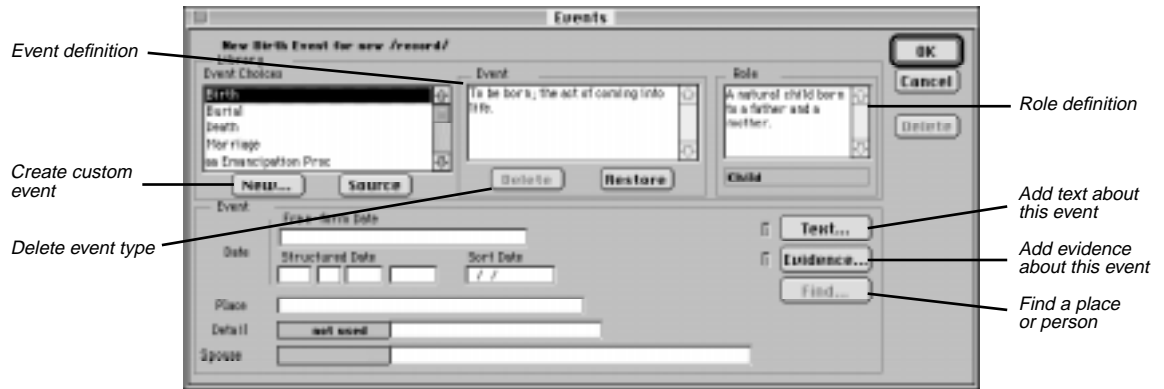
Figure 1-12:   Events Window

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 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.
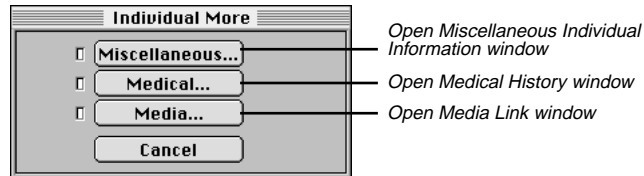
Figure 1-13:   Individual More Window

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 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 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.
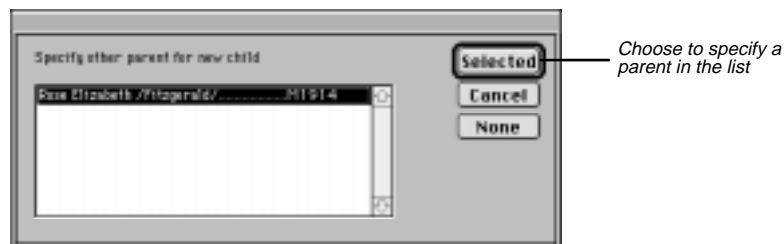
Figure 1-14:   Parent Selection Window

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 21.)

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 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.

   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.
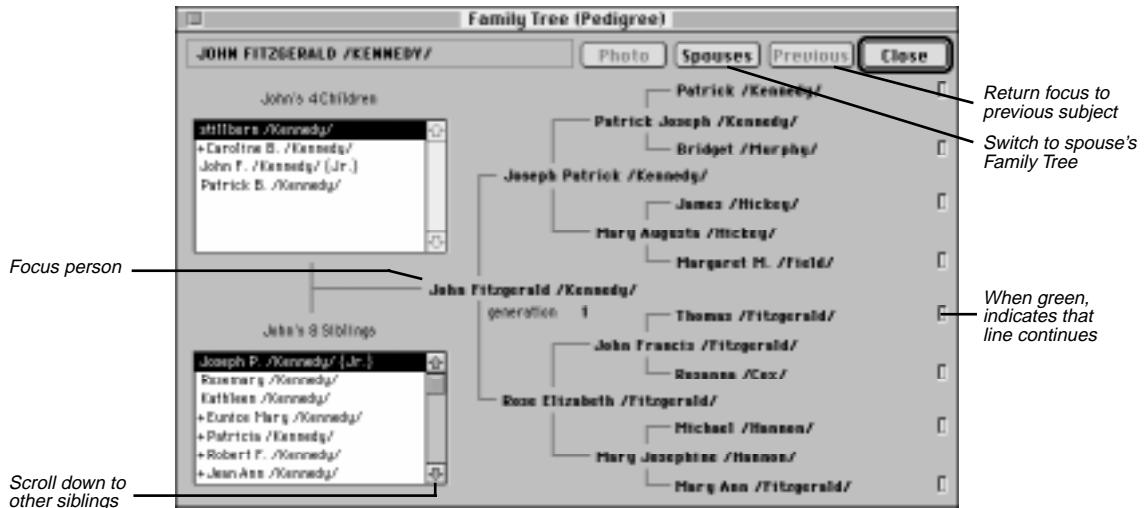
Figure 1-15:   Family Tree (Pedigree) Window

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.
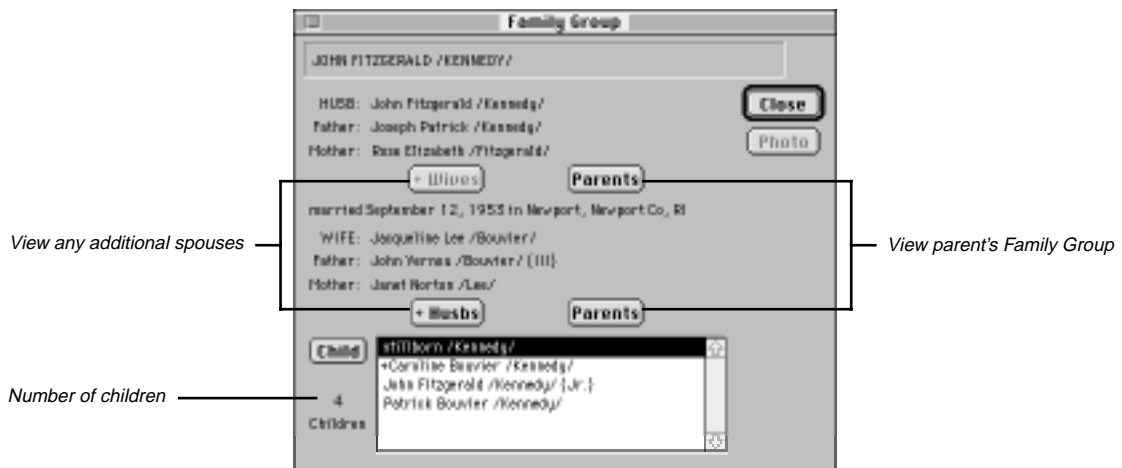
Figure 1-16:   Family Group Window

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.

Close box

Scroll through text

Figure 1-17: Individual Summary Window

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. 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 PERMANENTLY deleted if you choose OK."
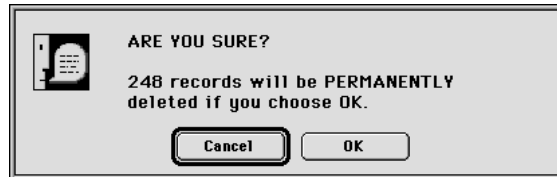
Figure 1-18:   Delete Project Warning

2. Click OK.

3. Another window appears with this message, "ARE YOU SURE? This project will be PERMA-NENTLY 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 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 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 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.

Section 2:
Entering Information

If you completed the Quick Start Tutorial, you know that 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 events are entered, as well as any text and footnotes for that person.

The Individual Record window also provides an easy way to navigate through your family from parents to children or children to parents. Because of its importance, the Individual Record window is always on the desktop.

Additional windows are provided for medical information and miscellaneous information such as nationality, languages, aliases, and social security number. A media window can be opened for attaching images.

In this section you will learn how to:

✓ Enter an individual's name, sex, parents, spouse, children, and siblings

✓ Enter events and places for an individual

✓ Enter evidence to support your information

✓ Record family stories and anecdotes

✓ Enter miscellaneous information such as aliases, religion, nationality, and more

✓ Enter addresses for creating Mail Labels

✓ Enter medical information about an individual

✓ Display pictures connected to a person or a family

✓ Create a Marriage Record

✓ Delete a person's record, an event, and a place

✓ Create or edit a source and footnote

For hints and tips, see "Did You Know?" on page 20.

Creating an Individual Record

Follow these steps to create an Individual Record:

1. If you are in another window, choose Individual Record from the Build menu. You can also use one of the following methods:

• Select the Individual Record window by clicking on it (if it is displayed behind an open window).

• Double-click a name in a View list.

• Select a name from the Go menu.

2. Click the Individual button at the bottom of the Individual Record window to create a new record with the next available record number. (If you do not want to save this new record, choose Undo from the Edit menu. You will be returned to the last selected individual.)
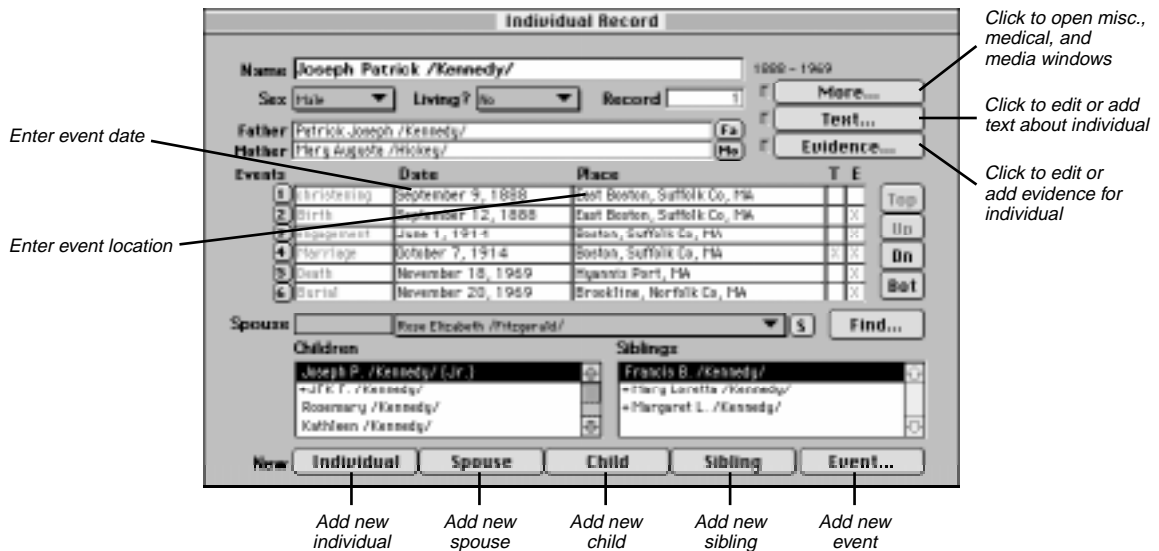
Figure 2-1:   Individual Record Window

3. With the cursor in the Name field, type the person's complete name. The name can include given names, surname, and title in any order. Ultimate Family Tree marks the last name entered as the surname by enclosing it within slash (/) characters. If you enter names in a different order, you can manually enter the slash (/) characters. If a name is longer than 52 characters, enter a shortened version here and enter a name of up to 65,000 characters in the Long Name text box opened from the Miscellaneous Individual Information window. See page 46.

   Note   Mark a title by enclosing it with braces { } to distinguish it from a surname, for example, *John /Smith/ {Jr.}* or *Jane /Smith/, {Ph.D.}*. The slashes and curly braces do not appear on printed reports. To remove them from the displayed names in Ultimate Family Tree windows except the Individual Record window, check the Hide Slashes box in the Name Format window (see page 165). Use only one set of slash characters in the name field.

4. Next, set the sex of the individual by selecting Female, Male, or Unknown from the pop-up menu.

5. At the Living field, select No, Yes, or Unknown from the pop-up-menu to indicate whether the individual is still living. If a death event is entered, this field is automatically set to No when you save the record. This field is optional.

A record number is automatically assigned when a new record is created. You can also choose your own record number (any number between 1 and 9999999). Ultimate Family Tree checks to make sure this number is not already in use before accepting it.

Adding Parents

1. Move the cursor to the Father field and type the father's name. If the father is already in the project, type the first few letters of his name (or simply highlight -*unknown*-) and click the Find button. From the Candidate Individuals list, select the correct individual and click OK.

   Note   The Candidate Individuals list shows individuals in alphabetical order by first name. The birth and death years (if known) and the record number for the selected individual are displayed at the bottom of the window. For two or more individuals with identical names, check the record number and birth and death dates to be sure you have selected the correct person.

2. Press Tab to move to the Mother field, and repeat the above step.

To edit a parent's record, click the Fa or Mo button to the right of that parent's name.

If you enter a full name in the parent field 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.

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 a marriage, or Cancel to return to the Individual Record without saving.

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 if the Individual Record window is not already open.

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 above for adding parents.

Adding Events

Events are added from the Individual Record window.

1. Click the Event button at the bottom of the window, or click the numbered button to the left of a "none" Event field. An Events window opens. Events are listed alphabetically, with the most common events capitalized so they appear first in the list.
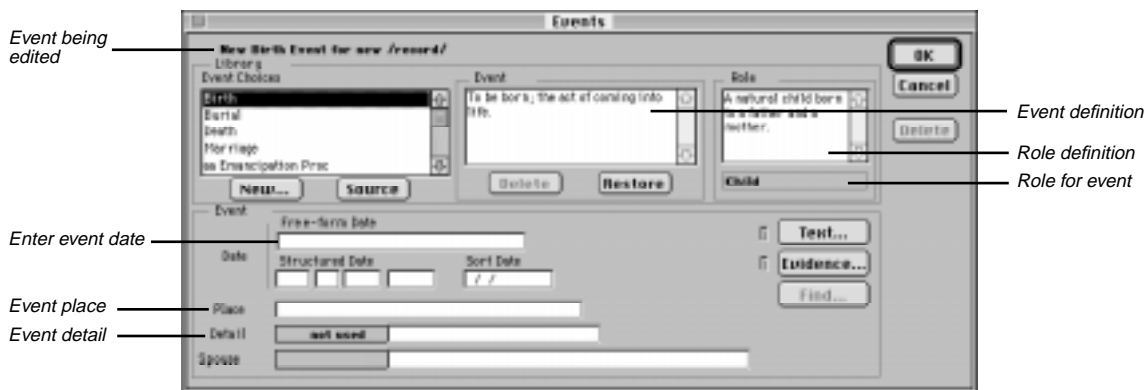
Figure 2-2:   Events Window

2. Highlight an event name to select it.

Ultimate Family Tree provides many event types, including ethnic and religious events, from which to choose. The definition of the event and the person's role are displayed. Click the Source button to display the source for a selected event type. Create a new event type by clicking New. (See page 32.) You can delete a selected event type by highlighting it and clicking the Delete button in the Event box. Basic event types such as Birth, Marriage, Death, and Burial cannot be deleted. Clicking the Restore button restores previously deleted event types. The information in the role field changes as you scroll through the events.

To delete an event (or unlink it from the individual), open the Events window for the event and click the Delete button under the OK and Cancel buttons on the right.

Dates

Dates associated with events are entered in the events window:

1. Enter a free-form date in the Free-form Date field.

2. Move to another field, and confirm the results in the Structured Date and Sort Date fields.

   Note   When you move to any other field after entering a free-form date, the Structured and Sort Date fields are automatically calculated and entered. If you enter only the year in the Free-form Date or Structured Date fields, Ultimate Family Tree sets the sort date to July 1 of that year. If you enter only the month and year, the sort date uses the 15th as the day. The sort date does not print in reports.

Dates can also be entered directly in the Date field in the Individual Record window. Dates entered here are free-form dates. The converted sort and structured dates can be viewed and edited by accessing the Events window.

A variety of date types can be entered:

- *Free-Form Date* — The Free-form Date field permits the date of an event to be entered exactly as it was found in the original source. This field will accept partial or incomplete dates, date modifiers, and date ranges in any order.

   When typing a free-form date, do not use the number sign (#) in the date field because the number sign is used internally in Ultimate Family Tree sentence codes. See Section 8, page 164 for information on setting date preferences.

- *Structured Date* — Ultimate Family Tree converts the date you enter in the Free-form Date field into several components: a date modifier such as BEF (before), AFT (after), CA (Circa); the day; the month (three-letter abbreviation such as JAN); and the year. This converted date appears in the Structured Date field and the Sort Date field. The structured date is used in reports, such as the Pedigree, where space is limited.

- *Sort Date* — The sort date, used by the program to establish the order of events, doesn't appear in reports. Use the sort date to order events where you don't know the dates but you do know the order, for example, the birth order of children.

   If you do not know a date for an event such as a birth, but you do know the birth order of someone's children, you can enter an approximate date for the individuals in the Sort Date field. It is important to note that the order of events will be proper, but no dates will appear for this event in reports because only a sort date has been entered. Enter a full date (MM/DD/YYYY) in the Sort Date field.

You can edit the structured and sort dates created by Ultimate Family Tree without affecting the free-form date you've entered. However, revising and then exiting a free-form date field resets the structured and sort dates. Dates entered as text (thirteenth) instead of numbers (13) are not converted to the Structured Date or Sort Date fields. In this case, you must manually enter the day in the Structured Date field. It is then reflected in the Sort Date field.

- *Unusual Dates* — Because the free-form date field accepts any variation of a date, you can handle situations that would otherwise be impossible. For example, you can enter Quaker or Jewish dates. You can also record dates that are normally outside the range of Ultimate Family Tree. Dates must fall between the limits of 100 AD to 3000 AD to be properly sorted. You can, however, record BC dates, or dates following any other calendar system, in the free-form date field. If you want to record BC dates, establish the order of events by using a fictitious year in the sort date field that is within the normal limits of 100 AD to 3000 AD. If you choose the year 100 for BC dates, 365 separate BC dates can be entered and ordered properly by assigning each BC date to a unique sort date (for example, 01/01/0100 through 12/31/0100). Using this technique, the order of events occurring before the year 100 can be established.

- *Double Dates* — If you encounter dates prior to 1752, double years such as 1725/26 might be listed. This double dating results from an alteration to the calendar. In 1582 it was found that the Julian calendar, which had begun with Julius Caesar, was inaccurate by 11 minutes and 14 seconds a year according to the cycle of the sun and moon. In 1582 Pope Gregory XIII corrected the discrepancy. The calendar lost ten days as the Pope decreed that October 4 would be followed by October 15.

  Countries accepted the new Gregorian calendar at different times, and England and the American colonies did not do so until 1752. By then the discrepancy between the Julian and Gregorian calendars was 11 days. This difference was compounded by the celebration of two New Year's days by England and its colonies. The government celebrated New Year's on March 25, and the masses celebrated the holiday on January 1. Depending upon which calendar you used and when you celebrated New Year's Day, there would be a difference in dating. To satisfy both conventions–until 1752 when the January New Year's celebration was made official–double dates sometimes were recorded.

  You can enter the double date year in the Free-form date field. The double date will print on text reports, such as the Genealogy report. The Structured date will display the second year in the double date and will print on structured reports such as the Family Group Report.

Adding a Place

To enter a place for an event, move to the place field, type the first few letters of the place, and click the Find button if the place you want is already in your project. If the place is not already in your project, type the entire place name.

Although up to 60 characters can be typed for a place name, a place name of that length will not display entirely in the place field unless you scroll to the right. Long place names will be abbreviated in structured reports where space is limited, such as the Family Tree (Pedigree) and Family Group reports. However, the entire place name will print in text reports such as Family Journal (Genealogy), Text Descendant and Ahnentafel reports.

Note The number sign (#) is used in Ultimate Family Tree role sentence codes. Do not use the number sign in Ultimate Family Tree place fields.

Removing a Place from an Event

1. To remove a place from an event, highlight the entire place name.

2. Press the Delete key on your keyboard, or type a new place name.

3. If you type a new place name, you'll get a message when saving the record stating what the event place was and what it is now. You are asked if these places are the same. If you are just changing the spelling of the name, click Yes. If you want to create a new place, or use the existing place, click No.

Editing a Place Name

1. To change the spelling of a place name, highlight the place name in the place name field in the Individual Record or Events window and type the correct place name.

2. Choose Save from the File menu or press ⌘-S to save the spelling change.

3. A window opens stating what the event place was and what it is now. Click Yes to change the name. (For additional information, see page 23.)

Event Details

You can add important details to some events.

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

When you choose one of these events from the Event Choice list, the Event Detail line, directly below the Place field, becomes available. Type the detail, such as the name of the cemetery for the burial event, in this field. Use up to 32 characters.

Do not use the number sign (#) in Ultimate Family Tree event detail fields as it is used internally in creating role sentences. Instead, use No., Number, etc. to indicate a building or apartment number.

Deleting Event Types

Deleting Event Types from the list allows you to shorten the list to include only those event types that you use on a regular basis. Basic event types such as Birth, Marriage, Death, and Burial cannot be deleted.

1. Click the Event button at the bottom of the Individual Record window.

2. Highlight the event type in the Event Choices list.

3. Click the Delete button in the Event box.

   Note   Deleting an event from the list does not affect events you have already entered. If you want to restore all event types, click Restore.

4. Click Cancel to return to the Individual Record without creating a new event for the individual.

Creating a New Event Type

1. To create a new event type, click the Event button at the bottom of the Individual Record.

2. Click New under Event Choices in the Events window.

3. In the New Event Type window, type the name for an event, the name or abbreviations that you want to appear on reports, and the role that the individual plays in this new event.
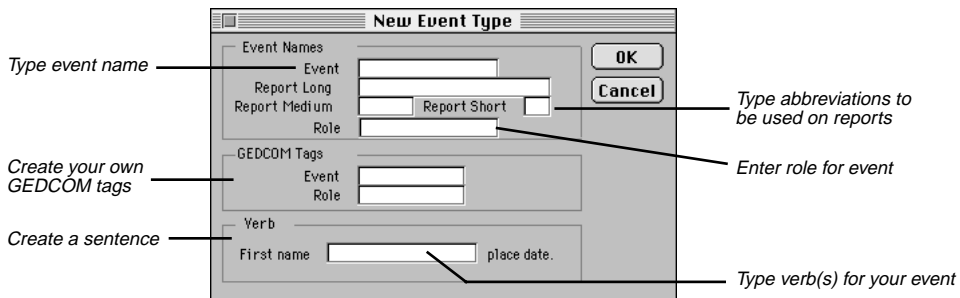
Figure 2-3:   New Event Type Window

4. Add a GEDCOM tag for the event and the role. Use any name you want, usually four or five uppercase characters, that will be used if you transfer this data via GEDCOM. If the name you choose for an event tag is already in use as a GEDCOM tag, you cannot use it. Try another.

   Note   You can create your own event and role tags for export when Event GEDCOM is selected. When creating your own tags, start the GEDCOM tag with an underline character, for example, _MEMSER for an event called Memorial Service. The GEDCOM tag should be somewhat descriptive of the event or role. See page 145 for more information about GEDCOM.

5. Complete the sentence in the Verb box: *First name _____ place date*. If you are creating a memorial service event, for instance, enter the words *was memorialized* on the blank field in the Verb box. The role sentence might then read *Mickey was memorialized in Windsor, California, May 1, 1996*.

6. Complete all fields in the window.

Marriages

You can create a marriage by clicking the Spouse button at the bottom of the Individual Record window, or by clicking Event. In both cases, a marriage event is added.

When you click the Spouse button, a new Individual Record opens where you enter the new spouse. If you click the Event button, the Events window opens where you can choose Marriage from the Events list. In this case, a spouse field appears. The Spouse field is used for engagement, prenuptial agreement, marriage, domestic partnership, annulment, separation, and divorce events. The label for the Spouse field depends on the event and the sex of the individual whose record you're entering.

Some of the spouse titles include:

*   *Fiancee* or *Fiancé* for engagement and premarriage events

*   *Bride* or *Groom* for marriage events

*   *Divorcee* or *Divorcé* for divorce events

*   *Husband* or *Wife* for LDS sealing of spouse, Get (Jewish religious divorce), and separation events

*   *Partner1* or *Partner2* for a domestic partnership event

*   *Man* or *Woman* for an annulment

*   *Novio* or *Novia* for diligencias matrimoniales, matrimonio and velación (Hispanic marriage events)

Creating a New Marriage Record

Follow these steps to create a new marriage event if the spouse has already been entered in the Project:

1. Click the Event button at the bottom of the Individual Record window to open the Event window.

2. Select Marriage from the Event list.

3. Enter the free-form date.

4. Move the cursor to the place field and enter a place name. If the place has already been entered in the project, type a partial place name (or simply highlight an unknown location), and click the Find button to open the Candidate Places list. Highlight the place name you want to enter for the event and click OK.

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, choose 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.

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 correct 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.

Adding Text for an Individual or Event

You can add text for every individual and event. To add text for an individual, click the Text button in the upper right corner of the Individual Record window. To enter text for a specific event, click the Event Text status box to the right of the event. Alternatively, you can click the numbered button to the left of the event name to open the Events window and then click the Text button. Enter up to 65,000 characters in any free-form text field. Many reports can include individual and event text.

Choose one of the three types of event text:

- *Text or Biographical Text* — Prints in the body of free-form reports.

- *Footnote* — Prints selected text as a footnote in reports. The selected text is displayed in the Text window, but will print only as a footnote.

- *Research Notes* — Records information about past, ongoing, or future research on this event or individual.
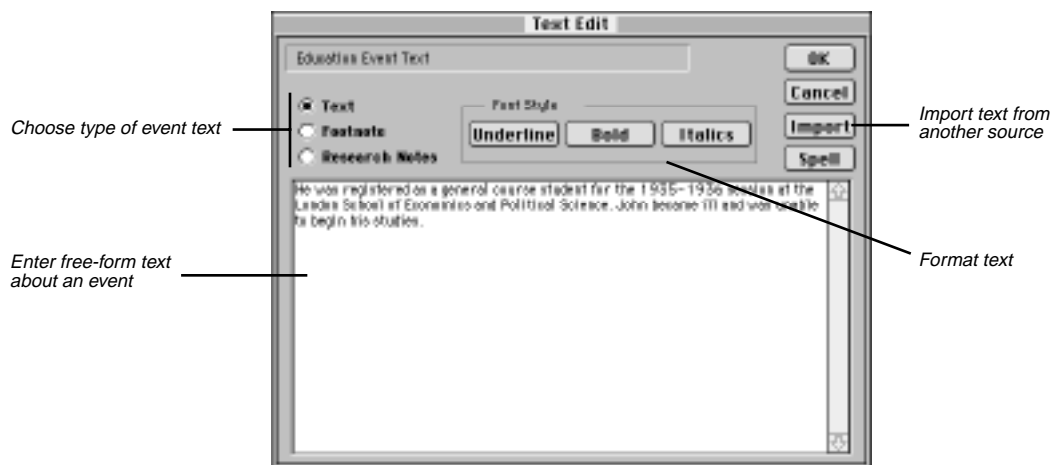
Figure 2-4:   Event Text Edit Window

Choose type of event text

Enter free-form text
about an event

Import text from
another source

Format text

You may format selected portions of text in reports using the Font Style Format buttons: Underline, Bold, and Italics. Highlight the text and then click a format button. See "Text Formatting," below, for more information.

Do not use the following characters in text because of conflicts with the Rich Text Format (RTF) feature:

- \ — Backslash character.

- { } — Left or right curly brace character except to mark a title in a name.

International Characters

To create diacritical marks such as acute accents and umlauts, you must use a special key combination. For example, type letters with acute accents, first press Option-E then release these keys and type the letter you want to appear with an accent. For umlauts, first press Option-U then the character you want. (See your *Macintosh User's Guide* for more information on other international characters.)

Text Formatting

Use the font style options to instruct Ultimate Family Tree how to display and print the text in reports. After familiarizing yourself with the formatting codes available, you can use the font style buttons or you can type the codes in the text windows. Formatting codes are displayed in text windows but are not printed in reports.

Automatic word wrap occurs at the end of lines unless the Enter key is used to end a line. Blank lines are preserved in Ultimate Family Tree reports. Press the Space Bar once at the beginning of a new paragraph to indent the first line.

The formatting codes appear around the selected text:

- [BO:This text is bold.:BO]   **This text is bold.**
- [UL:This text is underlined.:UL]   This text is underlined.
- [IT:This text is italicized.:IT]   *This text is italicized.*

How to Select Text

You can use the mouse or the keyboard to select text. To use the mouse:

1. Position the mouse cursor over the first character to be selected.

2. Press the mouse button and hold it while dragging the mouse across the text to be selected.

3. Release the mouse button.

To use the keyboard:

1. Position the cursor to the left of the first character to be selected.

2. Press and hold the Shift key. Press the Right Arrow key repeatedly until the text is selected.

3. Release the Shift key.

   Note   Double-click text to select entire words. Triple-click to select entire lines of text.

Checking Spelling

The Spell Check feature includes a dictionary of 140,000 words and 10,000 proper names. You can check spelling in Edit Text windows and all text data fields.

1. To check spelling in an editable window, click the Spell button, choose Spell Check from the Edit menu, or press ⌘-B.

2. If Spell Check does not find a misspelled word, the Spell Check window does not open. When Spell Check finds a word that is not included in its dictionary, the word is highlighted and displayed in the Word In Context box. Highlighted words are shown in lowercase letters but are saved as shown in the Replace With Word field.
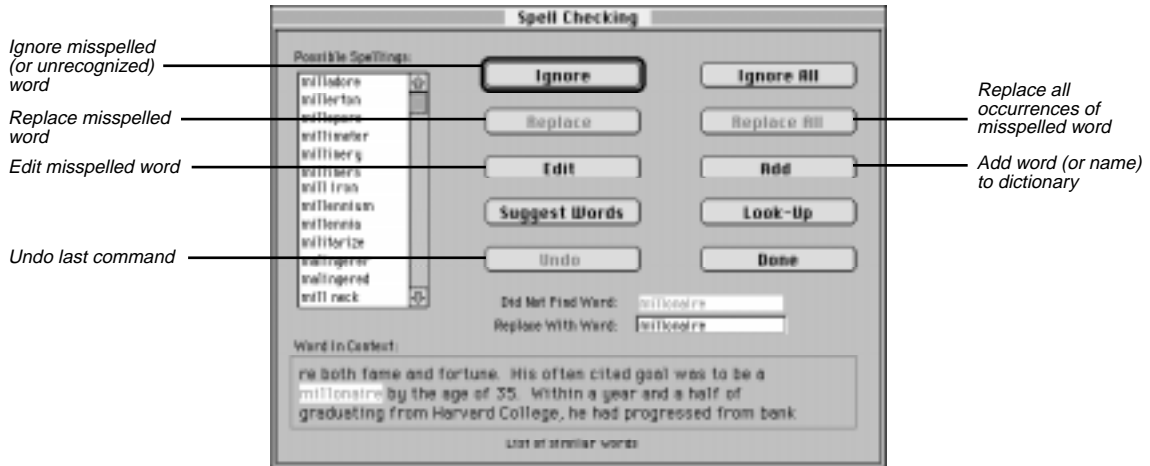
Figure 2-5:   Spell Check Window

3. A list of closely matched words is displayed in the Possible Spellings box. If the word you want to use is in the list, select the correct word and click Replace.

4. To edit the misspelled word, click Edit. After editing, click Replace.

5. To stop checking spelling and return to the Edit window, click Done.

   The following is a list of buttons in the Spell Check window:

- *Add* — Adds the word to the dictionary.

- *Done* — Ends the spelling check.

- *Edit* — Allows you to edit the misspelled word.

- *Ignore* — Ignores the current misspelled word.

- *Ignore All* — Ignores the current misspelled word and continues to check spelling. This word is ignored during the rest of the spelling check.

- *Look-Up* — Checks the spelling of the current text in the Replace With Word field.

- *Replace* — Replaces the misspelled word with the current text in the Replace With Word field.

- *Replace All* — Replaces all occurrences of the misspelled word.

- *Suggest Words* — Updates the Possible Spellings list box with more suggested words.

- *Undo* — Reverses the last Replace or Replace All command.

Importing External Text

You can import external ASCII text (up to 65,000 characters) into any Ultimate Family Tree text window. The text should not contain any control codes, such as those found in word processor files.

1. Open any Ultimate Family Tree text window by clicking the appropriate Text button.

2. Click Import.
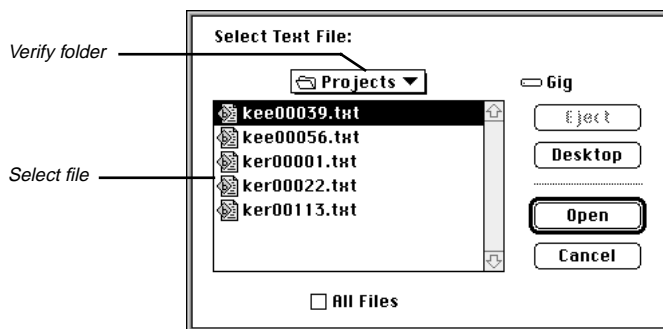
Figure 2-6:   Open Dialog Box

3. Change to the folder that contains the text you want to import.

4. Highlight the file and click Open.

5. From the Edit menu, choose Select All (or highlight the selected text).

6. From the Edit menu, choose Copy.

7. Close the external text file by clicking the Close box (or pressing the Escape key).

8. Position the cursor in the Text window where you want to insert the text.

9. From the Edit menu, choose Paste.

10. Click OK to close the window and save changes.

Exporting Text

To transfer text to an external text file, use the clipboard. The following method describes how to create an external text file and copy text from any Ultimate Family Tree text window to this file:

1. Open any text window in Ultimate Family Tree.

2. Select the text you want to export. (See page 36 for instructions on selecting text.)

3. From the Edit menu choose Copy (or press ⌘-C).

4. Click OK to close the Text Edit window.

5. From the File menu, choose New.

6. Select Text from the Type list.

7. Click OK.

8. Enter the file name in the File Name field.

9. Select the folder in which you want to place the text file.

10. Click Save to open the new external text file.

11. From the Edit menu choose Paste (or press ⌘-V).

12. Click the Close box to close the file. The file is automatically saved.

Evidence

The Evidence window, accessed from the Individual Record and Events windows, provides tools to enter and organize evidence used as proof for information contained in a Ultimate Family Tree project. Evidence can include formal source citations and free-form notes.
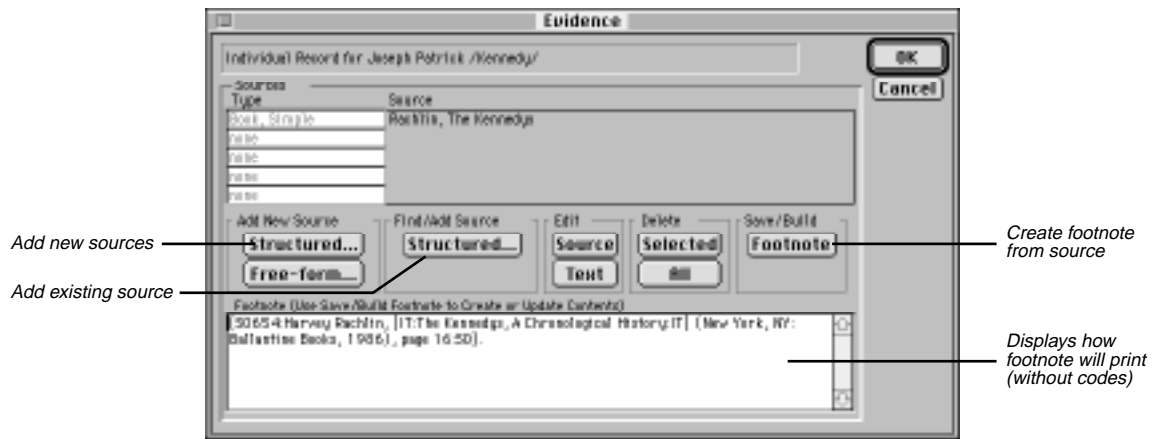
Figure 2-7:   Evidence Window

Source Record

The same sources can be used many times in a genealogical project. The source, once entered, is stored in the Source Library. Often, however, additional information, such as a page number, is unique in specific evidence. A source that might require additional text makes the Text button available. The additional information must be entered as text. The purpose for this text, originally established by the source type, is shown in the Edit Text window.

A source can be entered into the Source Library either before you add it to an Evidence window or while you are in the Evidence window. Follow these steps to create a source from the Build menu:

1. From the Build menu, choose Source Record.

2. Click New.
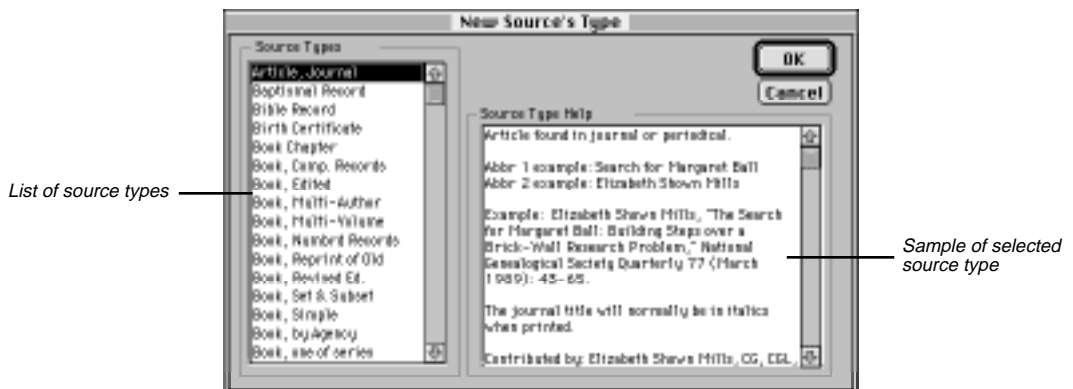
Figure 2-8:   New Source Type Window

3. Select a template from the 47 templates provided in the Source Types list. The Source Type Help box at the right side of the window provides a description of the template you select. Click OK.

4. Type Abbreviation 1 and 2 names for the type of source you're entering. Abbreviation 1 is used to identify the source in lists. Enter a unique Abbreviation 1 so that the source is easily identifiable in lists. If you must create a duplicate Abbreviation 1, be aware of it when you add sources to evidence windows.

5. Choose the first component (by double-clicking the component, or highlighting it and pressing Return), and enter the information about that component in the Component Contents box. Do not add ending punctuation because it is added automatically when the report is printed. Do not add ending punctuation, except for with the Free-form Text source type.

6. Repeat step 5 for the remaining component lines.

7. After completing the components, click Preview to see how your source will look when it's printed. Look for source components that are incomplete or that need further editing. Make any corrections in the associated Source Component field.

8. Click Close to close the Preview window.

9. Click OK to save the source and to close the Source Record window, or click New to create another new source.

Adding Evidence

To enter Evidence for an Individual, click the Evidence button in the Individual Record window. To enter evidence for an event, click the Evidence status box on the appropriate event line or click the numbered button to the left of the event name and click the Evidence button in the Events window.

You can create new structured or free-form sources. Existing sources can be also be accessed by clicking the Find/Add Structured Source button. Clicking the Footnote button creates a footnote from the source information you have entered. Click the Edit Source button in the Evidence window to make editing changes to an existing source.

To add an existing source to the Evidence window, click the Structured button in the Find/Add Source group in the Evidence window. The Add Evidence window opens.
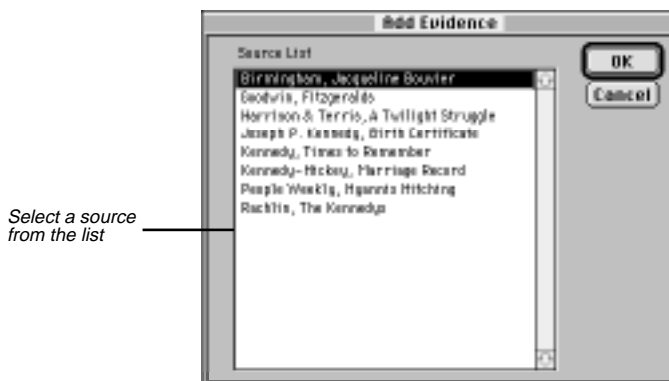
Figure 2-9:   Add Evidence Window

1. Scroll through the list of sources to find the correct source, select it, and click OK. The selected source is displayed in the Sources Type list in the Evidence window.

2. Click Text in the Edit group (if available) to open the Edit Text window, and then enter the appropriate data, such as the specific page number you want to cite for this proof.

    Note   Do not type ending punctuation because it is added automatically when the reports are printed.

3. Click OK to close the Edit Text window and return to the Evidence window.

4. Repeat the previous procedure to add additional sources of evidence for proof.

5. Click the Footnote button to create a footnote.

Creating a New Source from the Evidence Window

Sources can also be entered into the Source Library directly through the Evidence window:

1. From the Evidence window, click the Structured button in the Add New Source group to create a new source and add it to the Evidence window.
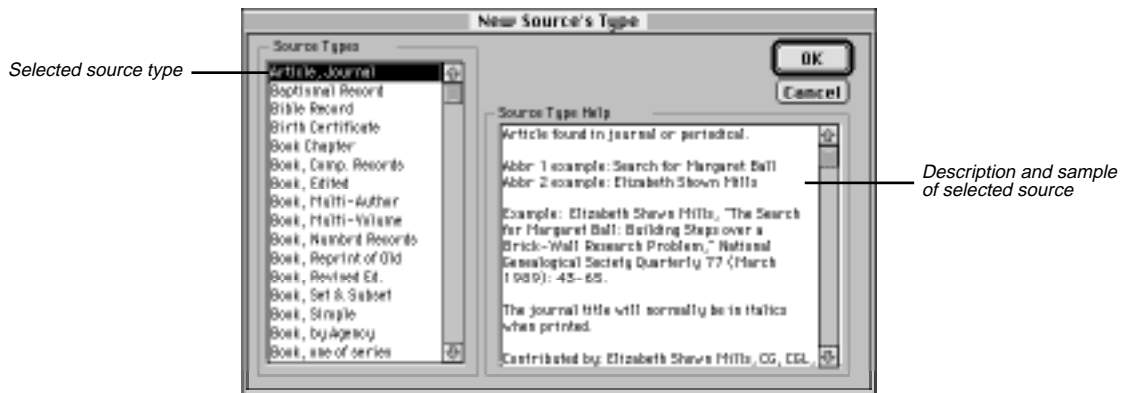
Figure 2-10:   New Source's Type Window

2. In the New Source's Type window, select a source type. If the specific source type you want is not in the list, choose Free-form Text from the list. Help for the Source Type is displayed in this window.

3. Click OK.

4. Type the Abbreviation 1 and Abbreviation 2 names. Help for the type you have selected is displayed in the Help for Type box.

5. Choose the first component (by double-clicking, or highlighting and pressing Enter), and type the information about that component in the Component Contents box. Do not add ending punctuation on the component lines except for with the Free-form Text source type, because it is added automatically when the report is printed.

6. Repeat step 5 for the remaining component lines.

7. Click OK.

8. Click Text in the Edit group (if available) to open the Edit Text window, and then enter the appropriate data, such as the specific page number you want to cite for this proof (for example, *page 20*). Do not type ending punctuation.

9. Click OK to close the Text window and return to the Evidence window.

10. Repeat the above procedure to add additional sources of evidence to the Evidence List.

11. Click the Footnote button to create a footnote.

Creating Free Notes

Use Free Notes as evidence in a proof.

1. To add a Free Note to the Source List, click the Free-form button in the Evidence window.

2. Enter the Free Note in the Edit Text window and use formatting buttons if desired.

    Note   Ultimate Family Tree does not add ending punctuation to Free Notes. Add ending punctuation to the Free Note, if desired.

3. Click OK to save any text entered and return to the Evidence window.

Creating Footnotes

Evidence that is formatted as a footnote will appear as End Notes. Evidence that has not been formatted as footnotes will not appear in reports.

1. In the Individual Record window, click the Evidence button or Evidence Status box for an event.

2. After adding a source, click the Footnote button in the Save/Build group to create a footnote.
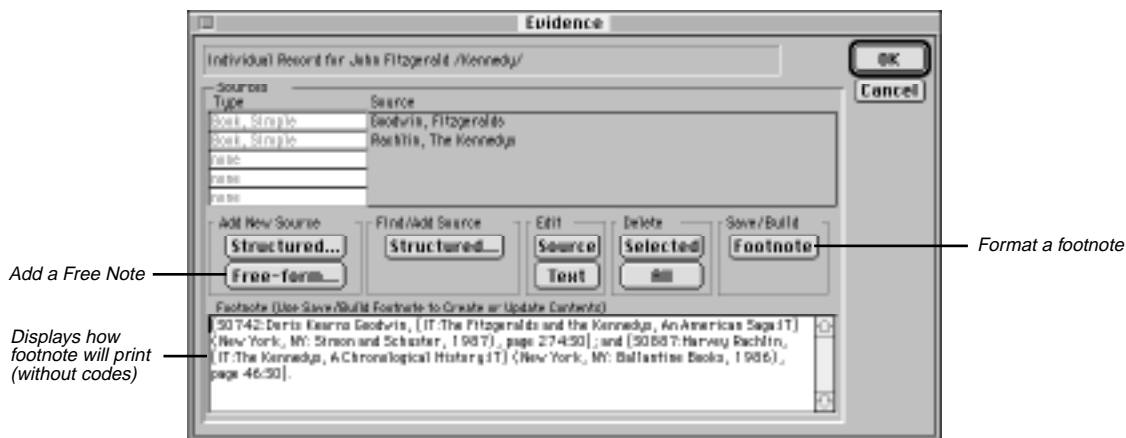
Figure 2-11:   Evidence Window

Note The footnote appears in the Footnote box. You can customize the footnote for printing if necessary. See *Customizing a Footnote*, below.

3. Click OK to save and close the Evidence window.

Customizing a Footnote

Customizing footnotes is not necessary, but you might want to rearrange footnotes for printing.

1. Create a footnote. (See "Adding Evidence" on page 40.)

2. Edit the footnote as follows:

• Enclose each Source or Free Note in your footnote in code brackets, for example, *[FR: :FR]* or *[SO#: :SO]*. The pound symbol (#) represents the record number of the evidence for that source.

• Do not change formatting inside the *SO:* source code brackets. When Ultimate Family Tree prints a footnote, it reconstructs the footnote from the sources in the Source Library and from Free Notes and text added to sources. Changes made within the Source or Free Note code brackets in the Footnote text window are not reflected in the Source Library record or the Added Text window, and will not be included in end note reports.

Formatting is added automatically to text within the source code brackets according to the source template in use. You can, however, manually customize the formatting in a footnote outside the source code brackets by typing the format codes before and after the appropriate text. For example:

[BO:This text is bold.:BO]	**This text is bold.**
[UL:This text is underlined.:UL]	This text is underlined.
[IT:This text is italicized.:IT]	*This text is italicized.*

Note Do not type directly into the Footnote text window. Any text you typed will be deleted when you rebuild footnotes using the automatic Rebuild Footnote option in the Check window, when you add additional text to this window, or when you click the Save/Build Footnote button. See page 166 for more information on using Check.

• You can Cut and Paste text inside the footnote to customize the way it displays and prints, as long as you move sources and free notes with their codes.

3. Click OK to save your changes and close the Evidence window, or click Cancel to close the Evidence window without saving changes.

Editing a Source from the Evidence Window

To edit an existing source from the Evidence window, select the source and click the Source button in the Edit group.

Note Any changes made to the source record will affect all footnotes using this source.

Deleting a Source from the Evidence Window

1. From the Source List in the Evidence window, select the source to be removed for an individual or event.

2. Click Selected in the Delete group, or click All to delete all evidence.

3. Click OK to delete the source and footnote reference (if present), or click Cancel to return to the Evidence window without deleting the source.

Adding Children

The Children box on the Individual Record window lists all children of the subject.

1. In the Individual Record window, double-click a child's name to make that person the subject of the Individual Record window. If you want to make a parent or spouse the subject, choose the appropriate button to the right of his or her name.

2. To enter a new child for a selected individual, click the Child button at the bottom of the window.
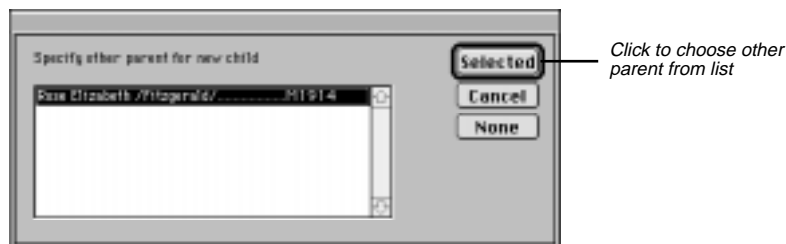
Figure 2-12: Other Parent Window

3. In the Specify Other Parent window, select the other parent for this child. Click Selected. A new Individual Record window opens for that child with the child's surname already entered in the name field and the child's parents (if known) already in the Mother and Father fields. Type the remaining information. If you choose not to create this new record, choose Undo from the Edit menu. You will be returned to the last selected individual. If the other parent is not listed, click Cancel or None in the Parent window. A new Individual Record window opens showing the parent. Enter the other parent in the appropriate parent field. (For additional information, see "Changing Parents" on page 28.)

Adoption

Ultimate Family Tree provides ways to indicate that a child is adopted. Begin by entering the adoptive parents as the Father and Mother in the child's Individual Record window. You then can add an adoption event for the child with information concerning the birth parents (if known), or the adoption itself, in the Event Text window. Another method to indicate adoption is simply to use the Miscellaneous window to add an "adopted" flag for the child.

Children of Unmarried Parents

A marriage is not required to connect parents to their children. In addition, you can enter one parent if the other parent is not known. When reports print for these families, no mention of the unmarried status is printed (unless you use the Unmarried event or include the information in the Individual or Event Text windows).

Adding Siblings

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

1. From the Individual Record window, add a brother or sister for that person by clicking the Sibling button at the bottom of the window. A new Individual Record window opens for a brother or sister with the sibling's surname already entered, along with parent names.

2. Complete the sibling's name field and the rest of the Individual Record. If you choose not to create this new record, choose Undo from the Edit menu. You will be returned to the last selected individual.

To use the Sibling button on the Individual Record, you must enter 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/*.

Additional Information

Ultimate Family Tree provides a way to add additional information for an individual. In the Individual Record window, click the More button to open the Individual More window. A green indicator next to the button shows if information is already present.
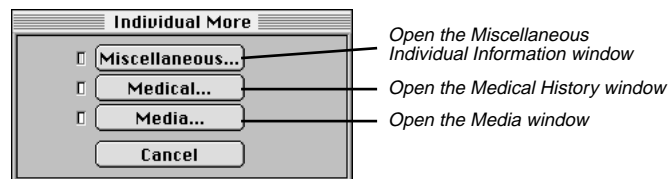
Figure 2-13: Individual More Window

Click Miscellaneous to open the Miscellaneous Individual Information window where you can record information such as aliases, nationality, languages, individual flags, ancestor and descendant interest levels, and Social Security number. Click Medical to open the Medical History window where you can enter information about the individual's physical characteristics (height, weight, skin, eyes, hair, etc.) as well as any known medical conditions. Click Media to attach images from the Media Library to the individual you're editing.

Miscellaneous Individual Information

Ultimate Family Tree provides a way to add miscellaneous information for an individual. In the Individual Record window, click the More button, and then click Miscellaneous to open the Miscellaneous Individual Information window.
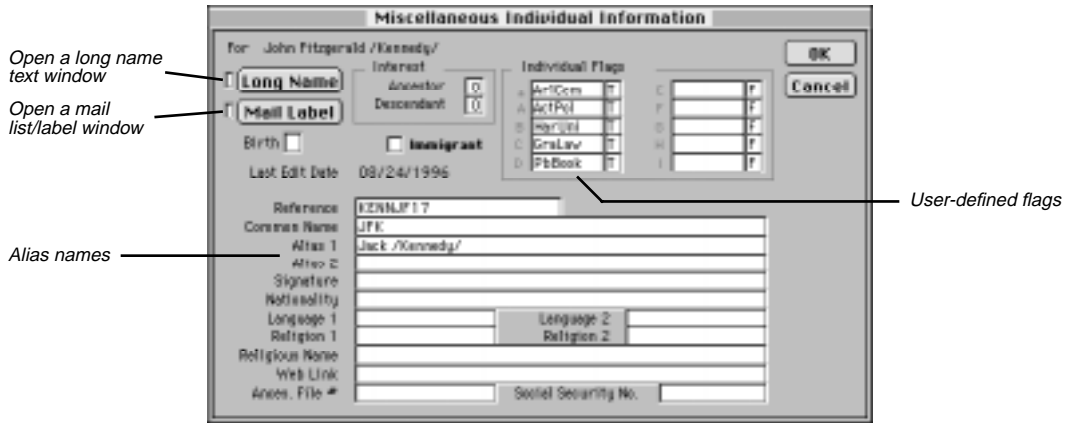
Figure 2-14:   Miscellaneous Individual Information Window

- *Long Name* — Opens a text window for entering a name of up to 65,000 characters for the selected individual. The long name is not displayed in Build or View windows, but is used in Family Journal (Genealogy) reports. Remember to use slash characters (/) to define the surname and curly braces { } to define a title.

- *Mail Label* — Opens the Mail Label window where you can enter an address of up to 34 characters per line and a telephone number for the individual. You can specify mailings such as a newsletter to send to this person. (See page 109 for more information about printing mailing labels.)

- *Interest Level* — Optional Ancestor and Descendent Interest levels are required in Tiny-Tafel reports. The Tiny-Tafel is a summary of your research interests that can be distributed to others so you can find people who are researching family lines in which you have an interest. Ultimate Family Tree interest designations are as follows:
    - 0 People who will not be used to establish a family line.
    - 1 People in whom you have no further interest or for whom your data is marginally reliable and therefore of no interest to anyone else. These people can be included in a Tiny-Tafel for reference to establish a family line.
    - 2 People in whom you have little interest, but your data is a high quality and might be of interest to another researcher.
    - 3 People in whom you have moderate interest. The data is either good or poor.
    - 4 People in whom you have great interest. The data is good or poor.

- *Individual Flags* — Flags designate special information that you might want to include in your project. Ten flags are available for each individual. They can be defined differently for each individual. Examples of possible flags include attendance at a certain college, needs more research, or cause of death. Up to ten characters of text can be entered in each Flag field.

- *Birth field* — Enter N(ormal), T(win), M(ultiple), S(tillborn), I(llegitimate), L(egitimate). This field is optional.

- *Immigrant* — Check this box if the individual you are entering was an immigrant. The Immigrant field is used in Family Journal reports to establish the correct generation number reference.

    A person identified as an immigrant in the Miscellaneous Individual Information window is numbered as generation 1 in Family Journal reports. In Descendant Family Journal reports, each generation of this individual's ancestors is identified with an alphabetic character beginning with A, while the descendant generations are assigned the usual generation numbers, beginning with 2. In Reverse Register Family Journal reports, opposite from Descendant reports, each generation of descendants is given an alphabetic character, beginning with *A*, while the ancestor generations are each assigned a generation number beginning with 2.

- *Last Edit Date* — The last edit date is the date this record was last saved. Ultimate Family Tree uses your computer's system date. The last edit date cannot be changed manually.

- *Reference* — If you have your own system for referencing and would like to use it, enter your data in the Reference field. Any combination of letters, numbers, and punctuation marks can be used up to 20 characters.

- *Common Name* — You can enter a commonly used name such as *Johnny* or *Mary Jo*. This name prints instead of the first name in reports where first names print without a surname. If a report has limited space for an individual's name it is truncated and the common name is substituted for the first name. For example, if *Mary Jo* is not entered here, Ultimate Family Tree uses *Mary* as the first name.

- *Alias 1* — First alias for the individual. This is a good place to record a woman's married name, the French Canadian *dit* name, nickname, or the way you'd like a person's given and surname(s) to appear in printed reports. Remember to use slash characters (/) to define the surname and curly braces { } to define a title.

- *Alias 2* — Second alias for the individual. Use slash characters (/) to define the surname and curly braces { } to define a title.

    For printed reports, Ultimate Family Tree provides choices for names in the Page Setup window. For example, you can choose Alias 1 as the first choice and Main (the Individual Record name) as the second choice. Ultimate Family Tree uses the Alias 1 name if it is present and then, if it's not present, the Individual Record name. The name choice is useful if you want to use a name other than a birth name on printed reports. The name you designate as your first choice is the one used by Ultimate Family Tree. The name options are Main, Alias 1, Alias 2 and Religious name.

- *Signature* — How the individual signed his or her name, for example, *M. A. Smith*.

- *Nationality* — Nationality of this individual.

- *Language 1* — Primary language for this individual.

- *Language 2* — Second language for this individual.

- *Religion 1* — First religion for this individual.

- *Religion 2* — Second religion for this individual.

- *Religious Name* — Religious name for this individual. Use slash characters (/) to define the surname and curly braces { } to define a title.

- *Web Link* — The Universal Resource Locator (URL) that links an individual to any other Internet URL in an Instant Web Page. This link can be to images, sounds, or other genealogies. For example, you can link John F. Kennedy to a genealogy at another Web site. If this genealogy were to be found at URL *http//www.anothersite.com/jfk.html*, you could enter this address in the Web Link field for John F. Kennedy. Someone browsing your genealogy could then click on the link to move to the new page for JFK. This link is included in Instant Web Pages.

- *Ances. File #* — Identifying number for LDS Ancestral File.

- *Social Security No.* — Individual's Social Security number.

Mail Label

Open the Mail Label window by clicking the More button in the Individual Record window. Click Miscellaneous, and then click Mail Label in the Miscellaneous Individual Information window. Use the Mail Label window to enter an address and phone number for the individual. There is also a list you can use to designate specific mailings. The name entered in the addressee field can be different from the name in the Individual Record window, such as *Mr. and Mrs. Thomas Smith*.
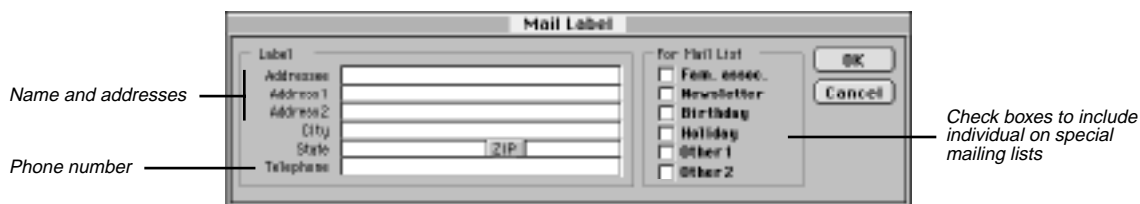
Figure 2-15:   Mail Label Window

1. Enter a name and address for the individual on the appropriate lines. You can enter up to 34 characters per line.

2. Designate specific mailings to send to this person, such as a newsletter. Check any of the appropriate option boxes.

3. Click OK to return to the Miscellaneous Individual Information window.

Medical History

Click the More button in the Individual Record window, and then click Medical to open the Medical History window.

Enter physical characteristics →

Open a medical condition text window →

Figure 2-16: Medical History Window

You can enter information about the individual's physical characteristics (height, weight, skin, eyes, hair, etc.) as well as any known medical conditions.

Clicking a medical condition opens a free-form text window where you can enter up to 65,000 characters of information. Click the Other button at the end of the list of medical conditions to add any medical conditions not listed in this window.

Media

Click the More button, and then Media to open the Media Link window where you can attach images from the Media Library to the subject individual.

1. To add an image, in the Add Media Link group, click Existing Media to open a Media Select window.
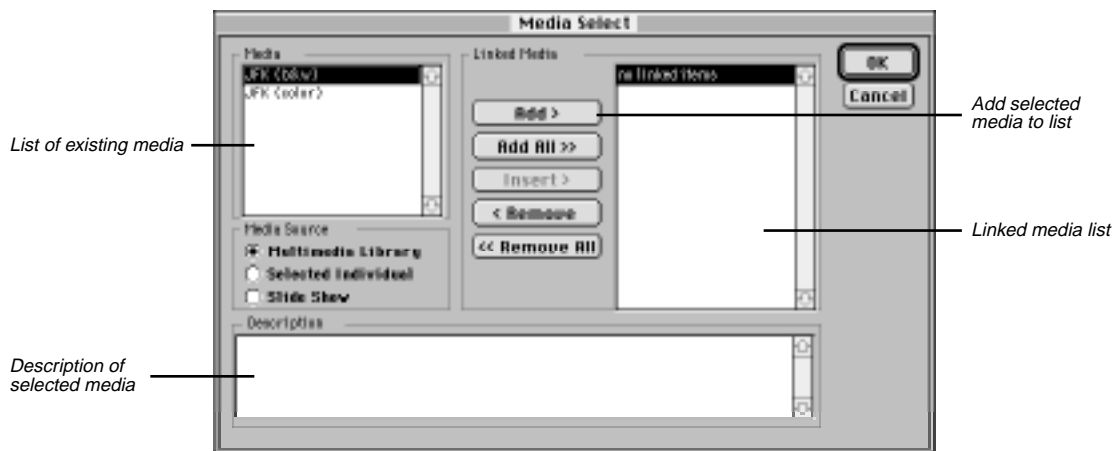
Figure 2-17:   Media Select Window

2. In the Media list, highlight the item you want to add and click Add to copy it to the Linked Media list.

3. Click OK.

4. Click OK to close the Media Link window.

   See Section 7 for more information on the Media Link window and building a Media Library.

Section 3:
Viewing Information

Use the View menu to choose ways to display information you have entered in your project. The following formats are available: Family Tree, Family Group, Individual Summary, Descendants, Kinship, Name + Record No, Slide Show, Photo, and Lists. Use the list windows to display information about individuals, marriages, and sources in table (row and column) format. Use lists to help analyze data in your project, as well as to locate records for editing.

You will learn how to:

✓ Move around the Family Tree window displaying up to five generations per screen with pictures

✓ Display a Family Group window

✓ View all information entered about an individual in story form

✓ View the descendants of a selected individual

✓ Determine the relationship between any two individuals in your project

✓ View a slide show for an individual or family

✓ See a person's full name and record number

✓ View all individuals in your project by record number, surname, given name, or birth date

✓ View a list of marriages in your project organized by surname, given name, date, or place

✓ View the list of sources in your Source Library

Family Tree (Pedigree) Window

The Family Tree (also known as Pedigree) window displays up to five generations of a family. This window can be used with other windows, such as the Individual Record window, to discover more about selected family members.

1. Choose Family Tree from the View menu.

   Note   The indicator in the far right column will be on (green) if that line continues. A plus sign (+) is displayed to the left of a subject's child or sibling if that person has descendants.
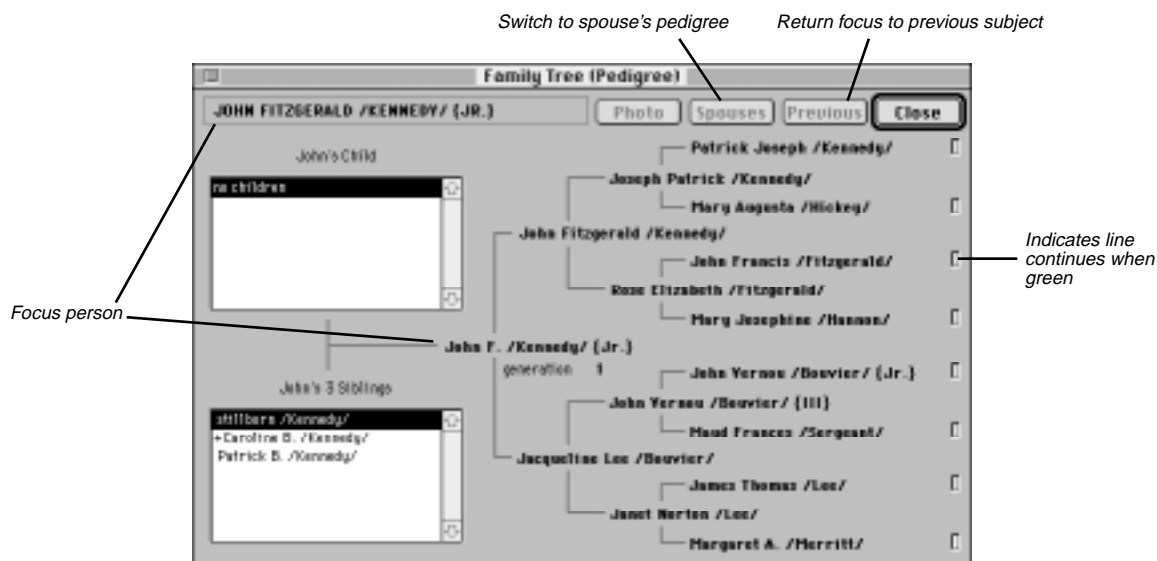
Figure 3-1:   Family Tree (Pedigree) Window

2. To change the focus of the Family Tree, you can do any of the following:

• Choose Locate from the Search menu (or ⌘-L) to select an individual as the focus.

• Double-click a name to make that person the focus.

• Click Previous to move back to the previous subject.

• Choose a focus from the child list (by double-clicking). Use the scroll bar to move up and down a long list of children, or click once on any child and use the Up and Down Arrow keys to move through the list. Type the first letter of a name to move up or down the list to names beginning with that letter. The number of children in the list is shown at the top of the list. Highlight a child's name and choose

Individual Record from the Build menu to display the Individual Record for the selected child. When you return to the Family Tree window, that child will be the focus.

- Double-click a sibling to make that person the focus. All siblings are listed, including those who have only one parent in common. Use the scroll bar, the Up and Down Arrow keys, or the first letter of the name to move up and down the Siblings list. Choose Individual Record from the Build menu to display the Individual Record window for a selected sibling.

3. Click the Spouses button to display spouses of the focus person. Click Cancel to return to the Family Tree window for the original person, or OK to return to the Family Tree with the selected spouse as the new subject. Click Edit in the Spouses window to open the spouse's Individual Record window.

   Note To return the focus to the original individual, double-click his or her name at the top of the window.

4. Click Photo to display the preferred image (if any) for the selected individual. See page 136 for information on selecting a preferred image for someone.

5. Click Close to close the Family Tree window and return to the Individual Record window. The last selected individual in the Family Tree window will be the new focus of the Individual Record.

Family Group Window

The Family Group window displays a family unit including a husband, wife, their parents, and their children.

1. Choose Family Group from the View menu.
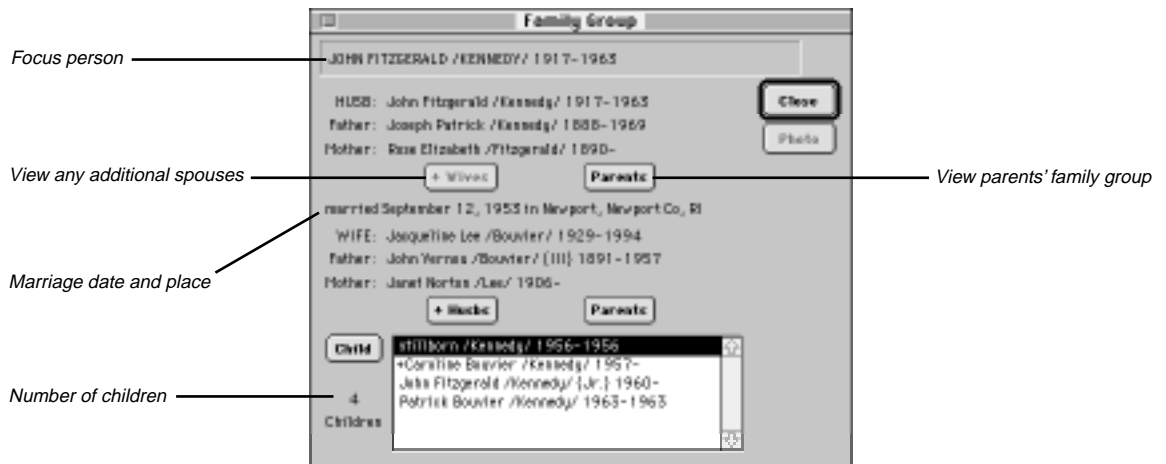
Figure 3-2:   Family Group Window

Note   If a marriage record for the husband and wife is found, the date and location of the marriage is shown in the center of the Family Group window. Otherwise, you'll see "marriage record not found." Parents who are not married or do not have a marriage record are considered parental partners. The children for this husband and wife are shown in the list box next to Child and the number of children is displayed under Child. This list contains all common children for this couple. Use the scroll bar or the Up and Down Arrow keys to move up and down a long list of children. You can also type the first letter of the name to move down the list to that child's name. A plus (+) sign in front of a child's name indicates that his or her descendant line continues. Type a plus sign to move up or down the list to a name with a plus sign.

2. To select a new focus, choose Locate from the Search menu (or ⌘-L). Remember, you can choose Individual Record from the Build menu if you'd like to display the Individual Record window for this or any selected individual.

3. Click +Wives or +Husbs to display a list of spouses or parental partners. Select a spouse or parental partner from the list to display his or her associated family, or click Cancel to return to the Family Group window. These buttons are dim if no other spouses are found.

4. Click Parents to display the family for the husband's or wife's parents. These buttons are dim if no parents are found.

5. To shift the focus forward one generation, highlight the child in the child list box and click the Child button, or double-click the child. When "no children" appears in the Child list box, the Child button is dim.

6. Click Photo to display the preferred image (if any) for the selected individual.

7. Click Close to close the Family Group window and return to the Individual Record window.

Individual Summary

To view all the information you've entered for an individual, follow these steps.

1. Select an individual in any window, and then choose Individual Summary from the View menu.

   Note   The selected individual's information is displayed in story form. Individual text, plus footnote and research notes, are shown in their entirety. Information in the Individual Summary window can be viewed but not edited. To change information appearing in the Individual Summary, edit the information in the Individual Record window.

2. To close the Individual Summary window, press Escape or click the close box.

   Note   Some event details might be displayed twice. This is normal.

Click to close window ————

Summary for Joseph P. /Kennedy/ 1888-1969 (read only)

Joseph was born in East Boston, Suffolk Co, MA September 6, 1888.

His birth parents are identified as:
father: Patrick Joseph /Kennedy/ 1858-1929
mother: Mary Augusta /Hickey/ 1857-1923

He married one time.

Joseph died November 18, 1969 in Hyannis Port, MA, at 81 years of age.

BIOGRAPHICAL TEXT: Born in 1888, the grandson of an Irish immigrant, Joseph Patrick Kennedy had an enormous drive to acquire both fame and fortune. His often cited goal was to be a millionaire by the age of 35. Within a year and a half of graduating from Harvard College, he had progressed from bank clerk through bank examiner to bank president and was on his way. Publicity from being the youngest U. S. bank president opened doors to other opportunities. Soon his financial enterprises embraced real estate, the stock market and motion pictures. Kennedy's accumulated wealth by 1929 enabled him to establish one million dollar trust funds for each of his children. In the 1930's he began to put his intelligence, personality and money into politics. His involvement in Roosevelt's inner circle during the presidential campaign led him to believe he would receive a cabinet post. Although that never materialized, he was chosen to head the

Figure 3-3: Individual Summary Window

Descendants Window

The Descendants window shows a list of descendants, one generation at a time, for a selected individual. For example, you can use the Descendants window to view all grandchildren of the focus person. Up to 100 generations can be viewed.

1. Choose Descendants from the View menu.

Focus person ————

Select a generation number to view descendants in a specific generation ————

Descendants of focus person ————

Descendants

PATRICK JOSEPH /KENNEDY/ 1858-1929   [Close]

GEN   generation 2, 4 sons and/or daughters ————————— Generation number, number of individuals

Francis Benedict /Kennedy/ 1891-1892
Joseph Patrick /Kennedy/ 1888-1969
Margaret Louise /Kennedy/ 1898-1974
Mary Loretta /Kennedy/ 1892-1972

[Photo....]

father: Patrick Joseph /Kennedy/ 1858-1929
mother: Mary Augusta /Hickey/ 1857-1923 ————————— Parents of selected person

Figure 3-4: Descendant Window

2. To choose a new focus for the Descendants window, choose Locate from the Search menu (or ⌘-L).

3. Choose a generation number from the Generation Gauge on the left side of the window to view the descendants in a specific generation. To choose a generation number, highlight the number or it's corresponding number line in the gauge. Alternately, you can click the gauge and use the Up and Down Arrow keys.

4. Use the scroll bar if the list of descendants in a generation is longer than the box. Individuals in each generation are shown in alphabetical order by given name. The number of persons in that generation are shown above the list, as is their relationship to the ancestor. The parents of the focus person are displayed at the bottom of the window.

   Note   To edit an individual record, select the individual and choose Individual Record from the Build menu to open the Individual Record window.

5. Click Close to close the Descendants window.

Kinship

You can find the relationship between any two individuals through birth or marriage. If a relationship exists, Ultimate Family Tree displays a list of common ancestors. The relationship between the selected individuals is computed through 16 generations.

1. Choose Kinship from the View menu.
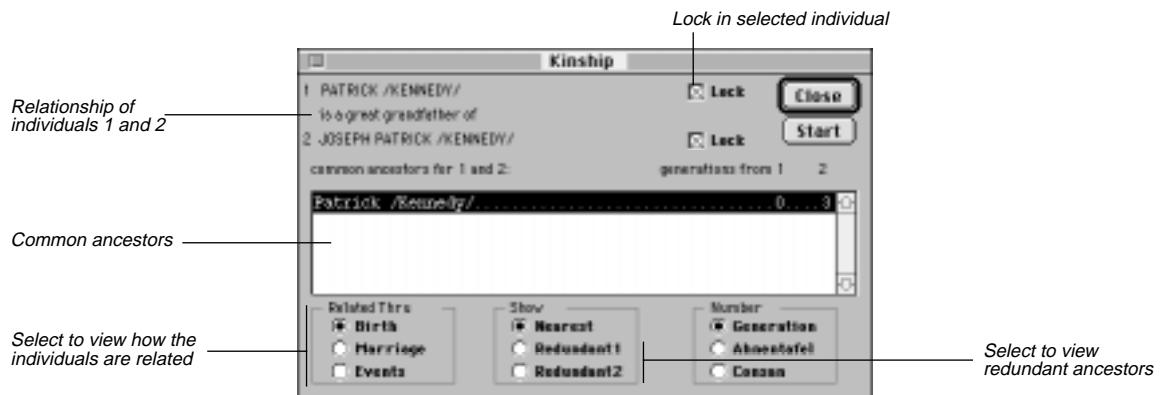
Figure 3-5:   Kinship Window

2. Start with subject 1. Uncheck subject 1's Lock button if it is checked. Choose Locate from the Search menu (or ⌘-L) to find a new individual. Click OK when done.

3. Check Lock to lock in subject 1.

4. Uncheck the Lock button for subject 2. Choose Locate from the Search menu (or ⌘-L) to find subject 2 for the relationship check. When the person is found, click OK.

    Note   You must unlock a subject before the Find Individual feature will work. Be sure to lock subject 1 before moving on to subject 2.

5. Click Start to compute the relationship between the two subjects.

6. The Related Thru group displays how the two individuals are related through birth or marriage, as well as any events they may have in common.

•   Select Birth to find a blood relationship.

•   Select Marriage to display relationships through marriage.

•   Select Events to display the events that the two individuals have in common.

7. To find the nearest common ancestor of the two subjects, select Birth from the Related Thru group and Nearest in the Show group.

8. Select Redundant1 from the Show group to display the redundant ancestors and the number of generations from subject 1 to all individuals in the list. To display the redundant ancestors and the number of generations to subject 2, select Redundant2.

    Note   Birth must be selected to access the Redundant options. Redundant ancestors occur when there is more than one line from an individual to his or her ancestor. Redundant lines result when cousins marry. If subjects 1 and 2 have common redundant ancestors, the number of generations to both is displayed. If the number 999 is displayed after an individual, there is no relationship between the selected subject and the individual in the list.

9. Select Generation from the Number group to display the number of generations from each ancestor to each subject. The resulting Relationship list contains the nearest common ancestors of the two subjects, and the number of generations from subject 1 and subject 2. This is the default selection when the Kinship window is first opened. Birth and Nearest must be selected to access the Generation option.

10. In the Number group, select Ahnentafel to display the Ahnentafel number for subjects 1 and 2. Birth and Nearest must be selected to access the Ahnentafel option.

11. To display the degrees of consanguinity (kinship) between each ancestor and subject, select Consan from the Number group. Birth and Nearest must be selected to access the Consan option.

12. Click Close to close the Kinship window.

Name and Record Number

Choose Name + Record No from the View menu to display a selected individual's full name and record number. Click OK to close the window.

Slide Show

Use the Slide Show window to view slide shows that you have created. See page 138 for steps on creating a slide show.

1. Choose Slide Show from the View menu to open this window.

List of slide shows ————
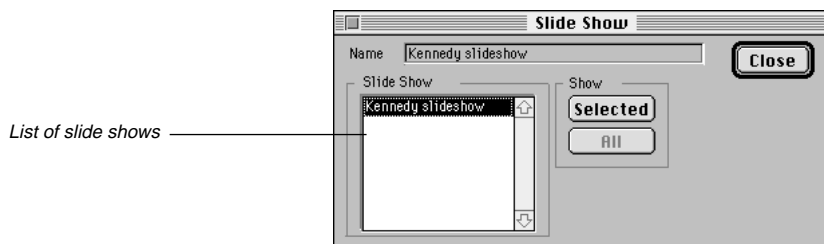
Figure 3-6:   Slide Show Window

2. Click Selected to view the show you highlighted or All to view all of the shows.

Viewing a Photo

Choose Photo from the View menu to display the preferred image for the selected individual. If no images linked to this individual have been selected as the preferred image, this feature is not available. See page 136 for instructions on selecting a preferred image.

Individual, Marriage and Source Lists

- *Individual List* — Displays a list of all individuals in your project. Choose Individual List from the View menu and choose one of the options: By Record Number, By Surname, By Given Name, or By Birth Date.

- *Marriage List* — Displays a list of the marriages in your project. Choose Marriage List from the View menu and choose one of the options: By Husb. Surname, By Wife Surname, By Husb. Given, By Wife Given, By Date, or By Place.

- *Source List* — Displays a list of all your sources in the Source Library.

Use arrows to scroll horizontally through list

Hold mouse button here and drag pointer to the left
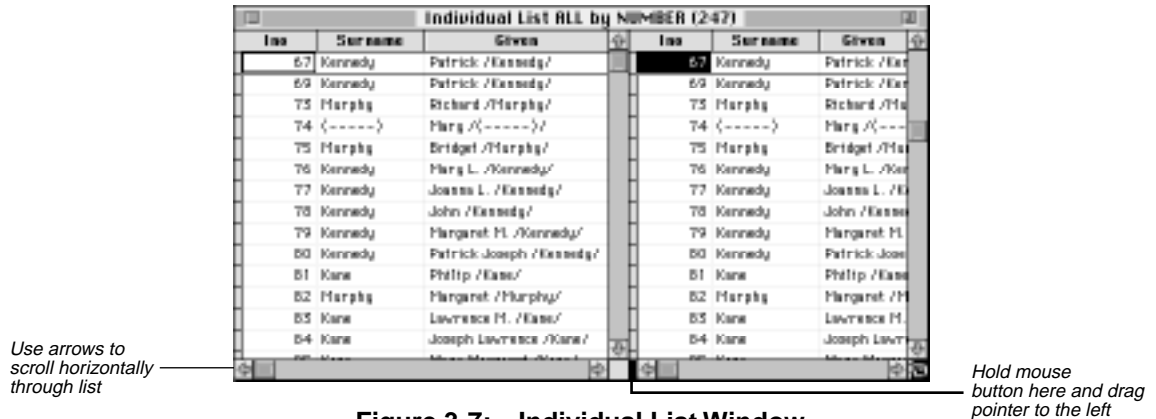
Figure 3-7:   Individual List Window

1. To open the right side of a List window, position the cursor on the resize box on the lower-right corner of the List window, hold down the mouse button, and drag the pointer to the left. When the right side of a List window is opened, the information in a record is displayed vertically and you can view all fields in that record.

2. When text is available in a text or note field, you'll see *Memo* in the list with an uppercase *M*. When no text is available, *memo* is displayed with a lowercase *m*. If text is available, you can view the text by pressing ⌘-PgDn with Memo selected.

3. Text in List windows can be viewed, but not edited. To edit text, events, sources, or other information displayed in an Individual List window, select the individual's name and choose Individual Record from the Build menu to open the Individual Record window. Click the appropriate button to access text, event, or source windows and make editing changes. In a Marriage list, double-click to open the Individual Record for the person on the left side of the list. In a Source list, double-click a selected field to open the Source Record window.

   Note   Use the vertically positioned arrows to scroll up and down the list. Use the arrows along the bottom of the window to scroll horizontally through the list.

Section 4:

Searching for Individuals

Ultimate Family Tree provides a powerful set of search routines designed to locate individuals in a project. In this section you will learn how to locate individuals by:

- ✓ Name and/or SOUNDEX code
- ✓ Citations
- ✓ Events in an individual's life
- ✓ User-defined flags
- ✓ Mailing label information
- ✓ Linked pictures
- ✓ Information contained in the Medical window
- ✓ Information contained in the Miscellaneous window
- ✓ Relationships
- ✓ Biographical, research or footnote text
- ✓ Event details
- ✓ Vital statistics
- ✓ Record number or part of the name

Using Search Windows

Each Search window provides options for defining the scope of your search. Ultimate Family Tree locates all records for which the contents of the specified field matches the search criteria. Information entered in a Search window is retained when you close the window. You can close a Search window, and then open it again to conduct another search using either the same or modified search criteria.

Search windows contain a pop-up menu with the following options:

- *Replace the list with those found* — Starts a new search list. This option replaces an existing search list with the results from the current search. Individuals already in the list are removed, and the new list is saved.

- *Add them to the name list* — Builds a composite list from two or more searches. This option adds the results of the current search to an existing search list. For example, if five individuals are already in the list from a previous search, and seven new individuals are found and saved with this option, the new list will contain 12 individuals.

- *Remove them from the name list* — Narrows an existing search list. This option removes the results of the current search from an existing search list. If five individuals are in an existing list, and two individuals from a new search are already in that list, they will be removed. The new search list will contain three individuals.

- *Keep if already in the name list* — Matches items in an existing search list. This option keeps the results of the search if they are already in the existing search list. If five individuals are in an existing list and a new search finds two who are already in that list, the new list will contain two individuals.

Other options common to all search windows are:

- *Close* — Closes the search window
- *Search* — Creates the Search list
- *Results* — Views the results of the last search
- *History* — Shows how the search list was built
- *Group* — Replaces the Grouping List with the results of the selected search
- *Preview* — Displays the results of a search without committing the results to the search list

Steps for Completing a Search

The following basic steps are used to conduct a search.

1. Open any search window from the Search menu.

2. Make selections for defining the search. The search criteria are shown at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

3. Choose one of the options (Replace, Add, Remove, or Keep) from the pop-up menu at the bottom of the window for the desired Search list.

4. To check the search without committing the results to the search list, click Preview. Press Escape to return to the Search window.

5. Click Search to create the Search list and view the results.

6. Click Group to replace the Grouping List with the results of the current search.

7. Click Close or press Escape to close the Search Window.

Note Click Results to show the last completed search list. Double-click any name to open the Individual Record for that person. Click History to see a summary of how the Search List was built.

Name Search

You can locate a person in a Ultimate Family Tree project by name or names. Various options provide flexibility in defining the Name search. The following rules apply when entering names in the Name Search and Find Individual windows:
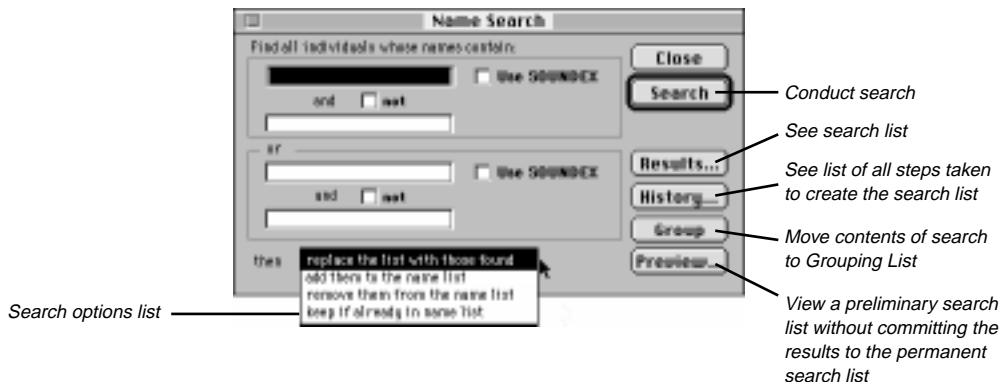
Figure 4-1: Name Search Window

- Name searches are not case sensitive—use uppercase or lowercase letters.

- Enter more than one name for a person if you want to be specific. For example, if you are looking for *John Fitzgerald Kennedy* in your project, you can type *john fitzgerald* in the top field.

- Type either full or partial names. For example, you can type *hn fit* to locate *John Fitzgerald Kennedy*.

- Use special characters called *wild cards*. The question mark wild card character (?) is used to represent a single unknown character. For example, *jo?n* finds the names *John* and *Joan*. The asterisk wild card (*) is used to represent more than one consecutive character. For example, *ho*r* finds *Howard* and *Homer*.

- Use forward slash characters (/) to specify surnames. For example, by typing */smith/* you find all those individuals having the surname *Smith*. If you enter *smith* without slash characters, Ultimate Family Tree finds all individuals whose names contain *smith* anywhere in their names.

- Use braces { } to specify titles. For example, typing *{Sr.}* finds all those individuals having the title *Sr.*

- Search for surnames in the top text field of each name specification box by SOUNDEX code. Enter a surname without the slash characters or a valid SOUNDEX code in the first name field. If you enter a surname, Ultimate Family Tree converts the name to the SOUNDEX code for that name, and replaces the name in the text field with the code.

  Note   SOUNDEX is a code used by the United States Government to index early census records. It is used to find names with the same sound, no matter how they are spelled. Each SOUNDEX code is made up of a letter and three numbers. The letter is the same as the first letter of the surname.

Searching for a Simple Name

1. Choose Names from the Search menu.

Type name here

Check here to exclude names containing characters entered below

Check here to search by SOUNDEX code

Figure 4-2:   Name Search Window

2. Type a name in the first name field of the top Name Search box. Use wild cards if desired and any combination of uppercase and lowercase letters.

3. Complete the search as described on page 62, "Steps for Completing a Search."

Searching for a Surname by SOUNDEX

1. Enter a surname (without slashes) or a valid SOUNDEX code in the top name field. If you enter a surname, Ultimate Family Tree converts the name to the proper SOUNDEX code for you. (The SOUNDEX search only finds surnames.)

2. Check the SOUNDEX box in the appropriate Name Specification box.

3. Make sure all other name fields are empty.

4. Complete the search as described on page 62, "Steps for Completing a Search."

Completing a Complex Name Search

1. Enter the search information using any combination of the four name fields available. Select the SOUNDEX and the NOT conditions that you want to use. The two name fields in each Name Specification box are used together.

2. Check the NOT box to exclude names from the search.

   Note The characters entered in both fields must be present in an individual's name for that individual record to be included in the search list. If the OR name specification fields (lower name specification box) are used with the upper name specification box, a record must match one or the other to be included.

3. Specify surnames by using the forward slash, for example, */Smith/*, and titles by using braces, for example, *{Jr.}*.

4. Complete the search as described on page 62, "Steps for Completing a Search."

Searching for Individuals Linked to Citations

The Citation Search locates individuals who are connected through a citation to specific sources in the Source Library. Open the Citation Search window by choosing Citations from the Search menu. The Citation Search window contains a list of all sources in the Source Library, and options to narrow your search.
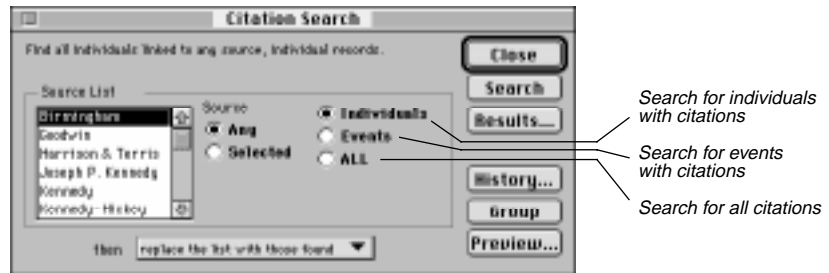
Figure 4-3: Citation Search Window

The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. Select the Any radio button in the Source group or the Selected button to match only a specific source in the search.

2. If you chose Selected in step 1, select the source you want to include in your search from the Source List. The Source List includes all the sources in the Source Library. The list shows the Abbreviation 1 name for each source.

3. Narrow your Citation search by specifying where the citation was used. Three location options are provided:

- *Individuals* — Searches for the selected source when used in citations for information in the Individual Record window

- *Events* — Searches for the selected source when used in citations for events

- *ALL* — Searches for the selected source when used in any citation

4. Complete the search as described on page 62, "Steps for Completing a Search."

Individual Events Search

The Individual Events Search looks for individuals connected to events in your project based on the events entered in the Individual Record window. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is completed.

1. Choose Events from the Search menu.

Figure 4-4:   Individual Events Search Window

2. Select Selected Event or All Events in the lower-left corner of the window.

3. If you chose Selected Event in step 2, select an event from the Possible Events list that shows all the event types used in the current project. Scroll through the events using the Up and Down Arrow keys or by typing the first letter of the event you want to search.

4. To search for events that happened in a selected place, check Selected in the Places group, and then click Place to open the Find Place window. If you are not including places in the search criteria, skip to step 9.

5. Type in the first few characters in a place name.

6. Click Exact for all place names with an exact match or click Like and use any characters including wild card characters. The question mark wild card (?) is used to represent a single unknown character. The asterisk wild card (*) is used to represent more than one consecutive character.

7. Click Show to see the list of places found.

8. Select a place and click OK to close the Find Place window. The place to be included in the search is added to the criteria at the top of the window.

9. To search for an event that took place in a certain time period, enter dates for the time period. Do one of the following:

• Enter the date in the After field in the Dates group to search for events occurring after a given date.

• Enter the date in the Before field to search for events occurring before a given date.

• Leave both the After and Before fields blank to search for events that occurred on an unknown date (the event date fields are blank).

   Note   If a date is entered in the Before field and the After field is left blank, the search includes events with a blank date field and events having dates after 1/1/100. If a date is entered in the After field and the Before field is left blank, the Before date defaults to today's date.

10. Complete the search as described on page 62, "Steps for Completing a Search."

Flags Search

The Flags Search locates individuals whose Individual Records contain specific user-defined flag information. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. Choose Flags from the Search menu.
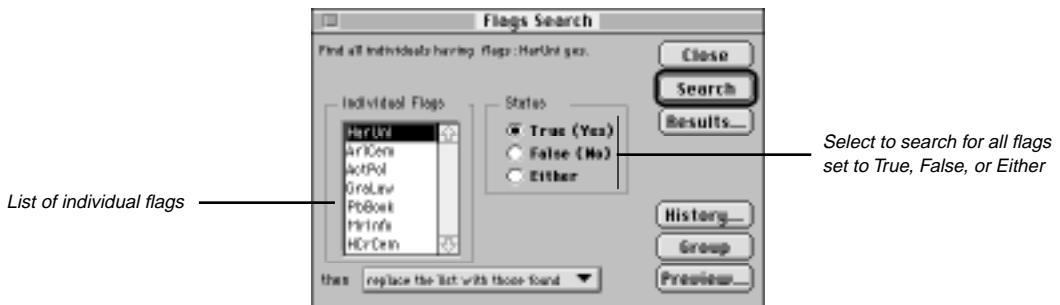
Figure 4-5:   Flags Search Window

2. Select a flag from the list of individual flag fields. All flag labels assigned to the project are included in the list.

3. In the Status group, select True to search for flags marked True, False to search for flags marked False, or Either to search for individuals linked to the selected flag marked as either True or False.

4. Complete the search as described on page 62, "Steps for Completing a Search."

Mail Search

The Mail Search window locates individuals by information entered in the Mail Label window, opened from the Miscellaneous Individual Information window. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is completed.

1. Choose Mail from the Search menu.

Search for individuals who are included in one of the Mail List options

Type text for which to search

Figure 4-6: Mail Search Window

2. Scroll down the list of options in the label field and select the criteria to be used in the search.

3. If you select one of the label fields that contains text, such as an addressee, enter the words to search in the Text field.

4. Select a mailing list from the Label Fields (such as Family Association, Newsletter, Birthday, Holiday, and Other 1 and 2) to enable the buttons in the Included in Mail List box.

5. Select Yes to search for individuals included in the selected mailing list, or No to find those not included in that mailing list.

6. Complete the search as described on page 62, "Steps for Completing a Search."

Media Search

The Media Search searches for individuals who are connected to a selected image. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. Choose Media from the Search menu.

Figure 4-7: Media Search Window

2. Select the image you want to include in the search from the Media list.

3. Complete the search as described on page 62, "Steps for Completing a Search."

Medical Search

The Medical Search looks for individuals for whom you have added medical information. The Medical History window is opened from the Individual Record window. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. Choose Medical from the Search menu.

2. Select one of the three options located under the Medical Conditions list: Selected, All, or Ignore. If you select Ignore, the Medical conditions are ignored and only the Measure and Misc. groups are available to be searched.

3. If you chose Selected in step 2, select the medical condition from the Medical Conditions list. Scroll through the list by using the Up and Down Arrow keys or by pressing the first letter of the condition you want to search.

4. Select Any Text in the Text group to search for text entered in the Medical Condition text windows, or select Specific Text and enter the words you want to search for.

Type specific weight and height data to be searched

Select to search on any text

Enter text to be searched

Check option to include medical conditions in search
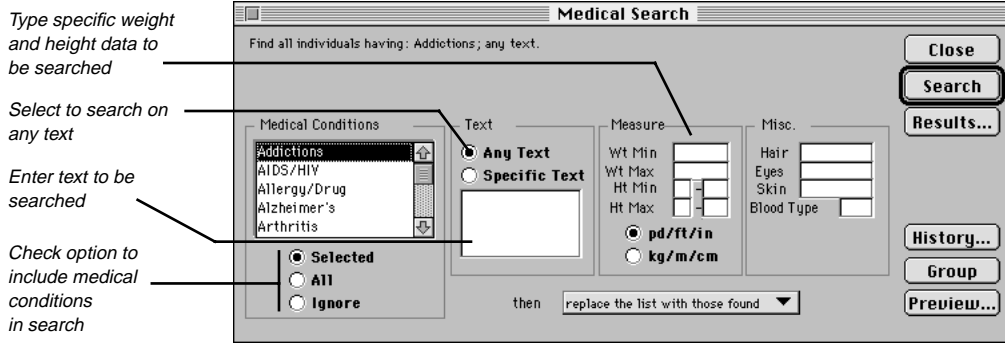
Figure 4-8:   Medical Search Window

5. Type a weight and/or height to search for. Enter a minimum and maximum number for each criteria. You can specify either pound/foot/inch (pd/ft/in) or kilogram/meter/centimeter (kg/m/cm).

6. Type specific criteria such as hair color, eye color, skin color, or blood type.

7. Complete the search as described on page 62, "Steps for Completing a Search."

Miscellaneous Search

The Miscellaneous Search window locates individuals with information entered in the Miscellaneous Individual Information window. The Miscellaneous Individual Information window is opened from within the Individual Record window. The search criteria are shown at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. Choose Miscellaneous from the Search menu.

Type text to be found

Ancestral and descendant limits can be entered here

Figure 4-9:   Miscellaneous Search Window

2. Select a field from the Miscellaneous Fields list. Use the scroll bar or the Up and Down Arrow keys to move through the list.

3. Type the text you wish to search for in the Search group, or if you have selected Ancestral Interest or Descendant Interest, type the interest limits in the Low and High fields in the search group.

4. Complete the search as described on page 62, "Steps for Completing a Search."

Relationship Search

The Relationship Search looks for individuals who are related directly or through collateral lines to a specified person. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. Select (from any window) the individual you want as the starting subject of the search.

2. Choose Relationship from the Search menu.

Enter limits of generations to be included in search

Add other spouses

Figure 4-10:   Relationship Search Window

Note   Choose Locate from the Search menu to find a new starting person for the search. See page 76 for information on using the Find Individual window.

3. Select one of the following Relationship Options:

• *Ancestors Only* — Searches for ancestors to a specified generation limit

• *Ancestors Plus Their Descendants* — Searches for ancestors to a specified generation limit, and descendants of those ancestors to a specified descendant limit

• *Descendant Only* — Searches for the selected individual's descendants to a specified generation limit

• *Descendants Plus Their Ancestors* — Searches descendants to a specified generation limit, and ancestors of those descendants to a specified ancestor limit

- *Ancestors Plus Descendants* — Searches ancestors and descendants to a specified generation limit in each direction

- *Siblings* — Searches for the start person's siblings (generation limit not used)

4. Use the Limits group to specify the number of generations (up to 999) to include in your search. The Limits group includes three fields:

- *Generation* — Enter the number of generations to search in the direction you are searching (ancestors, descendants or both).

- *Descendant* — Enter the number of generations of descendants to include when Plus Their Descendants is selected.

- *Ancestor* — Enter the number of generations of ancestors to include when Plus Their Ancestors is selected.

5. Check the Add Other Spouses box to add spouses not already included in the search.

6. Complete the search as described on page 62, "Steps for Completing a Search."

   Note   The starting individual is always included in the list.

Text Search

The Text Search locates individuals whose records contain text in a free-form text field. The search criteria are displayed at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

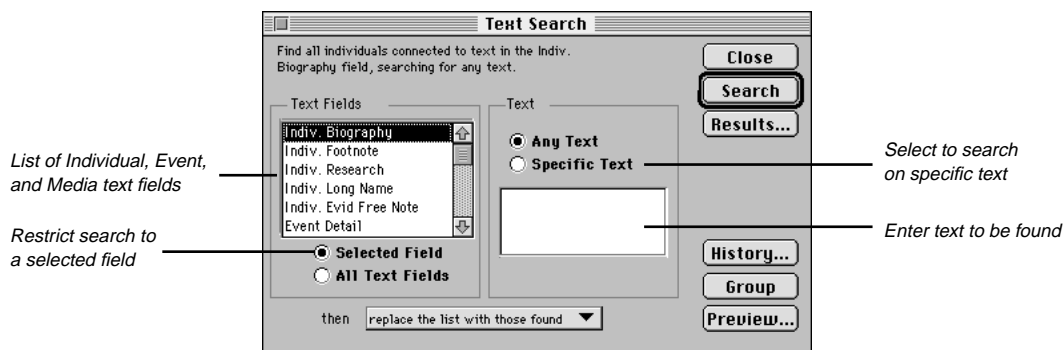1. From the Search menu, choose Text.

Figure 4-11:   Text Search Window

2. To search on a specific field, select the Individual, Event, or Media text field from the Text Fields list. Scroll through the list using the Up and Down Arrow keys or by typing the first letter of the event you want to search. Click Selected Field below the Text Fields list.

3. To search all fields, click All Text Fields below the Text Fields list.

4. Click Any Text or Specific Text (if you chose Specific Text, type the specific text for which you want to search in the Text box).

5. Complete the search as described on page 62, "Steps for Completing a Search."

Vital Statistics Search

The Vital Statistics Search locates individuals on the basis of their vital statistics, such as age at a certain event. The search criteria are shown at the top of the search window as you make your selections. This information is also added to the History window after a search is complete.

1. From the Search menu, choose Vital Statistics.

Enter T (true), F (false), Y (yes), N (no), or n/a (not applicable)

Enter low and high ages or number limits
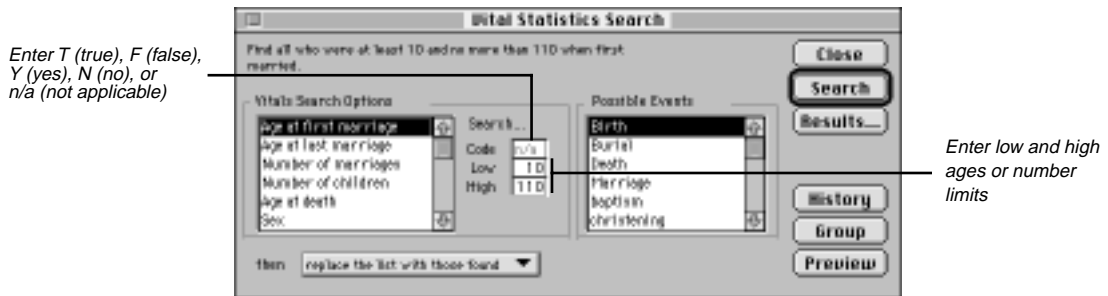
Figure 4-12:   Vital Statistics Search Window

2. Select a vital statistic from Vitals Search Options list.

3. Enter the appropriate search code or limit in the Search group.

    Note   Vital statistics can be specified either by code (such as *Y* for yes, *N* for no) or limits (such as low age and high age). Appropriate search conditions are available for each vitals search option.

4. Use the Vitals Search Options, Age at first (event) and Age at last (event) to choose any event you wish. For instance, you can choose Age at first (event) from the Vitals Search Options and then select an event type included in your project from the Possible Events list. Enter the age to be searched in the limit box.

5. Complete the search as described on page 62, "Steps for Completing a Search."

Grouping

The Grouping option merges search lists generated through the individual search routines. Use the Grouping List to hold only the names of individuals on whom you want to focus. It can also be used as a basis for printed reports and new projects. Each search window has a Group button that replaces the Grouping List with the results of the selected search. Use the Grouping window to merge the contents of several searches.

1. From the Search menu, choose Grouping.
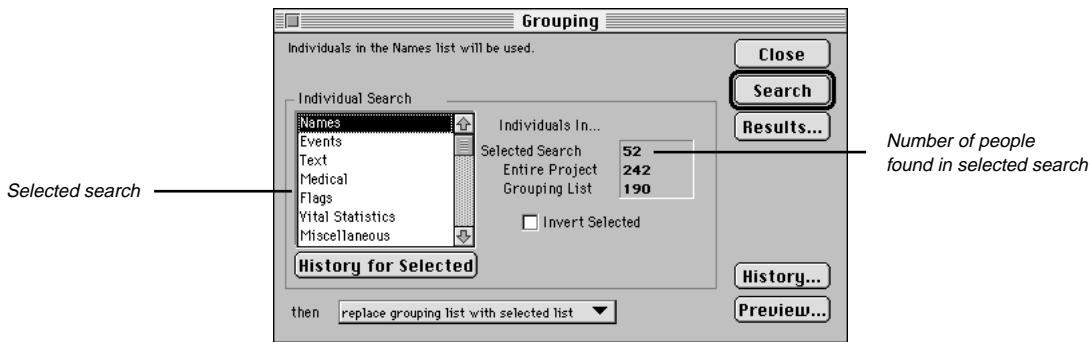
Figure 4-13:   Grouping Window

2. Select a search routine from the Individual Search list. The Individuals In group displays the number of individuals in each of three categories:

• *Selected Search* — Displays the number of individuals in the search routine selected from the Search list

• *Entire Project* — Displays the total number of individuals in the project

• *Grouping List* — Displays the number of individuals in the current Grouping List

   Note   You must run a search in the selected routine before you can add it to the Grouping List. The number of individuals found in the selected search appears next to Selected Search in the Individuals In group. If this number is zero, a search has not been run and a Grouping List cannot be created.

3. Click History for Selected to see a summary of how the results were obtained for the selected search.

4. Check the Invert Selected box to include all individuals not in the selected search.

5. Select one of these options from the pop-up menu for the resulting search list:

• *Replace grouping list with selected list* — Starts a new search list. This option replaces an existing search list with the results from the current search list. Individuals already in the list are removed, and the new list is saved.

- *Add selected list to grouping list* — Builds a composite list from two or more searches. This option adds the results of the current search to an existing search list. For example, if five individuals are already in the list from a previous search, and seven new individuals are found and saved with this option, the new list will contain twelve individuals.

- *Remove selected list from grouping list* — Narrows an existing search list. This option removes the results of the current search from an existing search list. If five individuals are in an existing list, and two individuals from a new search are already in that list, they will be removed. The new search list will contain three individuals.

- *Keep in selected list and grouping* — Matches items in an existing search list. This option keeps the results of the search if they are already in the existing search list. If five individuals are in an existing list and a new search finds two who are already in that list, the new list will contain two individuals.

- *Add spouses to grouping* — Adds spouses for all individuals in the Grouping list.

6. To check the search without committing the results to the permanent search list, click Preview. Press Escape to return to the Grouping window.

7. Click Search to create the Grouping list.

   Note   Click Results to show the list. Double-click a name to open the Individual Record for that person. Click History to see a summary of how the Grouping List was built. Click Close or press Escape to close the Grouping window.

Adding an Individual to the Grouping List

You can add an individual to the Grouping List.

1. From the Search menu, choose Grouping.

2. Click Results to open the Grouping List.

3. Choose Locate from the Search menu to open the Find Individual window.

4. Find the person and click OK. The Grouping List will close. Click Results to open the Grouping list again with the individual's name highlighted.

Removing an Individual from the Grouping List

You can remove an individual from the Grouping List.

1. Open the Grouping List by choosing Results in the Grouping window.

2. Highlight the name of the individual.

3. From the File menu, choose Delete Record.

   Note   This procedure removes an individual from the Grouping List, but it does not delete the person from the project. When removing an individual from the Grouping List, the change is not reflected on the list until you have closed and reopened the list.

Finding an Individual

The quickest, simplest way to find an individual is the following:

1. Click the main name field in the Individual Record.

2. Click the Find button to the right of the Spouse field. The Candidate Individuals window opens.

3. Press the first letter of the first name of the person you want to find to move to that place in the list.

4. Select the individual you want and click OK.

Another way to find an individual is to use the Find Individual window.

1. Choose Locate from the Search menu to open the Find Individual window.

Figure 4-14:   Find Individual Window

2. Type the first few characters of the name (or the record number, if known) and press Enter, or choose Find to display the first occurrence of that name in your project.

   Note   If you type a full name, use slash (/) characters to mark the surname. See the next section for other rules on entering names in searches. If you have typed characters, Find locates all individuals in the project whose names contain those characters and places them in a list. The first name found is displayed in the Find Individual window.

3. Click Find Next and Find Previous to move through the list. To display the entire list and make a selection, click Show.

4. Highlight the name of the individual you want in the Find list and close the window (click the Close box or press Escape) to return to the Find Individual window.

5. Click OK to return to the original window with the focus changed to the newly found individual.

A third way to find an individual is to use the View list.

1. From the View menu, choose Individual List and then By Surname.

2. Use the scroll arrows to scroll through the list.

3. Double-click the name you want, or select the name and choose Individual Record from the Build menu to open that person's Individual Record.

Rules for name searches

- Names are not case sensitive—use uppercase or lowercase letters.

- Enter more than one name for a person if you want. For example, if you are looking for John Fitzgerald Kennedy in your project, you can type *john fitzgerald*.

- Type either full or partial names. For example, you can type *hn fit* to locate *John Fitzgerald Kennedy.*

- Use special characters called *wild cards*. The question mark wild card character (?) is used to represent a single unknown character. For example, *jo?n* finds all those named *John* or *Joan*. The asterisk (*) is used to represent more than one consecutive character. For example, *ho*r* finds *Howard* and *Homer*.

  Note   Wild cards cannot be used in a SOUNDEX search.

- Use forward slash characters (/) to specify surnames. For example, by typing */smith/* you find all those individuals having the surname *Smith*. If you enter smith without slash characters, Ultimate Family Tree finds individuals whose names contain *smith* at any place.

- Use braces {} to specify titles. For example, typing *{Sr.}* finds all those individuals having the title *Sr.*

Using the Go Menu

The Go menu gives you the ability to move through the individual list and quickly return to recently edited records. Up to ten individual names are displayed in the Go List. Each time you open an Individual Record, that individual's name is placed at the top of the list.


```
 Go
 Top
 Up List
 Down List
 Bottom

 1 Henry R. /Caulfield/
 2 Edith M. /Caulfield/
 3 Margaret M. /Kennedy/
 4 Bridget /Murphy/
 5 Mary /(-----)/
 6 Richard /Murphy/
 7 John /Kennedy/
 8 Patrick Joseph /Kennedy/
 9 Francis Benedict /Kennedy/
10 Mary Augusta /Hickey/
```
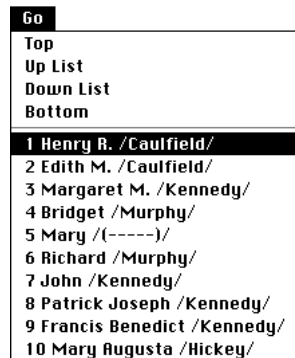
Figure 4-15:   Go Menu

From the Go menu, choose any name in the list to open that individual's record. Choose Go Top to move to the first person in your project. Choose Go Bottom to move to the last person. Choose Up or Down to move the previous or next person in the list. The next person is determined by the order in which you last opened individual records. If the last individual record you opened resulted from a search, the focus will change to those individuals in the search list.

Section 5:
Reports

Ultimate Family Tree provides a wide variety of genealogical charts and reports, from simple lists to fully indexed and documented books. Many different formats are provided which you can customize to your own preferences. Reports are sent to a Rich Text Format (RTF) file that can be imported into most word processing programs, including Microsoft Word and ClarisWorks version 4.0 and later. The Box Chart report is sent directly to your printer.

In this section you will learn how to:

✓ Use page setup to set name format and preferences, and to choose fonts and page layout

✓ Use print

and to create the following reports:

✓ Title Page

✓ Family Journal (Genealogy) report with pictures

✓ Portrait

✓ Family Tree (Pedigree) report

✓ Ancestor (Ahnentafel) report

✓ Text, Direct Drop, or Indented Descendant report

✓ Box Chart

✓ Relationship List

- ✓ Free-form text

- ✓ Family Group report

- ✓ Individual or Project Summary

- ✓ Individual, Marriage, Source, and GEDCOM Exception Lists

- ✓ Mail Lists and Labels

- ✓ Tiny-Tafel reports

Rich Text Format

The RTF standard developed by Microsoft describes a method of encoding formatted text for easy transfer between applications. With the RTF standard, documents composed under different operating systems and with different software applications can be transferred between those operating systems and applications.

Ultimate Family Tree supports the RTF standard for exporting report formatting, text justification, font attributes (size, bold, italic, superscript), indexing, footnotes, table of contents entries, headers, and footers. By using RTF, most Ultimate Family Tree reports can be sent to Microsoft Word or other word processing programs.

The following characters should not be used when entering data:

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

- { } — Used for control codes in RTF files. Do not use the left or right curly brace character in Ultimate Family Tree except to mark a title in a name.

Using the Page Setup Window

To set print options that affect how most reports appear, choose Page Setup from the File menu, and set the following options:
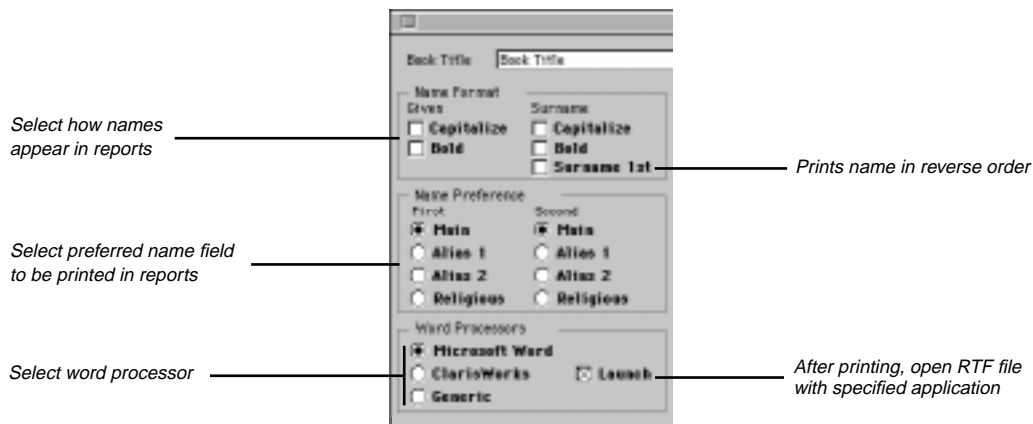

Figure 5-1:   Page Setup Window (left side)

- *Book Title* — Prints in the header on every page. Limited to 25 characters.

- *Name Format* — Capitalizes and uses bold text for given names or surnames. Select Surname 1st to print the surname before the given name.

- *Name Preference* — Prints the preferred name in reports. Specify your first and second choices for which names Ultimate Family Tree prints. If your first choice is blank for a given individual, Ultimate Family Tree uses your second choice. If your second choice is blank, Ultimate Family Tree defaults to the Main name field (on the Individual Record window). This gives you the option to use a woman's married name instead of her maiden name, for example. You can also use aliases or religious names (entered on the Miscellaneous Individual Information window, accessed by clicking the More button on the Individual Record window). If a name is entered in the Long Name field of the Miscellaneous Individual Information window, the Long Name is used on free-form reports such as Family Journal reports.

  Note Some reports, such as the Family Journal reports, override the Name Format selections to comply with National Genealogical Society and New England Historic Genealogical Society styles. Also, the Descendant Box Chart functions independently of the Page Setup window. Use the Box Chart Page Setup window and the Chart window itself to select page and formatting options for Box Charts.

- *Index Additions* — Adds information to names in the index. Select Include Index to include RTF indexing codes in reports. Select Birth/Death Years to add birth and death years to names in the index. Select Record Numbers to add record numbers.
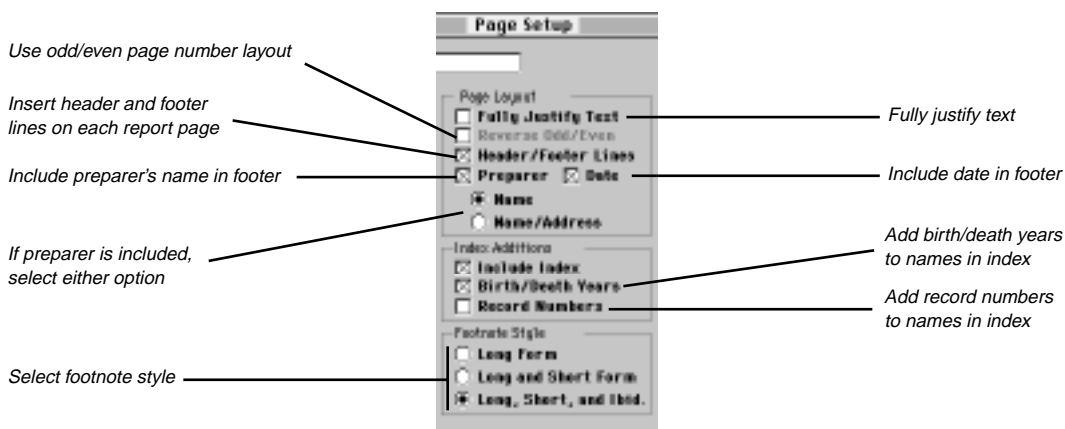
Figure 5-2:   Page Setup Window (center)

- *Page Layout* — Sets the page layout in reports. Check Reverse Odd/Even to print the page number on alternating edges of the page for double-sided printing. Check Preparer to include the preparer's name in the footer of the report. If you check preparer, select either Name or Name/Address. Check Date to include the date in the footer. Check Header/Footer Lines to insert header and footer lines on each report page.

- *Footnote Style* — Prints footnotes in long form, in long then abbreviated form, or in long form first and then in abbreviated form followed by *Ibid*.

- *Word Processors* — Printed reports can be opened automatically by your word processor. Check the Launch box and specify your word processor by choosing Microsoft Word, ClarisWorks version 4.0 and later, or Generic. If Launch is unchecked, the RTF file is saved in the folder you chose when you print the report, and you must manually start your word processor to open, edit, and print the report.

Note   If you select Generic, your word processor is not launched automatically. The report files are saved with the file type TEXT, allowing them to be opened in the word processor of your choice. When Generic is chosen, the Launch check box is inactive.

Changing Font Style and Size

To select different fonts for the various components of a report, choose Page Setup from the File menu.

Report components

Font type and size for selected component

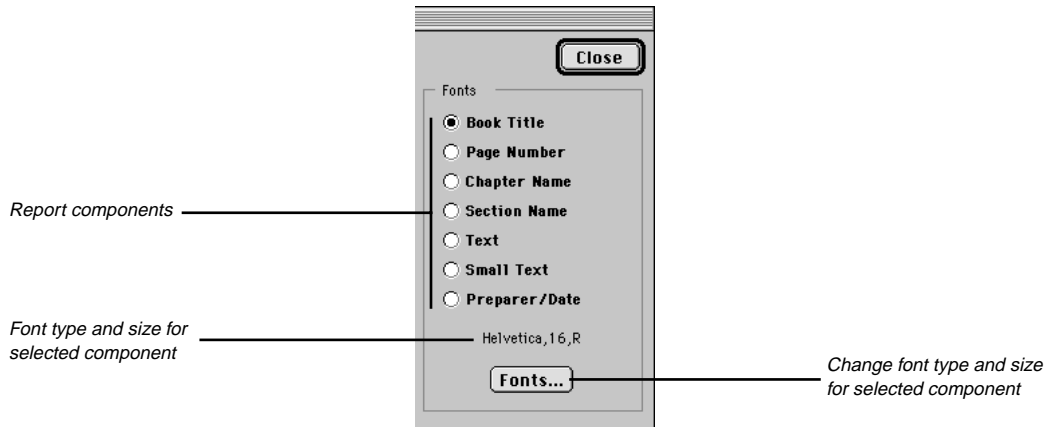Change font type and size for selected component

Figure 5-3:   Page Setup Window (right side)

The Ultimate Family Tree default fonts are Helvetica and Times. Suggested font sizes for each component follow:

- Book Title   16
- Page Number   12
- Chapter Name   14
- Section Name   12
- Text   10
- Small Text   9
- Preparer/Date   8

Specific fonts, font styles, and font sizes can be changed for various components of a report. Postscript fonts can be used in Ultimate Family Tree reports. However, Ultimate Family Tree determines both the font style and size in all List reports. In Family Tree reports, only the font size is set by Ultimate Family Tree—you can change the font style if you want. The index uses a fixed number of lines on a page. It is designed to use a 9-point font. White space will occur at the bottom of the page if you use a smaller font size. A larger font size can cause overflow to the next page.

1. Select the report component (for example, Book Title).

2. Click the Fonts button.

Figure 5-4: Font Dialog Box

3. Select a font from the Font list.

4. Select a font style: Regular Italic or Bold.

5. Select a font size.

6. Click OK to close the Font dialog box.

7. Repeat steps 1–6 for each of the remaining report components.

Basic Steps for Printing Reports

Each report window provides options for customizing and tailoring a report to your needs. Ultimate Family Tree uses the options you set to format and create the reports. Report windows share some or all of the same options. The following basic steps are used to print Ultimate Family Tree reports.

1. Before printing a report, set your basic options for printed reports in the Page Setup window. (See page 80.)

2. Choose a report from the Reports menu.

3. Choose Locate from the Search menu to find the individual you want to use as the focus of the report. (See page 76 for information on using the Find Individual window.) Some reports, such as List reports, do not require a focus person.

4. Type a chapter title if desired (up to 40 characters).This title is used as the chapter name and appears at the beginning of the report.

5. Set the available options for customizing the report.

6. Enter a number in the Generation limit field (if available) to limit the number of generations included in the report.

7. To include an introduction in a report, check Introduction, and then click Intro Text to open a free-form text window where you can write introductory text for the report or chapter. The text window consists of an area for entering text and a set of buttons for formatting the text. (See page 35 for more information on formatting text. See page 37 for information on using the import button if you want to import introductory text from an external text file.)

8. To use a subset of the individuals in your project, locate and list individuals in your project that meet your criteria and add them to the Grouping List. You can then use the options in Grouping to limit your printed reports to those individuals in the Grouping List. Check the appropriate boxes to include the following options:

- *Use List* (in the Grouping box) — Prints a report which includes only those individuals who are in the Grouping List.

- *Add Asterisk* — Prints a report including all individuals but with an asterisk to indicate those in the Grouping List.

   Note   The Grouping option is available in Family Tree (Pedigree), Descendant, Relationship, Family Group, and List reports.

9. Click Print on the report window or press ⌘-P.

If you check the Launch box in Page Setup, the word processor you specified will open.

1. Edit and/or print the report. Refer to the user's guide for your own word processor for information on editing and printing.

2. Choose Save to save the report as a Rich Text Format file.

3. Enter a file name.

If you choose Generic in Page Setup as your word processor, or did not check Launch, a Save As window opens.

1. Type a file name for the report file, select the folder where you want to save it.

2. Click Save.

Preparing to Print a Book

Before printing the first page of your book, you should prepare an outline. It does not have to be elaborate; a simple list of the reports, in order, will do. This is also the time to make decisions about what other information to include and where to place it. Use your outline to keep track of formatting and to make other notes to yourself for printing. Here is a sample outline:

- Title Page
- Table of Contents
- Introduction
- Family Tree (Pedigree) Report
- Map (two page spread, start on left page)
- Reverse Register Report
- Relationship List
- Index

Suggestions on Style

Two of the most common ways to arrange genealogical records in a book are in *ancestral order* and *descendant order.*

Ancestral-Ordered Book   An ancestral-ordered book is the history of an individual back to his or her distant ancestors. Many people choose to prepare a book about parents or grandparents, and include the complete history of their family or just a portion of it. Here is a typical format:

- Title Page
- Table of Contents
- Introduction (Text Report)
- Family Tree (Pedigree) Report for the person the book is about
- Reverse Register Report (Family Journal Report)
- Ancestor (Ahnentafel) Report
- Relationship List Report
- End Notes
- Index

Descendant-Ordered Book   A descendant-ordered book singles out an ancestor and traces his or her children, grandchildren, and all other documented descendants to the present day. If you choose this format and have a large family, you might find there is so much information to be presented that you should

divide the book into separate volumes (one or two children of the ancestor per volume). Here is a possible format:

- Title Page

- Table of Contents

- Introduction (Text Report)

- Descendant Report

- Register Report (Family Journal Report)

- Relationship Report

- End Notes

- Index

   Note   The table of contents and index are generated by your word processor based on the codes embedded in the RTF reports. You can customize your reports by changing margins, moving text, rewriting sentences, and adding pictures. Any page numbering changes are reflected in the table of contents and index subsequently generated by the word processor.

Title Page Report

The title page normally contains the book title, subtitle (if applicable), author, publisher, date, and location of publication. To open the Title Page window, choose Title Page from the Reports menu.

Figure 5-5:   Title Page Report Window

The following fields are available in this window:

- *Title* — Enter the title of the book in this field (up to 40 characters). For example, you might title your book *The Kennedys*. The title prints in a large font centered in the upper third of the page.

- *Subtitle* — Enter a subtitle for the book (up to 48 characters). For example, *The Descendants of Joseph Patrick Kennedy*. The subtitle prints below the title in a smaller font.

- *Title Page Text* — When chosen, this check box opens a free-form text window where you can enter text to be printed on the title page. You can include the preparer's name, the date the book was written, publisher information, or any other text.

    Note   The Title Page Text is printed centered at the bottom of the title page. The text can be formatted as bold, italic, and/or underline. To create a new paragraph, leave a blank line between paragraphs.

Family Journal Report

The most widely accepted formats for publishing a genealogy in the United States are the New England Historic Genealogical Society's *Register* and the National Genealogical Society's *Modified Register* plans. You can use options available in the Family Journal Report window to create either of these formats. The similarities between the two are substantial; the differences are slight but significant.

Family Journal Report Styles

Both formatting plans begin with one person. This person is given the number 1, indicating the position of the first person in this first generation. The children of this progenitor are assigned, in order of birth, a small Roman numeral (i, ii, iii). In addition, each child can be given an Arabic number (1, 2, 3) that establishes that child's overall placement in both the specific family and the larger family described in the report. These numbers (both Roman and Arabic) precede the name. All family members are placed in their respective generations, with generation numbers appearing as superscripts following the first name. In the report, each primary person's name is followed by a back reference, in parentheses. The back reference includes the given names and generation numbers of each person in the line back to the progenitor.

Here are the differences between the plans:

- In the Register format, only children whose lines continue are given Arabic numbers. In the Modified Register format, all children receive an Arabic number. In both cases, these numbers are in birth order and begin (for the eldest child) with the next number after the last one used in the previous generation.

- In the Register format, children whose lines continue are clearly identified with an Arabic number. In the Modified Register format, with all children bearing such a number, a plus (+) is placed in front of the number to indicate children whose lines continue.

- In the Register format, the main individuals' names print in bold, uppercase letters. In the Modified Register format, the main individuals' names print in bold, upper/lowercase letters.

- In the Register format, notes are embedded in the text. In the Modified Register format, the notes print as end notes.

Printing a Family Journal Report
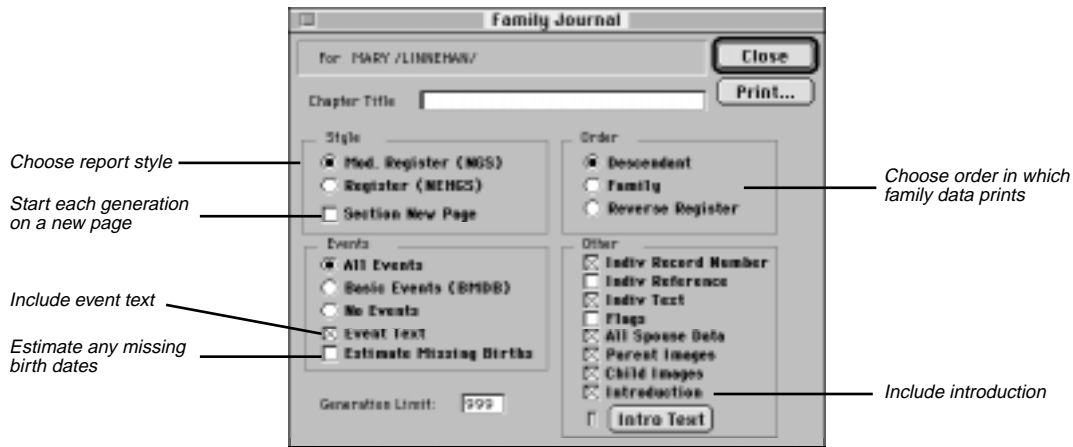
1. Choose Family Format from the Reports menu.

Choose report style

Start each generation on a new page

Include event text

Estimate any missing birth dates

Choose order in which family data prints

Include introduction

Figure 5-6:   Family Journal Report Window

2. Choose one of the following styles:

• *Modified Register* (National Genealogical Society style, NGS) — Select this style to print footnotes as end notes, number all children, and a use a plus sign (+) to indicate a child whose line continues. The main individuals' names print in bold upper/lowercase letters.

• *Register* (New England Historic Genealogical Society style, NEHGS) — Select this style to include footnotes as embedded notes and to number only those children whose lines are continued. The main individuals' names print in bold, uppercase letters.

3. Choose Section New Page to start each generation on a new page.

4. After establishing the style of Family Journal report, choose one of the following options to determine the order in which your data will print:

• *Descendant* — The Descendant Family Journal Report starts with a progenitor (the selected ancestor) and traces his or her family line to the present. The individual selected is the subject of the first generation.

• *Family* — The Family Report creates a descendant-style report for all families in the project with each family in a chapter in alphabetical order. Note that an end-of-line progenitor female must have either a spouse or father entered to be included because the Family Report is based on male surnames.

• *Reverse Register* — The Reverse Register Family Journal Report starts with a descendant (the selected individual) and traces his or her line back through all ancestors. The numbering system used in these reports is the same as that used in the Register or Modified Register, but in reverse. Here you begin with a selected individual and move backwards in time.

5. Choose to include any of these options in your report by clicking the corresponding boxes and radio buttons:

- Events — choose to include All Events, Basic Events (Birth, Marriage, Death, and Burial), or No Events

- Event Text (includes text entered for events)

- Estimate Missing Births (estimates the birth date from other events when no birth date is available)

- Indiv Record Number (includes the individual record number)

- Indiv Reference (includes the reference data entered in the Reference field of the Individual Miscellaneous window)

- Indiv Text (includes text entered in the Individual Biographical Text window)

- Flags (includes individual flags entered in the Miscellaneous window)

- All Spouse Data (includes all data entered for spouses)

- Parent Images (includes the preferred image for all main individuals in the report)

- Child Images (includes the preferred image for all children in the report)

- Introduction (includes text entered after clicking Intro Text)

6. Enter number of generations to allow in the report in Generation Limit.

7. Print the report. (See page 83 for basic steps for printing reports.)

Ancestor Reports

Ultimate Family Tree provides two kinds of ancestor reports, Family Tree (Pedigree) and Ancestor (Ahnentafel).

Family Tree (Pedigree) Chart

The Family Tree Chart graphically traces ancestral lines back through an individual's parents, grandparents, and so on. In Ultimate Family Tree you can print four generations on each page of a report. You can also print a blank Family Tree Chart.

The Family Tree Chart allows room for a variety of data. Information on a Family Tree Chart includes the date and place of the birth, death, marriage, and resides events for each individual. If dates and places are unknown, the corresponding line on the chart is blank.

A number is associated with each person's position on the Family Tree Chart. These numbers are a referencing system to keep track of a pedigree that fills more than one page. The Family Tree Chart can extend back 54 generations. For a line that continues past the last generation on a page, Ultimate Family Tree prints a "continued on later chart" reference.

To print a Family Tree (Pedigree) Chart:

1. From the Reports menu, choose Ancestor, and then Family Tree.

Figure 5-7:   Family Tree (Pedigree) Chart Window

2. Check Use List to include only those individuals in the Grouping List.

3. Check Add Asterisk to print an asterisk next to the name of each individual in the Grouping List.

4. Select Blank Report to produce a Family Tree Chart form for use in research.

5. Check Omit Redundant Ancestors, if desired. (Redundant ancestors occur when cousins marry.) If Omit Redundant Ancestors is checked, the first occurrence of a redundant ancestor includes all of his or her information. Any recurrence of the redundant information is referred back to the first occurrence, by citing the previous chart, and the redundant line is not continued.

6. Print the report. (See page 83 for basic steps for printing reports.)

Space available for names is limited in the Family Tree Chart. If necessary, Ultimate Family Tree shortens names by abbreviating the middle names, one at a time, and then the first name, until the name fits in the available space.

Abbreviations for events included in the report print before the event:

- *b.*   birth
- *d.*   death
- *m.*   marriage
- *r.*   resides (prints if the person has a resides event or is still living)

Ancestor (Ahnentafel) Report

An Ancestor Report is a Family Tree Chart in text rather than graphic form. The Ancestor report lists ancestors for up to 50 generations. All ancestors included in the Ancestor report are given a number from the Ahnentafel system. In this system, a unique number is assigned to each position in the pedigree regardless of whether or not a person is occupying that position. Ahnentafel numbering assigns the number 1 to the starting individual. The father's number is two times his child's number, and the mother's number is two times her child's number plus one.

With these position markers you can quickly determine exactly how any person on the chart is related to the starting person. For example, the label, great-great-grandfather, reveals that the ancestor is four generations back and is male. A great-great grandfather can be any one of eight people. Ahnentafel number 26, however, is the maternal grandfather's mother's father (for the selected individual).

To print an Ancestor (Ahnentafel) Report:

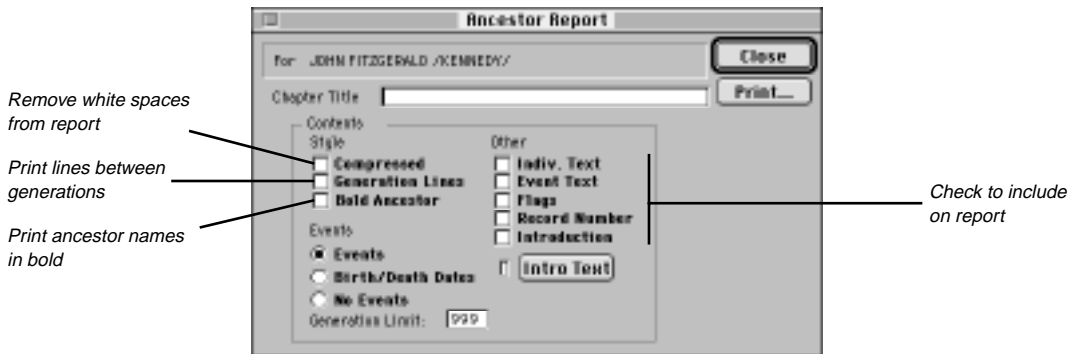1. From the Reports menu, choose Ancestor, and then Ancestor Report.

Remove white spaces from report

Print lines between generations

Print ancestor names in bold

Check to include on report

Figure 5-8:   Ancestor Report Window

2. In the Events group, choose whether or not to include the individual's events on the report, or choose to create an abbreviated Ancestor report that contains only Ahnentafel numbers, names, and dates of birth and death.

   Note   If you select Birth/Death Dates or No Events, the option to include Event Text cannot be selected.

3. Check to include options in the Other group, or to add an introduction.

4. Print the report. See page 83 for basic steps for printing reports.

Descendant Reports

Ultimate Family Tree provides four different styles of descendant reports: Indented, Text, Direct Drop, and Box Chart.

Indented Descendant Report

The Indented Descendant Report window prepares a descendant chart that starts with the progenitor of a family line and follows all descendant lines to their ends. Each generation is indented from the previous generation. Up to 16 generations can be included.
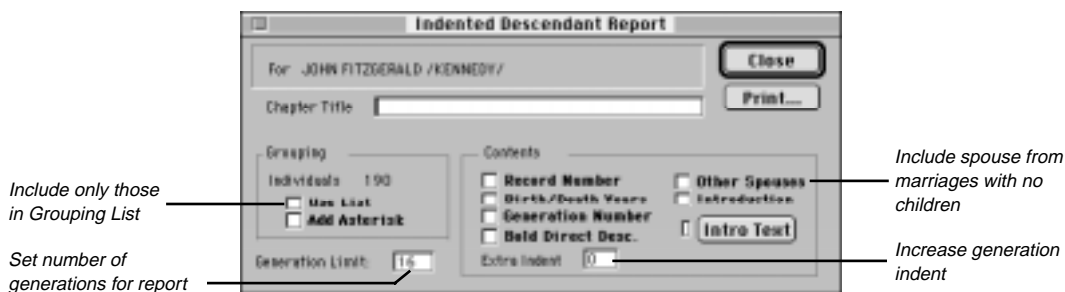
1. From the Reports menu, choose Indented Descendant.

Include only those in Grouping List

Set number of generations for report

Include spouse from marriages with no children

Increase generation indent

Figure 5-9:   Indented Descendant Report Window

2. Choose to include any additional options from the Contents group. Check Other Spouses to include spouses from marriages with no children.

3. Check Use List to include only those individuals in the Grouping List.

4. Set the number of generations (up to 16) for the report.

5. Enter a number in the Extra Indent box (from 1 to 10) if you want to increase the number of characters that each generation is indented for ease of reading. When Extra Indent is 0, generations are indented three characters. This option is useful when there are only a few generations or when names are short.

   Note   The space for names is determined by the options selected to be printed: generation number, birth and death dates, and record numbers. If a name does not fit in the available space, Ultimate Family Tree shortens the name so it will fit. If a common name has been entered in the Miscellaneous Information window, that name is used to shorten.

6. Print the report. See page 83 for basic steps for printing reports.

Descendant Text Report

The Descendant Text Report is a descendant report in text style that offers several generation numbering styles: Generation Number, Henry Number, Modified Henry, and D'Aboville. Information included in the report is dependent on the options chosen in the report window.

1. From the Reports menu, choose Descendant Text.

2. Choose a numbering style:

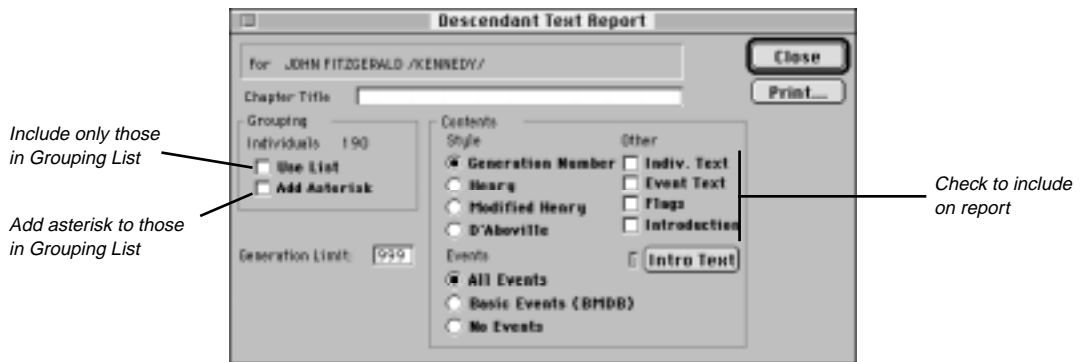• *Generation Number* — The generation number for each descendant is included with his or her name.

Figure 5-10:   Descendant Text Report Window

- *Henry Numbering System* — A genealogical numbering system where the progenitor, or a selected individual, is given the number 1. The oldest child is number 11, the next child the number 12, etc. The oldest child of number 11 is number 111, the next is 112, etc. When there are more than nine children, the numbers are placed in parentheses.

- *Modified Henry Numbering System* — A genealogical numbering system that is similar to the Henry system except that instead of using 10, 11, 12 in parentheses for the tenth, eleventh, and twelfth children, the letters *A*, *B*, and *C* are used. If there are more than 35 children, lowercase letters are used, for example, *a*, *b*, *c*, for the thirty-sixth, thirty-seventh and thirty-eighth children.

- *D'Aboville Numbering System* — A genealogical numbering system where the progenitor, or selected individual, is given the number 1, the first child is given the number 1.1, the second child is given the number 1.2, etc. This system is similar to the Henry Numbering System, except that each individual number includes periods to separate generations. For example, 1.2.2 indicates that an individual is the second child of the second child of the progenitor for this family line.

3. Choose one of the options in the Events group to determine which events will be included in the report: All Events, Basic Events (Birth, Marriage, Death, and Burial), or No Events.

4. Include additional options from the Other group.

5. Include only individuals found in the Grouping List by checking Use List. See page 74 for information on grouping.

6. Choose Add Asterisk to add an asterisk to individuals in the report who are in the Grouping List.

7. Print the report. See page 83 for basic steps for printing reports.

Direct Drop Descendant Report

The Direct Drop Descendant chart shows how two people are connected through a direct line. It starts with an ancestor and traces his or her direct family line to any descendant you choose.
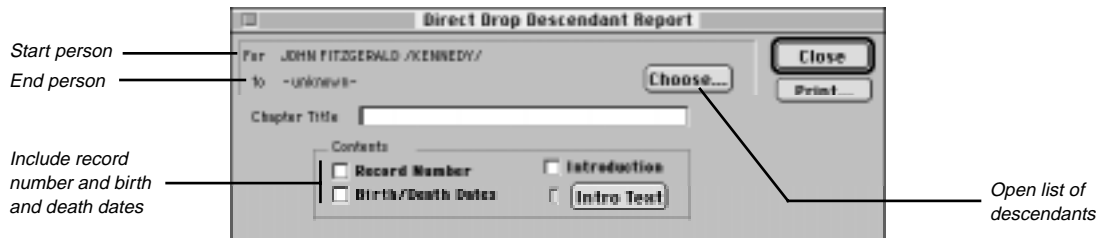
1. From the Reports menu, choose Direct Drop.

Figure 5-11:   Direct Drop Descendant Report Window

2. After choosing a start person, click the Choose button to open the Choose Descendant List window. The list includes the starting person and descendants.

3. Select the descendant you want as the ending person on this report, then double-click the name or close the Choose Descendant window by pressing Escape or clicking the Close box.

4. Choose to include any additional options from the Contents group: Record Number, Birth and Death Dates, and introduction.

   Note   The space for names is limited. If a name does not fit in the available space, Ultimate Family Tree shortens the name so it will fit, abbreviating middle names (one-by-one) and finally the first name.

5. Print the report. See page 83 for basic steps for printing reports.

   Note   If you choose to include introductory text, the Direct Drop report starts on the next full page.

Descendant Box Chart

Ultimate Family Tree includes an option to print a beautiful family tree or Box Chart as either a page to be included in a family history book, as a wall chart, or as a web page. There are many styles, fonts, and border options from which to choose to customize a unique chart. The contents of charts can be edited and saved for future sessions. Up to 16 generations of descendants can be included. This report is sent directly to your printer rather than saved to an RTF file.

Creating a New Box Chart

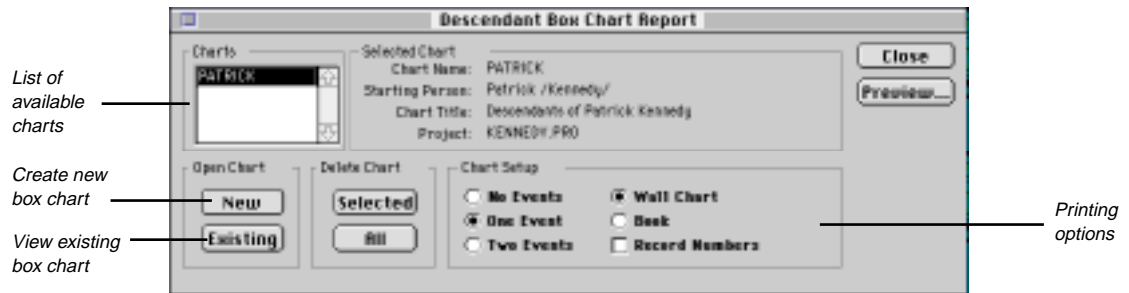1. From the Reports menu, choose Box Chart.

List of
available
charts

Create new
box chart

View existing
box chart

Printing
options

Figure 5-12:   Descendant Box Chart Window

2. Click New in the Open Chart group. The New Chart window opens.

Type control name
(8 characters max.)

Include only those
in Grouping List

Design box chart
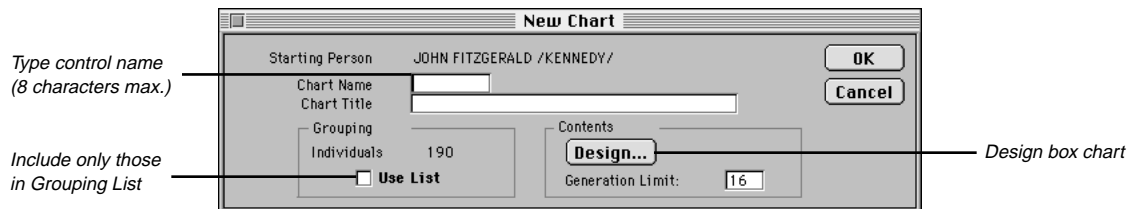
Figure 5-13:   New Chart Window

3. Press ⌘-L to locate a new starting person for the report.

4. Type a name of up to eight characters in the Chart Name field. This is the control name that appears in the Charts list.

5. Type a title (optional) for the chart in the Chart Title field (up to 39 characters). This title appears at the top of the chart window and can be included on printed charts.

6. Enter a number in the Generation limit field if you want to limit the number of generations to be included in the chart.

7. Choose Use List if you want to limit the report to only those individuals in the Grouping List. Use Ultimate Family Tree search routines to locate and list individuals in your project who meet your criteria, and add them to the Grouping List. See page 74 for information on grouping.

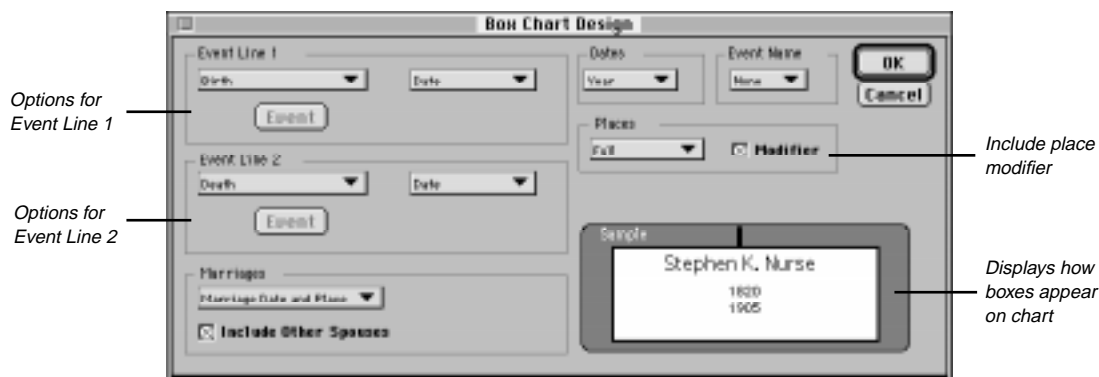8. Click Design from the Contents group to open the Box Chart Design window.

Figure 5-14:   Box Chart Design Window

9. Choose the options you want included in the chart. The sample window in the lower-right corner displays how the chosen options will appear in the boxes on the chart.

10. Select any of the following options from the pop-up menus in Event Line 1 and Event Line 2 groups:

   • *Blank* — Leaves corresponding event line blank

   • *Line* — Includes a line in place of corresponding event data

   • *Birth* — Includes birth event data on event line 1.

   • *Death —* Includes death event data on event line 2.

   • *Birth and Death Dates* — Includes birth and death dates on corresponding event line

   • *Birth and Death Years* — Includes birth and death years on corresponding event line

   • *Selected Event (First)* — Includes event chosen from Events list. Select this option and click the Events button. Select the event you want included in the report and click OK. Only the first occurrence of the selected event is used.

   • *Date* — Includes only the date for selected event

   • *Place* — Includes only the place for selected event

   • *Date and Place* — Includes date and place for selected event if checked

      Note   The birth and death dates and years options override selections in the Dates group.

In the Marriage group, choose from these options:

   • *Blank —* No marriage information

   • *Marriage Date* — Marriage date

   • *Marriage Date and Place* — Date and location of marriage

   • *Include Other Spouses* — Includes other spouses for whom there are no descendants

In the Dates group, choose from these options:

- *Year* — Year of the selected event

- *Short* — Day, month, and year of selected event

- *Structured* — Date from structured date field, including the date modifier

- *Long* — Free-form date for the selected event

    Note   The Dates group options are not used if the Birth and Death dates or Birth and Death years options are selected in the Event Line 1 or 2 groups.

In the Event Name group, choose from these options:

- *None* — No name or abbreviation for the event

- *Short* — Short version of event name before event data (e.g., *b.* for birth)

- *Medium* — Medium abbreviation of event name (e.g., *bir* for birth)

- *Long* — Long version of the event name

In the Places group, choose from these options:

- *First and Last* — First and last levels of a place name (normally city and state)

- *Last Two* — Last two levels of a place name (normally county and state)

- *Full* — Full place name

- *Modifier* — Place modifier (e.g., *in*)

11. After making your selections, click OK to return to the New Chart window.

12. Click OK in the New Chart window to open the Chart window you have designed.

    Note   The Box Chart Design sets the overall design of a chart. Once the chart is created, the basic design options cannot be altered. However, changes, additions, and customizing details can be made from the Descendant Box Chart window, the Box Chart Page Setup window, and on the Box Chart itself. These changes are reversible.

13. Choose Exit from the File menu to return to the Descendant Box Chart window.

Preparing a Box Chart for Printing

1. From the Reports menu, choose Box Chart.

2. In the Descendant Box Chart window, choose whether you want to print a chart that will fit on a standard page and can be included in a book, or one that is designed to be displayed on a wall, by selecting either Book or Wall Chart in the Chart Setup group. Choose Book to print charts with the Ultimate Family Tree headers and footers, or choose Wall Chart to print charts without headers and footers.

3. Select the chart you want to print and click Existing.

4. From the File menu, choose Page Setup.

    Note If Page Setup is dim, uncheck HTML Mode in the Chart menu.

Choose paper size and orientation

Choose page margins for Box Chart

Figure 5-15:   Box Chart Page Setup Window

5. Select a paper size from the Paper Size pop-up menu.

6. Choose to print the chart in either Portrait or Landscape mode.

    Note Selections made in the Box Chart Page Setup window are used only for printing box charts. They do not affect the default printer settings.

7. Set the margins for the box chart.

    Note This is particularly useful if you are printing a wall chart. Be aware that some printers (Laser-Writers, for example) will not print on the outer edges of the pages. In these cases, setting the margin to less than 1/4 inch will not be reflected on the printed page.

8. Click OK to return to the chart.

9. From the Chart menu, select one, two, or no events for the chart you want to print.

10. Choose whether or not to include individual record numbers on the printed chart by selecting Record Numbers in the Chart menu.

    Note To further customize the chart, see the Chart Window section below. The original Box Chart Design sets the overall design of a chart. Once the chart is created, the basic design decisions cannot be altered. However, changes, additions, and customizing details can be made from the Box Chart Page Setup window, and on the Box Chart itself. These changes are reversible.

11. With the selected chart open, choose Print from the File menu.

Chart Window

Use the options in the Chart menu to modify the displayed chart. Use Graphics to change the overall design of the chart, Colors to make color selections, and Fonts to change the fonts used.

Graphics   You can select the number of boxes to be printed across and down on each page, the box border style, the line thickness between boxes and around the outside of the report, and the footer position for the chart title.

1. From the Charts menu, choose Graphics to open the Select Graphics window. In the Page Layout group, select the number of boxes to be printed across and down on each page.
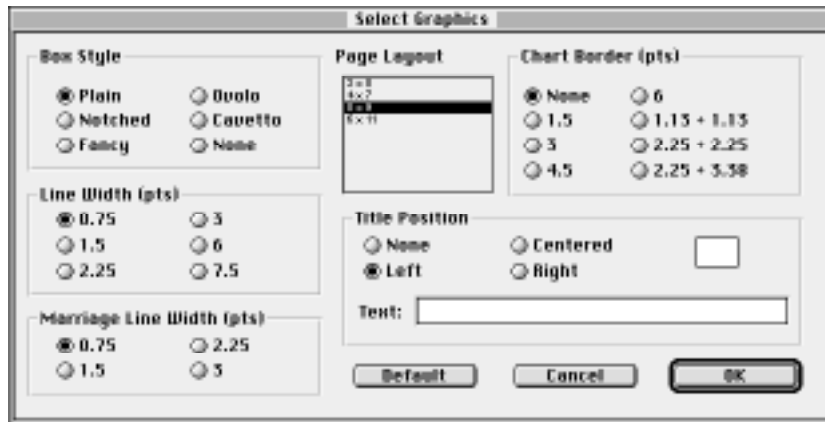

Figure 5-16: Select Graphics Window

Note   The number of boxes per page in the list depends on the page size and orientation choices made in the Page Setup window.

2. In the Box Style group, select the style of box you want for the chart. The options include: Plain, Notched, Fancy, Ovolo (concave corners), Cavetto (rounded corners), and None.

3. Select the size of the lines that connect descendants by choosing the appropriate radio button in the Line Width group. Measurements are in points (72 points = 1 inch).

4. Select the size of the lines that connect spouses by choosing the appropriate radio button in the Marriage Line Width group.

5. Select a border for the entire chart by choosing the appropriate radio button in the Chart Border group.

6. Edit an existing chart name or enter a new chart name in the Text field of the Title Position group.

7. Choose the placement of the title by choosing the appropriate radio button in the Title Position group. The title can be left justified, centered, or right justified. Choose None if you do not want a title printed on the chart.

8. Click OK to close the Select Graphics window.

Fonts   From the Chart menu, choose Fonts to open the Select Fonts window where you can make font and formatting choices.

Figure 5-17: Select Fonts Window

Available choices include:

- *Record Number* — The unique identifier for each individual.
- *Event* — The text for included events.
- *Given Names* — The given name for each individual.
- *Surnames* — The surname for each individual.
- *Chart Title* — The title you have selected for the report.
- *Chart Legend* — The key for color selection in the box chart.

1. Select a field from the Text Item list.

2. Choose the Change button to open the Font selection window.

3. Select a font from the pop-up menu.

4. Select a font size for the selected field.

5. Select Regular, Italic, Bold, or Bold Italic from the pop-up menu to print the selected data in the style format of your choice.

6. Repeat steps 1–5 for each data item you want to change.

   Note   Use narrow fonts to allow more information to be included in each box. If the font size is too large, the names and events will print outside the box. Choose Separate Surname from the Chart menu to print the given names and surnames on separate lines. Choose Auto Edit Text from the Chart menu to automatically truncate names to fit inside the boxes.

7. Click OK to close the Select Fonts window, and click OK again to return to the chart.

Colors   From the Chart menu, choose Colors to open the Select Colors window where you can select colors for the various boxes. For example, you can choose to have boxes for males in red and boxes for females in green.

Figure 5-18: Select Colors Window

Four color options are available: black, red, green, or blue. If a color is not selected, the default is black.

1. Select a field from the Flag list such as Male, Female, or Spouse.

2. Select a color for this field in the Color list.

3. Click the arrow button next to the associated field: First, Second, or Third.

   Note   The First color option overrides the Second and Third color choices.

4. Repeat steps 2 and 3 for the remaining color options.

5. Check the Legend box to include the color legend on the chart.

6. Click Close to view the changes on the chart.

Additional Options for Display

1. From the View menu, choose Screen settings to open the Screen Settings window.
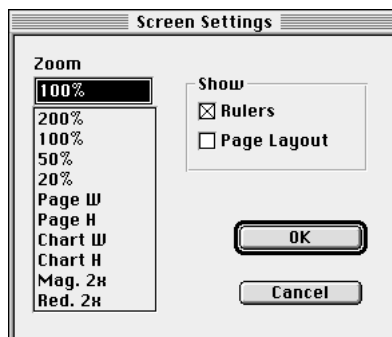
Figure 5-19:   Screen Settings Window

2. Select an option from the Zoom display list to change the zoom factor for the chart.

3. Check Rulers to display ruler guides for the chart.

4. Check Page Layout to display page boundaries and numbers. The page layout depends on the choices made in the Page Setup window. You can also choose the Rulers and Page Layout Lines menu items on the View menu.

5. Click OK to close the window.

Printing a Chart

1. With the chart open, choose Print from the File menu.

2. Select All to print all pages, or select From and enter the page range.

3. Click OK to print the report.

4. Choose Exit from the File menu to close the chart.

Deleting a Chart

1. In the Descendant Box Chart window, select a chart in the Charts List.

2. Click the Selected button in the Delete Chart group.

3. If you want to delete all charts, click All in the Delete Chart group.

Relationship List Report

The Relationship List report provides a list of everyone in the project related by blood to a specified individual. Grouping allows you to customize the list. You could list those individuals with a specific SOUNDEX code, for example, or show those who are male and who were married more than once.

Relatives are listed in order of degree of consanguinity, which is the number of steps in a family tree between people. Ultimate Family Tree calculates the relationships for this report through 16 generations.
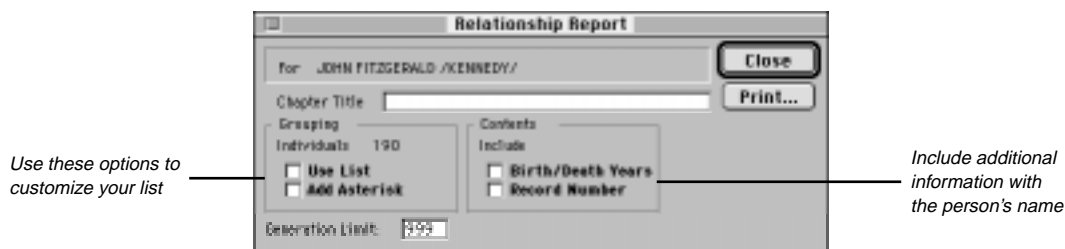
1. Choose Relationship List from the Reports menu.

Use these options to customize your list

Include additional information with the person's name

Figure 5-20:   Relationship List Report Window

2. Include any additional options from the Contents group.

3. Print the report. See page 83 for basic steps for printing reports.

Text Report

The Text Report allows you to create a free-form text report such as an appendix or an introductory chapter for your book. This report can include a header, footer, and title.
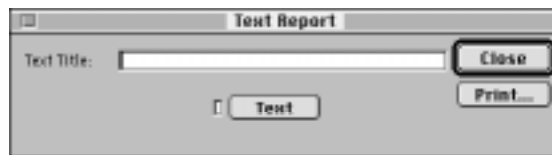
1. Choose Text from the Reports menu.

Figure 5-21: Text Report Window

2. Type a title for the Text report and click the Text button to open an Edit Text window.

3. You can type up to 65,000 characters of text. Click Import in the Edit Text window to import a text file. See page 37 for information on importing text. The indicator next to the Text button is green when text is present.

4. Click Print. See page 83 for basic steps for printing reports.

Portrait Report

The Portrait report prints an image and text connected to the image. Ultimate Family Tree prints black-and-white and color images if your printer supports color.

Printing a Portrait Report

1. Choose Image Portrait from the Reports menu.

2. Select the Image you want to print from the Digitized Images list. The name (if used) of the selected image is displayed at the top of the window.

3. Check the Caption and Description boxes to include the caption and description you entered for that image in the Media Library. If you have not entered a caption or description in the Media Library, you can do so at this time. Captions and descriptions entered here will not be saved in the Media Library.
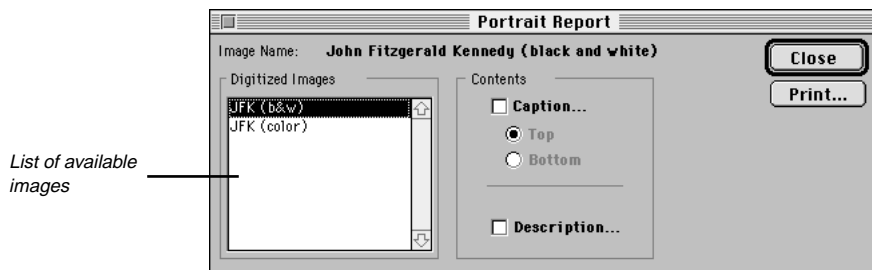
Figure 5-22:   Portrait Report Window

4. If a caption has been entered, choose Top or Bottom to select the position for the caption. The caption should be limited to 50 characters or fewer.

    Note   A caption must be selected to activate the Top and Bottom options.

5. Print the report. See page 83 for basic steps for printing reports.

Family Group Report

The Family Group Report contains detailed information about a family unit (father, mother, and their children). The Family Group Report is useful during the research phase of a genealogical project because it provides a ready reference to facts about the family. You can use options on the Family Group Report window to customize the form depending on your needs. Ultimate Family Tree provides an option to print a blank Family Group Sheet for research purposes.
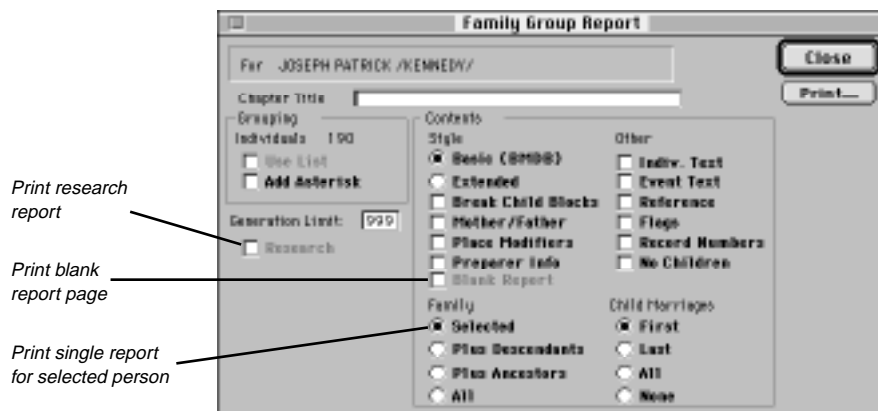
1. Choose Family Group from the Reports menu.

Figure 5-23:   Family Group Report Window

2. Choose Locate from the Search menu to find the starting individual.

    Note   To print a blank Family Group report, check Blank Report.

3. Choose from the following options:

• *Basic* — Includes only Birth, Marriage, Death, and Burial events on the report.

• *Extended* — Prints all applicable events.

• *Break Child Blocks* — When not checked, moves the block of information for a child to the next page if the entire block does not fit on the current page. Ultimate Family Tree does not move the block if doing so leaves more than 15 blank lines at the bottom of the page. When checked, splits blocks of child information across page boundaries to reduce white space.

• *Mother/Father* — Prints Mother and Father labels instead of Wife and Husband.

• *Place Modifiers* — When checked, the report includes the place modifier *in*.

• *Preparer Info* — Includes Preparer relationship information in the report.

    Note   To include the preparer name and address in the footer of the report, check Preparer in the Page Setup window. When Preparer Info is selected as an option, the preparer relationship information includes the relationship of the preparer to the husband and wife. Only blood relationships are included, not relationships by marriage. The preparer relationship information prints above the footer on the first page. If the researcher's individual record number is entered in the Researcher # field in the Project Information window, the blood relationship to the husband and wife is shown. If you do not want the relationship to show, enter *0* in the Researcher # field.

4. Choose one of the options from the Family section:

• *Selected* — Prints a single Family Group Report for the selected individual

• *Plus Descendants* — Prints Family Group Reports for the selected individual plus his/her descendants

• *Plus Ancestors* — Prints Family Group Reports for the selected individual plus his/her ancestors.

• *All* — Prints Family Group Reports for every individual in the project

    Note   If you select Plus Descendants, Plus Ancestors, or All, use the Grouping option. You should complete a Vital Statistics search for those individuals who are married and/or have children. Move this search into the Grouping List and choose Use List in the Grouping section on the Family Group Report window. By using these features, Family Group Reports will be printed only for those individuals who are married and/or have children.

5. If you choose Plus Descendants or Plus Ancestors in step 4 and want to set the number of generations to print, enter the number in the Generation limit field.

6. Choose any additional options from the Other group.

7. Choose one of the following options in the Child Marriage group:

• First (print only the first marriage for each child)

• Last (prints only the last marriage for each child), All (prints all marriages for each child)

• None (excludes child marriages)

8. Check the Research box to print a research version of the report. Research notes entered in the Individual Record Text and the Event Text window print as text if the Individual Text and the Event Text options have been selected.

9. Print the report. See page 83 for basic steps for printing reports.

   Note   If an individual has more than one spouse, Ultimate Family Tree asks you to select one of the spouses from a list. Single Family Group reports contain vertical lines to separate columns of information. Multiple Family Group Reports do not use vertical lines.

Individual Summary Report

The Individual Summary provides a comprehensive report for individuals in your project. You have the option of including any or all of the information that you've entered for selected individuals. By using the Grouping List, you can create a customized report for whatever purposes you need. All information except footnotes is included.

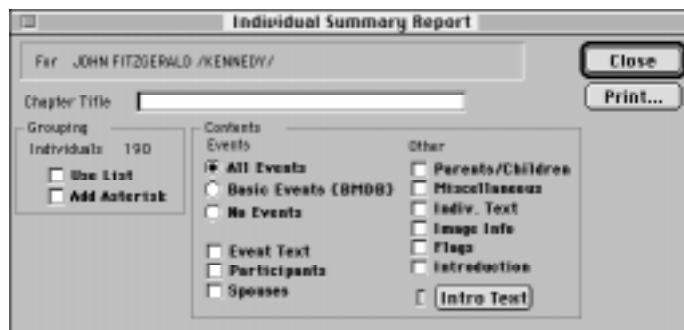1. From the Reports menu, choose Summary, and then Individual.

Figure 5-24:   Individual Summary Report Window

2. Choose Locate from the Search menu to find the individual for whom you want to print the report.

3. Choose the options you want to include in the summary.

   Note   To print multiple Individual Summary reports, place the individuals in the Grouping List and check Use List in the Grouping section of the report window. See page 74 for information on using the Grouping window.

4. Print the report. See page 83 for basic steps for printing reports.

Project Summary Report

The Project Summary Report contains comprehensive information on the current project. This report can include the project information, a file list, project statistics, and a system summary.

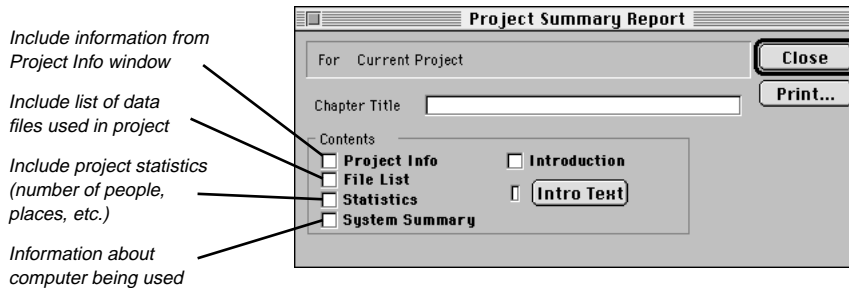1. Choose Project from the Summary submenu in the Reports menu.

Include information from Project Info window

Include list of data files used in project

Include project statistics (number of people, places, etc.)

Information about computer being used

Project Summary Report

For   Current Project

Chapter Title

Contents
☐ Project Info   ☐ Introduction
☐ File List
☐ Statistics   ☐ [Intro Text]
☐ System Summary

Close

Print...

Figure 5-25:   Project Summary Report Window

2. Include any of the options by checking the appropriate boxes.

3. Check Introduction and click Intro Text to enter an introduction.

4. Print the report. See page 83 for basic steps for printing reports.

The following information is provided in the Project Summary report when the System Summary option is selected:

*   *Processor* — The microcomputer chip detected by Ultimate Family Tree.

*   *Graphics Card* — The graphics card or system detected by Ultimate Family Tree.

*   *Default Volume* — The partition where the Ultimate Family Tree application is located

*   *Folder* — The current folder.

*   *Start Folder* — The folder where Ultimate Family Tree was started.

*   *Disk Size* — The size of the default volume.

List Reports

The List Reports create tables of information for individuals, marriages, and sources. They also print mailing lists or mailing labels, and provide a list of the data not transferred into Ultimate Family Tree via a GED-COM file. For more information on GEDCOM, see page 145.

Individual, Marriage and Source List Reports

1. Choose Lists from the Reports menu, and then choose Individual, Marriage or Source from the sub-
   menu.

Figure 5-26:   Individual List Report Window

2. To select the items to include in the report, double-click each item in the Field List (or highlight each
   item and press Return). To insert a selected field from the Field List into the selected list, select the
   field below which you want the first field to be. Click the insert button. When fields are added to the
   Selected list, the Columns Used display is updated.
       The fields print in the order shown in the Selected list. To remove an item from the Selected list
   using the mouse, double-click the item. Using the keyboard, select the item and press the Return key to
   remove it.

   Note   The Level 2 category for Birth and Death place names is generally used for the county.

3. Check the Skip 1st Col box to omit the first column in the Selected list from printing. This gives you
   the ability to sort the list on the first column field, but not actually print the first column information.
   You can then attach many reports side-by-side that are sorted using the same field without having to
   print the redundant column over and over.

4. Check the Line Numbers box to include them to the left of the first column.

5. Select one of the following font size options:

• *Small* — Allows the most information to be printed on a single page

• *Medium* — Uses a larger font size and therefore prints fewer columns

• *Large* — Uses the largest font size and prints the least amount of information

   Note   Selecting a font size determines the number of columns available for the report. The smaller
   the font, the more columns you are able to print.

6. Print the report. See page 83 for basic steps for printing reports.

Mail List Report

The Mail List Report contains a complete or selected list of mailing addresses and phone numbers for individuals in your project. This list can be formatted and printed as mail labels. You enter mailing addresses and phone numbers for an individual in the Miscellaneous Individual Information window opened through the Individual Record (see page 46).

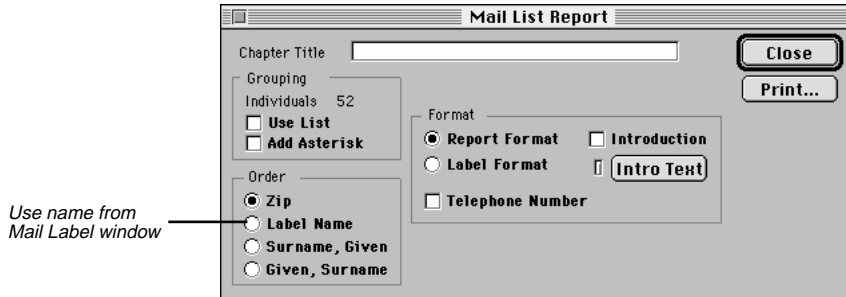1. From the Reports menu, choose Lists, and then Mail from the submenu.

Use name from Mail Label window

Figure 5-27:   Mail List Report Window

2. Select the order in which you want the addresses to be printed in the Order group.

    Note   The name entered in the addressee field can be different from the name in the Individual Record window, such as *Mr. and Mrs. Thomas Smith* instead of *Nancy Smith*. Ultimate Family Tree does not differentiate between first and last names in the Mail Label window. *Mr. and Mrs. Thomas Smith* will print in the mail list before *Nancy Smith*, if the Label Name radio button is selected, because *M* comes before *N* in the alphabet.

3. Choose Report Format to print the mail list as a report page, or choose Label Format to print on mail labels.

4. Enter a title you want to be printed at the top of the mail list. This field is available only when Report Format is selected from the Format group in this window.

5. To include introductory text in your report, check the Introduction box, click the Intro Text button, and enter the text in the Edit Text window. These options are available only when Report Format is selected.

6. Print the report. See page 83 for basic steps for printing reports.

GEDCOM Exceptions List Report

The GEDCOM Exceptions List prepares a list of data that did not transfer into Ultimate Family Tree via a GEDCOM import. You can also view the missing data on screen by choosing Project from the Utilities menu and GEDCOM Exceptions from the submenu to open the GEDCOM Exceptions window.

1. After importing a GEDCOM file, choose Lists from the Reports menu and GEDCOM Exceptions from the submenu.
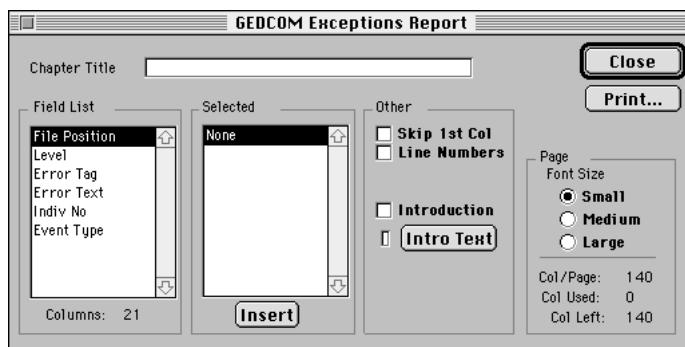

Figure 5-28:   GEDCOM Exceptions Report Window

2. To select the items to include in the report, double-click each item in the Field List (or highlight each item and press Return). To insert a selected field in the Field List above the selected field in the Selected list, click the Insert button. When fields are added to the Selected list, the Columns Used display is updated.

   The fields print in the order shown in the Selected list. To remove an item from the Selected list using the mouse, double-click the item in the Selected list. Using the keyboard, select the item and press the Return key to remove it.

3. The choices in the Field List include:

   • *File Position* — The position in the GEDCOM file (number of characters from the start) where the exception is located

   • *Level* — The level number of the excepted item in the GEDCOM file. For example, the BIRT tag for an individual is level 1 and the DATE tag under the BIRT tag is level 2

   • *Error Tag* — The GEDCOM tag to which the exception belongs, such as PLAC or DATE

   • *Error Text* — The text or information that did not import into Ultimate Family Tree

   • *Indiv No* — The individual record number in Ultimate Family Tree for the individual associated with the exception

   • *Event Type* — The name of the event in Ultimate Family Tree (such as Birth) that is associated with the exception

4. Check the Skip 1st Col box to omit the first column in the Selected list from printing. This gives you the ability to sort the list on the first column field, but not actually print the first column information. You can then attach many reports side-by-side that are sorted using the same field without having to print the redundant column over and over.

5. Check the Line Numbers box to include them to the left of the first column for this report.

6. Select one of the following options for font sizes:

   • *Small* — Prints the most information on a single page

   • *Medium* — Uses a larger font and therefore prints fewer columns

   • *Large* — Uses the largest font and prints the least amount of information

   Note   The selection you make determines the number of columns available for the report. The smaller the font, the more columns you are able to print. *Col/Page* indicates the number of columns available at the selected font size. *Col Used* indicates total columns used when selections are made from the Field List. *Col Left* indicates the number of columns still available.

7. Choose Print in the report window. See page 83 for basic steps for printing reports.

Tiny-Tafel Report

The Tiny-Tafel Report is a shortened version of an Ancestor (Ahnentafel) list. The report contains one line of text for each family line. It also contains the surnames, time periods, and locations represented by that family line, plus codes to signify the degree of interest in receiving information about the ancestors or descendants of that line.

Every family consists of a number of family lines. A Tiny-Tafel family line starts with an ancestor (with a particular surname) for whom you have assigned an Ancestor Interest (AI) level and extends forward in time to all descendants for whom you have set a Descendant Interest (DI) level. These interest levels are assigned in the Miscellaneous Individual Information window from the Individual Record.

   Note   If more than one DI level is set in a family line, a new Tiny-Tafel line is created. You can have two or more lines for the same family line with different interest levels.

For Ultimate Family Tree to establish a family line and create a Tiny-Tafel Report, you must set the Ancestor Interest (AI) level for the earliest ancestor and the Descendant Interest (DI) level for the latest descendant in a line.

Adding Ancestor and Descendant Interest Levels

You can easily add interest level flags to an existing project. For the AI level, use the Pedigree window to spot the gaps in your family tree and identify the individuals whose line you want to extend back in time. For the DI level, use the Descendant window to move forward through a family line and identify the most recent individuals.

To get the most out of the Tiny Tafel report, follow these interest level ranking guidelines when setting the AI and DI levels in your project:

- *0* — The individual is not used to establish either the Ancestor or Descendant end of a line.

- *1* — No interest, and reliability of the data is marginal, making it of little interest to others, but used to establish one end of a family line.

- *2* — Low interest, but contains high quality data that might be of substantial interest to other researchers.

- *3* — Moderate interest, data quality is good or poor.

- *4* — Highest interest, data quality is good or poor.

1. Choose Individual Record from the Build menu to open the Individual Record window.

2. Choose Locate from the Search menu to find the earliest ancestor in a family line you are interested in.

3. Click the More button, and then click Miscellaneous to open the Miscellaneous Individual Information window.
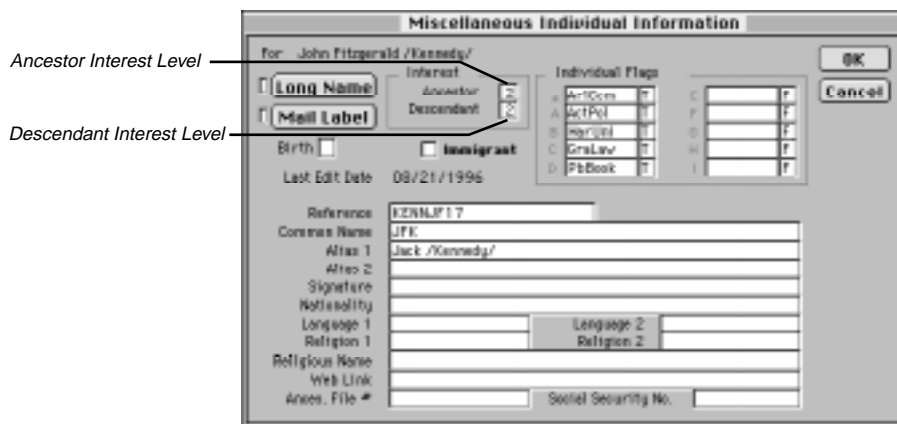
Figure 5-29:   Miscellaneous Individual Information Window

4. Enter the AI level.

   Note   Set the AI level only on the earliest ancestor in a family line you are interested in. Because any Descendant Interest Level setting higher than 0 will result in a separate Tiny-Tafel line for each individual so marked, set the DI level only if you are interested in receiving Tiny-Tafel information for the selected individual.

5. Click OK.

6. Choose Locate from the Search menu and select the most recent individual in the family line.

7. Click the More button and then click Miscellaneous.

8. Enter a DI level.

   Note   In most cases, a DI level is used to indicate that you are interested in all descendants across a family line, so you can select the most recent individual in the family line for the interest level setting.

9. If you have a gap in a family line, use AI and DI to indicate that you would like to fill in the gap. Set the DI on the older end of the gap (because that individual's descendants are missing) to 4, and set the AI on the younger end (you want information on that individual's ancestors) to 4.

Printing a Tiny-Tafel Report

1. Choose Tiny-Tafel from the Reports menu.
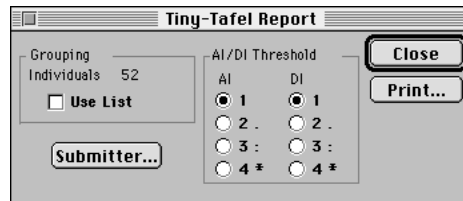
Figure 5-30:   Tiny-Tafel Report Window

2. Choose one of the AI/DI Threshold options.

   Note   Eight radio buttons are available to select what appears in the Tiny-Tafel report; four radio buttons are for the AI level, and four radio buttons are for the DI level. Select the appropriate radio button in each column for the lowest interest level to be included in the Tiny-Tafel. If you select 2, then interest levels 2, 3, and 4 are included. If you select 4, only interest level 4 is included.

3. Check the Use List box if you want to use the Grouping List to limit the individuals included in the Tiny-Tafel Report.

   Note   To create a Tiny-Tafel for one family line, use the Relationship Search feature to identify the line, and then add the results to the Grouping List. You can also use the Miscellaneous Search window to search for an Ancestor and/or Descendant Interest level, and add the resulting people to the Grouping List.

4. Click the Submitter button. A submitter is the person offering his or her selected genealogical data, along with requests for further information.

5. Enter the submitter's name (up to 38 characters). Enter your name exactly as you do when you log on to a bulletin board system. For example, if you use *John Doe* for the bulletin board, do not use *John H. Doe* in the header. This field is mandatory. The report cannot be created if the Submitter name is not entered. The remainder of the header fields are optional:
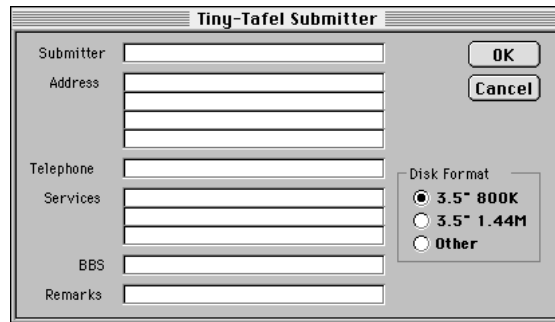
Figure 5-31: Tiny-Tafel Submitter Window

- *Address* — Your mail address, up to four lines of 38 characters each

- *Telephone* — Your telephone number, up to 38 characters

- *Services* — The communication services where you can be contacted, up to 3 lines of 38 characters each. Generally, these lines will be in the form, *name of service/login name*.

- *BBS* — Enter the name of the BBS you're using as *name of BBS/telephone number*, up to 38 characters.

- *Remarks* — Remarks about the Tiny-Tafel. For example, how to send information other than on floppy disks.

- *Disk Format* — The disk format that you prefer to exchange information with other researchers. The Other selection specifies no specific disk format. If you want to receive Tiny-Tafel information by telephone or in writing, state your preference on the Remarks line.

6. Click OK to return to the Tiny Tafel Report window

7. Print the report. See page 83 for basic steps for printing reports.

8. If the Tiny-Tafel is not automatically opened by your word processor, open the Tiny-Tafel RTF file manually and save the report as a plain text file. You can now upload your Tiny-Tafel to a BBS.

Section 6:

Putting Your Family History on the Web

Ultimate Family Tree can create Instant Web Page Family Journals and Descendant Box Charts suitable for publishing on the World Wide Web (WWW or Web). The Modified Register Family Journal report format is used for the Family Journal Instant Web Page. Actual family histories submitted by users of Ultimate Family Tree can be seen at *http://www.uftree.com.*

In this section, you will learn how to:

✓ Plan your online family history — style, format, and graphics

✓ Create or identify images in the Media Library you want to use

✓ Specify Preferred Images for each individual

✓ Create the Family Journal Instant Web Page using the Web option

✓ Create the Box Chart Instant Web Page

✓ Preview the Instant Web Page

✓ Register online with Palladium to reserve your Web space

✓ Upload your Instant Web Page

Cautions

- In preparing your Web page, be sensitive to the wishes of other family members who may not want certain information to be placed on the Web.

- Be sure to include your email address so other researchers and family members can contact you.

- Remember that genealogical information is only as useful as its documentation. Cite your sources!

Creating an Instant Web Page

A Family Journal Instant Web Page contains the following information:

- Family history name as entered in the Book Title field in the Page Setup window

- Contact information for the author of the family history including an email link and the researcher's name, address, and telephone number as entered in the Project Info window.

- Link to an optional GEDCOM file for downloading

- List of surnames included in the report

- Introduction

- Family Journal (genealogy) report in the Modified Register format, using Descendant, Family or Reverse Register

- Footnotes and references linked to text in the report

- Index of names in the report

- Ability to suppress information about living family members

- Images connected to the Title, Introduction, or any individual in the report

- Audio files in any accepted format. Currently these include .WAV, .AU, and .AIF

- Links to other Universal Resource Locators (URLs). A URL in the Web Link field of the Miscellaneous Individual Information window links an individual to any other Internet URL. This link can be to images, sounds, or other genealogies. For example, you can link John F. Kennedy to a genealogy at another WWW site. If this genealogy is found at URL *http://www.anothersite.com/jfk.html*, enter this address in the Web Link field for John F. Kennedy. Someone browsing your genealogy can then click the link to move to the new page for JFK.

Enter URL to link
individual to that URL

Figure 6-1: Miscellaneous Individual Information Window

A Box Chart Instant Web Page contains the following information:

- A starting individual and his or her descendants up to 16 generations

- Birth and death years (optional) for all individuals listed in the box chart

- Option to suppress information on living people

File Organization

Ultimate Family Tree provides a number of options for saving a family history file. The family history can be saved as:

- One file

- Multiple files in a single folder

- Multiple files in multiple folders

The option you choose depends on the size of the family history you wish to create and the capabilities of the WWW server you will be using.

The main reason to use multiple files is to improve the speed. A large file takes a long time to load, while small files can be accessed by a browser much more rapidly. The multiple-folder option allows a large number of files to be divided into separate folders. Use multiple files in multiple folders for uploading to the Palladium Ultimate Family Tree Web site.

Multiple File Option

The following files are created by Ultimate Family Tree:

- *INDEX.HTM* — The main family history file containing the table of contents, surname list, and introduction.

- *Innnnnnn.HTM* — Files for each main individual in the report. The record number of the individual uses the format nnnnnnn, preceded by zero's. For example, a file for a person having record number 8 would be I0000008.HTM.

- *SOURCES.HTM* — The source citations for the report.

- *NINDEX.HTM* — The name index for the family history.

- *HTMFILES.TXT* — A list of files created for this family history.

- *name.ZIP* — Zip compressed archive when Web option is selected.

Multiple Subfolder Option

Ultimate Family Tree places the main individual files in separate subfolders. The subfolders are created automatically below the starting folder if they do not already exist. The number of files in each folder can be set from the Options window, described on page 121. All other files listed previously are located in the starting folder.

The subfolders created by Ultimate Family Tree have the name *Dnnn*, where *nnn* is the number of the folder starting with zero. If you have 500 files and have set the file per folder limit to 200, Ultimate Family Tree will create three subfolders, D0, D1, and D2.

Linking Files

Images

If a preferred image (see page 136) is linked to an individual who is included in the Web Page report, it will be automatically extracted from your Media Library and located in the Ultimate Family Tree HTML GRAPHICS subfolder.

Additional image links are provided:

- *Background* — Provides a background texture for the family history. Not all browsers support background images.

- *Header Graphic* — Displays at the top of the first page. Use this for a family picture or graphic.

- *Title Graphic* — Appears at the top of the first page under the header graphic. Use this for a graphic version of your title. It replaces the chapter title.

- *Bullet Graphic* — Precedes the names of the children the first time they are introduced following the parents in each generation.

- *GEDCOM Graphic* — Precedes the URL for immediate downloading of the GEDCOM file specified on the entry line, left aligned. Available for the Web option only. Be sure to specify a GEDCOM file name as described later.

- *Email Graphic* — Appears left aligned at the end of the document preceding the URL for sending immediate email. Available for the Web option only. Be sure to include your email address as described later.

- *Table of Contents* — Appears left aligned at the end of each page to go back to the main HTML page. It precedes the phrase, "Table of Contents."

- *Next Page Icon* — Appears at the bottom of a page in multiple-page HTMLs.

- *Previous Page Icon* — Appears at the bottom of a page in multiple-page HTMLs.

- *Horizontal Rule* — Specifies a separator bar used to separate items in the report. Normally a narrow, page-width image.

- *Audio Graphic* — Precedes the URL for transmission of a sound file. Be sure to specify the audio file name.

A number of graphic (.GIF) files are included with Ultimate Family Tree for your use. These graphic files are located in the Images subfolder.

Sounds

You can also include a sound file.

- *Audio File* — Links a .WAV, .AU, or .AIF sound file.

Immediate GEDCOM

You can specify a GEDCOM file so a viewer can display onscreen or save to disk a specific GEDCOM file. This file can be a compressed file created with a utility such as StuffIt or ZipIt.

Connecting to Palladium Interactive

To connect directly to the Ultimate Family Tree Web site, from the Online menu, choose Connect to Palladium-net. Your browser must be set up in Ultimate Family Tree to connect to the Ultimate Family Tree Web site (see page 3).

Family Journal Instant Web Page Tutorial

The following tutorial presents the sequence of steps you take to create a Family Journal page on the Web:

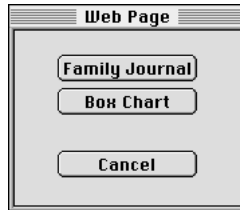1. From the Online menu, choose Instant Web Page.

Figure 6-2: Web Page Window

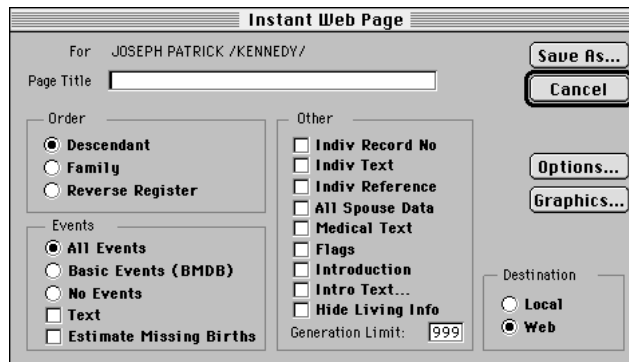2. From the Instant Web Page window, click Family Journal.

Figure 6-3: Instant Web Page Window

3. Specify the report options and starting individual for your report. The options on the Instant Web Page window are similar to the options on the Family Journal report window. See page 88.

4. Select Hide Living Info to suppress information about living family members. The names of living individuals and the connections to their families remain intact, however events, including dates and places, will not be included. The notation, "(still alive)," prints after the name. Ultimate Family Tree determines individuals who are still alive by checking for a Y(es) in the Living field in the Individual Record window.

5. Select the Local or Web option in the Destination group as desired:

- *Local* — Creates HTML files for local viewing and is not meant for the Internet. This option omits any URL email and download links you have configured in the program, and will not archive the files for you.

- *Web* — Prepares the HTML files for uploading to your server. This option inserts all URLs as configured.

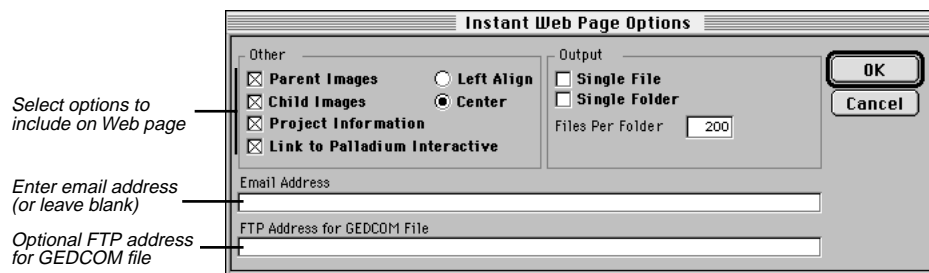6. Click Options to open the Instant Web Page Options window.

Select options to
include on Web page

Enter email address
(or leave blank)

Optional FTP address
for GEDCOM file

Figure 6-4: Instant Web Page Options Window

Select any options as described below:

- *Parent Images* — Checks for images for all main individuals in the report. If found, the image is inserted in the Web page describing the individual.

- *Child Images* — Checks for images for all children in the report. If found, the image is inserted in the Web page for children.

- *Project Information* — Include information from the Project Information window in your Web page.

- *Link to Palladium Interactive* — When checked, includes a link on the family history Web page that connects to the Palladium home page. Visitors can find out more about genealogy, the Ultimate Family Tree program and Palladium Interactive.

- *Left Align/Center* — Controls placement of images and section titles. Not all browsers support centering; some simply ignore it.

- *Single File* — Creates one large family history file. Do not select this option if creating a Web page for uploading to Palladium Interactive.

- *Single Folder* — Specifies a single folder when single file is not checked. Do not select this option if creating a Web page for uploading to Palladium Interactive.

- *Files Per Folder* — Specifies the number of files you want in each subfolder. Do not enter a number larger than 500.

- *Email Address* — Provides your email address. When this field is left blank, your email address is not included in the Instant Web Page.

- *FTP Address for GEDCOM File* — Location displayed on Web pages from which a file can be FTP'd.

  Note   This is an optional way to provide a GEDCOM file for your Family History. Normally it is best to include the GEDCOM file with the Instant Web Page.

7. Click OK.
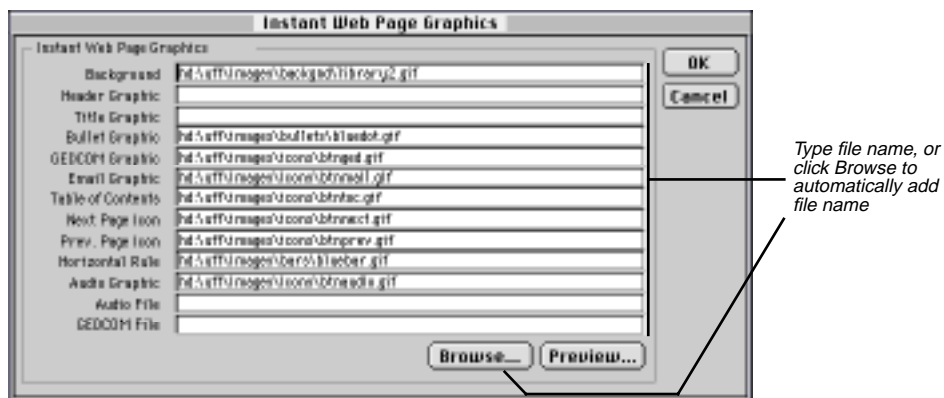
8. Click the Graphics button in the Instant Web Page window.

Figure 6-5:   Instant Web Page Graphics Window

9. Select any field and click Browse to find an existing graphics file, or type the names of the various sound and graphic files in the appropriate field.

10. Select GIF files for each option you want to use, and click OK.

11. Enter a GEDCOM or audio file in the appropriate field for inclusion in the Instant Web Page.

12. Select any field with a graphic entered and click Preview to view the graphic. Click OK to return to the Graphics window.

13. Click Save As. Select from the existing list, or enter a name for the Instant Web Page. Ultimate Family Tree creates a subfolder with the name you have chosen. The main Web page file is named index.htm.

14. Click OK to create the Web Page.
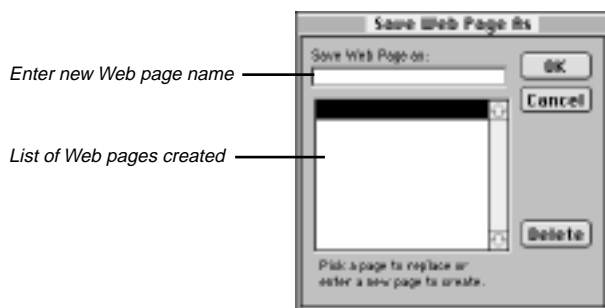
Figure 6-6:   Save Web Page As Dialog

Box Chart Instant Web Page Tutorial

The following tutorial contains the steps to create a Box Chart Instant Web Page:

1. From the Online menu, choose Instant Web Page.
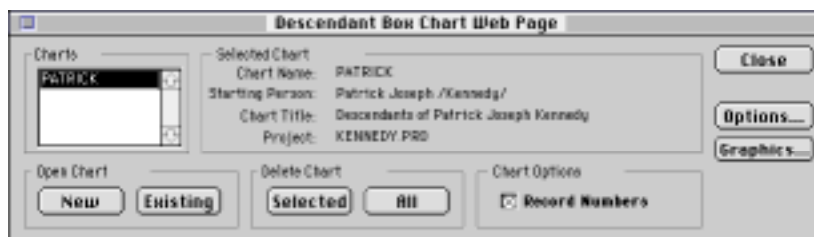
2. In the Web Page window, click Box Chart.

Figure 6-7:   Descendant Box Chart Web Page Window

3. Click the Options button to open the Instant Web Page Options window. For information on using this window, see page 121

4. Click OK.

5. Click the Graphics button to open the Instant Web Page Graphics window. For information on using this window, see page 122.

6. Click OK.

If you want to create a Web page for a new Box chart, follow these steps (or skip to step 9 for existing charts):

7. Click New to create a new Box Chart. The New Chart window opens with options to include Birth/ Death dates for individuals, and an option to hide information for living individuals.

    Note   In preparing your Web page, be sensitive to the wishes of family members who may not want certain information to be made available on the Web.

8. Select the options for the Box Chart Instant Web page and click OK. Skip to step 10.

If you want to create a Web page for a new Box chart, follow these steps:

9. Select the chart name and click Existing.

10. Enter a name for the new Web page in the Save Web Page As Window and click OK.

    Note   The following Chart menu options are not available while in HTML Mode: Graphics, Fonts, Colors, No Events, One Event and Two Events. Instead of events, only birth and death years are included in the Box Chart web page. The Ruler and Page Layout lines options on the View menu are not available in HTML Mode.

11. Choose Separate Surnames from the Chart menu to print given names and surnames on separate lines.

12. Choose Auto Edit Text from the Chart menu to automatically truncate names to fit inside the boxes.

13. Choose Record Numbers from the Chart menu to include record numbers on the Web page.

14. From the File menu, choose Create HTML. The Create Web Page window opens.

15. Click Create HTML Files.

Previewing an Instant Web Page

1. From the Online menu, choose Preview Instant Web Page.

2. Select a Web page from the pop-up menu.

3. Click OK. The Web browser you configured in Ultimate Family Tree opens with the Web page you selected. See page 3 for information on configuring a browser for Ultimate Family Tree.

4. After viewing your Web page, exit the browser to return to Ultimate Family Tree.

Deleting a Family Journal Instant Web Page

1. From the Online menu, choose Instant Web Page.

2. Click Family Journal.

3. Click Save As.

4. Select the Web page you want to delete and click Delete.

Deleting a Box Chart Instant Web Page

1. From the Online menu, choose Instant Web Page.

2. Click Box Chart.

3. Select the chart to delete and click Selected. Click All to delete all Box Chart Web pages.

Going Online from Ultimate Family Tree

If you have a manual dialer (such as FreePPP), you must take certain steps to ensure the smooth operation of the Ultimate Family Tree online functions.

Make sure that your browser is *not* running before you choose Connect to Palladiumnet from the Online menu. Choosing Connect to Palladiumnet will start your browser automatically. Use the Application menu (the icon at the far right side of the menu bar) to switch between applications. Do not choose Connect to Palladiumnet to return to your already running browser.

When using a manual dialer, after you choose Connect to Palladiumnet from the Online menu, Ultimate Family Tree will display a message reminding you to manually connect to the Internet. Switch to the Finder and launch your dialer. After dialing up, bring the program called ADMIN to the front. This should redisplay the message box. Click OK.

Whether you dialed manually or connected through a network, Ultimate Family Tree will now start your browser and take you to the Ultimate Family Tree Web Site, which contains a "Members Only" section available only to Ultimate Family Tree CD-ROM owners.

Before you go online from Ultimate Family Tree, follow these steps:

1. Quit your browser if it is running.

2. Select Connect to Palladiumnet from the Online menu.

3. Dial your Internet service provider (ISP) manually, if necessary.

Before you upload Web pages from Ultimate Family Tree, you must go online and register in the Members Only section. Then follow these steps:

1. Select Upload Web Page from the Online menu.

2. Dial your ISP manually, if necessary.

3. Wait while Ultimate Family Tree uploads your Web page to the Palladium server, then close your connection, if still connected.

When you quit your browser, Ultimate Family Tree will display a reminder that you may close your Internet connection. However, this is unnecessary if you plan to go online again soon. In any case, click OK to dismiss the reminder.

Registering with Palladium Interactive

You must register with Palladium Interactive before uploading your Instant Web Pages.

1. From the Online menu, choose Register Online.

2. Click Go Online. Ultimate Family Tree will automatically connect with the Palladium Interactive Web site. The program pauses until the connection is made. Not all browsers will automatically dial your phone and connect to your Internet Service Provider (ISP). If your browser does not connect automatically, it will be necessary for you to connect to your ISP first. Once your online session is through, be sure to disconnect from your ISP.

3. From the home page of the Ultimate Family Tree Web site, click the Publish Your Page link under the Family Web Pages icon.

4. Follow the instructions on the screen to complete your registration.

Uploading Your Web Page

After creating a Web Page and registering with Palladium, you can upload the Web page to the Palladium Interactive Web site. During this process, Ultimate Family Tree will attempt to connect to the Palladiumnet server and send your Web page. While in progress, do not switch applications. If you want to cancel the operation, click Cancel.

1. From the Online menu, choose Upload Web Page.

Figure 6-8:   Upload Instant Web Page Window

Note If you are using a manual dialer, Ultimate Family Tree will display a message reminding you to manually connect to the Internet. Switch to the Finder and launch your dialer. After dialing up, bring the program called PDFTP to the front. The reminder message should reappear. Click OK.

2. Read the disclaimer (see Figure 6-9). Click the I Accept button to accept the terms of the agreement. If you do not want to see the disclaimer each time you upload a Web page, select that option before choosing I Accept. If you click I Decline, you will be returned to Ultimate Family Tree.

Palladium Interactive Notice

We are pleased that you want to create a "Family Tree" Web page. In order to ensure enjoyment by all of our customers, we must establish some basic rules.

Third Party Content In creating your World Wide Web page to be uploaded on the Palladium World Wide Web site ("Site"), you may not use any material that is protected by copyright of a third party without first obtaining permission from the copyright owner. You, not Palladium, are responsible for any damages such as copyright infringement or any other harm that results from Palladium's use of any items submitted by you. You agree to indemnify and hold Palladium harmless from any claims, reasonable expenses, or attorneys' fees relating to any violation of these rules or submission of any material to Palladium. Remember that submission of such material to Palladium for use on the Site grants to Palladium the right to use, reproduce, modify, distribute, publicly perform and publicly display such material.

Objectionable or Defamatory Content Users are prohibited from posting or transmitting any obscene, hateful, defamatory, racially or otherwise objectionable language, images, software or content of any kind, including without limitation any material that would constitute libel, slander, defamation, or invasions of publicity or privacy of any third party in any jurisdiction. You will indemnify, defend, and hold harmless Palladium and its representatives from any and all losses, claims, liabilities, obligations, reasonable expenses or attorneys' fees which arise in connection with objectionable or defamatory content in the materials submitted by you.

Figure 6-9: Palladium Disclaimer

3. Select the Web page you want to upload from the pop-up menu.

4. Type the title of your family history.

5. Type the author's name. This is normally your name.

6. Type a short description of the family history.

Note The title, author's name, and description are used by Palladium to create an online card catalog of all family histories that are available.

7. Type the name and password you used to register online with Palladium.

8. Click Upload. Ultimate Family Tree will now create a Zip compressed file for uploading to the Palladiumnet server.

Troubleshooting

If you have a slow browser or modem, you may want to disable automatic image loading (found in the preferences of most browsers). The resulting text-only pages will load quickly, and give you the same information without the accompanying graphics. Some browsers will then allow you to display graphics by clicking on their placeholders. (Consult your browser's online help or user's guide.)

Ultimate Family Tree will not open your browser if you change it's name or location on your hard drive. If you do so, or want to upgrade or switch to a different browser, run the Browser Setup Wizard in the Ultimate Family Tree folder.

> **Note**   From time to time, you will see various dialog boxes informing you about the state of Ultimate Family Tree. You must dismiss these dialogs before returning online.

Supported Macintosh Browsers

Netscape Navigator™ 2.0 or later
Microsoft Internet Explorer 2.0 or later

Supported Macintosh TCP, Open Transport, and Dialers

MacTCP 2.0.4 or greater
Open Transport 1.1 or greater
MacPPP 2.0.1 or greater
FreePPP 1.0.5 or greater

Quitting Your Browser

If you quit your browser and your dialer does not hang up automatically, you can do so manually by using the Finder to bring forward the dialer program and quitting to avoid further connect charges.

Netscape Navigator™ and Internet Explorer allow you to open mulitple Web page documents. Closing the last (or only) Web page will not quit the browser. Make sure that you use the pulldown menu to quit the browser and return to Ultimate Family Tree.

Section 7:
Media

Using the media features in Ultimate Family Tree, you can create family-oriented slide shows and draw on a library of images. Images can be displayed and included in printed reports. The image formats supported are PICT (16.7 million colors, 24-bit), CompuServe GIF (256 colors, 8-bit), Aldus TIFF (16.7 million colors), 24-bit), and Joint Photographic Experts Group (JPEG) (16.7 million colors, 24-bit).

> **Note** Apple QuickTime must be active for JPEG format to be supported.

Media is stored and maintained in the Ultimate Family Tree Media Library. Once entered in the Library, media can be linked to as many individuals and slide shows as you wish. The material is also available to all projects. You can enter information about an image once and then use it an unlimited number of times in any project. Digitized images that are stored in a file on your computer can be displayed or printed.

It is important to note that all media (except referenced) must be in a digitized format for use in Ultimate Family Tree. There are various ways in which this can be accomplished, from using media capture software and graphics programs to image scanners.

In this section you will learn how to:

✓ Add or delete media files

✓ Display images

✓ Select a preferred image (to display in various view windows)

✓ Create a Slide Show

Referenced Media

Much of the media that is important to a genealogist cannot be digitized. Ultimate Family Tree provides a way to record, retain, and display a complete reference to this material. Referenced media records contain information about the identity and location of important external media, from books to lithographs. You can link these easily accessible records to the appropriate individuals and store the information about them in the Media Library.

1. From the Build menu, choose Media Library.

2. Click the New button in the Add Media box. The New window opens.
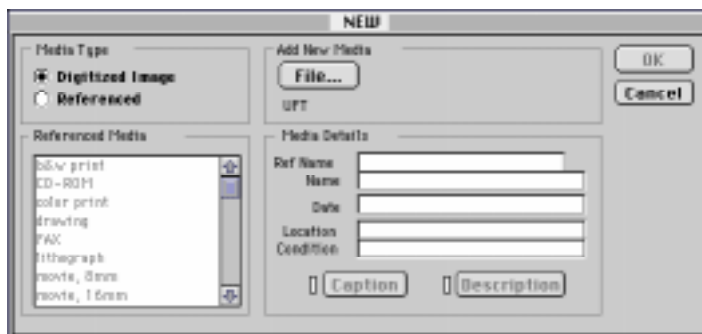
Figure 7-1:   New Window

3. Select Referenced in the Media Type box.

4. Scroll the list of media types and highlight the type you want to reference.

5. Enter a unique name (up to 20 characters) in the Ref Name field in the Media Details group. The Ref Name is required because it is used in Media List boxes.

6. Enter a descriptive name (optional) for the media in the Name field. This becomes the title name. The descriptive name is limited to approximately 35 characters.

7. Enter a date (optional) for the image (up to 30 characters) in the date field.

8. Enter the physical location (optional) of the media, for example, the album number for a photograph. Use any description you wish (up to 33 characters).

9. Enter the condition (optional) of the media, such as *poor*, *fair*, *good*, or *excellent*. Use any description you wish (up to 33 characters).

10. Click Description (optional) to open an Edit Text window where you can enter up to 65,000 characters of text describing the media. The description can include the names of the people, location of the media, or any other information you wish. Click Import to take you to an Open dialog box where you can select external text to copy and paste into the Description text window.

11. Click OK to close the New window.

Direct Media

Direct media are items that are digitized and stored on your hard disk. Images can be stored in a wide variety of formats, such as PICT, GIF, TIFF, and JPEG, and can be incorporated into your Ultimate Family Tree program. When any of these file formats containing 24-bit data are imported into Ultimate Family Tree, they are compressed using the JPEG specification.

Using Media in Ultimate Family Tree

Once media is stored in the Ultimate Family Tree Media Library, it can be linked to individuals and slide shows.

Media Library

The Media Library is the repository for all Ultimate Family Tree media files. These files are added or deleted from the Media Library window. This window contains detailed information about the images in Ultimate Family Tree projects. You can use this window to enter new images, to modify existing media records, to export image files, or to delete media records.

Adding a Digitized Image

1. From the Build menu, choose Media Library.

List of available media

Figure 7-2:   Media Library Window

2. Click New in the Add Media group to open the New window.
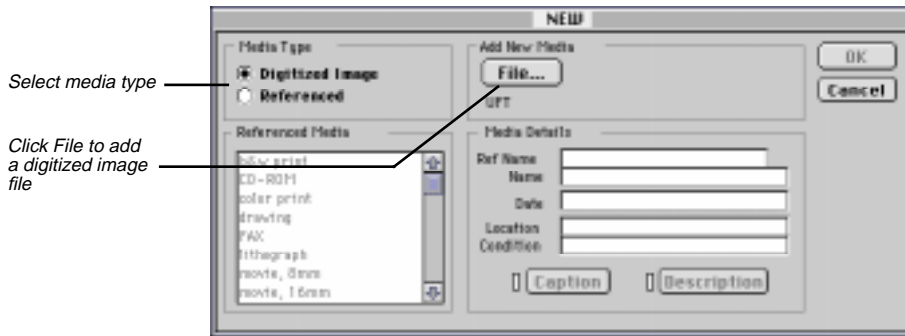
Figure 7-3:   New Window

Select media type —

Click File to add a digitized image file —

3. Select Digitized Image in the Media Type group.

4. Click File in the Add New Media From group.
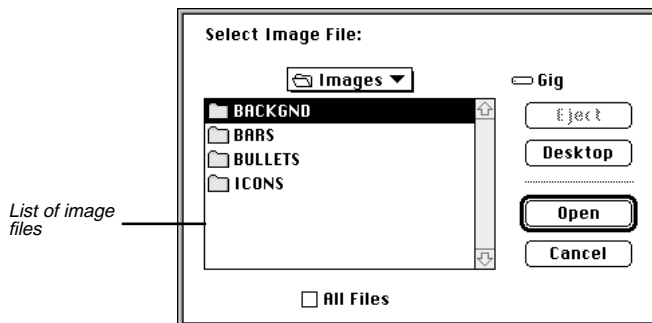
List of image files —

Figure 7-4:   Open Dialog Box

5. Select the folder where you placed the image file. A list of image files appears in the Select Image File window.

6. Select the image you want to add to the library and click Open. If you choose an image, a window opens where you can preview it. Click OK to return to the Media window, or Cancel if you change your mind.

7. In the New media window, enter a unique name (up to 20 characters) in the Ref Name field in the Media Details group. The Ref Name is required because it is used in the Media List boxes.

8. Enter a descriptive name (optional) in the Name field. This becomes the title name. The descriptive name is limited to 25 characters.

9. Enter the date (optional) for the image (up to 30 characters) in the date field.

10. Enter the location (optional) of the media, (for example, the volume for a digitized image). Use any description you wish (up to 33 characters).

11. Enter the condition (optional) of the media, such as poor, fair, good, or excellent. Use any description you wish (up to 33 characters).

12. Click Caption (optional) to open a text window where you can enter a caption for the image. The caption is a single line included below a digitized image when it is printed and should be limited to a maximum of 50 characters.

13. Click Description (optional) to open an Edit Text window where you can enter up to 65,000 characters of text describing the image. The description can include the names of the people in the image, the location of the image, or any other information. Click Import to take you to an Open dialog box where you can select external text to copy and paste into the Description text window.

14. Click OK to close the New media window.

15. The Media Library window displays a Media Library list which includes the name you typed in the Ref Name Field. Click OK to close this window.

Figure 7-5:   Media Library Window

Deleting Media

1. From the Build menu, choose Media Library.

2. Select the media you want to delete from the Library list on the left.

3. Click the Selected button in the Delete Media group to delete the selected media or click All to delete all media from the Media Library.

4. Click OK to delete the selected media or Cancel to return to the Media window.

Displaying Images and Screen Resolutions

The resolution of your monitor directly affects the quality of the images you display. Resolution is determined by the number of pixels (picture elements) on the monitor and the number of colors per pixel. A 13-inch monitor, having 640 × 480 pixels and 256 colors (8-bit) is the minimum recommended configuration for displaying images. Image quality improves dramatically as the number of pixels and color depth increase.

     If you are using a system that is limited to 256 colors, configure Ultimate Family Tree to use the Macintosh Desktop Colors option. See page 164 for more information.

Displaying a Digitized Image

1. From the Build menu, choose Media Library.

2. Select the digitized image you want to view from the Media Library list.

3. Click Display in the Image group.

Figure 7-6:   Display Window

4. Add a caption for the image, or any descriptive text, in the appropriate fields.

5. Click Close to return to the Media Library window.

Exporting a Digitized Image

1. From the Build menu, choose Media Library.

2. From the Media Library list, select the digitized image you want to export.

3. Click Image from the Play group.

4. Click Export.

5. Select the image file format you want to create.

6. Click Save.

7. Select the folder in which you want to store the image.

8. Enter the file name for the image in the New Image Name field.

9. Click Save.

10. Click Close to return to the Media Library window.

Linking Media

You can link an unlimited number of images to an individual.

1. Click the More button in the Individual Record window, and then Media to open the Media Link window.
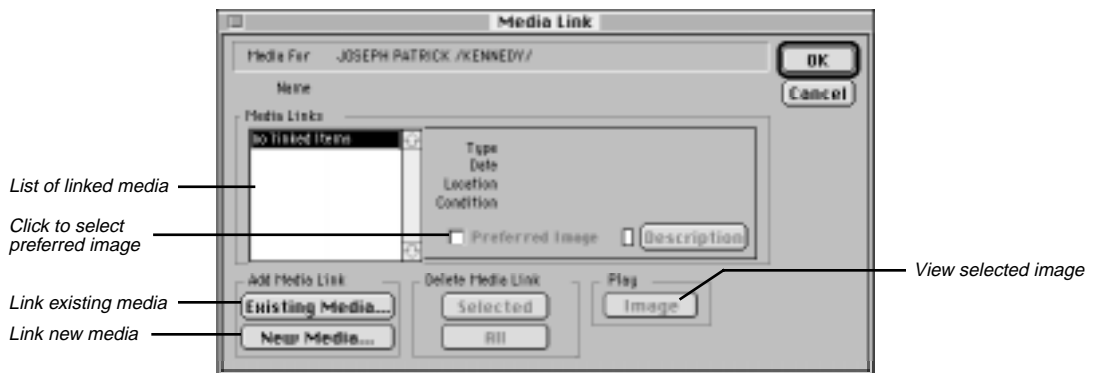
Figure 7-7: Media Link Window

2. Make sure the name of the desired individual appears at the top of the window and click Existing Media from the Add Media Link box.

3. Select Media Library in the Media Source group to add existing media found in the Media Library.

Note   If you wish to add media which is linked to another individual or an existing slide show, select the appropriate radio button in the Media Source group. A list of individuals or slide shows will open depending on your choice. Select the individual or slide show from the list and click OK.

4. Select the media you want from the Media Library list.

5. Click the Add button or double-click the media to move the selected media to the Linked Media list.

6. Click Add All to add all media to the Linked Media list.

7. Click Remove to remove selected media from the Linked Media List, or click Remove All to remove all linked media from the list.

    Note   A description of the media is displayed in the Description box if a description was entered in the Media Library window.

8. Click OK to save and close the window.

    Note   The Insert button is active only when adding media to a slide show.

Selecting a Preferred Image for Display

You can link more than one image to an individual. Ultimate Family Tree gives you the option of selecting one of these images as the preferred one that will appear in the Family Tree, Family Group, and Descendant windows (and will be included in an Instant Web Page and Family Journal Report). From the Media Link window, highlight the image you want as the preferred image and check the Preferred Image box. Click More, and then Media in an Individual Record window to open the Media Link window.

Adding New Media to an Individual

1. Click More and then Media in the Individual Record of the person to whom you want to add media.

2. In the Media Link window, click New Media to open a New media window.

3. Select Digitized Image in the Media Type group.

4. Click File in the Add New Media From group.

5. Select the folder where you placed the image file. A list of image files appears in the Add Image File box.

6. Select the image you want to add to the library and click Open. A preview window opens where you can view the image you are adding. Click OK to return to the Media window or click Cancel if you change your mind.

7. In the Media window, enter a unique name (up to 20 characters) in the Ref Name field, under the Media Details group. The Ref Name (Reference) appears in the Media List boxes. This reference is required.

8. Enter a descriptive name for the media in the Name field. This becomes the title name. The descriptive name is limited to 25 characters (optional).

9. Enter the free-form date for the image (up to 30 characters) in the date field (optional).

10. Enter the physical location of the media, for example, the volume for a digitized image, or the album number for a photograph. Use any description you wish, up to 33 characters (optional).

11. Enter the condition of the media, such as poor, fair, good, or excellent. Use any description you wish, up to 33 characters (optional).

12. Click Caption to open a text window where you can enter a caption that is included on a single line below a digitized image when it is printed. This optional caption is limited to a maximum of 50 characters.

13. Click Description to open an Edit Text window where you can enter up to 65,000 characters of text describing the image. The description can include the names of the people in the image, the location of the image, or any other information. Click Import to take you to an Open dialog box where you can select external text to copy and paste into the Description text window (optional).

14. Click OK to close the New window.

15. Click OK to close the Media Link window.

Unlinking Media from an Individual

1. Click the More button, and then Media in the Individual Record of the person from whom you want to unlink media.

2. Make sure the name of the individual appears at the top of the window. From the Media Links list, select the media you want to unlink.

3. Click Selected in the Delete Media Link group to unlink the selected media or click All to unlink all media from the individual.

    Note   The Delete Media buttons do not delete the media from the Media library. These buttons merely unlink the media from the selected individual.

4. Click OK to unlink the media.

Viewing Images Linked to a Selected Individual

1. Click the More button and then Media in the Individual Record to open the Media Link window.

2. Select the image you want to view in the Media Links list.

3. Click Image in the Play group.

Slide Shows

One of the most exciting features of Ultimate Family Tree is the ability to create a slide show presentation.

Creating a New Slide Show

1. From the Build menu, choose Slide Show.

Type name for
new slide show

List of slide shows
in project

Media type of
selected image

Set time for
selected image

Figure 7-8:   Slide Show Window

2. Click New in the Add Show group.

3. Enter a name in the Show Name field. This required name appears in the Slide Show list.

4. To add slides, click Existing or New in the Add Slide group. If you click Existing, continue with step 5. If you click New, see "Adding a Digitized Image" on page 131.
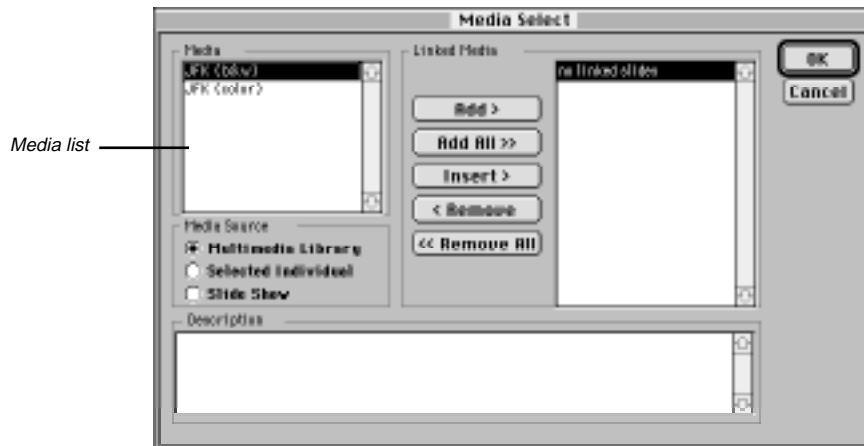
Media list

Figure 7-9:   Media Select Window

5. Select the Media Library radio button in the Media Source group. Select the Selected Individual option for media items linked to an individual. Select Slide Show to create a new slide show from an existing slide show.

6. In the Media List, highlight the media you want to include.

7. Click Add or Add All.

8. Repeat steps 6 and 7 until all media you want to add to the slide show has been linked.

   Note   Click the Remove and Insert buttons to arrange the slides in the order in which you want them to be displayed. The Remove button unlinks a selected file from the slide show. The Insert button inserts a selected file above a highlighted item in the Linked Media list.

9. Click OK to return to the Slide Show window.

10. Highlight a slide in the Selected Show list and set the time (in seconds) that you wish the slide to play. Repeat this for each slide.

11. To view any of the slides or view the complete slide show, click any of the following buttons in the Play group:

   • *Image* — Displays the selected image

   • *Slide Show* — Displays the entire slide show

Editing an Existing Slide Show

1. From the Build menu, choose Slide Show.

2. Highlight the slide show you wish to edit and click any of the buttons in the Add Slide, Move Slide, or Delete Slide boxes to add new slides, to change the order in which the slides are displayed, or to remove slides from the Slide Show.

3. Click OK to save changes and close the window.

Adding all Media Linked to an Individual to a Slide Show

You can create slide shows about several different people by adding all media linked to an individual to a new or existing slide show.

1. From the Build menu, choose Slide Show. To create a new slide show, follow the steps in "Creating a New Slide Show" on page 138.

2. Highlight the slide show to which you want to link an individual's linked media and click Existing in the Add Slide group.

3. In the Media Select window, select the Selected Individual radio button from the Media Source group. A Candidate Individuals window opens listing all individuals within the project with linked media.

4. Select the individual whose linked media list you want to use and click OK to open the Media Select window. The media linked to the selected individual is listed in the Media list.
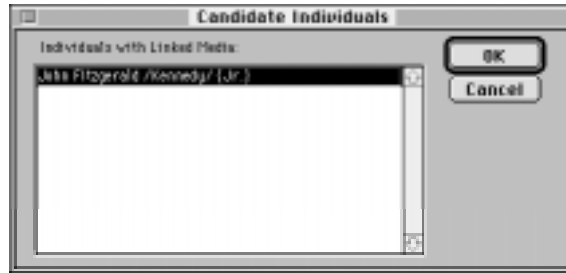
Figure 7-10: Candidate Individuals Window

5. In the Media List, highlight the media you want to include.

6. Click Add, or Add All.

7. Repeat steps 5 and 6 until all media you want to add to the slide show has been linked.

   Note   Click the Remove and Insert buttons to arrange the slides in the order in which you want them to be displayed. The Remove button unlinks a selected file from the slide show. The Insert button inserts a selected file above a highlighted item in the Linked Media list.

8. Click OK to return to the Slide Show window.

9. Highlight a slide in the Selected Show list and set the time (in seconds) that you wish the slide to play. Repeat this for each slide.

10. Click OK to close the Slide Show window.

Adding an Existing Slide Show to a Slide Show

1. From the Build menu, choose Slide Show. To create a new slide show, follow the steps in "Creating a New Slide Show" on page 138.

2. Highlight the slide show to which you want to link another slide show and click Existing in the Add Slide group.

3. In the Media Select window, select Slide Show from the Media Source group. A Candidate Slide Show window opens listing all existing slide shows for the current project.

4. Highlight a slide show and click OK to open the Media Select window with the list of media linked to the selected slide show displayed.

5. In the Media List, highlight the media you want to include.

6. Click Add. To add all listed media to the slide show, click Add All.

7. Repeat steps 5 and 6 until all media you want to add to the slide show has been linked.

> **Note** Click the Remove and Insert button to arrange the slides in the order in which you want them to be displayed. The Remove button unlinks a selected file from the slide show. The Insert button inserts a selected file above a highlighted item in the Linked Media list.

8. Click OK to return to the Slide Show window.

9. Highlight a slide in the Selected Show list and set the time (in seconds) that you wish the slide to play. Repeat this for each slide.

10. Click OK to close the Slide Show window.

Section 8:
Managing Your Data

In this section you will learn how to:

- ✓ Merge two projects
- ✓ Import data from another program via GEDCOM
- ✓ Export data from Ultimate Family Tree to another program
- ✓ Save a project
- ✓ Backup (archive) a project
- ✓ Restore an archived (backup) file
- ✓ Open files
- ✓ Delete an individual from a project
- ✓ Delete a place from the Place Library
- ✓ Delete a source from the Source Library
- ✓ Use the Project Info window
- ✓ Exit Ultimate Family Tree
- ✓ Set desktop preferences
- ✓ Pack a project

✓ Check and repair

✓ Reindex a project

✓ View a GEDCOM Exception List

Merging Projects

At some point you may want to combine one project with another.

> **Note**   To combine two projects that use different library files, use GEDCOM.

1. Open the project into which you want to merge a second project.

2. Choose Open from the File menu to open the second project.

3. Select Ultimate Family Tree and click Open.

4. Select the folder where the second project is located. Select the project name from the list and click Open. The Project Merge Options window opens.
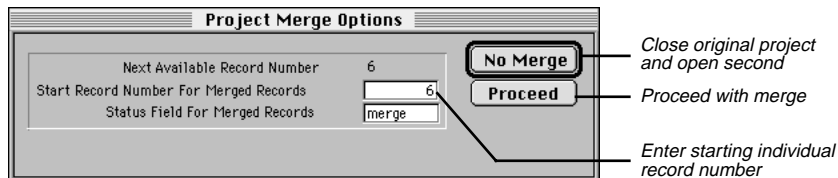
Figure 8-1:   Project Merge Options Window

5. Enter the starting individual record number for the merged records. It can be the next available record number, which appears automatically, or any higher number you choose. The Next Available Record Number displayed in the Project Merge window is the highest record number used in the original project, plus one. Note that gaps will occur in the numbering of the merged records if gaps are present in the records of the project that is being merged.

6. Click Proceed to merge the two projects. If you change your mind, click No Merge. Clicking No Merge closes the first project and opens the second one.

7. A message appears, stating, "The two projects you have specified will be merged if you proceed." The original project will contain records from both projects. The second project will not be changed. Click OK to continue or Cancel if you do not want to merge the two projects.

> **Note**   If you merge two projects, duplicate individuals are not combined. Manually combine any duplicates. See "Combining Individuals" on page 159.

Data from Another Program

Ultimate Family Tree can import GEnealogical Data COMmunications (GEDCOM) data from any other software program that is also GEDCOM compatible.

> **Important Note about GEDCOM**   The GEDCOM standard provides a set of rules that allows software designers to create programs for exchanging genealogical information. The GEDCOM standard has changed considerably since it was first introduced in 1984, and continues to evolve. Prior versions of the GEDCOM standard were released in October 1987 (3.0) and August 1989 (4.0). Versions 1 and 2 were drafts for public discussion, and were not established as a standard. The Family History Department of the LDS Church released the latest GEDCOM standard draft proposal, version 5.5, in December 1995. Version 5.5 addressed improvements in the treatment of sources and user-defined events. Ultimate Family Tree GEDCOM is designed to conform as closely as possible to version 5.3.
>
> The GEDCOM standard, while providing an excellent starting point, can be interpreted differently by designers, resulting in potential incompatibilities. For these reasons, the export and import of GEDCOM information between Ultimate Family Tree and other programs must be approached with caution. You might need to edit or update the information that is not converted correctly. While tools are provided in Ultimate Family Tree to help with this process, it is extremely important to check all information imported to Ultimate Family Tree for error or omissions. It is also important to alert those receiving a GEDCOM file from Ultimate Family Tree (or any other advanced genealogy software) of the possibility of incompatibility problems.

Importing a GEDCOM File

Ultimate Family Tree imports GEDCOM files that use either the ANSEL or IBM PC character sets.

1. From the File menu, choose Open.

2. Select GEDCOM and click Open.

3. Select the folder where the GEDCOM file can be found.

4. Select the GEDCOM file to be imported and click Open. The Import from GEDCOM Options window opens.

   Names   Select one of the two name options:

 - *Convert AL SMITH to Al Smith* — Select this option if your GEDCOM file has names in all uppercase and you want to convert those names to upper/lowercase.

 - *Convert Smith, Al to Al Smith* — Select this option if your GEDCOM file has names entered as surname, given name, and you want to reverse them to given name, surname.

   Note   Additional editing may be required if you choose either of these options. If you use the case conversion option, MCLEAN is converted to Mclean, whereas you may want it to be McLean. If the reverse surname option is used, Smith, Al Jr. is converted to Al Jr. Smith

Figure 8-2:   Import from GEDCOM Options Window

Free Date Format   Select one of the four Free Date Format options. This converts dates in the GEDCOM file to the format selected and places them in the Free-form Date field of the Individual Record window. The date prints on unstructured reports such as the Family Journal Reports.

You can edit dates in the Individual Record or Events windows at any time. Free Date Format options include:

- Month, day, year   March 3, 1908

- Day, month, year   3 March 1908

- Day, abbreviated month, year   3 Mar 1908

- Day, abbreviated all caps month, year   3 MAR 1908

Note   It is important to select the appropriate date format to ensure that Ultimate Family Tree auto-matically enters dates correctly. If you do not choose the correct date format now, you must manually change dates later.

Text Destinations: Individual   Select one of the three individual text destinations:

- *Biographical Text* — Converts text notes attached to individuals to the Individual Biographical Text field of the Individual Record window.

- *Footnote* — Converts text notes attached to individuals to the Individual Footnote Text field of the Individual Record window.

- *Research Notes* — Converts text notes attached to individuals to the Individual Text Research Note field of the Individual Record window.

Text Destinations: Event   In addition to the individual text destinations, select one of the three event text destinations:

- *Research Notes* — Converts text notes attached to events to the Event Text Research Notes field of the Individual Record window.

- *Text* — Converts text notes attached to events to the Event Text field of the Individual Record window.

- *Footnote* — Converts text notes attached to events to the Event Text Footnote field of the Individual Record.

Other   Check any of the six Other option boxes:

- *Build Footnotes* — Check this box if you want Ultimate Family Tree automatically to create the footnote text that will print on reports, such as the Family Journal Report.

    Note   The Build Footnote process increases the time required to convert a file, depending on the number of footnotes in your GEDCOM file. If you do not choose to build footnotes, evidence and sources are imported and can be converted to footnote text later. You can also rebuild footnotes using the Check window opened from the Utilities, Project menu.

- *Include Last Changed Date* — Check this box if your GEDCOM file supports the CHAN tag for the Last Edit Date for individual records. This date is placed in the Research Note text field in the Individual Record window.

- *Assume Marriage When Family* — Check this box if your previous genealogy program does not distinguish between family records and marriage records, using instead a FAM tag (e.g., Personal Ancestral File®) as in the case of the PAF (Personal Ancestral File) program. If selected, Ultimate Family Tree creates a marriage record for all couples with a FAM tag.

- *Remove Carriage Returns from Text* — Check this box to remove carriage returns from text notes and to allow Ultimate Family Tree to correctly wrap text.

- *Retain Original Record Numbers* — Check this box if your GEDCOM file supports the NUMB tag for individual record numbers. This option retains the record number from the previous program in Ultimate Family Tree. If the conversion finds an individual without a NUMB tag, a message warns you that if you proceed, record numbers will be unreliable. If you click Proceed, any individuals with NUMB tags receive the original record number, and those without a NUMB tag receive the next available record number. Click Cancel to abort the conversion.

- *Add to Open Project* — Check this box to merge the GEDCOM file into the current Ultimate Family Tree project. If no Ultimate Family Tree project is open, the Add to Open Project box is unavailable (dim). Cancel the options window, and open the project with which you want to merge the new project.

5. Click OK when you have made your option choices.

6. Enter a file name for the project.

Figure 8-3:   Save Window

7. Select a folder if you wish. Use the Projects folder or a folder other than the Ultimate Family Tree folder.

8. Click Save to start the conversion. When the GEDCOM conversion is complete, a message shows the conversion time in minutes and the number of exceptions. An exception is data that did not convert from the GEDCOM file to the Ultimate Family Tree project. See "Viewing GEDCOM Exceptions" on page 168.

9. Click OK to close the Save window.

10. Enter the appropriate data in the Project Information window. See page 162 for more information on this window.

11. Click OK to close the Project Information window.

Importing GEDCOM from Personal Ancestral File® for Macintosh

1. From the File menu, choose Export. A box will open asking, "What type of Export?"

2. Select GEDCOM File and click OK.

3. Select *All of this Family Records file* from the Export group, select *PAF 2.1/2.31 on Another Macintosh* from the Destination group, and select which of your notes you want to include with your file. Choose All Notes, No Notes, or tagged notes only.

4. Click OK.

5. If you want to save your GEDCOM file on a disk, insert a disk and click Drive to switch from your hard drive to the disk drive. Name your file and click Save.

6. Click Done. The Submitter's Name and Address window will appear. Enter or change the submitter information if necessary. Click OK

7. A window opens where you can add a note to the file if you like. Click OK and the GEDCOM file will be created.

8. Follow the steps starting on page 145 to convert the PAF GEDCOM file to Ultimate Family Tree Format.

Importing GEDCOM from Reunion®

If your family's data has been stored in Reunion, here's how to transfer it to Ultimate Family Tree:

1. In Reunion, choose File, Open to open a family file.

2. Choose File, Export, GEDCOM file. This will open the GEDCOM Export window.

   Note   If you want to export data from Reunion's five custom fields to GEDCOM tags that Ultimate Family Tree will understand, follow the procedure in the Reunion manual for assigning outgoing custom field data.

3. In the Destination field, specify Other.

4. Click Export to open a Save window. Enter a file name and click Save.

5. Follow the steps starting on page 145 to convert the GEDCOM file to Ultimate Family Tree.

Importing Unrecognized Events

When importing from other genealogy programs, events that are not recognized by Ultimate Family Tree transfer with the # character in front of the event name.

When transferred, these events do not have GEDCOM tags. They will not be included in GEDCOM exports. To transform them into fully recognizable and usable event records within Ultimate Family Tree, first find the events and the individuals connected to them.

1. From Search menu, choose Events.

GEDCOM
events import like this

Figure 8-4: Events Search Window

2. Select the # event from the Possible Events list.

3. Select Use Selected Event below the Possible Events list.

4. Do not check the Selected box in the Places group.

5. Enter today's date in the Before field of the Dates group. Leave the After field blank.

6. Choose *Then replace the list with those found* from the pop-up list.

7. Click the Search button. The Results list opens.

8. Double-click the first name in the list to open the Individual Record for that person.

9. Create a new event for that person using either a Ultimate Family Tree event type or a new event type you create. See "Adding Events" on page 28 and "Creating a New Event Type" on page 32.

10. Delete the original # event by clicking the number to the right of the event name on the Individual Record and clicking the Delete button on the right side of the Events window.

11. Click OK when prompted to delete the event.

12. Save the record by choosing Save from the File menu.

13. Go Down List from the Go menu to move to the next person in the Events Search list.

14. Repeat Steps 1–13 for any other # event types.

Exporting Data to Another Program using GEDCOM

The GEDCOM standard was developed to provide a flexible format for exchanging genealogical data. A program that reads and writes GEDCOM data can exchange data with other GEDCOM-compatible programs.

Ultimate Family Tree provides four GEDCOM export options: Basic, Version 4, Family GEDCOM Version 5.3, and Event GEDCOM Version 1.0. The first three GEDCOM options have been approved by the Family History Department of the LDS Church for submitting GEDCOM format data to the LDS Ancestral File™. Approval of Event GEDCOM is pending.

The Ultimate Family Tree GEDCOM files, compatible with GEDCOM Version 5.5 and earlier, connect individuals through families. In this sense, GEDCOM 5.5 and its ancestors are family-oriented.

Creating a GEDCOM File

1. From the File menu, choose Save As.

Choose GEDCOM
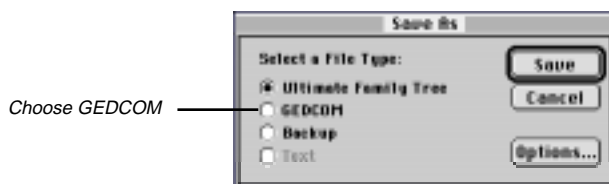
Figure 8-5:   Save As Window

2. Select GEDCOM from the Select a File Type list.

3. Click Options. The Save As GEDCOM Options window opens, providing selections that determine the format and content of Ultimate Family Tree GEDCOM files.

Check if GEDCOM is to be submitted to LDS Church Ancestral File

Check to export only those in Grouping List
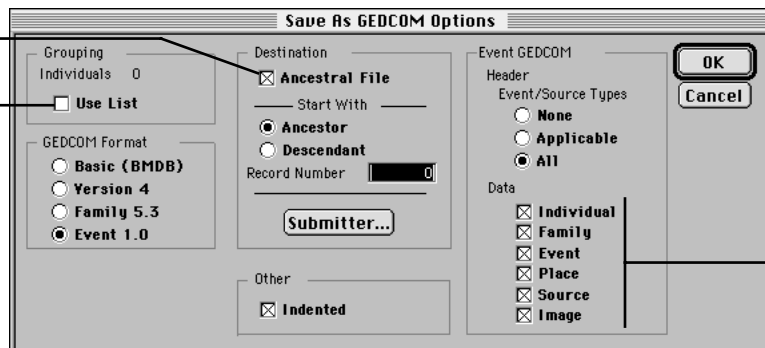
Options for Event GEDCOM 1.0

Figure 8-6:   Save As GEDCOM Options Window

4. Use grouping to create a GEDCOM export with only part of your project. To export a selected family line, use the Relationship Search window to define the family, and then add the results to the grouping list. Check the Use List box under Individuals in the Grouping field to export only the individuals found in the grouping List.

5. Choose one of the four GEDCOM Format types:

- *Basic* — Creates a GEDCOM file that contains information about family links and the basic events: birth, marriage, death and burial. Basic GEDCOM export is useful for sending minimal data to programs, such as special purpose utilities used for creating genealogical charts.

- *Version 4* — This format uses the GEDCOM 4.1 specifications.

- *Family 5.3* — This format uses the GEDCOM 5.3 specifications. Use this option if you are transferring information to another genealogy program that currently supports the GEDCOM 5.3 specification.

    Miscellaneous and Medical information, except for Flags and Ancestor and Descendant Interest, is not exported. On the Individual Record window, Individual Text Footnote, Event Text Footnote, and Research Notes are not exported. Media files are also not exported.

- *Event 1.0* — This format provides the most complete information transfer. It is an extension of Family version 5.3 that incorporates features for transferring events, roles, sources, and images. Event GEDCOM is designed to be compatible with lineage-linked systems, while providing extensive support for event-oriented systems, such as COMMSOFT's ROOTS IV. At the current time, only Ultimate Family Tree, and COMMSOFT's Visual ROOTS and ROOTS IV support Event GEDCOM.

    Note   Photo files are created for all linked images and are located in the folder in which the GEDCOM file was saved. The files normally have an extension that indicates their format. If Ultimate Family Tree finds a file of the same name, it converts the extension to a number from 1 to 999.

6. Create an Event GEDCOM. The Event GEDCOM group is unavailable unless you select Event 1.0 in the GEDCOM Format group. The Event GEDCOM file can contain a dictionary of event and source types. Use the Event/Source Types radio buttons to determine how much event/source type information is included in the file. Check any applicable Data option boxes:
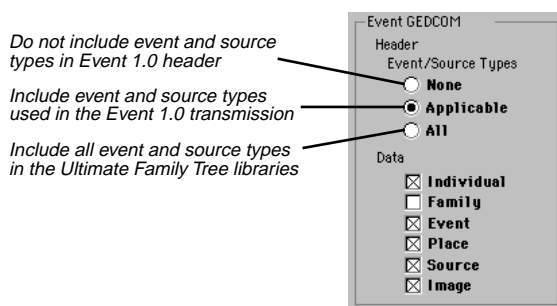
Figure 8-7:   GEDCOM Options Window

- *Individual* — Includes information about individuals

- *Family* — Includes lineage-linked family information. This option is required to maintain compatibility with lineage-linked family systems. It is not required when communicating with other Event Version 1.0 programs such as ROOTS IV.

- *Event* — Includes information about events

- *Place* — Includes information for places

- *Source* — Includes information for sources

- *Image* — Includes information about images

  Note   If you have created a media library in Ultimate Family Tree, linked media are exported to external files that can be sent with the Event 1.0 file. These media are given a name that starts with P, followed by a linking number, and an extension that shows the type of media. Keep these media files with the GEDCOM file.

7. In the Destination group, check the Ancestral File box, and then click the Submitter button if you intend to submit a GEDCOM file to the Family History Center of the LDS Church. This option indicates that the GEDCOM transmission is intended for submission to the LDS Church Ancestral File™. If you are not creating such a file, leave the check box blank and skip to step 8.
    An LDS submission requires the following steps:

- Select the appropriate radio button to choose the ancestors or descendants of the starting individual.

- Enter the record number of the starting ancestor or descendant.

- Click the Submitter button.

- Enter the submitter name, address and phone number.

- Enter any comments concerning the GEDCOM file in the Comments field.

- Click OK to close the window and save changes.

- Prepare a label for the disk(s) with the title, "Ancestral File," and the submitter's name, address, and phone number. Mail the disk(s) to:
      Family History Department
      50 East North Temple
      Salt Lake City, UT 84150

8. Choose Indented to create a GEDCOM file in an indented format.

    Note   Not all genealogy programs can read the indented format. Do not choose this option unless you know that you are preparing a GEDCOM file for a program, such as Ultimate Family Tree, Visual ROOTS, and ROOTS IV, that can read the indented format.

9. Click OK. Click Save in the Save As window.

10. Enter a file name in the GEDCOM File Name field.

11. Change the folder to the desired location for the GEDCOM file, for example, GEDCOM.

12. Click Save to start the GEDCOM export.

    Note   You cannot export directly to a floppy disk.

Saving and/or Backing Up Data

Always make copies of your Ultimate Family Tree project files and library files to protect against disk cor-
ruption and hardware failure. These copies are called backups. Without backup files, you might lose hours,
days, or even years of work.

　　To minimize losses due to power failure and machine failure, Ultimate Family Tree provides you with
backup features. These features, however, do not ensure against lost work due to damaged or worn out disks.

　　The Save As window allows you to save the current project as an archive. It is important to back up
data regularly to prevent loss of information if there is an unexpected problem with your computer system.
You should back up both project and library files, because they are connected. You do not need to back up
media files if you have not modified the Media Library. If it is ever necessary to restore project, library or
media files, you will have to reenter any data entered since the most recent backup. *Back up your data often*.

Backing Up a Project

1. With the project open, choose Save As from the File Menu.

2. Select Backup from the list.

3. Click Options to open the Save As Backup Options window.
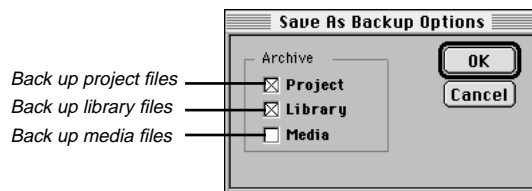
Figure 8-8:   Save As Backup Options Window

4. Check the Project box to back up the project files.

5. Check the Library box to back up the library files.

6. Check the Media box only if you have modified the Media Library. (The Media files greatly increase
   the size of your backup.)

Note   Back up project, library, and media files separately with different file names, especially if you have more than one project. Complete the backup procedure during one editing session. The Library and Media files are common to all projects and need only be archived once for all projects.

7. Click OK.

8. Click Save in the Save As window to open the Save dialog box.

Path to file ————

Enter file name ————
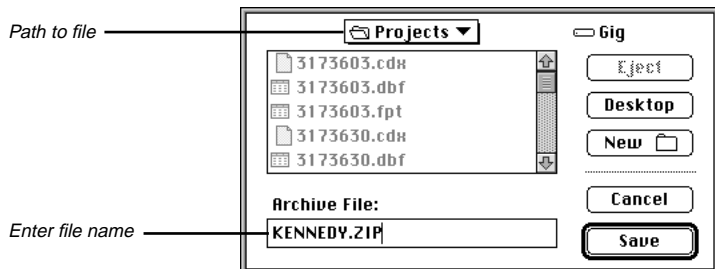
Figure 8-9:   Save As Window

9. Select the location in which the backup file is to be saved. This file can be saved to your hard disk or to one or more floppies. If you save to a floppy, Ultimate Family Tree will request new disks as they are required to complete the backup.

10. Click Save.

    If you save the backup to your hard disk, copy the archived file to a floppy disk to protect it. Archive files have the extension .ZIP. See your Macintosh manual for further instructions on copying files to floppies.

Restoring a Backup

A project need not be open to restore projects, but you must be in Ultimate Family Tree. If you restore a project with another project open, Ultimate Family Tree first closes the open project and then restores the old project. When complete, the backup project you have restored will be open. To restore a project, follow these steps:

1. From the File menu, choose Open.

2. Select Backup and click Open.

3. Select the folder or disk where you placed the backup. The current folder name is displayed above the list box.

4. Select the backup file to be restored. Backups have the extension .ZIP, such as FILENAME.ZIP.

5. Click Open. A warning message will appear, "Note: Restore Project and/or Library files. Warning! Existing project of same name and/or library will be erased."

6. Click Proceed.

Note   Restoring the project overwrites all existing files for the project and library being restored. Make sure this is what you want to do before you proceed. If you change your mind, click Cancel rather than Proceed.

When processing is complete, open the restored project by following the steps on page 9.

Save As Ultimate Family Tree Project

Use the Save As window to save the current project as a Ultimate Family Tree project with a new name. This option is handy when you want to split part of the project, to create a working copy in another folder using the same name, or to keep a working copy of the project using another name.

1. With a project open, choose Save As from the File menu.

2. Select Ultimate Family Tree.

3. Click the Options button.

Check to split part of project into a new project
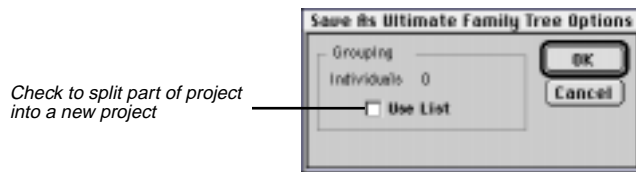
Figure 8-10:   Save As Ultimate Family Tree Options Window

4. Uncheck the Use List box.

   Note   For detailed steps on how to split a project, see "Splitting a Project" on page 156.

5. Click OK.

6. Click Save.

7. Enter a new name in the Ultimate Family Tree Project field. If you are saving the project using the same file name, place the new project in a folder different from that occupied by the current project.

8. Select the folder for saving the new project. Use a different project name to avoid confusion.

9. Click Save. When the new project is created, it is the open project. The original project is closed. This procedure does not change the original project file in any way.

10. Click Cancel if you want to return to the current project without creating the new project.

    Note   Do not save to a floppy disk. Because the Save As Ultimate Family Tree feature creates a new project, you must have sufficient disk space on the hard drive before saving the project. Allow at least 2.5 MB of free disk space for every 1,000 individuals in your project.

Splitting a Project

The following procedure shows how to split a portion of an existing project into a new project. For example, you can create a new project containing your spouse's ancestors from an existing project. The three basic steps are locating the individuals, moving those found into the Grouping List, and creating the new project. Later you can remove the individuals in the newly created project from the original project. Modify the instructions to fit your specific needs.

To locate the individuals you want to use in a new project, follow these steps:

1. Choose Relationship from the Search menu.

2. Choose Locate from the Search menu to find the starting person for the search.

3. Select Ancestors Plus Their Descendants in the Relationship Options list.

4. Set the Generation and Descendant Limits options to 999.

5. Check the Add Other Spouses box to add spouses not already included to the Search List.

6. Choose the option, Replace the list with those found, from the pop-up menu.

7. To check the search without committing the results to the permanent search list, click Preview. Press Escape to return to the Search window.

8. Click Search to create the Search list. Close the results list by pressing Escape.

9. Click Group to move the contents of the search to the grouping list.

10. Click OK to close the search window.

To create the new project, follow these steps:

1. From the File Menu, choose Save As.

2. Select Ultimate Family Tree.

3. Click Options. The Save As Ultimate Family Tree Options window opens. The number of individuals in the Grouping List will be displayed.

4. Check the Use List box, and then click OK to close the Options window.

5. Click Save.

6. Enter a new file name for the new project in the Ultimate Family Tree Project field.

7. Select a folder for saving the new project. Use a different project name to avoid confusion. Otherwise, you must place the new project in a different folder.

8. Click Save. Click Cancel if you want to return to the current project without creating the new project.

   Note   Because the Save As Ultimate Family Tree feature creates a new project, be sure you have sufficient disk space on your hard drive before saving the project. Allow at least 2.5 MB of free disk space for every 1,000 individuals. Do not save to a floppy disk.

The new project becomes the open project, and the original project is closed. This procedure does not change the original project file in any way. The name you entered in the Description field for the original project will transfer to the new project. Open the Project Information window from the File menu and enter a new name on the Description line.

You might want to remove the records in the new project from the original project. If you have not completed a new Relationship search or created a new Grouping List, continue with the steps below. If you have created another Relationship search and/or Grouping List, you will need to repeat the steps you took previously to locate the individuals in the new project.

1. Open the original project.

2. Choose Grouping from the Search menu.

3. Select Relationship from the Individual Search list.

4. Select Invert Selected.

5. Click Search.

6. Repeat the steps to create a new project.

When you complete these procedures you will have two new projects, with the original project intact. After checking the contents of the two new projects, you may want to delete the original project. Make a backup of the original on a floppy disk and then delete it from the hard drive. See page 159 for information on deleting projects.

Deleting Data

Deleting an Individual from the Project

1. To delete an individual from the project, choose Locate from the Search menu or find the name in the Individual List accessed from the View menu. Double-click the name to open that person's Individual Record window.

2. Choose Delete Record from the File menu. An "Are You Sure?" message appears. Click OK to continue. Another message appears stating, "(This individual) and all references to him/her will be removed from this project. This person is linked to ## events."

3. Click OK to delete the individual in your project, or Cancel if you want to keep the individual.

Deleting Text

Select the text to be deleted and press the Delete key on the keyboard. See page 36 for instructions on selecting text.

Deleting an Event

To delete an event, select the event in the Individual Record window and click the numbered button to the left of the event field to open the Events window. Click the Delete button on the right below the OK and Cancel buttons. The Events window closes, and a message appears asking if you want to delete the event. Click OK.

Deleting a Place from an Event

To delete a place from an event in the Individual Record or Events window, highlight the place and press the Delete key, or choose Cut from the Edit menu. This procedure removes the place from the event, but not from the Place Library. If you change your mind, choose Undo from the Edit menu.

Deleting a Place from the Place Library

1. In the Individual Record window, select a place field and choose the Find button.

2. Highlight the place to be deleted.

3. Click the Delete button in the Places window. A message appears stating whether this place is used in the current project.

4. Click OK.

    Note   Because the Place Library is common to all projects, *do not* delete a place that is used in another project.

Deleting a Source from the Sources List in the Evidence Window

1. Open the Evidence window that includes the source you want to remove.

2. Select the source to be removed from the Source List.

3. Choose Selected from the Delete group.

4. Click Proceed to delete the source and footnote reference (if present) or Cancel to return to the Evidence window without deleting the source.

    Note   This procedure removes the source from the Evidence window, but not from the Source Library.

Delete a Source from the Source Library

1. From the View menu, choose Source List.

2. Scroll through the list and highlight the source you want to delete.

3. Double-click the selected source or choose Source Record from the Build menu. The selected source is displayed.

4. From the File menu, choose Delete Record.

   Note This procedure permanently erases a selected source from the project and library. Because the Source Library is common to all projects, *do not* delete a source that is used in another project.

Deleting a Slide Show

1. From the Build menu, choose Slide Show to open the Slide Show window.

2. Select the Slide Show you want to delete from the Slide Show list.

3. Choose the Selected radio button in the Delete Show box to delete the selected Slide Show.

4. To delete all slide shows, choose All in the Delete Show group.

Deleting a Project

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

2. Click OK.

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

4. Choose New, Open, or Quit from the File menu.

Combining Individuals

The Combine Individuals feature is helpful when an individual is entered more than once in your project and you want to remove the duplicate name but retain that person's links.

1. Select the Name field and click the Find button in the Individual Record window. The Candidate Individuals window opens (Figure 8-11).

2. Select the person you want to keep in the project.

*Select the person
you want to keep*
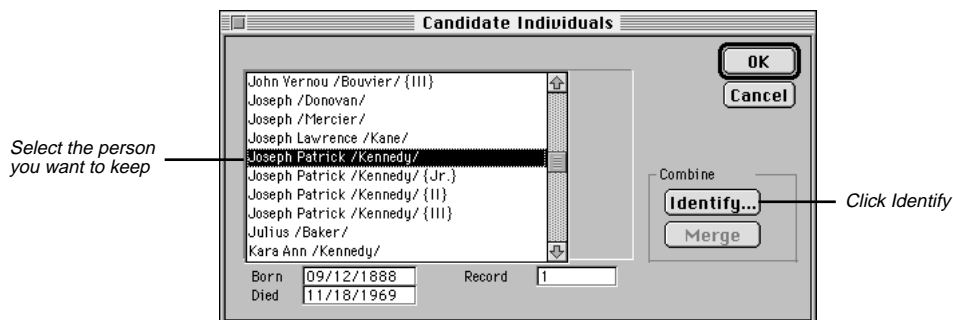
Click Identify

Figure 8-11:   Candidate Individuals Window

3. Click Identify. A dialog appears showing the name you selected as the surviving person and what steps to take.
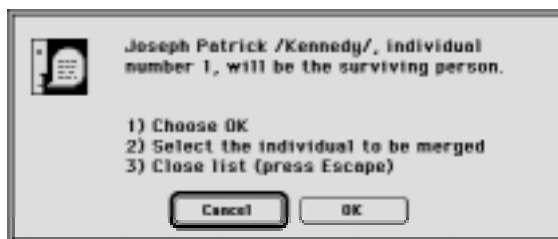
Figure 8-12:   Merge Individual Dialog

4. Click OK.

5. Select the individual to be merged from the Individual list.

6. Close the list by clicking the Close button or by pressing the Escape key.

   Note   If the two individuals you are attempting to combine are of a different sex or the sex is marked as Unknown, you will be prompted to click OK or Cancel.

7. Leave the Candidate Individual list as is (do not select another name) and click Merge to combine the two individuals.

8. A message appears showing the name and record number of the individual who will be merged and the name and record number of the surviving individual. Click OK or Cancel.

9. If you proceed, another message appears asking if you would like to erase the individual who was merged from the project. Click OK to complete the merge, or Cancel to abort.

10. When you finish the procedure, return to the surviving person's Individual Record and delete any duplicate events.

The parents and birth record for the surviving individual remain intact. Ultimate Family Tree deletes parent links for the merged individual. Events and Event Evidence for the merged individual link to the surviving individual. Individual Evidence for the merged individual transfers to the surviving individual. Click the Individual Evidence button and then the Save/Build Footnote button to rebuild the footnote.

Note If you started the combine function with the cursor in the main name field (not a Parent field) and then deleted that person during the combine, a blank individual record will open. Choose Locate from the Search menu to find another person.

Combining Places

This feature is helpful when you have entered a place more than once and you want to merge all links to one place before removing the duplicates. To combine places, complete the following steps:

1. Select any place field in the Individual Record window and click the Find button. The Candidate Places window opens.
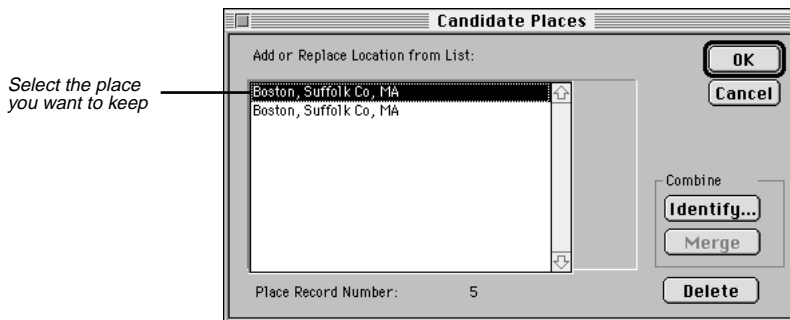
Figure 8-13: Candidate Places Window

2. Select the place you want to keep in the project.

3. Click Identify. A note appears showing the name you selected as the surviving place and what to do.
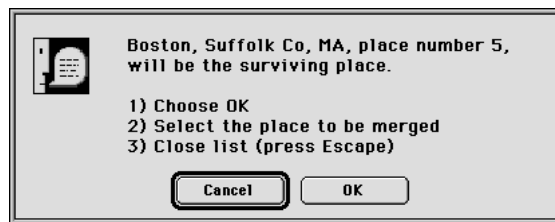
Figure 8-14: Merge Place Dialog

4. Click OK.

5. Select the place to be merged from the Places list.

6. Close the list by clicking the Close button or by pressing the Escape key.

7. Click Merge in the Candidate Places window.

8. Confirm the place names and click OK to merge. *Do not* delete the place if it is used in other projects.

A message appears asking if you want to erase the merged place from the Place Library. The place you choose as the surviving place remains in the Place Library and the duplicate place is deleted. *Do not* delete the merged place if the place you want to combine (not the surviving place) is used in other projects.

Viewing Information About your Project

The Project Information window provides a summary of an open project.

1. From the File menu, choose Project Info.
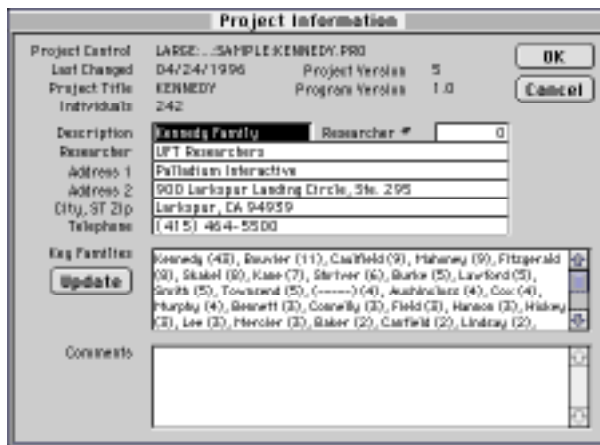
Figure 8-15:   Project Information Window

2. The following information is provided:

- *Project Control* — The name and path of the selected project control file.

- *Last Changed* — The date the selected project was last edited and saved.

- *Project Version* — The version number of the current project. In each session where the project is saved, the version number is increased by one.

- *Project Title* — The short name for the project.

- *Program Version* — The Ultimate Family Tree version number.

- *Individuals* — The number of individuals in the project.

- *Description* — A short description of the project.

- *Researcher* — The name of the principal researcher for the project. This information is optional. You can choose to have this name appear in the footer on printed reports.

- *Researcher #* — The Researcher's record number, if you want the relationship to the husband or wife to show in Family Group Sheets. If you do not want the relationship to show, enter *0* in the Researcher # field.

- *Address, etc*. — The address and phone number of the researcher, using the Address 1 and Address 2, City, State, Zip, and Phone fields. This information can also be included in the footer on printed reports.

- *Key Families* — A list of surnames found in this project, arranged in order of frequency of occurrence. The number of times each surname is encountered is shown to the right of the name. Use the scroll bar on the right side of the Key Families box to see more.

- *Update button* — Updates the Key Families list shown in the Project Info window. If you've entered new data in a project and return to the Project Info window, click Update to get a new count of surnames since the last edit.

- *Comments* — The Comments box displays the source of the data used in this project, including the import method, date, and time. Enter and edit general information in this box. Use the scroll bar on the right side of the Comments box to see more.

Desktop Preferences

You can customize Ultimate Family Tree in several ways:

1. From the Utilities menu, choose Desktop Preferences, and then Miscellaneous. Select any of the following options:
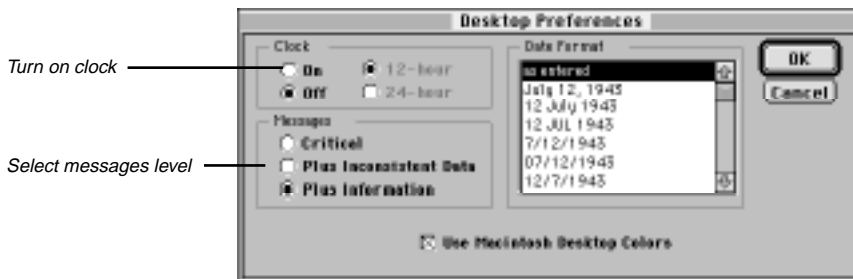
Figure 8-16:   Desktop Preferences Window

- *Clock* — Displays a clock in the lower-right corner of the Ultimate Family Tree window. Select On in the Clock group, and select the 12-hour or 24-hour clock setting.

- *Messages* — Provides three levels of context-sensitive messages that require a response from you before continuing. Choose one of the following options:

  Critical — Have Ultimate Family Tree ignore inconsistent data and information messages. Critical messages alert you to an inconsistency or error that may affect the integrity of the data in a project.

  Plus Inconsistent Data — Have Ultimate Family Tree display critical and inconsistent data messages. An inconsistent data message is used when data entry is inconsistent with rules for such items as age, but underlying data is not at risk.

  Plus Information — Have Ultimate Family Tree display all critical, inconsistent data, and information messages. Information messages provide a reminder that changes are about to be made.

- *Date Format* — Specifies the date format in the freeform date field. The date displays and prints in this format in all text reports. You can set your preference to have dates display and print exactly as you've entered them (as entered), or you can set a date format default (such as 12 JUL 1943). 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 freeform date field, such as *ABT* to *about*.

  Note Changes to the way dates display and print affect dates entered or changed only *after* you've selected a preference. Dates entered *before* selecting a preference remain unchanged.

  If you set the date preference to MM/DD/YYYY (for example, 07/12/1943), and enter a date such as 14/10/1955 for October 14, 1955, the first number will be dropped, and the date will convert to 4/10/1955 (April 10, 1955).

- Ultimate Family Tree provides two styles for desktop display. Check the Use Macintosh Desktop Colors box to make Ultimate Family Tree use the window color selected in the Color control panel. Uncheck the Use Macintosh Desktop Colors box to make Ultimate Family Tree use custom, more colorful graphics. You must quit Ultimate Family Tree and restart to see the change.

  The custom graphics mode (Use Macintosh Desktop Colors unchecked) 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 color mode.

  When you open certain windows while in the custom graphics mode, the message, "Picture colors may be incorrect. Do you wish to use Macintosh Colors?" may appear. Click No to ignore the message, and open the window. Click 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 monitor is set to 256 colors. If your monitor is set to 16 colors, the Macintosh colors will be used by default.

2. Click OK to close the Desktop Preference window.

3. Quit and restart Ultimate Family Tree if you changed the Use Macintosh Desktop Colors setting.

Modifying the Name Format

To further customize Ultimate Family Tree, you can modify the way names appear in windows. Names can appear alone or with additional information such as dates of birth and death.

These options do not affect how names appear in lists or in the editable name fields in the Individual Record window.

1. From the Utilities menu, choose Desktop Preferences, and then Name Format.

Select an option for displaying names

List of individual flags entered in project

Name Format

Add To Name
- Nothing
- Years
- Record Number
- Image Info
- Indiv. Flag

Indiv. Flags
ActPol
ArlCem
GraLaw
HCrCem
HarUni
MrInfo
PbBook

OK
Cancel

Surnames
- Use Upper Case
- Hide Slashes (/)
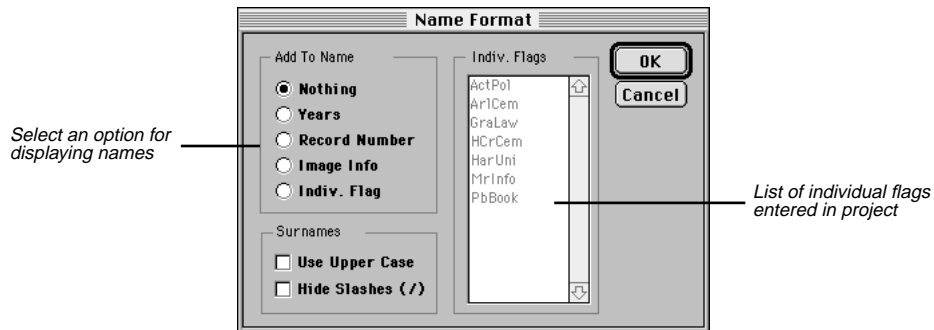
Figure 8-17:   Name Format Window

2. Select any of the following options from the Add to Name group:

- *Nothing* — Only the name.

- *Years* — Names plus birth and death years.

- *Record Number* — The name plus record number.

- *Image Info* — The name, plus the word *image* if an image is linked to the individual.

- *Indiv. Flag* — The list of flags on the right side of the window is activated when this radio button is selected. Select the flag you want from the list. The name appears plus the selected individual flag (if attached to that name).

3. Check the Use Upper Case box in the Surnames group to display surnames in all uppercase letters.

4. Check the Hide Slashes (/) box in the Surnames group to display surnames without slash marks. Checking this also removes the braces { } from titles. This setting does not affect the Individual Record window.

    Note   After changing the name format, click any open window to display the new name format.

Project Utilities

Ultimate Family Tree offers several features to help you manage your project files. They are found under Project in the Utilities menu.

Pack

Packing a Ultimate Family Tree project permanently removes records that have been deleted from your project or from a library. This is an important feature to use after deleting a number of records because packing reduces the total disk space used. Ultimate Family Tree also rebuilds all index files associated with the project.

From the Utilities menu, choose Project, and then Pack. To interrupt the Pack process, press Escape. This stops the Pack and leaves the original file unchanged.
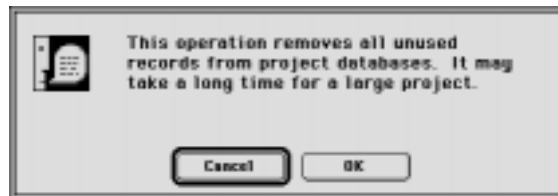
Figure 8-18:   Pack Message Window

Note   The Pack process replaces your original project files. Make a backup copy of your project files before starting Pack.

Ultimate Family Tree creates large work files during the packing process. If Ultimate Family Tree runs out of disk space during a pack, it automatically recovers the original project.

Reindex

Reindexing rebuilds any index files that are associated with an open Ultimate Family Tree project. You should reindex in the unlikely event an error message indicates that an index file is corrupted. From the Utilities menu, choose Project, and then Reindex. Ultimate Family Tree informs you when the reindexing is complete. See page 173 for information on error messages.

Check Window

The Check feature tests the files in a Ultimate Family Tree Project and Library. Inconsistent links are repaired if possible, and unlinked events removed (for example, birth events remaining after an individual has been deleted). An option is provided to rebuild footnotes.

1. From the Utilities menu, choose Project and then Check.

Figure 8-19: Check Window

2. Check any of the following boxes in the Project group:

- *Events and Event Links* — Removes events to which no individuals are linked. This option also checks place links to make sure an associated place is in the Place Library. If an associated place is not found (it may have been deleted while in a different project), the place is restored and given the name *Missing Place no. nn*. The *nn* will be replaced by the place record number. Edit the place name in the Individual Record window to change *Missing Place* to the correct place name. See page 174 for more information.

- *Add Birth/Death Events* — Checks all individuals for birth events. If one is not found, a new event is added and parents are linked. If the Living status flag for an individual is *N*, Ultimate Family Tree looks for a corresponding death event. If one is not found, a death event for that person is added.

- *Find Duplicate Record Numbers* — Checks individual record numbers to make sure they are unique and reports any duplicates found. Use the Individual Record window to assign unique numbers. See "Deleting or Renumbering Duplicate Record Numbers" on page 168.

- *Check Parent Links* — Checks links to parents.

- *Source Links* — Checks source links to make sure an associated source is in the source library. If an associated source is not found, the source is restored to the Source Library when the Repair option is chosen. The new source is replaced with a source type called Generic and given the name, *Unknown source nn*. The *nn* will be replaced by the source record number. Edit the source in the Source Record window to change *Unknown Source* to the correct source information.

3. Choose Rebuild Footnotes if you want to rebuild all footnotes. This option is useful if you did not choose to build footnotes during a GEDCOM conversion.
   The Rebuild Footnotes procedure overwrites any text you have typed directly into the Footnote text field of an Evidence window. If you do not want this text overwritten, do not choose this option.

4. When you select any of the Project options, the Repair button is activated. You have two ways to check your data:

- Click OK to check items selected on the left side of the window and prepare a report telling you what's wrong. Click OK to see the list of data that will be fixed when you click Repair or that you can choose to edit yourself.

- Click Repair to check the data and repair if possible.

A text file named CHECK.TXT is created when either OK or Repair is clicked. This text file lists problems found and changes and repairs that have been made to a project and library. If you want to save this file for later use, be sure to rename it before running a new Check.

> **Note**   Running a complete set of tests on a project may take from several minutes to many hours to complete, depending on the size of the project. To stop the Check routine, press the Escape key.

Deleting or Renumbering Duplicate Record Numbers

If the Check routine reports that you have duplicate record numbers, you must delete or renumber one of them. To find duplicate record numbers, from the Utilities menu, choose Project, then Check. Check the Find Duplicate Record Numbers box. Click OK. When the Check routine is complete, a CHECK.TXT file is opened, showing any duplicate records. If no duplicates are found, the CHECK.TXT file will not be displayed.

To delete duplicate record numbers, follow these steps:

1. Choose Individual Record from the Build menu to open the Individual Record window. Choose Locate from the Search menu and enter the record number, for example, 150. Press the Return key, and then click the OK button.

2. In the Individual Record window, change the record number to an unused one, for example, change record 150 to 10150. Choose Save from the File menu to save.

3. Choose Locate from the Search menu and enter the record number for the duplicate, for example, 150. Press Enter and then click OK.

4. Choose Delete Record from the File menu to delete this record.

5. Once deleted, choose Locate from the Search menu, enter the changed record number (10150), press Enter and then click OK. Change the changed record number (10150) back to the original number (150). Choose Save from the File menu to save.

Viewing GEDCOM Exceptions

Ultimate Family Tree maintains a list of the information that did not convert into a project from a GEDCOM file. The GEDCOM Exceptions window appears with the GEDCOM file behind it as a read-only file. The top left corner of the GEDCOM Exceptions window indicates the path and name of the GEDCOM file you are viewing.

1. From the Utilities menu, choose Project, and then GEDCOM Exceptions to view the contents of the GEDCOM Exceptions list.

> **Note**   If you have deleted or moved the GEDCOM file from the folder from which it was imported, and then try to open the GEDCOM Exception window, the message, "GEDCOM file not found," is displayed in the upper right corner of the Ultimate Family Tree window.
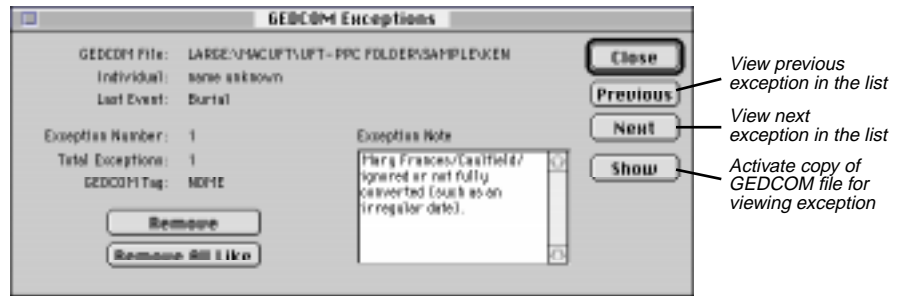
Figure 8-20:   GEDCOM Exceptions Window

- *Individual* — Indicates the individual to whom the exception belongs.

- *Event* — Indicates the event to which the exception belongs.

- *Exception Number* — Indicates the number of the exception you are viewing.

- *Total Exceptions* — Indicates the total number of items that did not convert to the Ultimate Family Tree project.

- *GEDCOM Tag* — Indicates the GEDCOM tag that was not imported.

- *Exception Note Box* — Shows the text that was attached to the selected tag, followed by the phrases *ignored or not fully converted* or *unrecognized or ignored*, to indicate the text was left out of the project. To update your data more easily, you can copy this text into a text file or field using the Copy and Paste commands from the Edit menu.

  Note   The phrase, *unrecognized or ignored*, indicates that Ultimate Family Tree correctly interpreted the GEDCOM information but did not use it (usually because a conversion option, such as Include Last Changed Date, was not selected). The phrase *ignored or not fully converted*, indicates that Ultimate Family Tree could not interpret the information correctly.

2. Click the Next and Previous buttons to scroll through the Exception List in the GEDCOM Exceptions window.

3. Click Show to activate a copy of the original GEDCOM file and to view where the exception is located in that file. Click the Close box or press the Escape key to close the GEDCOM file and to return to the GEDCOM Exception window, or click on the GEDCOM Exceptions window to bring it forward.

4. Click Remove to remove the GEDCOM exception displayed in the Exception Note field from the GEDCOM Exceptions list.

5. Click Remove All Like to remove the GEDCOM exception displayed in the Exception Note field and all GEDCOM exceptions like it from the GEDCOM Exceptions list.

6. Click Close to close the GEDCOM Exceptions window.

Opening an External Text Document

1. To open an external text document, choose Open from the File menu.

2. Select Text. Click Open.

3. Change to the folder that contains the text document you want to open.

4. Select the document, and click Open.

Saving An Open External Text Document Under a New Name

1. From the File menu, choose Save As.

2. Select Text and click Save.

3. Select the folder in which you want to save the document.

4. Enter a name for the document.

5. Click Save.

Exiting Ultimate Family Tree

To exit Ultimate Family Tree, choose Quit from the File menu.

> **Note**   It is not necessary to close a project before exiting Ultimate Family Tree. If you quit Ultimate Family Tree with a project open, that project will be open the next time you start Ultimate Family Tree. If you close the project before exiting, the next time you start Ultimate Family Tree you will need to choose Open from the File menu to open a project. See page 9 for more information on opening an existing project.

Appendix A:
Common Questions

This appendix provides answers to questions users commonly ask and solutions to problems sometimes encountered in Ultimate Family Tree. See "Did You Know?" on page 20 for more information.

Frequently Asked Questions

How do I split my project?

See page 156.

Why is the Find button sometimes dim on the Individual Record?

The Find button is available only when the cursor is on a name or place field.

How do I get events without dates to print in the proper order?

Ultimate Family Tree places all events in chronological order by the date entered in the Sort Date field. Events without dates will print first, followed by those with dates. When you know the order in which events took place, but do not have dates, enter a date in the Sort Date field for each undated event to place the events in the proper order. For example, if you know the birth order of the children in a family, but do not know the birth dates, enter an approximate date for each child in the Sort Date fields for their births, making sure the oldest child has the earliest Sort Date. The Sort Date will not print in the report, but Ultimate Family Tree uses it to place events in chronological order. To edit the sort date, click the numbered button to the left of the event name in the Individual Record window to open the Events window.

How do I edit place names in Ultimate Family Tree?

You can edit the spelling of place names in the Place field on the Individual Record or Events windows. See page 23.

How do I add a sibling when I don't know the parents for an individual?

To use the New Sibling button on the Individual Record, you must enter a parent in either the Mother and Father fields. If you do not know the parents for a group of siblings, enter a name for the father or mother in the appropriate parent field. For example, for an individual named John Smith, you could enter a mother or father named *Unknown /Smith/*, or *(-----) /Smith/*, etc. With at least one parent named, you can enter siblings.

How can I turn off the note messages?

Ultimate Family Tree provides three levels of context-sensitive messages that require a response from you before continuing. To turn off all but the most critical messages, choose Desktop Preferences from the Utilities menu and then Miscellaneous. In the Messages group, select Critical. Click OK to close the Desktop Preferences window.

How do I turn off graphics?

Ultimate Family Tree runs faster without the default graphics. To turn them off, from the Utilities menu choose Desktop Preferences and then Miscellaneous. Select Use Macintosh Desktop Colors.

What should I do when I get the message "At least one other source has the same first abbreviation" when creating new sources?

Abbreviation 1 is used to identify the source in lists. If possible, change Abbreviation 1 to something unique so that the source is easily identifiable in lists. If not possible, leave the duplicate, but be aware of this duplication when adding sources to evidence windows.

How does Ultimate Family Tree store data?

Ultimate Family Tree organizes family history information into projects. If you are researching your own family, keep all your research data in one project. If you are a professional genealogist, you will probably have at least one project for each client.

When you begin a family history project, Ultimate Family Tree asks you to give your project a name. If, for example, you call your project "SMITH," Ultimate Family Tree creates two project control files: SMITH.PRO and SMITH.FPT. The information Ultimate Family Tree needs to manage your project files is stored in these two files.

Specific information about individuals and events in their lives is stored in several files managed by the project control files. Approximately 25 to 30 numbered files belong to each project and begin with the same two or three numbers. Each numbered file has two or three different extensions: .DBF (database files), .FPT (memo files), and .CDX (index files). You can print a Project Summary report to show how each numbered file is used and the drive and directory that contains the file.

Some of the information you enter can be used in more than one family history project. Ultimate Family Tree stores this information in special libraries that can be accessed by any project you're working on.

Ultimate Family Tree maintains libraries for places, sources and source types, event and role types, and media. These common libraries save you time and increase the consistency and reliability of your data.

> **Note** Because the library files are common to all projects, do not delete places, sources, or media that might be used in other projects. Deleting an item from a library will remove the links to that item in the current project, but will not remove links in unopened projects. If you ever need to reinstall Ultimate Family Tree, be sure to back up your library and media libraries before you reinstall, or install only the program files.

Troubleshooting

This section lists error messages and possible problems you might experience in Ultimate Family Tree and what you can do if you encounter them.

General Errors

Error 15: Not a database file

The file which Ultimate Family Tree is trying to open may be corrupted. Restore the most recent backup of your data.

Error 26: Database is not ordered

This message usually means there is a problem with an index file. From the Utilities menu, choose Project and then Reindex to rebuild the index files. If reindexing does not correct the problem, rebuild all project files by creating a duplicate project. See "Save As Ultimate Family Tree Project" on page 155 for steps to create a duplicate project. When you are certain the project has been fixed, you can delete the original project. If creating a duplicate project does not correct the problem, try reinstalling the program files only (not a full installation). See "Reinstalling Ultimate Family Tree" on page 4.

Error 41: Memo file is missing/invalid

A file which Ultimate Family Tree is trying to open is either missing or corrupted. Rebuild all project files by creating a duplicate project. See "Save As Ultimate Family Tree Project" on page 155 for steps to create a duplicate project. When you are certain the project has been fixed, you can delete the original project. If creating a duplicate project does not correct the problem, try reinstalling the program files only (not a full installation). See "Reinstalling Ultimate Family Tree" on page 4.

Error 56: Not enough disk space

Ultimate Family Tree needs approximately 2.5 MB free disk work space for every 1000 individuals in the open project. Delete any programs or files that you do not use to free additional hard disk space. If you save a project or file to another drive or floppy disk, make sure the disk has sufficient space. This error can also occur if you have duplicate record numbers or an individual is linked as his or her own ancestor. Check for duplicate record numbers using the Check routine found in the Utilities, Project menus. Check your data for incorrect links.

Error 1707: Structural CDX file not found

This message indicates that an index file is either missing or corrupted. Reindex the project by choosing Project, and then Reindex from the Utilities menu. A file that Ultimate Family Tree is trying to open is either missing or corrupted. Rebuild all project files by creating a duplicate project. See "Save As Ultimate Family Tree Project" on page 155 for steps to create a duplicate project. When you are certain the project has been fixed, you can delete the original project. If creating a duplicate project does not correct the problem, try reinstalling the program files only (not a full installation). See "Reinstalling Ultimate Family Tree" on page 4.

Format not allowed

The image file you are trying to open is either corrupted or the image format is not supported by Ultimate Family Tree.

Some place names say *Place missing from Library*

Each place in the Place Library uses an internal record number. When a place is added to an event, a link from the event to that place record number is created. If that place is missing from the place library because you deleted the place in a different project, you deleted the Place Library, or you overwrote the Library files by reinstalling the entire program, the link to a valid place is broken.

To restore the missing place, backup your Project and Library files. See "Backing Up a Project" on page 153. Choose Project from the Utilities menu and then Check. Select all options in the Project group and then click Repair. Any places used in the current project that are missing from the library are restored. The new place is given the name, Missing Place no. nn. The nn represents a place number. To change this place name to the correct name, return to the Individual Record window that contained the missing place. Tab to the place field, Missing Place no. *nn*, and overwrite Missing Place with the correct place name for that event. Choose Save from the File menu to save it. A message appears stating that the place was Missing Place no. nn and is now the name that you just typed. Click Yes to change the spelling to the new name.

Be sure to enter the correct place name. The new place name will now be attached to all events that originally used this missing place in the current project and to all other projects that use this place record.

File does not exist (upon opening Ultimate Family Tree)

If you have intentionally or accidentally deleted a program file that Ultimate Family Tree later needs, you might see this message. You might need to reinstall the program files only. Do not reinstall the full program or data entered in the Library files (places, sources, and/or media information) will be lost. See "Reinstalling Ultimate Family Tree" on page 4.

File too large for Ultimate Family Tree

The external text file you are attempting to import is too large for the Ultimate Family Tree text field.

Display Errors

Individual, Marriage or Place Lists contain strange names in the column titles

If the View lists contain strange names (for example, INO instead of numbers) in the column titles, pack the project using Pack from the Utilities, Project menus.

When A Descendant Box Chart opens, List windows (Individual, Marriage and Source) close

Ultimate Family Tree closes all browse windows before opening a new Box Chart window. This is normal.

No names are displayed in the Candidate Individuals list

There are two possibilities: Ultimate Family Tree has not found any matching individuals, or the project needs to be thoroughly indexed using the Check routine (with no options selected) from the Utilities, Project menus.

Displaying Images and Screen Resolutions

The resolution of your computer display adapter and monitor directly affects the quality of the images you display. Resolution is determined by the number of pixels (picture elements) on the monitor and the number of colors per pixel. A SVGA monitor, having 480 x 640 pixels and 256 colors is the minimum recommended configuration for displaying images. Image quality improves dramatically as pixels and color depth increase.

If you are using a system that is limited to 256 colors, configure Ultimate Family Tree to use the Macintosh Colors option. See page 164 for more information.

Slide Show Troubleshooting

First slide flashes before each slide

Play Slide Show flashes the first image before displaying the next image. This is normal.

Printing Errors

The report Use Grouping options are dim

No individuals have been found in the Grouping list. See "Grouping" on page 74.

Place names are shortened or abbreviated in reports

Some structured reports, such as the Family Tree report, are designed with a 30-character limit to place names. Ultimate Family Tree shortens these names, if required.

Starting person not in individual grouping list

Grouping is checked and the selected person for the report is not in the Grouping List. Either add the individual to the Grouping list, or uncheck Use List in the report window.

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Glossary

Abbreviation 1   The first abbreviation used to identify a source. Usually, the name of an author or compiler is used.

Abbreviation 2   The second abbreviation used to identify a source. The identifier can be a title or name, and is italicized in printed reports unless italics are not supported by the printer.

Ahnentafel   A German word meaning ancestor table. This report uses a text format rather than the family tree (pedigree) form.

Ahnentafel number   A unique number assigned to each position in a family tree (pedigree) whether or not you have an individual to fill that position. These numbers do not vary from chart to chart. Ahnentafel numbers can tell you exactly how a particular ancestor is related to the selected individual.

Ancestral File   A compilation of records submitted to the LDS Family History Center by individuals doing genealogical research.

Ancestral Ordered Book   The history of an individual back to his or her distant ancestors.

ASCII   Stands for American Standard Code for Information Interchange. This standard defines the codes for a character set used for information exchange between computer systems of different manufacturers. ASCII is a common coding standard used in the computer industry.

Backing up   Copying data, typically the data on your hard drive, to a floppy disk.

Backup   A compressed file used to back up the current project.

BBS (Bulletin Board System)   A computer running communications software and connected to a telephone line through a modem that can be accessed by remote users

Canon law   A code of law in which degrees of consanguinity are defined. In canon law, the degree indicates the number of steps on a consanguinity chart from one individual to the closest ancestor shared in common by a second individual. This number produces the degree of consanguinity between these individuals.

CD ROM (Compact Disk Read Only Memory)   A data storage medium that uses laser optics rather than magnetic means to read data. Information can be read from CD ROM disks, but not recorded on them. They are capable of storing an enormous amount of data compared to a traditional floppy disk.

Check box   A small square in a dialog box or window that can be selected or cleared. When the check box is selected, an X appears in the box. A check box represents an option that you can set.

Citation   Detailed information that documents a pedigree, a genealogy, or a statement of fact.

Civil Law   A code of law in which degrees of consanguinity are defined. In civil law, as distinct from canon law, the degree depends on the number of steps on a consanguinity chart from one individual to another.

Click   To quickly press and release the mouse button.

Clipboard   A temporary storage location used to transfer data between fields, windows, and programs.

Close box   A box found in the upper-left corner of most windows. Choosing the close box closes the window.

Collateral   Descended from a common ancestor, but through a different line, such as a cousin, aunt, uncle, nephew, etc.

Command   A word or phrase, usually found in a menu, that you choose to initiate an action.

Command key   A key that, when held down while another key is pressed, causes a command to take effect. The Command key is marked with a propeller-shaped symbol. On some keyboards, the Command key has both the propeller symbol and the Apple symbol on it.

Consanguinity   A legal description of the distance between two individuals who are related by blood. Consanguinity is defined differently under civil law and canon law.

Copy   An Edit menu command that copies selected text to the Clipboard without removing it from the original location. See also *Paste*.

Cut   An Edit menu command that removes selected text from its original location and places it on the Clipboard. See also *Paste*.

Descendant Ordered Book   A type of book that singles out an ancestor and traces his or her children, grandchildren, and all other documented descendants to the present day.

Dialog box   A window that requests information. A Dialog box is a stepping stone to initiating an action.

Digitized image   A photo or picture that has been converted into an electronic (digital) format.

Direct Media   Media items that are digitized and stored on your hard disk.

Double-click   To rapidly press and release a mouse button twice without moving the mouse. Double-clicking selects an object and carries out an action.

Double dating   If you encounter dates prior to 1752, you will find that a double year might be listed, such as 1725/26. The explanation for double dating is an alteration to the calendar. In 1582 it was found that the Julian calendar which had begun with Julius Caesar was off by 11 minutes and 14 seconds a year according to the cycle of the sun and moon. Beginning when the Julian calendar was first used in 46 BC, the error accumulated yearly, and in 1582 Pope Gregory XIII corrected the discrepancy. The calendar lost ten days as the Pope decreed that October 4 would be followed by October 15.

Countries accepted the new Gregorian calendar at different times, and England and the American colonies did not do so until 1752. By then the discrepancy between the Julian and Gregorian calendars was 11 days. This difference was compounded by the celebration of two New Year's days by England and its colonies. The government celebrated New Year's on March 25, and the masses celebrated the

holiday on January 1. Depending upon which calendar you used and when you celebrated New Year's Day, there would be a difference in dating. To satisfy both conventions—until 1752 when the January New Year's celebration was made official—double dates sometimes were recorded.

You can enter the double date year in the Free-form date field. The double date will print on text reports, such as the Genealogy report. The Structured date will display the second year in the double date and will print on structured reports such as the Family Group Report.

Drag   To move an object on the screen by selecting the item and then holding down the mouse button while moving the mouse. For example, you can move a window to another location on the screen by dragging its title bar.

Emigrant   A person who departs from a country to settle elsewhere.

Event GEDCOM   The Event GEDCOM Version 1.0 specification has been designed by to provide the most complete transfer of event-oriented genealogical data. It is an extension of Family Version 5.3 that incorporates features for transferring events, roles, sources and images. Event GEDCOM is designed to be compatible with lineage-linked systems, while providing extensive support for event-oriented systems, such as ROOTS IV. At the current time, only Ultimate Family Tree and Visual ROOTS and ROOTS IV programs support Event GEDCOM.

Event text footnote   Free-form text that can be used to record explanatory notes or other references about an event that are best reported as a footnote rather than in the body of printed reports.

Evidence   Relates to or provides proof of a claim. In genealogy, most evidence comes from records, documents, and circumstances.

Family GEDCOM   The current GEDCOM specification, version 5.5, is a family-focused, lineage-linked format. It uses cross-referenced pointers to connect each child to a family and each family to its children. It does not provide for the transfer of as much data as Event GEDCOM, version 1.0.

Family Group Sheet   A genealogical form summarizing genealogical data for a single family unit. The Family Group Sheet contains detailed information about a family unit–husband, wife, and children. The Family Group Sheet begins with the husband and wife, and then lists their children in birth order.

Field   A specific area set aside for a given type of information, for example, a name field, date field, place field, etc.

Flags   A method for keeping track of special information that can be answered true or false. Ten flags are available for each individual in your project. They can be defined differently for each person. Examples of flag situations include the need for more research, attendance at a certain college, or cause of death.

Footer   Text printed at the bottom of every page for most Ultimate Family Tree reports. It can include name and address of preparer and the date the report was printed.

Footnote   Provides the evidence to support a fact. Footnotes can be either explanatory text or evidence presented in a more structured format (such as author or title).

Format   The way text appears on the pages of a report.

Free-form field   Fields that allow you to enter names and dates as they appear in their original source without formatting constraints.

Free-form text   Text that does not conform to a structured or rigid format.

GEDCOM   A standard to provide for genealogical data exchange between programs. GEDCOM stands for GEnealogical Data COMmunications. Ultimate Family Tree supports two GEDCOM forms: Family and Event.

Group   A cluster of related radio buttons or check boxes, located in a window, from which you can make selections.

Grouping   Grouping is a way to generate specialized lists of individuals who fulfill certain criteria. These lists can be manipulated or merged in a variety of different ways.

Header   Descriptive text printed at the top of every page for most Ultimate Family Tree reports. It can include book name and page number.

Highlighted   Selected object or text that will be affected by the next command or action. Highlighted text appears in black-on-white (reverse video) on monochrome displays and sometimes in color on color displays. Highlighted objects might change color or be surrounded by a selection cursor.

Icon   A small picture representing various types of applications on the desktop.

Image   Photographs, movies, videos, digitized images, and any other type of image that might be used to document a family history.

Immigrant   A person who comes to a country to take up permanent residence.

Import   To convert a non-Ultimate Family Tree file into a Ultimate Family Tree project.

Index   A list of all individuals and marriages in the project with a page number reference to where the name appears on a chart or report.

International characters   Alphabetic characters with diacritical marks commonly found in languages such as French, Spanish, or German.

Invert selected   Grouping command to exchange everyone in the grouping table for everyone previously excluded from the grouping table project.

List window   List windows show information from your project in a table format, using rows and columns.

Lock   A check box on some windows where you can lock the starting individual in the window. The individual will be in the window when it is next activated.

Long Name   The Long Name is a name of up to 65,000 characters for the selected individual. The long name is not displayed on screen in Build or View windows, but is used in Family Journal reports. Slash characters (/) define the surname and curly braces { } define a title.

Media   A general term encompassing all types of information from text to sound, but used here to refer specifically to pictures and graphics.

Memory   RAM (Random Access Memory). The memory in a computer designed to store data temporarily. The data in RAM is lost when you turn off the computer. Permanent data storage is made on floppy or hard disks.

Menu   A list of commands you can carry out. Menu names appear in the menu bar at the top of the Ultimate Family Tree main window.

Menu Bar   A horizontal bar containing the names of all the menus at the top of the main window.

Message dialog box   Contains information messages, warnings, and critical messages about the operation of Ultimate Family Tree.

Modified Register   A genealogy format that conforms with the style used in the National Genealogical Society's Quarterly. It is sometimes called the Record plan.

NEHGS   New England Historic Genealogical Society, 99-101 Newbury Street, Boston, MA 02116.

NGS   National Genealogical Society, 4527 17th Street, North, Arlington, VA 22207-2399.

Option   A selection in a dialog box. An option affects the way in which a command is carried out. Dialog boxes have several kinds of options including radio buttons (you can select only one) and check boxes (you can select as many as you wish).

Parental partner   A parents who is not married or does not have a marriage record.

Paste   An Edit menu command that moves text from the clipboard into a text file or Text window at the new cursor location. See also *Copy* and *Cut*.

Preferred image   The selected image that can be displayed from the Pedigree, Family, and Descendant windows.

Radio button   The small round button in a window that acts like the buttons on a car radio. In a group of related radio buttons, only one can be on at a time.

RAM   Random Access Memory. The memory in a computer designed to store data temporarily. The data in RAM is lost when you turn off the computer. Permanent data storage is made on floppy or hard disks.

Record   A collection of related data items, for example, an individual record.

Record Footnote   Free-form text that can be entered about an individual to print out as a footnote. Not recommended for formal source citations.

Record plan   A genealogy format that conforms with the style used in the National Genealogical Society's Quarterly. Also called the Modified Register.

Redo   Edit menu command that repeats a cut or copy that you make.

Redundant ancestors   When there is more than one line from an individual to his or her ancestor, the ancestor is considered redundant. This normally occurs when cousins marry.

Referenced media   Media of every kind that can not be transformed into a digitized format.

Register   A genealogy report that conforms with the style used by the New England Historic Genealogical Society.

Research note   Free-form text that can be entered about past, ongoing, or future research on an individual.

Reverse Register   The Reverse Register is a genealogical report format that uses a numbering system similar to the Register or Modified Register reports, and follows ancestral rather than descendant lines.

Rich Text Format (RTF)   A standard developed by Microsoft describing a method of encoding formatted text for easy transfer between applications. With the RTF standard, documents composed under different operating systems and with different software applications can be transferred between those operating systems and applications. Ultimate Family Tree supports this standard.

Save   A File menu command used to save changes made to an active window.

Scanned image   An electronic reproduction of a picture or document that is stored in a file on the computer.

Scroll bars   The bars at the bottom and right edge of a window whose contents are not entirely visible. Each scroll bar contains a scroll box and two scroll arrows.

Scroll box   Contained in scroll bars. Dragging the scroll box up or down displays information in a list or document.

Search Criteria   The choices selected in the search routines that tell Ultimate Family Tree what to look for when searching the project.

Selection cursor   The selection cursor shows where you are in a window.

Shortcut keys   The specialized key strokes (a combination of the Command key with a letter key) that you press to carry out a command or action. If a command has a shortcut key, the key combination is listed to the right of the command name on the menu.

Sibling   Brother or sister, first-generation relationship with one or both parents the same.

Sort date   The date used to establish the order of events and for calculating information such as a person's age at the time of a specific event. Normally it does not appear on reports.

SOUNDEX   A code used by the United States Government to index early census records. It tries to minimize spelling variations.

Structured date   A date in fixed form (dd mmm yyyy) used on fixed or structured reports such as the Pedigree and Family Group reports.

Structured fields   Fields, such as the sort date and structured date, that are used for structured reports, such as the Pedigree and Family Group reports.

Submitter   The individual creating a Tiny-Tafel or GEDCOM file. The word submitter is also used to refer to information about this individual.

Text box   A box located in a window where you type information.

Tiny-Tafel   Tiny-Tafel is a shortened variation of an Ahnentafel list. The Tiny-Tafel contains one line of text for each family line, giving the surname, locations, and the time period represented by that family line and codes to signify the degree of interest in receiving information concerning the ancestors or descendants of that line.

Title bar   The horizontal bar located at the top of a window and containing the title of the window.

Undo   An Edit menu command that reverses the last action you performed on any text within a field, record or file. Undo deletes a new record only if the record was not saved.

Unusual dates   Unusual or nonstandard dates (for example, Quaker or Jewish dates). In Ultimate Family Tree dates that do not fall between the limits of 100 AD to 3000 AD are considered unusual dates. Ultimate Family Tree is able to accept dates in all of these categories.

Wildcard   A character used to represent one or more different characters. A question mark (?) can be used to substitute for a single unknown character. The asterisk (*) can be used to substitute for more than one consecutive character.

Window title   The title of the window that is found at the top of the window.

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