

# Ultimate Family Tree User's Guide

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# 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 ever want to go back and check a fact, you can check the source at the same time.

## **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. You can take two directions 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, yearbook and scrapbooks. Other sources include legal papers, financial papers, photographs, and even household items.

## **Conducting an Interview**

After picking your brain for facts and while 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 Ws—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 our 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 genealogical and 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 genealogical collections 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, UT 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 those of any search. First, you define exactly what you want to know, then design a method for carrying out the search. 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.



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## Section 1:

# Introduction

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

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

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

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

Soon you will be entering your own information, creating beautiful journals, and experiencing the voices and pictures of loved family members.

## 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.

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

1. Check the Table of Contents or the Index of the *Ultimate Family Tree User's Guide* for the subject you need help with, or from the Ultimate Family Tree menu, choose Help followed by Help Topics. In the resulting window, locate on-screen information about your topic.
2. See “Troubleshooting” in Appendix A and online Help for answers to common problems.

If you need assistance with Windows, please contact Microsoft Corporation or consult your *Microsoft Windows User's Guide*.



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# Getting Ready to Install

## System Requirements

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

## Make sure you have everything you need

Your Ultimate Family Tree package should include:

- *Ultimate Family Tree User's Guide*
- Registration card
- CD-ROM disk

## Customer Registration

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

# Installing Ultimate Family Tree

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

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

If you install Ultimate Family Tree as an update to ROOTS IV, the Ultimate Family Tree library files will be installed in the same directory as the ROOTS IV library files, resulting in two sets of library files. When you install Ultimate Family Tree as an update to ROOTS IV, the ROOTS IV program files are deleted, the data files remain intact, and the library files retain their ROOTS IV names. If you start a new project, you have the option of choosing to create an Ultimate Family Tree or ROOTS IV project. If you choose to create a new Ultimate Family Tree project, the Ultimate Family Tree library files are used. If you choose to create a

ROOTS IV project, your existing ROOTS IV libraries, containing the places and sources entered in ROOTS IV, are used. If you have been using ROOTS III or another genealogy software program, you will import your ROOTS III or GEDCOM file, and the Ultimate Family Tree library files are used.

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

**Note** ROOTS IV library files are named X\_PLBOOK.\*, X\_SOBOOK.\*, X\_ELBOOK.\*, and so on. ROOTS V, Visual ROOTS, Family Gathering, and Ultimate Family Tree library files are named V\_PLBOOK.\*, V\_SOBOOK.\*, V\_ELBOOK.\*, and so on.

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

## Installation Instructions

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

**Note** If you have any problems with the installation, see “Installation Troubleshooting” on page 203. Please ensure that you have disabled all virus scanning software, screen savers, and any other software which may interfere with the installation.

1. Start Windows
2. Insert the CD-ROM in your CD drive.
3. If you are running Windows 3.x, choose File from the Program Manager, and then Run. If you are running Windows 95, choose Start, and then Run from the task bar.
4. Type *d:\setup* (substitute the correct drive letter for your own CD-ROM drive). Click OK.
5. The Ultimate Family Tree install program begins. It is strongly recommended that you close all running Windows applications before proceeding. Click Cancel to stop the setup program and close any running applications or click Next to continue.
6. The Setup program will search for installed components of Visual ROOTS, ROOTS IV, or Family Gathering. The installation program will ask you if you want to update an existing program or install Ultimate Family Tree in a new directory.
7. Click Yes to update the program or No to install Ultimate Family Tree as a separate program.

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

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

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

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

- *Typical* — Installs the program plus the Kennedy sample project.
- *Minimum* — Installs Ultimate Family Tree and library files without the Kennedy sample project.
- *Custom* — Allows you to install selected files. The Custom option should be used for reinstallation only.

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

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

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

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

- Existing Spell Checker files
- Existing Event Choice lists
- Existing report configurations
- Existing Task Lists
- Existing right mouse setups

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

**Warning** Answering *no* will replace these files with program default files, and you will lose any changes you may have made. Before reinstalling over a previously installed version of Family Gathering or Ultimate Family Tree, please read “Reinstalling Ultimate Family Tree” on page 6.

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

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

14. In the new Genealogy Program Group, up to six icons are created, depending on the installation options you chose and the operating system you are using.
  - *Browser Setup* — Identifies a browser for Ultimate Family Tree.
  - *Ultimate Family Tree* — Starts Ultimate Family Tree.
  - *Kennedy Sample* — Starts Ultimate Family Tree with the sample Kennedy project.
  - *Uninstall Ultimate Family Tree* — In Windows 3.x, an additional icon is created to uninstall Ultimate Family Tree from your system. In Windows 95, Uninstall is located in the Control Panel under Add/Remove Programs. Note that Uninstall cannot remove any files created or modified after installation such as Project or Library files.
  - *Ultimate Family Tree Editor* — Opens the powerful Windows word processor supplied with Ultimate Family Tree.
  - *Readme file* — Opens a text file with last-minute information not available when the manual was created.

## On-Line Guide and Browser Setup

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

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

## Reinstalling Ultimate Family Tree

To reinstall Ultimate Family Tree, follow these steps.

1. Start Windows.
2. Insert the CD-ROM in your CD drive.
3. If you're running Windows 3.x, choose File from the Program Manager, and then Run. If you're running Windows 95, choose Start, and then Run from the task bar.
4. Type *d:\setup* (substitute the correct drive letter for your own CD-ROM drive). Click OK.
5. In the Welcome dialog, read the information and click Next.
6. Setup will search for installed components and display a message if an existing Ultimate Family Tree installation is found. Click OK.

**Note** The directory in which the Ultimate Family Tree executable file was found is displayed in the Destination Directory box. Click Browse to change to another directory.
7. Three installation options are available. Select Custom and click Next.

8. Deselect the options you do not want reinstalled with Ultimate Family Tree.
9. Highlight Ultimate Family Tree by clicking once on the program name. Notice that the Change box turns from gray to black. Click Change to select the modules of Ultimate Family Tree that you wish to reinstall.

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

## Creating an Ultimate Family Tree Icon in Windows 95

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

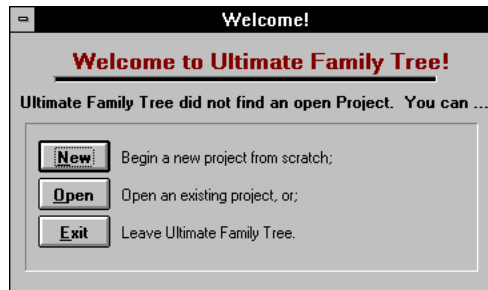
1. Click the right mouse button on the Desktop.
2. Choose New.
3. Choose Shortcut.
4. Click Browse.
5. Change to the \UFT directory and choose UFTREE (UFTREE.EXE).
6. Click Open. UFTREE.EXE appears in the Command line.
7. Click Next.
8. Type *Ultimate Family Tree* in the name field and click Finish.

## Starting Ultimate Family Tree

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

To start Ultimate Family Tree, follow these steps:

1. Start Windows.
2. Open the Genealogy program group (or whichever group or folder in which you installed Ultimate Family Tree).



**Figure 1-1: Welcome Window**

3. Double-click the Ultimate Family Tree icon. If you are starting Ultimate Family Tree for the first time, the Ultimate Family Tree Title window appears, followed by the Welcome window with a message stating Ultimate Family Tree did not find a project. You are offered the following options:
  - *New* — Begins a new project
  - *Open* — Opens an existing Ultimate Family Tree project
  - *Exit* — Leaves Ultimate Family Tree

## Ultimate Family Tree Desktop Display

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

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

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

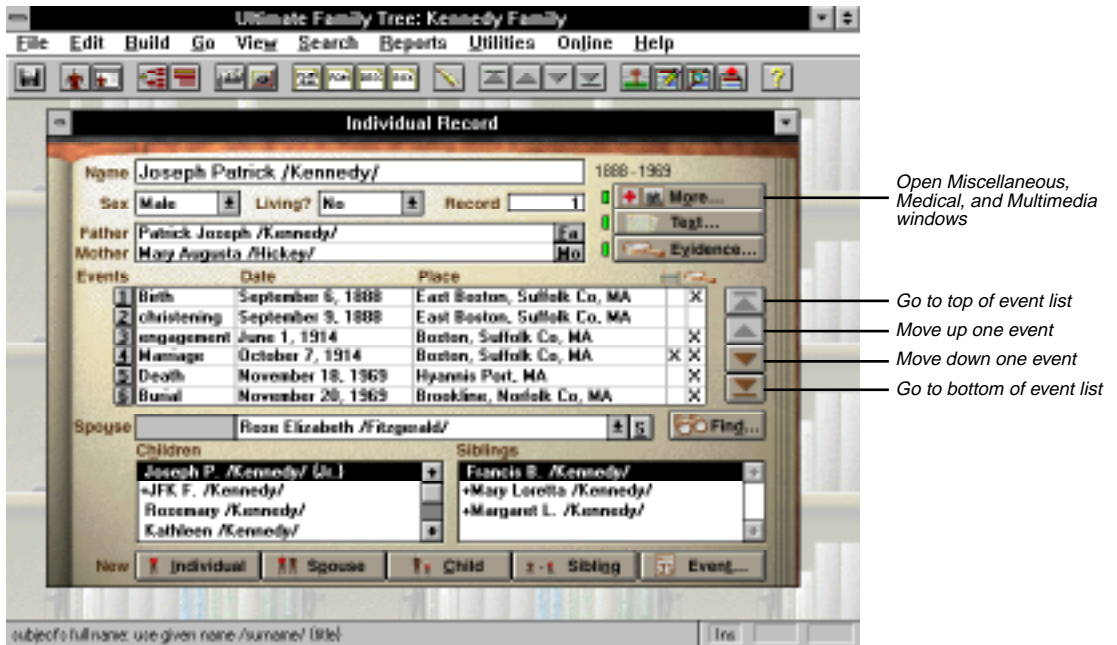


Figure 1-2: Ultimate Family Tree with Graphics Desktop Display

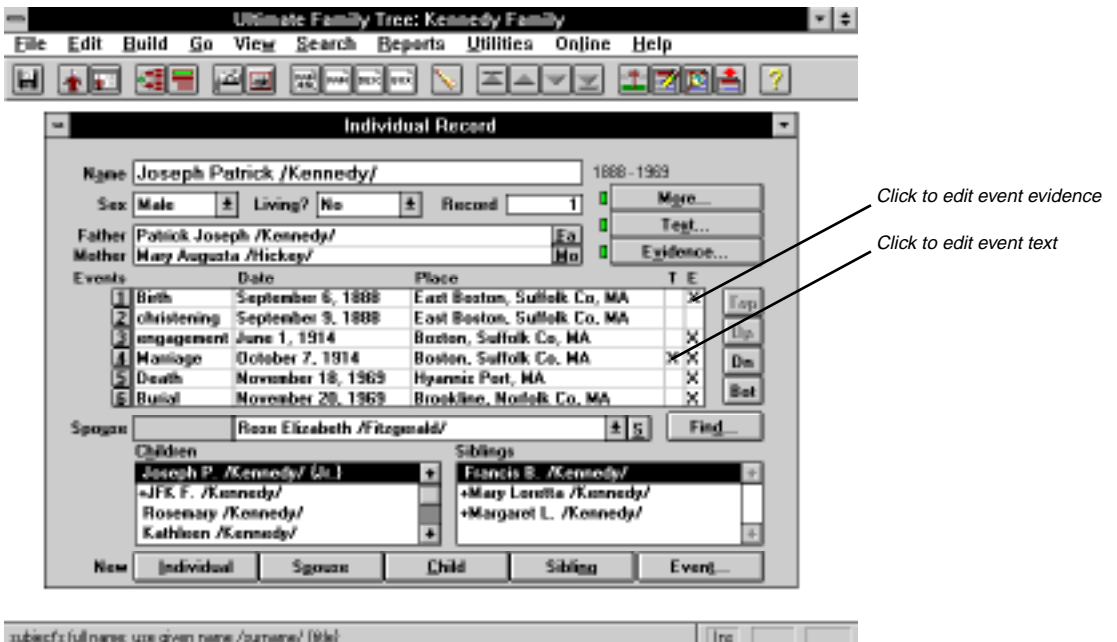


Figure 1-3: Ultimate Family Tree with Windows Colors Desktop Display

## Creating a new project

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

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



Figure 1-4: New File Window

2. In the File Type list, select Ultimate Family Tree and choose Open.
3. In the File Name field, type a file name (up to eight characters) for the new project.

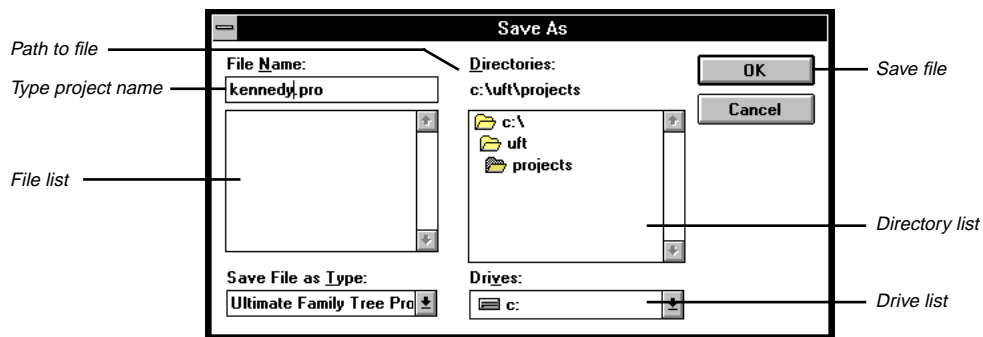


Figure 1-5: Save As Dialog Box

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

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



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

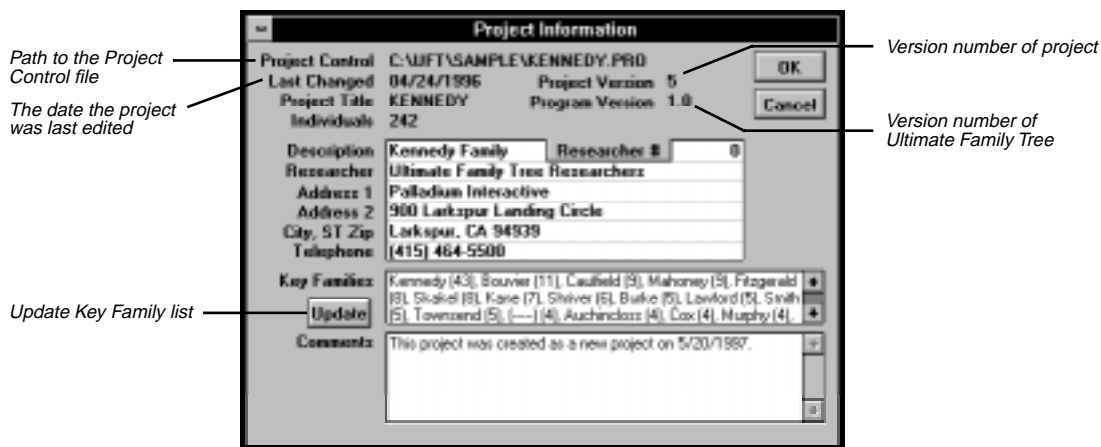


Figure 1-6: Project Information Window

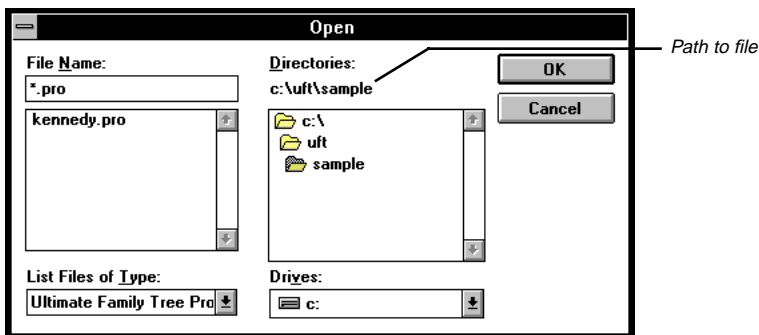
**Note** To open the Project Information window at any time, choose Project Info from the File menu.

- Enter a short description of the project, such as a family name, on the Description line. The description appears on the title bar of the Ultimate Family Tree window.
  - Enter the name of the principal researcher for this project in the Researcher Field. This field is optional, but you can have the researcher's name appear in the footer on printed reports by typing a name here and choosing Preparer in the Page Setup window. See the note below.
  - Enter the address of the researcher. This information can be included in the footer with the preparer's name, if you want. You might include "Prepared by:" before the name to have the footer of your reports printed in this way.
- Note** To print the relationship of the preparer on Family Group reports when Preparer Info is checked, enter the Researcher's record number in the Researcher # field. For a new project, enter an Individual Record for the preparer and then return here by choosing Project Info from the File menu.
- Key Families is a list of surnames in the project arranged in the order of frequency of occurrence. Ultimate Family Tree keeps track of the number of times each surname is encountered and displays it to the right of the name. This field is blank for a new project. Choose the Update button to update the Key Families surname list. When new individuals have been entered into Ultimate Family Tree, choose Update to get a new count of the surnames.
  - The Comments box displays the source of the data used in this project, including import method, date, and time. Enter general information about the project in this box.

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

To open an existing project, follow these steps:

- From the Menu Bar, choose File.
- Choose Open.



**Figure 1-7: Open Dialog Box**

- In the File Type drop-down list, select Ultimate Family Tree Project.
- Select the drive and directory of the existing project. Select \UFT\SAMPLE directory if you want the Kennedy sample project, or the \UFT\PROJECTS directory if you've already converted or saved a project that you'd like to open.
- Make sure that the proper drive, directory, and subdirectory appear above the directory list box.
- Select the project filename to be opened (for example, KENNEDY.PRO).
- Choose Open. The Individual Record window appears and is ready to accept information about an individual.

See Section 8 for information on importing GEDCOM and ROOTS III files.

## Getting Familiar with Ultimate Family Tree

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

## Menu Bar

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



**Figure 1-8: Menu Bar**

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

- Press the Alt key to activate the menu bar and then use the right or left arrow keys to move across the bar to the menu name you want. Press the down arrow key to open the menu.
- Press the Alt key followed by the underlined letter in the menu name.

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

- Press the left mouse button
- Press Alt plus the underlined letter
- Press the combination of shortcut keys indicated next to an option

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

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

## Function and Shortcut Keys

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

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

Here are helpful and frequently used keyboard shortcuts:

- *F5* — To view an Individual Record, highlight a person's name anywhere in the program and press F5.
- *F8* — To open the Events window for an event, select the event and press F8 or choose the numbered button to the left of the event name.
- *F9* — To save data in a window, press F9, or in an Individual Record click the Save button on the Toolbar.

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

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

## Toolbar

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

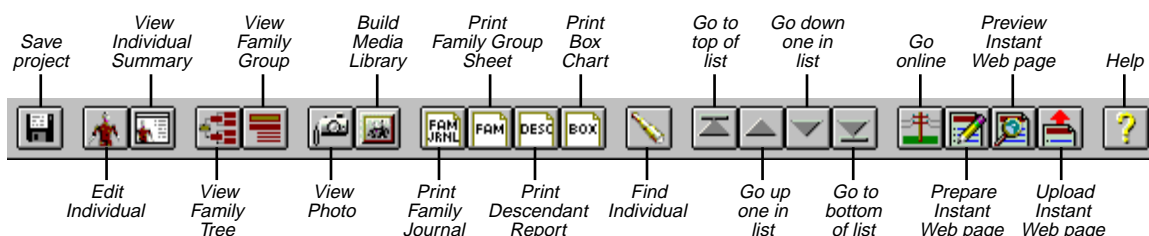


Figure 1-9: Toolbar

You can turn the Toolbar on and off, and you can disable the balloon (command description) help associated with each Toolbar button. See page 196 for instructions.

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

## Reserved Characters

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

- / — Used to mark surnames. On ROOTS III import, the pipe symbol (|) is substituted for extra forward slash characters in names. Do not use the forward slash character in names except to mark the beginning and end of the surname.
- # — The number sign is used in role sentence codes. Do not use the number sign in name, event detail, place, or date fields.
- { } — Used to mark a title in a person's name. Can be used in other fields, subject to the restrictions under Rich Text Format listed in the next section, "Rich Text Format Printing."

## Rich Text Format Printing

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

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

## International Characters

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

## Quick Start Tutorial

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

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

For additional hints and tips, see “Did You Know?” on page 23.

## Creating an Individual Record

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

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

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

## Creating a new record for yourself

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



Figure 1-10: Individual Record Window

2. In the Name field, type your full name given at birth. Ultimate Family Tree automatically marks the surname with slash (/) characters.
3. See Section 2, page 29 for more information on entering names which include titles.
4. Tab to the Sex field. Type M, F, or U. Alternatively, you can press the down arrow and select Male, Female, or Unknown from the drop-down list.
5. Tab to the Living field. Type Y(es), N(o) or U(nknown). Alternatively, you can use the mouse to select one of these options from the drop-down list.

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

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## Adding parents

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

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

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

## Creating a birth event

1. Tab to the Birth event date field.
2. Type your birth date using any format you want. See Section 8, page 195 for information on setting date preferences.
3. Tab to the Place field and type the place of birth.

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

## Creating a marriage event and adding a spouse

1. If your spouse is not yet in the project, choose the **New Spouse** button to create a new Individual Record along with a marriage record. If a marriage event has not yet been created for your parents, you are given the option to add one now.
2. A new Individual Record opens. Type the name of your spouse in the Name field.
3. Press Tab to move to the date field of the newly created marriage event and type the date on which the marriage took place.
4. Tab to the Place field and type the location of the marriage.
5. Click the "S" button to the right of the spouse's name field to return to your Individual Record.

## Creating other events

1. Choose the **New Event** button to add another event. The Events window opens.
2. Select any event from the list. To scroll the list, use the down arrow on the scroll bar or type the first letter of the event you want to move to.

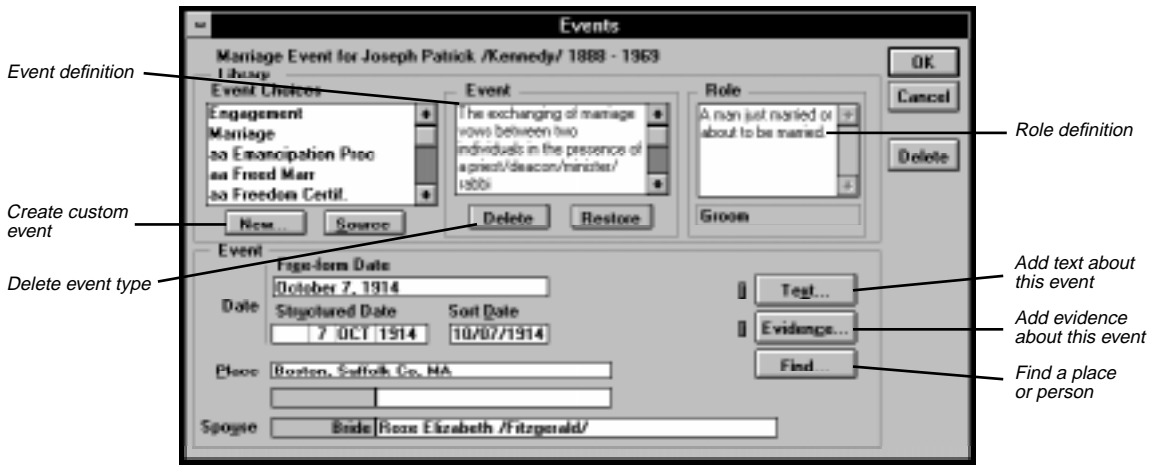


Figure 1-11: Events Window

3. With the event highlighted, type the free-form date in the Date field. The structured and sort date fields are automatically calculated and entered when you Tab out of the Free-form date field.
4. Tab to the Place field and type the place name where the event occurred.
5. When certain events are created, an event detail line becomes available. For example, in the case of graduation, the detail is the institution or school from which you graduated. Type the detail information in the event detail line and press Enter. A marriage or divorce type event activates the Spouse field where you can enter the name of the other individual linked to this event.

These events use the Event Detail field:

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

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

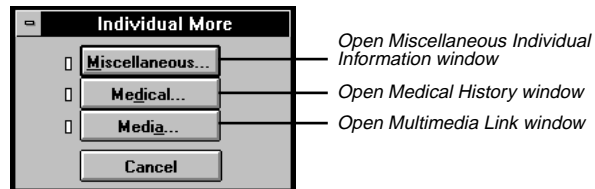


## Adding Evidence, Text, and Other Information

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

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

2. Select the Birth event you created for yourself and click the Text Status box to open a window where you can type free-form notes about this event. Up to 65,000 characters of text can be entered here. Type a few words and choose OK to save the data and close the text window. An X shows that text is present for this event.
3. Choose the Event Evidence Status box to open a window where you can enter evidence to support the event, such as a birth certificate. See page 40 for information about entering sources.
4. Choose the Text and Evidence buttons to type notes about an individual (up to 65,000 characters) and attach evidence documenting your knowledge of that individual. The Individual Text and Individual Evidence buttons work the same way as the Event Text and Event Evidence Status boxes.
5. Choose the More button to open an Individual More window and then choose Miscellaneous to open the Miscellaneous Individual Information window. Record miscellaneous information about yourself. Type your Social Security number in the last field and choose OK to close the window.



**Figure 1-12: Individual More Window**

6. Choose the More button, and then Medical to open the Medical History window in which you can enter physical details and medical conditions. Choose a medical condition to open a second window where you can type up to 65,000 characters of information about that condition. Choose OK and return to the original Medical History window. Type your weight, height, and hair and eye color in the Physical characteristics group. Choose OK.
7. Choose the More button, and then Media to open the Multimedia Link window where you can attach and display or play image or audio recording files linked to an individual. See Section 7 for information about adding and linking Media.
8. Choose Cancel to close the Multimedia Link window and return to the Individual Record window.

## Adding a Child

The Children box lists all children of the selected individual.

1. Add a child by choosing the New Child button at the bottom of your Individual Record window.
2. In the Parent window, specify the name of the other parent and choose Selected. A new Individual Record window opens with the child's surname already entered and the parent's names in the Mother and Father fields.

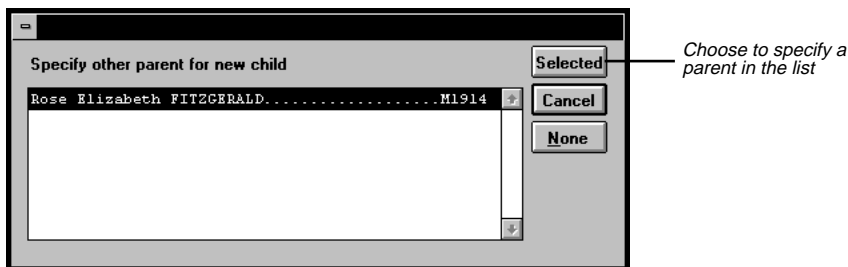


Figure 1-13: Other Parent Window

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

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

## Adding a Sibling

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

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

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

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

## Viewing Ancestors in the Family Tree (Pedigree) Window

- From the View menu, choose Family Tree to leave the Individual Record window and open the Family Tree window, which is also known as a Pedigree chart.

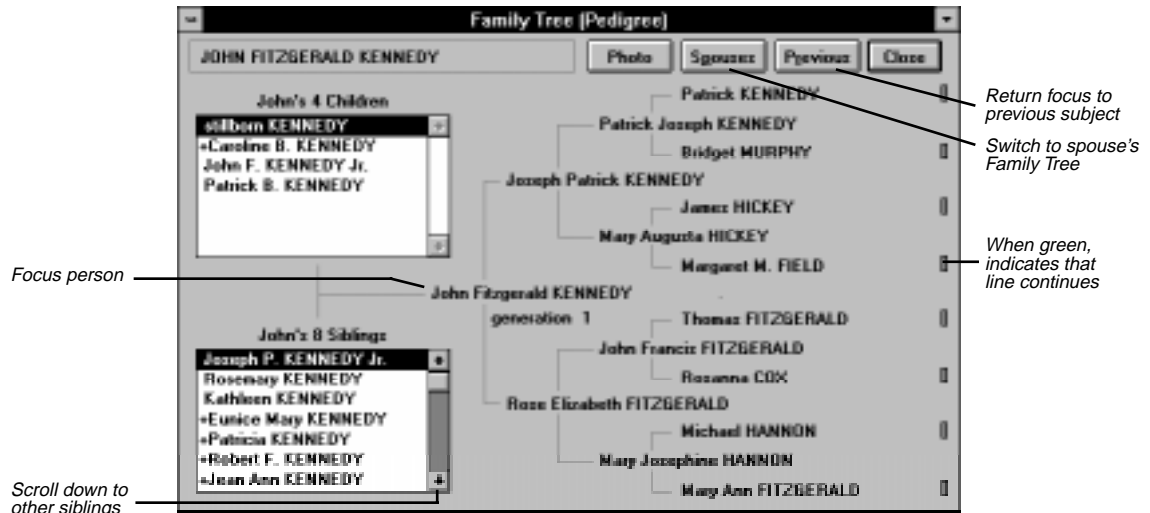


Figure 1-14: Family Tree (Pedigree) Window

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

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

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

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

## Viewing a Family Group

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

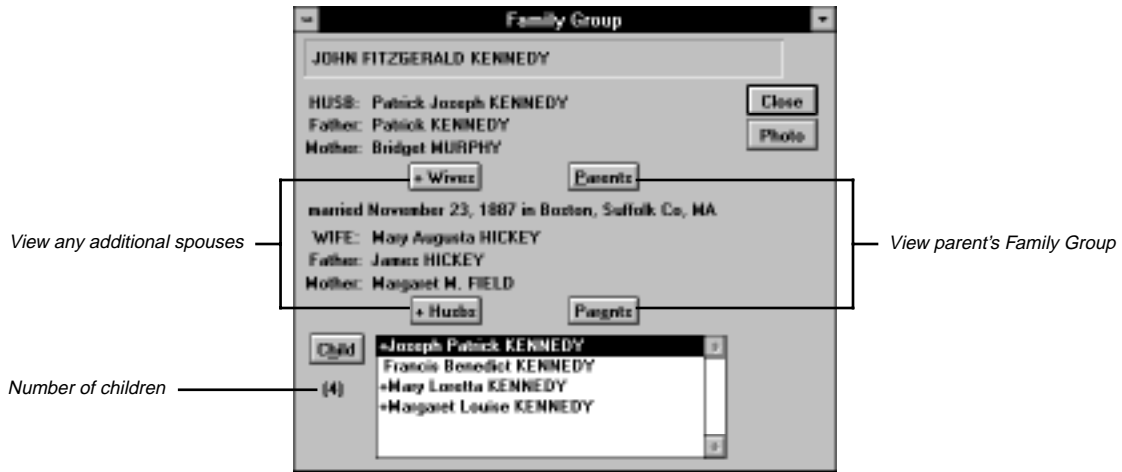


Figure 1-15: Family Group Window

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

## Viewing an Individual Summary

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

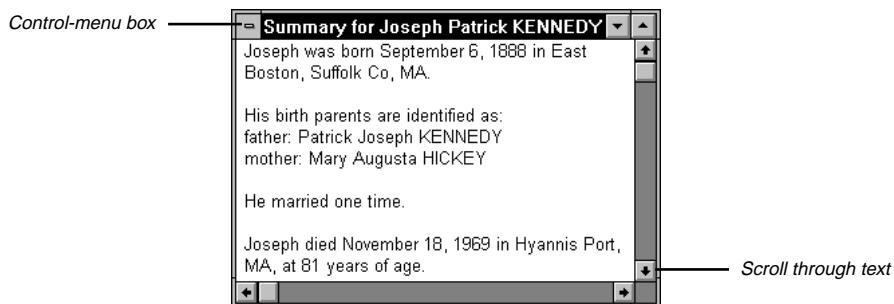


Figure 1-16: Individual Summary Window

**Note** Event details are displayed twice when viewing an Individual Summary. Because the Individual Summary shows a summary of all the information entered for an event, it displays the text that will be printed in the report as well as the basic data entered in the detail field. For this reason, you can

view the more extensive event information that can be entered into ROOTS IV and then accessed in Ultimate Family Tree. What you see as a duplicate detail on the computer screen will not print in your report.

2. Scroll through the text to review the information that you entered.
3. Close the window by choosing the Close box or by pressing Escape.

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

## Deleting a Project

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

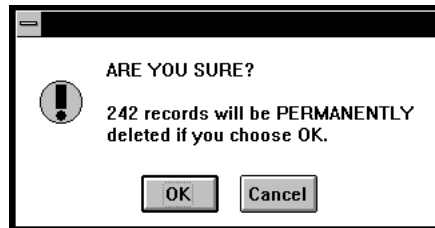


Figure 1-17: Delete Project Warning

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

## Did You Know?

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

## Go Menu

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

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

## The New Spouse Button

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

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

## Text and Evidence Status Boxes

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

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

## Using Undo

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

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

## Date Preferences

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

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

## Graphics Display

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

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

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

## Editing Place Names

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

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

**Note** See pages 192 for information on combining duplicate place names.

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

## Finding Individuals

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

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

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

See page 80 for information on using the Find Individual window.

## Using Existing Records for Parent and Spouse Fields

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



## Section 2:

# Entering Information

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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. It can be minimized to remove it from the desktop when desired.

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 and audio recordings.

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 and sound 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 23.

## 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 or by pressing F5 on the keyboard. You can also use these methods:
  - Choose the Individual Record button on the Toolbar.
  - Select the Individual Record window (if it is displayed behind an open window).
  - Double-click a name in a View list.
  - Select a name from the Go menu.
2. Choose the New Individual button to display 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.)

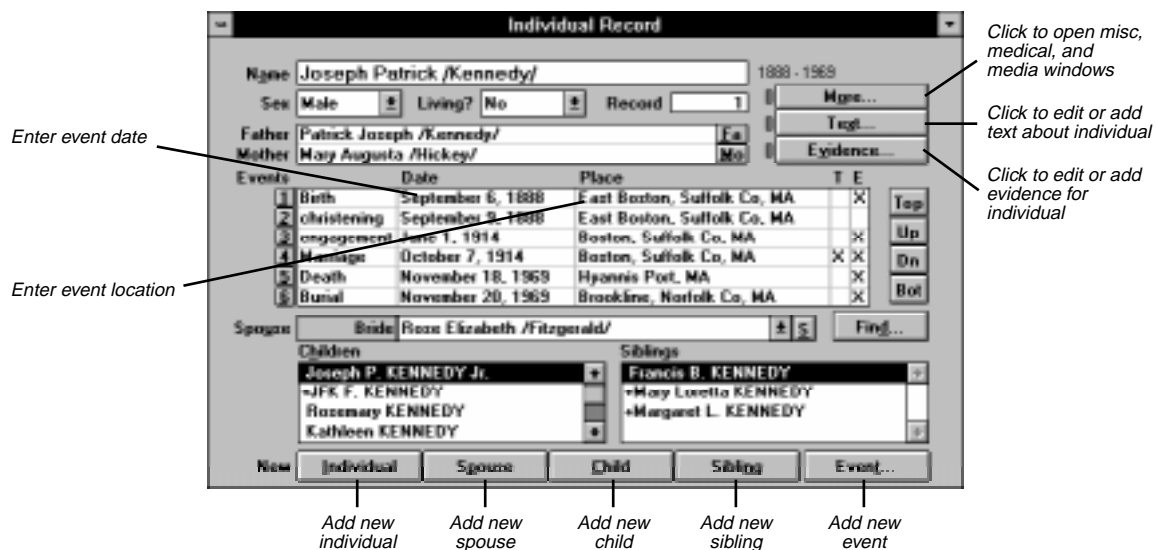


Figure 2-1: Individual Record Window

Use the Tab key to move forward from field to field and Shift + Tab to move in the opposite direction. Don't use the Enter key because its primary function is to choose a selected command button or other selected item.

**Note** Many buttons in the Individual Record window have an underlined letter in their title. Hold down the Alt key and type that letter to move to the associated field or choose the associated button. Once you have opened a record, you can enter a person's information.

1. 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 with 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 window. See page 48.

**Note** Mark a title by enclosing it with left and right 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 on any Ultimate Family Tree window except the Individual Record window, select No Slashes in the Name Format window (see page 196). Use only one set of slash characters in the name field.

2. Tab to the next field and enter the sex of the individual. Type F, M, or U or press the down arrow and select Male, Female, or Unknown from the drop-down list.
3. At the Living field, type Y, N, or U to indicate whether or not the individual is still living. Using the mouse, you can click the down arrow and select from the drop-down list. If a death event is entered, this field is automatically set to N 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. Tab 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 choose the Find button. From the Candidate Individual's list, select the correct individual and choose 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, birth, and death dates to be sure you have selected the correct person.

2. Repeat the step above for the Mother field.

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

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, choose New. If the person has already been entered, highlight the person's name and choose List to link that individual. If you want to make changes, choose Cancel to return to the Individual Record window.

## Adding Events

Events are added from the Individual Record window.

1. Choose the New Event button or click the numbered button to the left of an Event field labeled "none" in the Individual Record window. Events are listed alphabetically, with the most common events capitalized so they appear first in the list.

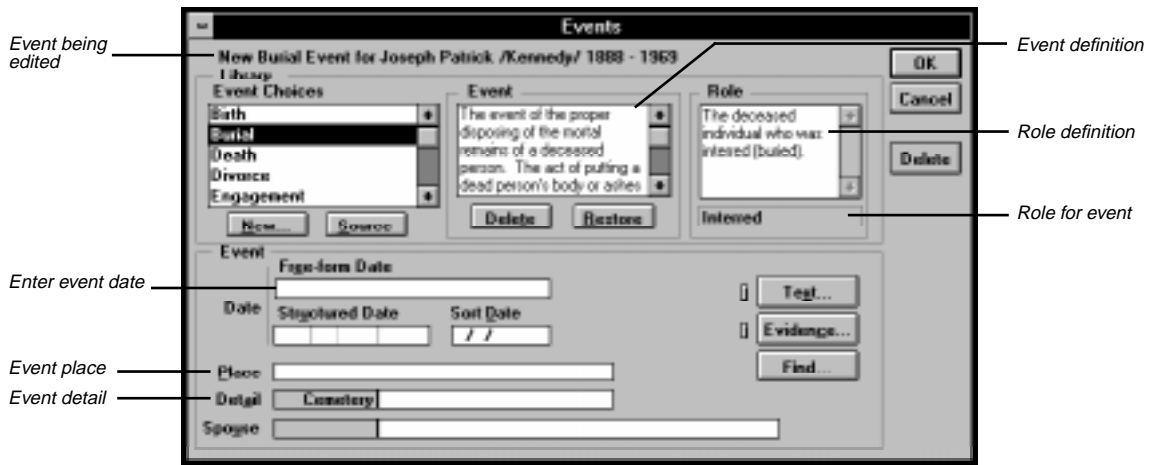


Figure 2-2: Events Window

2. Highlight an event name to select.

Ultimate Family Tree provides hundreds of 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. Create a new event type by clicking New. (See page 33.) 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. 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 choose the Delete button under the OK and Cancel buttons on the right.

## Dates

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

2. Tab to the next field and confirm the results in the Structured and Sort date fields.

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 or Structured 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.

You can enter dates in a variety of ways:

- *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 195 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 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.
- *The 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 Dating* — 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

1. To enter a place for an event, Tab to the place field, type the first few letters of the place, and choose 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.

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. However, the entire place name will print in text reports such as Family Journal (Genealogy), Text Descendant and Ahnentafel reports. In structured reports where space is limited, such as the Family Tree (Pedigree) and Family Group reports, a long place name is abbreviated.

**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 Del (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, choose Yes. If you want to create a new place, choose No.

## Editing a Place Name

To change the spelling of a place name, highlight the place name in the place name field in the Individual Record window and type the correct place name. Choose Save from the File menu or press F9 to save the spelling change. A window opens stating what the event place was and what it is now. Choose Yes to change the name. For additional information, see page 25.

## 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 include a building or apartment number.

## Deleting Event Types

You can delete event types from the list if you want. 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. Choose the New Event button in the Individual Record window.
2. Highlight the event type in the Event Choices List.
3. Choose the Delete button in the Event box.

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

4. Choose 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, choose New Event in the Individual Record.
2. Choose New in the Events window.

- 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**

- 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 pages xx for more information about GEDCOM.

- 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.”
- Complete all fields in the window.

## Marriages

You can create a marriage by choosing the New Spouse button in the Individual Record window, or by choosing New Event. In both cases, a marriage event is added.

When you choose the New Spouse button, a new Individual Record opens where you enter a new spouse. If you choose the New 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, pre-nuptial 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 pre-marriage 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 velacion (Hispanic marriage events)

## Creating a New Marriage Record

Follow these steps to create a new marriage event.

1. Choose the New Event button in the Individual Record window.
2. Select Marriage from the Event list.
3. Enter the free-form date.
4. Tab to the place field and enter a place name. If the place has already been entered, type a partial place name (or simply highlight an unknown location) and choose the Find button to open the Candidate Places list. Highlight the place name you want to enter for the event and choose 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 choose the Find button to open the Candidate Individuals list. Highlight the name and choose OK.

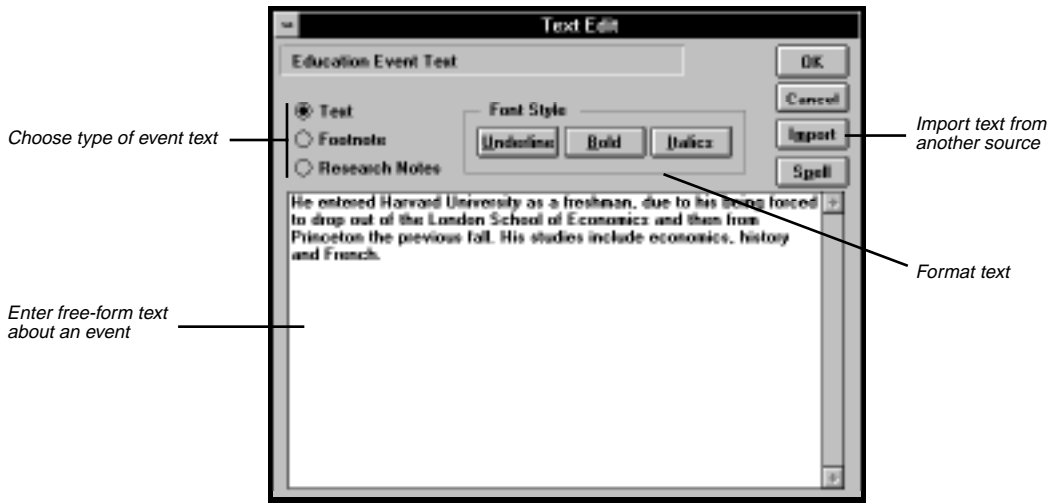
**Note** If you enter a full name in the Spouse field for an individual that has already been entered in Ultimate Family Tree, a message appears when the Individual Record is being saved stating that this name has already been entered. If it is a different person, choose New. If the person has already been entered, highlight the person's name and choose List to link that individual. If you want to make changes, choose 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, choose 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 choose the Text button. Enter up to 65,000 characters in any free-form text field. Many reports can include individual and event text. See page 14 for information on reserved characters that should not be used when entering text.

Choose the option you want:

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



**Figure 2-4: Event Text Edit Window**

- *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.
- *Underline, Bold, and/or Italics* — Formats selected portions of text in reports. Highlight the text and then choose a format.

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

- \ — Do not use the backslash character in Ultimate Family Tree if you will be using the RTF feature.
- { } — Do not use the left or right curly brace character in Ultimate Family Tree (except to mark a title in a name) if you will be using the RTF feature.

See page 85 for information on using the RTF feature.

## International Characters

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

## 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 left mouse button and hold it while dragging the mouse across the text to be selected.
3. Release the left mouse button.

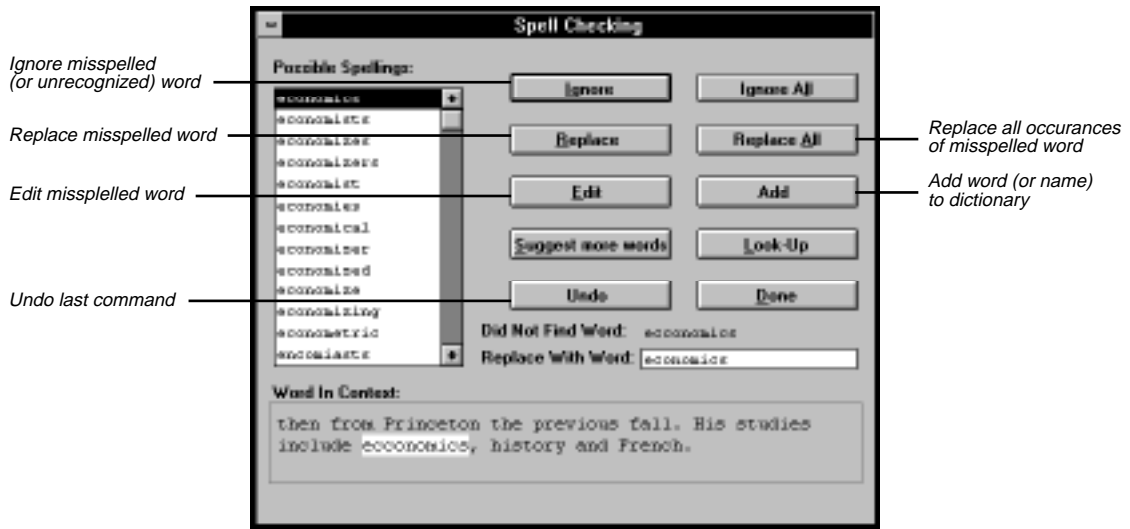
To use the keyboard:

1. Position the cursor under the first character to be selected.
2. Press and hold the Shift key. Press the Right Arrow key until the text is selected.
3. Release the Shift key.

## 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, choose the Spell button, choose Spell Check from the Edit menu, or press Ctrl+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.
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 word and choose Replace.
4. To edit the misspelled word, choose Edit. After editing, choose Replace.
5. To stop checking spelling and return to the Edit window, choose Done.



**Figure 2-5: Spell Check Window**

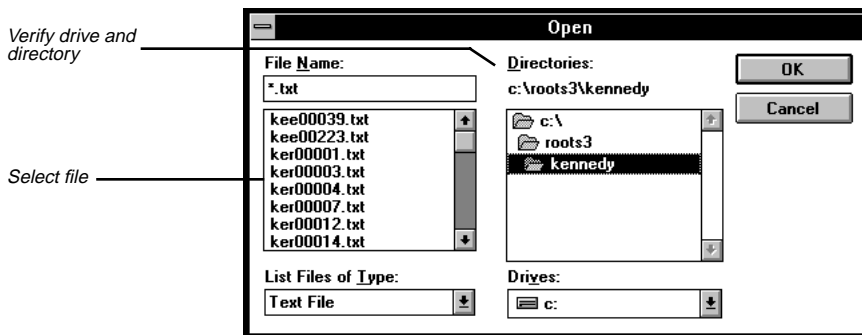
The following is a list of options in the Spell Check window:

- *Add* — Adds the word in the Replace With Word field 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. The 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.
- *Possible Spellings* — Displays the closest matching words.
- *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 more words* — Updates the Possible Spellings list box with more suggested words.
- *Undo* — Reverses the last Replace or Replace All command.

## Importing an External Text File

You can import external ASCII text files (up to 65,000 characters in size) into any Ultimate Family Tree text window. The text should not contain any control codes, such as those found in word processor files. See page 14.

1. Open any Ultimate Family Tree text window by choosing the appropriate Text button.
2. Choose Import.



**Figure 2-6: Open Dialog Box**

3. Change to the drive and directory that contains the text file you want to import.
4. Highlight the file and choose Open.
5. From the Edit menu, choose Select All (or highlight selected text).
6. From the Edit menu, choose Copy.
7. Close the external text file by choosing the Close box (or press Escape).
8. Click the left mouse button in the Text window where you want to insert the text.
9. From the Edit menu, choose Paste.
10. Choose 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 37 for instructions on selecting text.
3. From the Edit menu choose Copy (or press Ctrl+C).

4. Choose OK to close the Text Edit window.
5. From the File menu, choose New.
6. Select Text from the Type list.
7. Choose Open.
8. Enter the file name with a .TXT extension in the File Name field.
9. Select the drive and directory where you want to place the text file.
10. Choose OK to open the new external text file.
11. From the Edit menu choose Paste (or press Ctrl+V).
12. Choose the Close box to close the file.
13. Choose Yes when closing the text file if you want to save it.

## Event 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 an Ultimate Family Tree project. Evidence can include formal source citations and free-form notes.

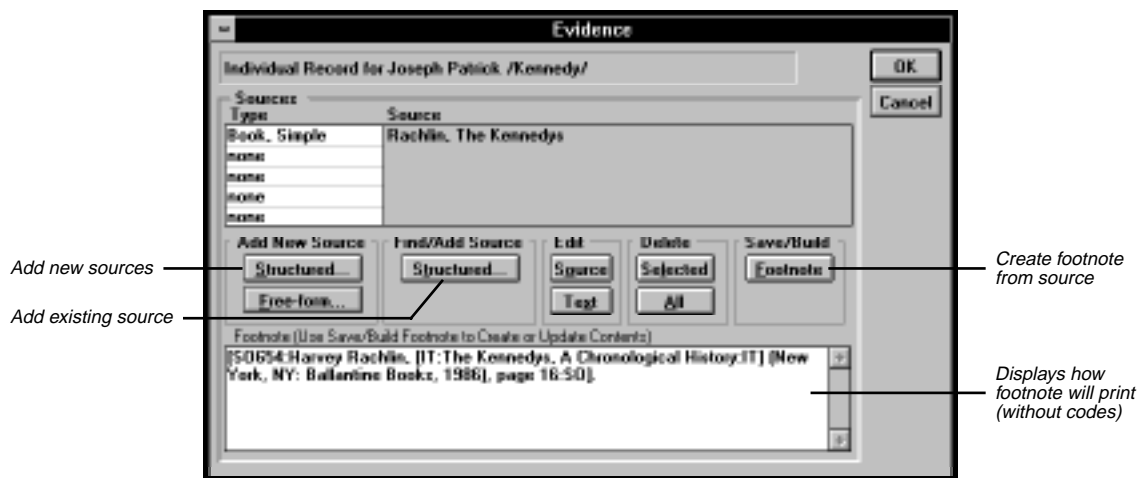


Figure 2-7: Evidence Window

## 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. Choose New.

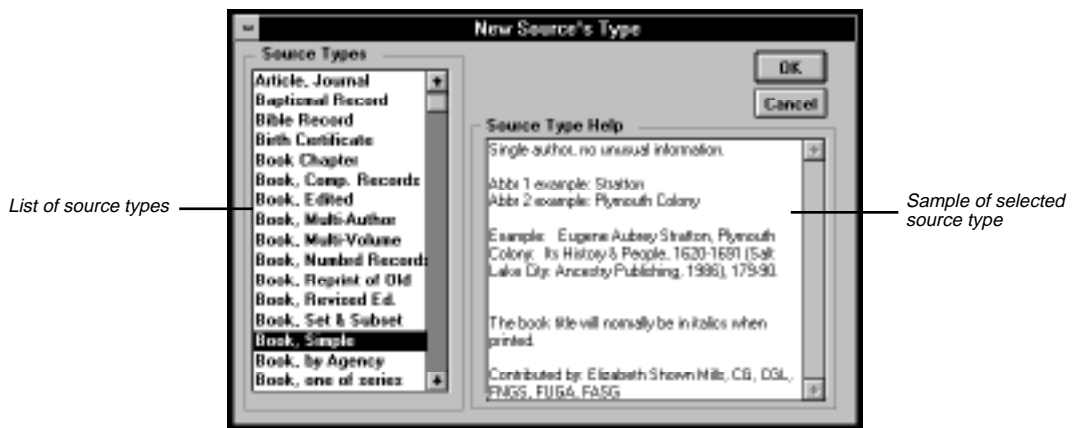


Figure 2-8: New Source Type Window

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. Choose 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, or highlighting and pressing Enter) 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.
6. Repeat step 5 for the remaining component lines.

**Note** Enter ending punctuation (if desired) in the Main Text component field only for the Free-form Text source type.

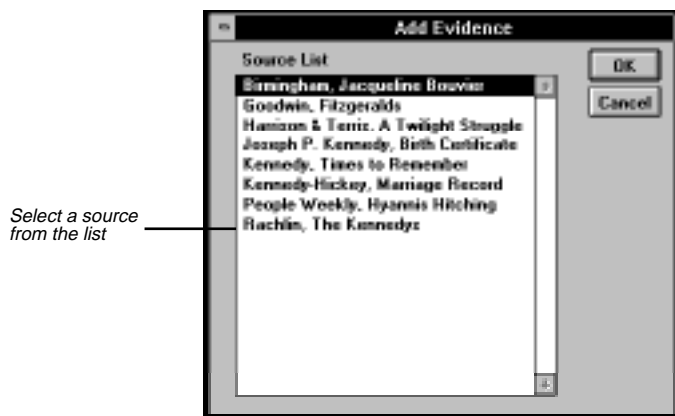
7. After completing the components, choose Preview to see how your source will look when it's printed. Look for source components that are incomplete or that need further editing. Make any corrections you want in the associated Source Component field.
8. Choose Close to close the Preview window.
9. Choose OK to save the source and to close the Source Record window, or choose New to create another new source.

## Adding Evidence

To enter Evidence for an Individual, choose 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 choose 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. The Footnote button creates a footnote from the source information you have entered. Use 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, choose 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 choose OK. The selected source is displayed in the Source Type list.



2. Choose 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.

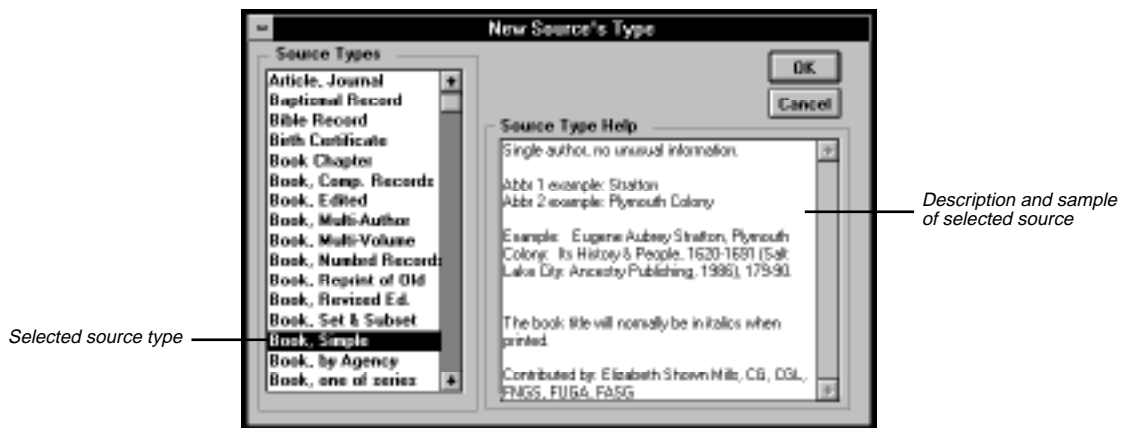
**Note** Do not type ending punctuation because it is added automatically when the reports are printed.

3. Choose 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. Choose 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, choose 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 Type Window**

2. Select a source type. If the source type you want is not in the list, choose the source type, Free-form text. Source Type Help is displayed to the right of the Source Type list.
3. Choose 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 because it is added automatically when the report is printed.

6. Repeat step 5 for the remaining component lines.

**Note** Enter ending punctuation (if desired) in the Main Text component field only for the Free-form Text source type.

7. Choose OK.

8. Choose 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 29). Do not type ending punctuation.

9. Choose 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 for the proof.

11. Choose 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, choose 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. Choose 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 a footnote will not appear in reports.

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

2. After adding a source, choose the Footnote button in the Save/Build group to create a footnote.

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

3. Choose 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 42.

2. Edit the footnote as follows:

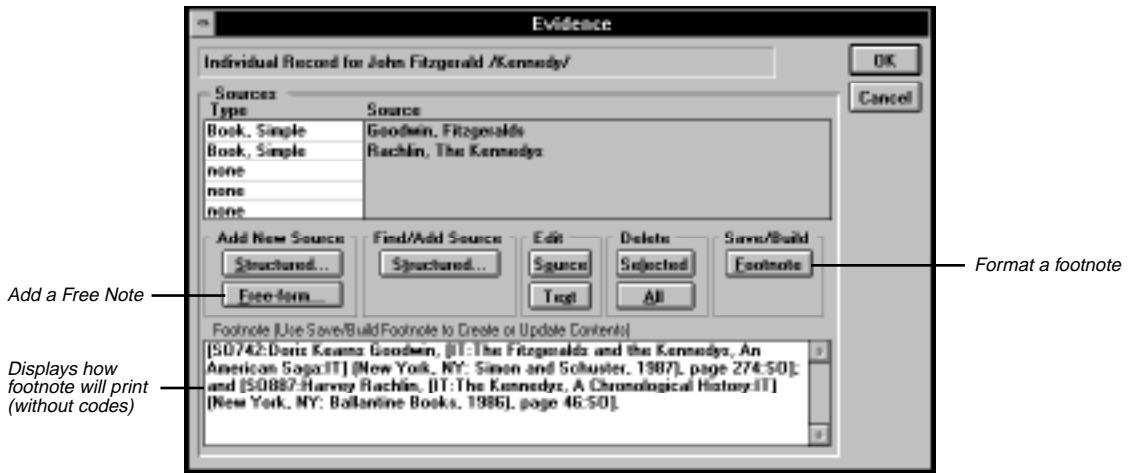


Figure 2-11: Evidence Window

- 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]	<b>This text is bold.</b>
[UL:This text is underlined.:UL]	<u>This text is underlined.</u>
[IT:This text is italicized.:IT]	<i>This text is italicized.</i>

You can also add information to a source listing that is unique to a specific piece of evidence, for example, a page number in a document. Type this text outside the source code brackets, for example:

[SO12:Harvey Rachlin, [IT:The Kennedy's, A Chronological History:IT] (New York, NY: Ballantine Books, 1986),:SO] page 43.

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. Choose OK to save your changes and close the Evidence window, or choose 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 choose 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 an event.
2. Choose Selected in the Delete group, or choose All to delete all evidence.
3. Choose Proceed to delete the source and footnote reference (if present), or choose Cancel to return to the Evidence window without deleting the source.

## Adding Children

The Children window lists all children of the subject.

1. In the Individual Record window, double-click the left mouse button on an individual's name to make that person the focus of the Individual Record window. If you want to make a parent or spouse the focus, choose the appropriate button to the right of their name.
2. To enter a new child for a selected individual, choose the New Child button.

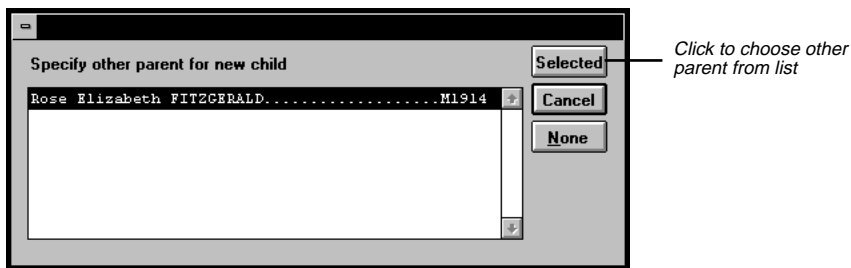


Figure 2-12: Other Parent Window

3. In the Parent window, select the other parent for this child. Choose 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, choose 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.

**Note** To maintain proper text alignment, the text in the Parent window appears in a different font.

## 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

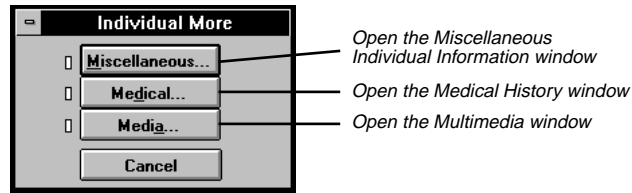
The Siblings window lists all siblings and half-siblings of the subject.

1. From the Individual Record window, add a brother or sister for that person by choosing the New Sibling button. 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, choose the More button to open the Individual More window. A green indicator next to the button shows if information is already present.

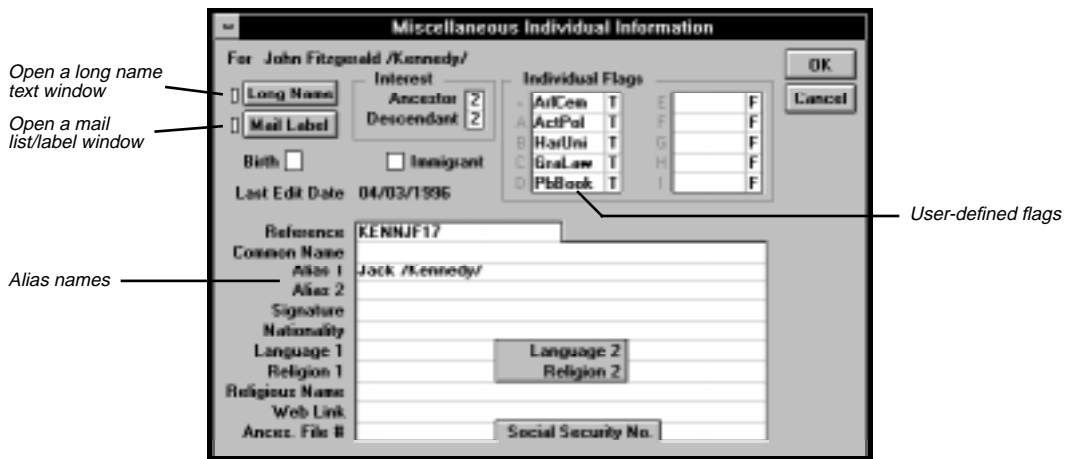


**Figure 2-13: Individual More Window**

1. Choose 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.
2. Choose 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.
3. Choose Media to attach images or audio from the Multimedia 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, choose the More button, and then choose 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 pages 126 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 field 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 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* — 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 a first and second choice 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. If you consistently use Alias 1 for a married name, then Ultimate Family Tree uses the married name (when present) if you have selected Alias 1 as the first choice name. 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* — 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 WWW 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 choosing the More button in the Individual Record window. Choose Miscellaneous, and then choose Mail Label in the Individual Miscellaneous 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.

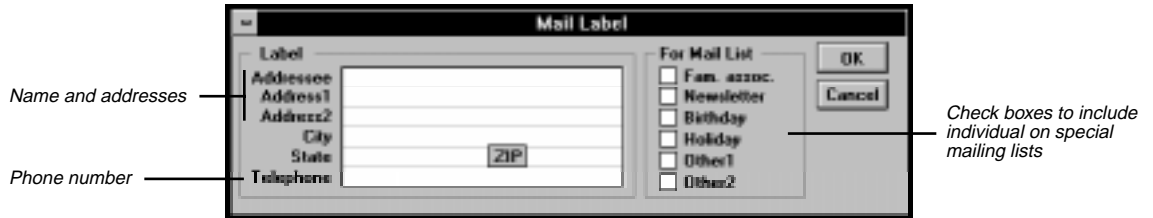


Figure 2-15: Mail Label Window

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 options.
3. Choose OK to return to the Miscellaneous Individual Information window.

## Medical History

Choose the More button in the Individual Record window, and then choose Medical to open the Medical History window.

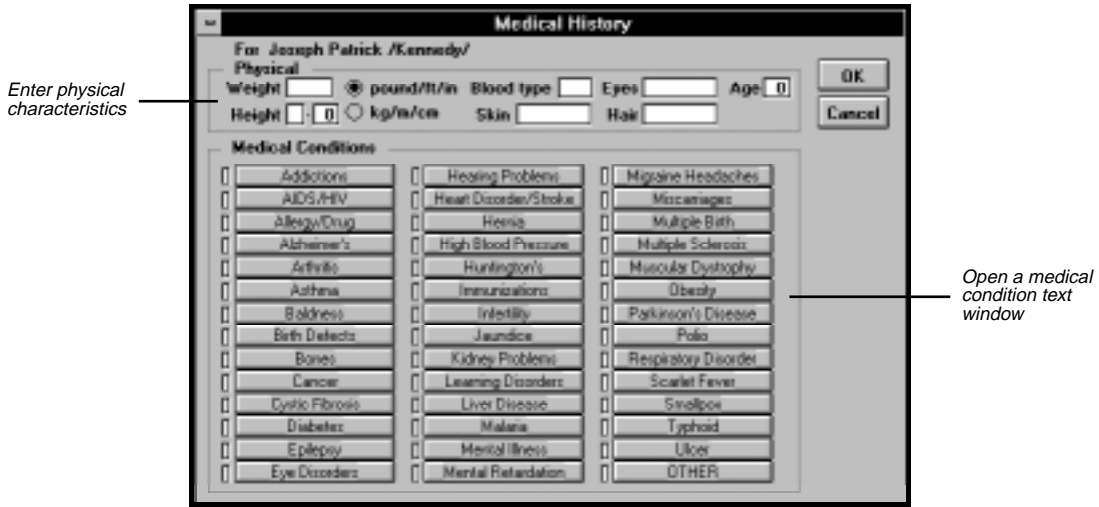


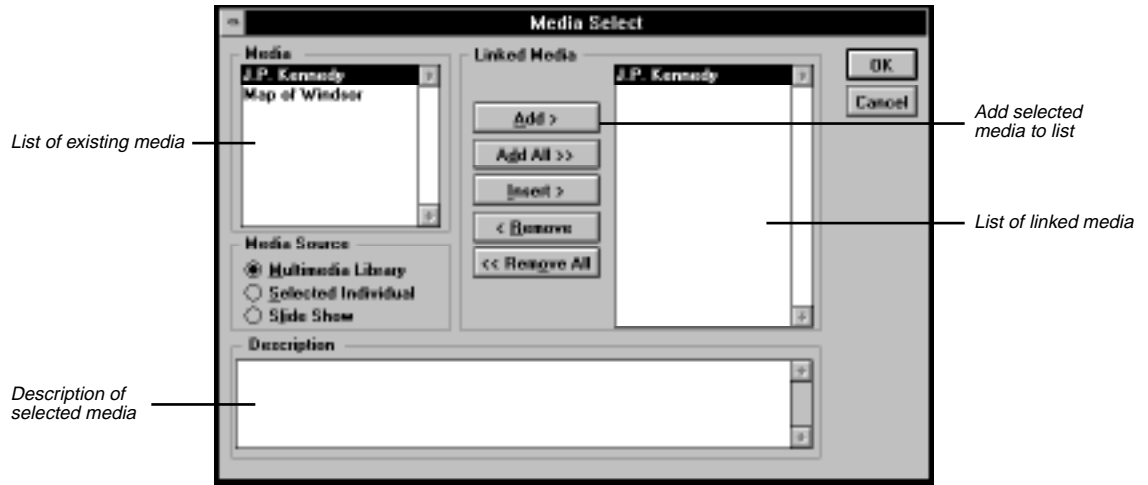
Figure 2-16: Medical History Window

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

## Media

Choose the More button, and then Media to open the Multimedia Link window where you can attach images or audio from the Multimedia Library to the individual you're entering.

1. To add an image or audio file, in the Add Media Link group, choose 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 choose Add to copy it to the Linked Media list.
3. Choose OK.
4. Choose the Play Image or Audio/OLE button (depending on the type of file) to display or play the file.
5. Choose OK to close the Multimedia Link window.

See Section 7 for more information on the Multimedia Link window and building a Multimedia 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, Individual Summary, Descendants, Kinship, Photo, Slide Show, Media Tree, 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 combined with pictures
- ✓ View all information entered about an individual in story form
- ✓ View the descendants of a selected individual with pictures
- ✓ Determine the relationship between any two individuals in your project
- ✓ View a slide show for an individual or family
- ✓ View a four generation Media tree including pictures and narrative
- ✓ 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 or given name, date, or place
- ✓ View the list of sources in your Source Library

## Family Tree (Pedigree) Window

The Family Tree (also known as a 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, or click the Family Tree button on the Toolbar.

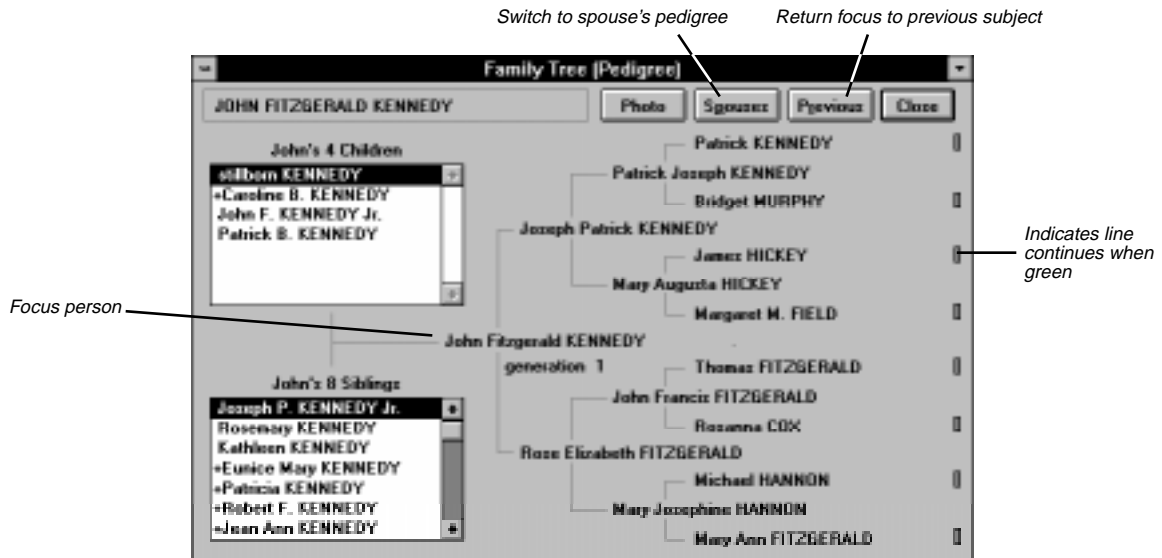


Figure 3-1: Family Tree Window

2. To change the subject of the Family Tree window, click the Find button on the Toolbar, or use the Find key (F10) to select an individual.
3. Double-click a name to make that person the focus person of the window.
 

**Note** The indicator to the right of a name in the far right column will be on if that line continues.
4. Choose Previous if you want to move back to the previous subject.
5. Choose any person (by double-clicking the left mouse button) in the child list to move that person to the subject line. (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 that child's name.) The number of children in the list is shown at the top of the list. Highlight a child's name and press F5 or the Individual Record button on the Toolbar to display the Individual Record for the selected child. When you return to the Family Tree window, that child will be the focus of the window.

- Double-click any sibling to make that person the focus. All siblings are listed, including those who have only one parent in common. Use the scroll bar or the up and down arrow keys to move up and down a long list of siblings, or type the first letter of the name to move up and down the list to that sibling's location. Press F5 or the right mouse button to display the Individual Record window for a selected sibling.

**Note** A plus (+) sign is displayed to the left of a subject's child or sibling if that person has descendants.

- Choose the Spouses button to display spouses of the selected individual in the window. Choose 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. (Choose edit in the Spouses window to open the spouse's Individual Record window.)
- Choose the Previous button to return the focus to the previous subject.
- Choose Photo to display the preferred image (if any) for the selected individual. See page 164 for information on selecting a preferred image for someone.

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

- Choose 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.

- Choose Family Group from the View menu or click the Family Group button on the Toolbar to open the Family Group window.

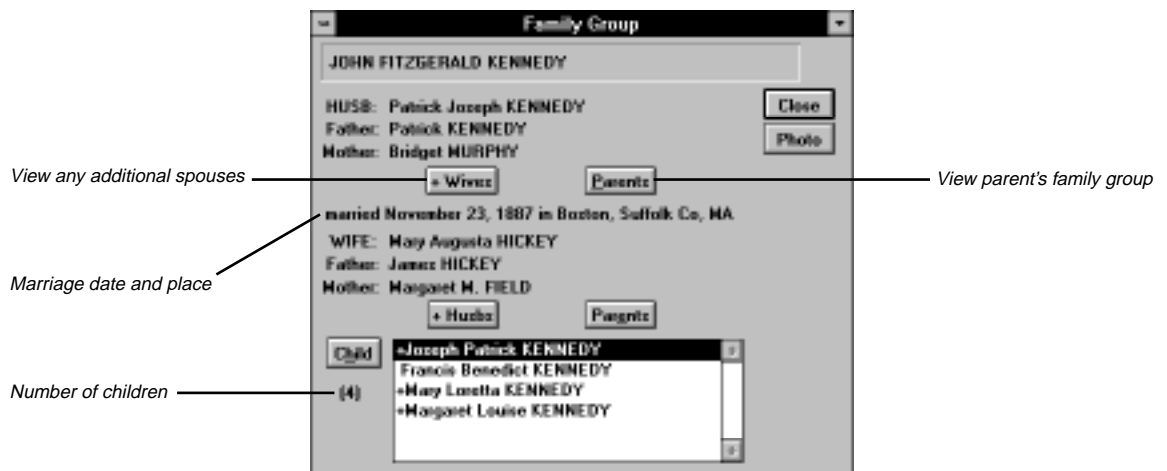


Figure 3-2: Family Group Window

2. Press F10 or click the Find button on the Toolbar to find a new subject, and choose OK to return to the Family Group window with your selected person as the Start person. Remember, you can press F5 or choose the Individual Record button on the Toolbar if you'd like to display the Individual Record window for this or any selected individual.
3. 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."
4. Choose +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 choose Cancel to return to the Family Group window. These buttons are dim if no other spouses are found.

**Note** Parents who are not married or do not have a marriage record are considered parental partners.

5. Choose Parents to display the family for the husband's or wife's parents. These buttons are dim if no parents are found.
6. To shift the family display forward one generation, highlight the child in the child list box, choose the Child button, or double-click the name. When "no children" appears in the Child list box, the Child button is dim.

**Note** 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.

7. Choose Photo to display the preferred image (if any) for the selected individual.
8. Choose 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, press Shift + F5 on the keyboard, or choose the Individual Summary button on the Toolbar.

The selected individual's information is displayed in story form. Individual text, plus footnote and research notes, are shown in their entirety.

2. 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.
3. To close the Individual Summary window, press Escape or choose the Close box.

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



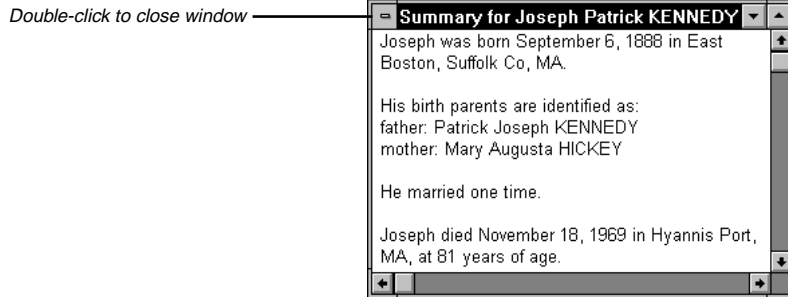


Figure 3-3: Individual Summary Window

## 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 a selected person. Up to 100 generations can be viewed.

1. Choose Descendants from the View menu.

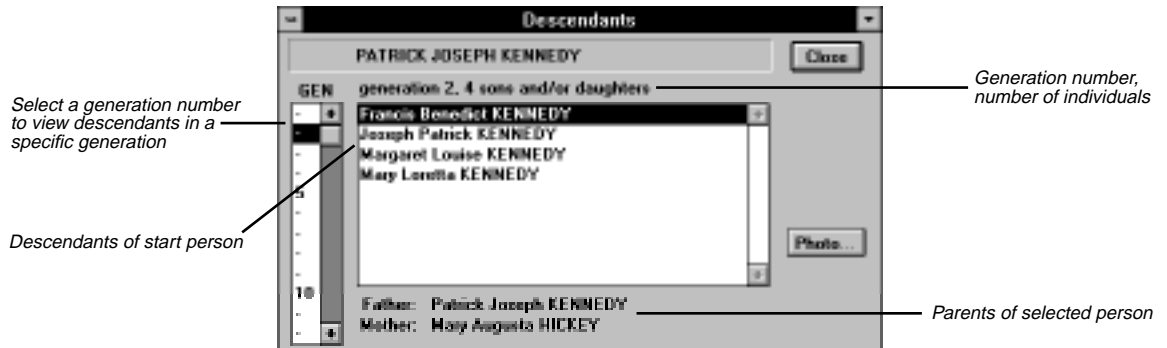


Figure 3-4: Descendant Window

**Note** To find a new starting person for the Descendants window, press F10 or choose the Find button on the Toolbar to open the Find Individual window. (See page 80.)

2. 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 corresponding number line in the gauge, or Tab to the gauge and use the Up and Down Arrow keys.)
3. Use the scroll bar if the list of descendants in a generation is longer than the box. Individuals in each Generation List 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 selected person, if known, are displayed at the bottom of the window.

**Note** To edit an individual record, select the individual and press F5 or the Individual Record button on the Toolbar to open the Individual Record window.

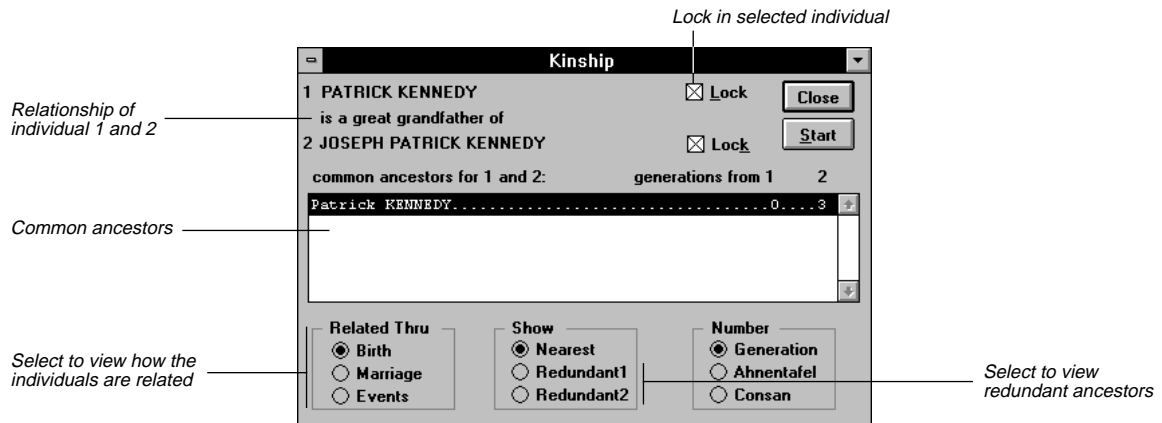
4. Choose Close.

## 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. Two individuals (Subjects 1 and 2), are selected as the subjects for a relationship check.

**Note** In order to maintain proper text alignment, the text appears in a different font.

1. Choose Kinship from the View menu.



**Figure 3-5: Kinship Window**

2. Start with Subject 1. A Lock button is next to the name field. Unlock the Lock button if it is checked. Click the Find Person button on the Toolbar or press F10 to find a new individual. When the desired individual is found, choose OK in the Find Individual window. See page 80 for information on using the Find Individual window.

3. Check Lock to lock in Subject 1.
4. Unlock the Lock button for Subject 2 (if Lock is on). Click the Find button on the Toolbar or press F10 to find the second subject for the relationship check. When the person is found, choose OK.

**Note** You must unlock a subject before the Find Individual and arrow buttons on the Toolbar will work. Be sure to lock Subject 1 before moving on to Subject 2.

5. Choose 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 result from relationships in which 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 Subject 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. Choose Close to close the Kinship window.

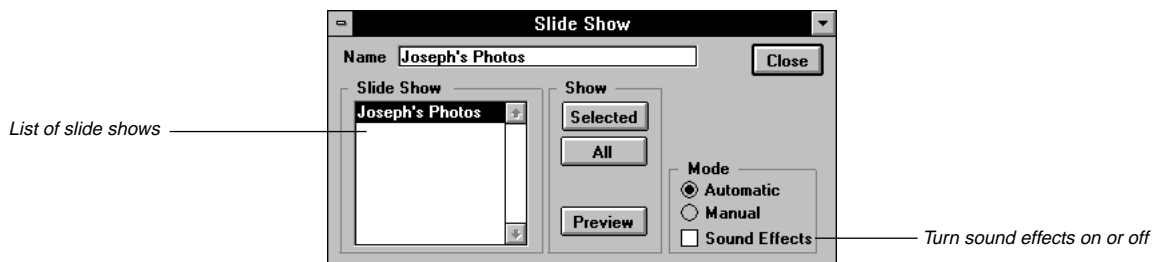
## Name and Record Number

Choose Name and Record Number from the View menu to display that 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.

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



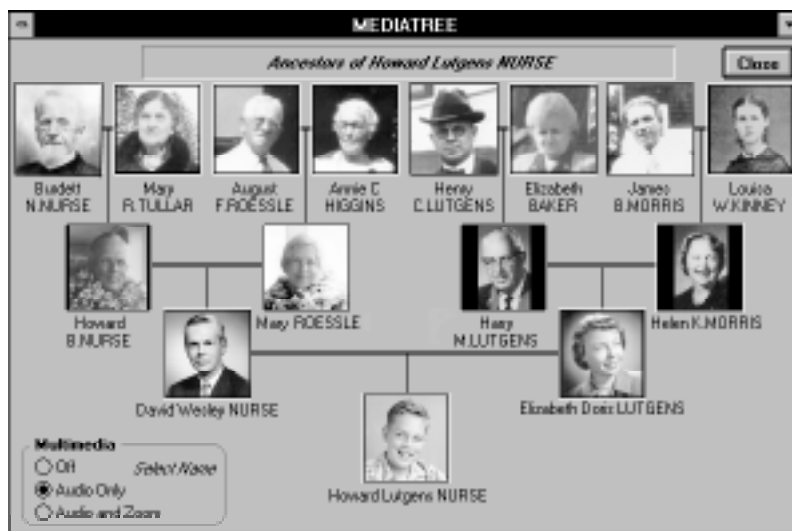
**Figure 3-6: Slide Show Window**

2. Highlight one of the shows in the Slide Show list and choose Preview to see the slides for that show displayed eight at a time. This allows you to review the show before viewing the show, one slide at a time. See page 166 for steps to create a slide show.
3. To view the slides manually or automatically, select the appropriate option in the Mode group. If you choose Manual, you must advance each slide by pressing the Escape key. If you choose Automatic, the program advances the slides for you.
4. Check the Sound Effects option to turn sound effects on or off.
5. Choose Selected to view the show you highlighted or All to view all of the shows.

## Media Tree

The Media Tree displays four generations of a family with pictures and recordings attached to each individual.

1. Choose Media Tree from the View menu.
2. To change the start person for the tree, use the Find Individual button or F10 key to find a new subject.



**Figure 3-7: Media Tree Window**

3. Select Narrative from the Multimedia drop-down list and choose an individual's name on the Media Tree to hear a recording that has been linked to that person.
4. Select Photo and Narrative from the drop-down list and then choose an individual's name to see an enlargement of the "preferred image" and play a narrative, if present.

**Note** If more than one image is linked to an individual and none have been selected as the preferred image, the first image linked to the individual is displayed in the Media Tree.

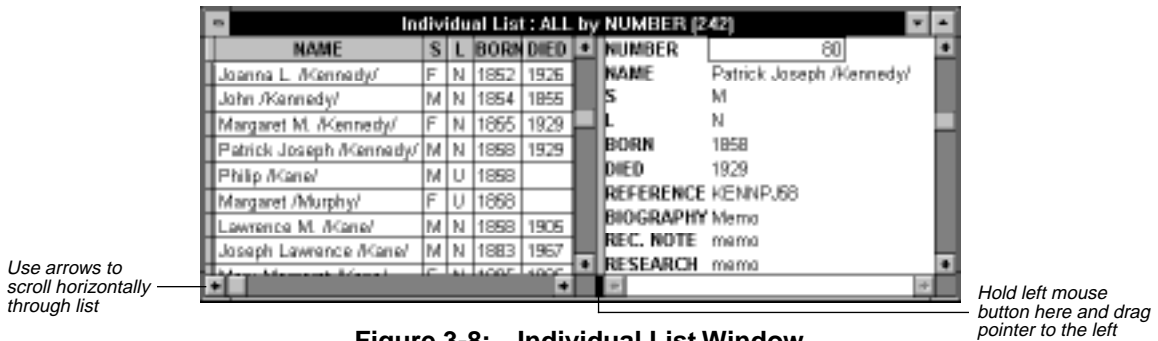
5. Choose Close to close the Media Tree.

## 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 164 for instructions on selecting a preferred image.

## Individual, Marriage and Source Lists

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



**Figure 3-8: Individual List Window**

- *Marriage List* — Provides a list of the marriages in your project. To open the Marriage List, choose Marriage List from the View menu and choose one of the options: By Husband Surname, By Wife Surname, By Husband Given, By Wife Given, By Date, or By Place.
- *Source List* — Provides a list of all your sources in the Source Library.

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 a record. 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 left mouse button and drag the pointer to the left.

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 Ctrl+PgDn with Memo selected. If you double-click on Memo, the Individual Record for the selected individual opens.

Text in List windows can be viewed, but not changed. To edit text, events, sources, or other information displayed in an Individual List window, select the field and press F5, or double-click the left mouse button to open the Individual Record window. Choose 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.

Use the vertically positioned arrows to scroll up and down the list. Use the arrows along the bottom of the window to scroll horizontally throughout 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 using search criteria.

- ✓ Name and/or SOUNDEX code
- ✓ Citations
- ✓ Events in an individual's life
- ✓ User-defined flags
- ✓ Mailing label information
- ✓ Linked pictures or audio recordings
- ✓ Information contained in the Medical window
- ✓ Information contained in the Miscellaneous window (long names, aliases, religion, nationality, social security number, and more)
- ✓ Relationships
- ✓ Biographical, research or footnote text
- ✓ Event details
- ✓ Vital statistics (age at marriage, sex, living, related, unrecorded parents, and more)
- ✓ 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 drop-down list 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 list. 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 from the drop-down list at the bottom of the window to Replace, Add, Remove, or Keep for the resulting Search list. (See options listed in the previous section.)
4. To check the search without committing the results to the permanent search list, choose Preview. Press Escape to return to the Search window.
5. Choose Search to create the Search list and view the results.
6. Choose Group to replace the Grouping List with the results of the current search.
7. Choose Close or press Escape to close the Search Window.

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

## Name Search

You can locate a person in an 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**

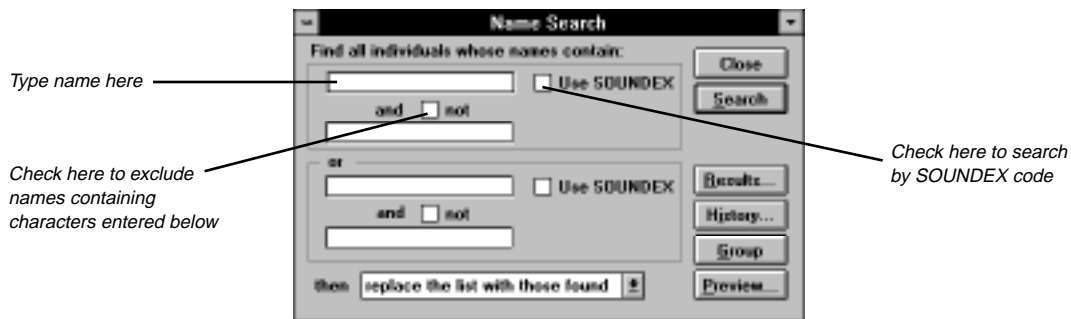
- Use either uppercase or lowercase letters. Name searches are not case sensitive.
- Enter more than one name for a person if you want. For example, if you are looking for *John Fitzgerald Kennedy* in your project, you can type *john fitzgerald* in the top field.
- Type either full or partial names. For example, you can type *hn fit* to locate *John Fitzgerald Kennedy*.
- Use special characters called wildcards. The question mark wild-card character (?) is used to substitute for a single unknown character. For example, *jo?n* finds all those named *John* or *Joan*. The asterisk (\*) is used to substitute for 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 name contains *smith* at any place in their name.
- 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.



**Figure 4-2: Name Search Window**

2. Type a name in the first name field of the top Name Specification box. Use wild cards if desired and any combination of uppercase and lowercase letters.
3. Complete the search as described on page 66, “Steps for Completing a Search.”

## Searching for a Surname by SOUNDEX

1. Enter a surname (without slashes) or a valid SOUNDEX code in the first 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 check box in the appropriate Name Specification box.

3. Make sure all other name fields are empty.
4. Complete the search as described on page 66, “Steps for Completing a Search.”

## Completing a Complex Name Search

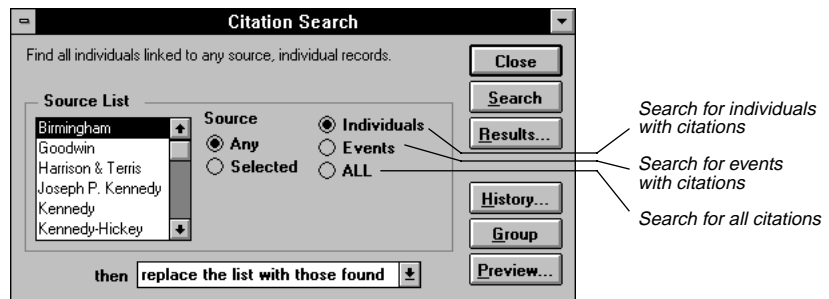
1. Enter the search information using any combination of the four name fields available. Select the SOUNDEX and the NOT conditions that you want to use. The two name fields in each Name Specification box are used together.
2. Check the NOT check box to exclude names from the search.

**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 66, “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.

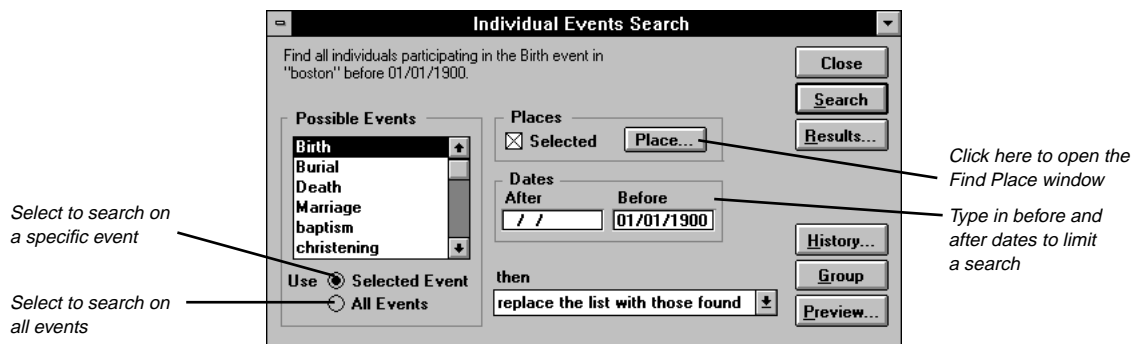
1. Select Any in the Source box. Choose Selected to include only a specific source in the search.

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 66, “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. Choose 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 choose 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. Choose Exact for all place names with an exact match or choose Like and use any characters including wildcard characters. The question mark wild card (?) is used to substitute for a single unknown character. The asterisk wild card (\*) is used to substitute for more than one consecutive character.
  7. Choose Show to see the list of places found.
  8. Select a place and choose 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 66, "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.
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, or select False to search for flags marked False. Select Either to search for individuals linked to the selected flag marked as either True or False.
4. Complete the search as described on page 66, "Steps for Completing a Search."



Figure 4-5: Flags Search Window

## 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.



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 66, “Steps for Completing a Search.”

## Media Search

The Media Search searches for individuals who are connected to a selected image or audio recording. 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.

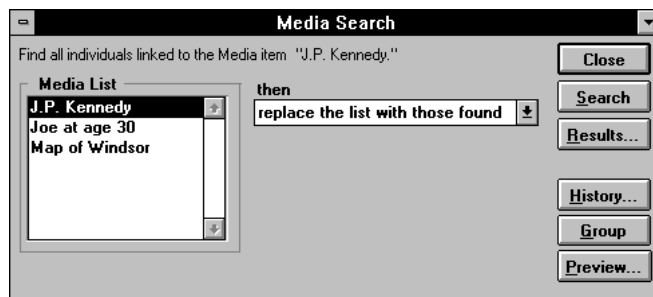


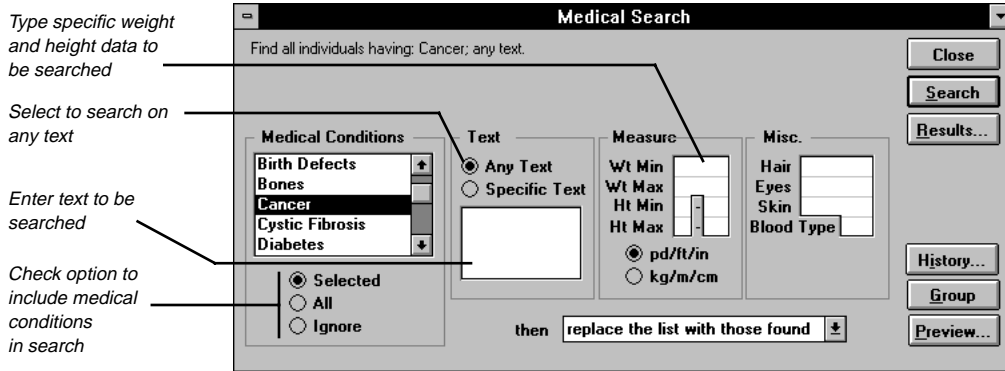
Figure 4-7: Media Search Window

2. Select the audio or image you want to include in the search from the Media list.
3. Complete the search as described on page 66, “Steps for Completing a Search.”

## Medical Search

The Medical Search looks for individuals for whom you have 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.



**Figure 4-8: Medical Search Window**

2. Select one of the three options located under the Medical Conditions list: Selected, All, or Ignore. If you choose 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.
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 66, “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.
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.



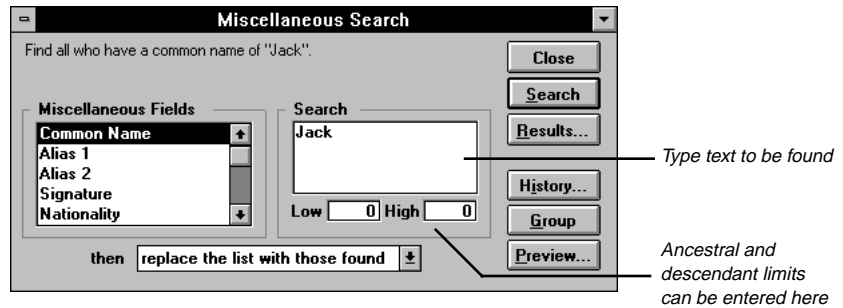


Figure 4-9: Miscellaneous Search Window

3. Type in the text you wish to search for, or if you have selected Ancestral Interest or Descendant Interest, type the low and high interest limits in the boxes below the Search box.
4. Complete the search as described on page 66, “Steps for Completing a Search.”

## Relationship Search

The Relationship Search searches 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 shown in 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.

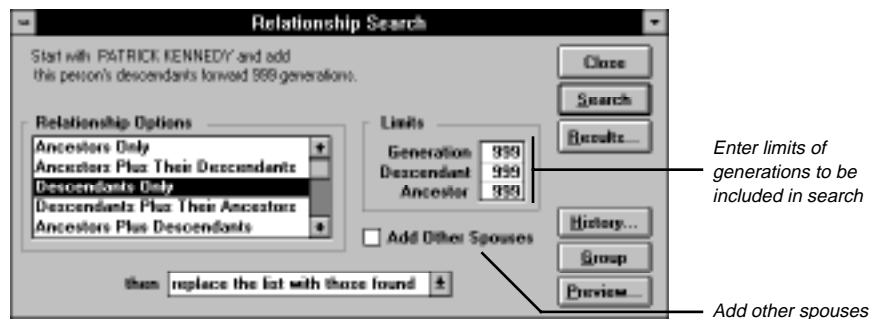


Figure 4-10: Relationship Search Window

**Note** Press F10, or choose the Find button on the Toolbar to find a new starting person for the search. See page 80 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 each way
  - *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 66, "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 any or specific 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.
2. To search on a specific field, select the Individual, Event, or Media text field from the Text Field 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. Choose Selected below the Text Field list.
3. To search all fields, choose All below the Text Field list.
4. Choose Any Text or Specific Text.

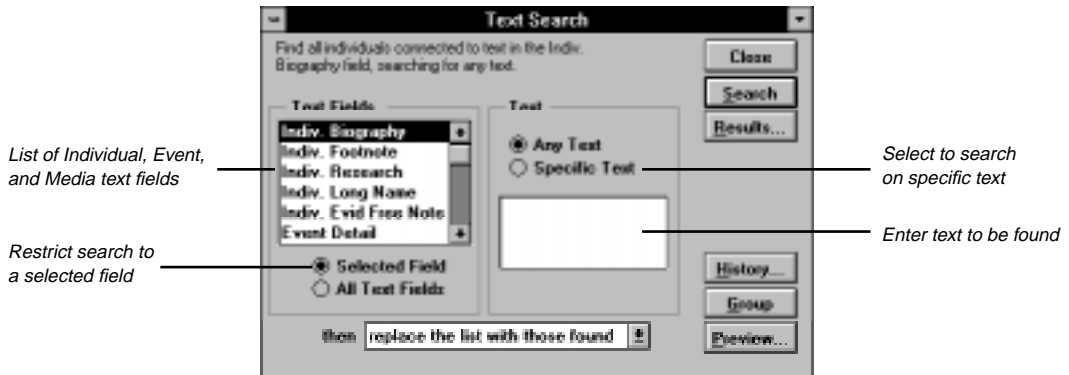


Figure 4-11: Text Search Window

5. If you chose Specific Text, type the specific text you want to search in the Text box.
6. Complete the search as described on page 66, “Steps for Completing a Search.”

## Vital Statistics Search

The Vital Statistics Search locates individuals on the basis of their vital statistics, such as age. 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.

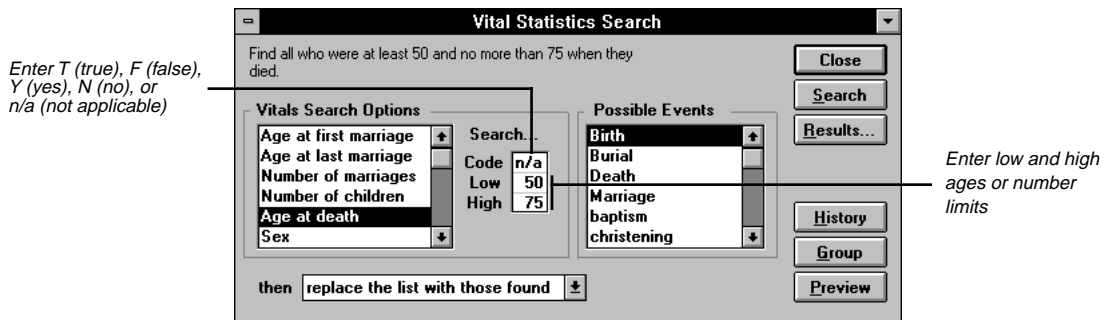


Figure 4-12: Vital Statistics Search Window

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 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 66, “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.

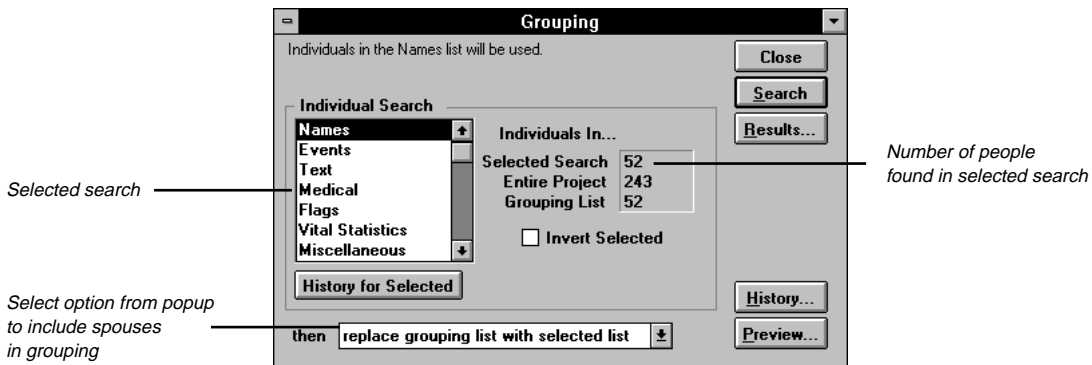


Figure 4-13: Grouping Window

2. Select a search routine from the Individual Search Options 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. Choose History for Selected to see a summary of how the results were obtained for the selected search.
4. Check the Invert Selected check box to include all individuals not in the selected search.
5. Select one of these options from the drop-down list 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 12 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, choose Preview. Press Escape to return to the Grouping window.
7. Choose Search to create the Grouping list.

**Note** Choose Results to show the list. Double-click a name to open the Individual Record for that person. Choose History to see a summary of how the Grouping List was built. Choose 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. Choose Results to open the Grouping List.
3. Press F10 or click the Find button on the Toolbar to open the Find Individual window.
4. Find the person and choose OK. The Grouping List will close. Choose 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.

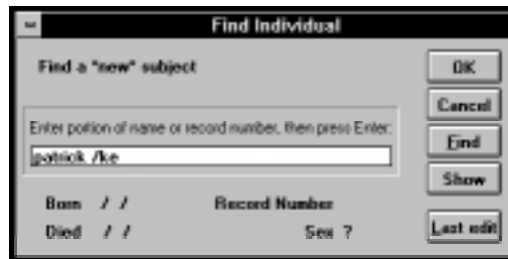
1. Open the Grouping List by choosing Results in the Grouping window.
2. Highlight the name of the individual.
3. Press Shift + F9, or from the File menu, choose Delete Record.

**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 Using the F10 Key or Find Button

The quickest, simplest way to find an individual is to enter a record number or type part of a name in the Find Individual window.

1. Press F10, choose the Find button on the Toolbar, or choose Find 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. Use the scroll bar or Shift+F3 (Go Top), F3 (Go Up List), F4 (Go Down List), or Shift+F4 (Go Bottom) to move through the list. To display the entire list and make a selection, choose Show.

4. Highlight the name of the individual you want in the Find list and close the window (choose the Control-menu box or press Escape) to return to the Find Individual window.
5. Choose OK to return to the original window with the focus changed to the newly found individual.

## 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 *wildcards*. The question mark wildcard character (?) is used to substitute for a single unknown character. For example, *jo?n* finds all those named *John* or *Joan*. The asterisk (\*) is used to substitute for 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 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 throughout 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.

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 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:

# Printing Reports

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Ultimate Family Tree prints 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. You can send reports directly to a printer or to a file for printing later. Reports can be sent to an ASCII file, or to a Rich Text Format (RTF) file that can be imported into many word processing programs.

In this section you will learn how to:

- ✓ Use print setup to select a printer or file
- ✓ Use page setup to set name format and preferences, and to choose fonts and page layout
- ✓ Use print and print preview

and to print the following reports:

- ✓ Title Page
- ✓ Family Journal (Genealogy) report
- ✓ Image
- ✓ Family Tree (Pedigree) report
- ✓ Ancestor (Ahnentafel) report
- ✓ Text, Direct Drop, or Indented Descendant report
- ✓ Box Chart
- ✓ Relationship List
- ✓ Free-form text
- ✓ Footnotes as end notes

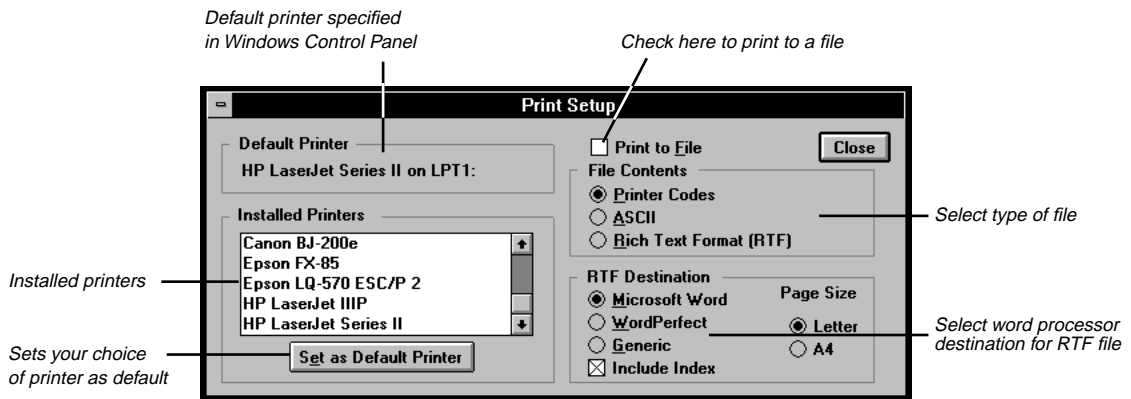
- ✓ Index
- ✓ Family Group report
- ✓ Individual or Project Summary
- ✓ Individual, Marriage, Source, and GEDCOM Exception Lists
- ✓ Mail Lists and Labels
- ✓ Text or Box style Calendar
- ✓ Tiny-Tafel reports

## Using the Print Setup Window

Before you can print, you must install a printer through the Windows Control Panel. The default printer in Windows is displayed at the top of the Print Setup window in Ultimate Family Tree. Choose Print Setup from the File Menu to view a list of installed printers. For instructions on installing additional printers, refer to your Windows manual.

### Changing the Default Printer

1. From the Ultimate Family Tree File menu, choose Print Setup.



**Figure 5-1: Print Setup Window**

2. Select a printer from the list and choose the Set as Default Printer button. The printer name you chose appears in the Default Printer box.

**Note** Changing the printer in the Print Setup window also changes the default printer in the Windows Control Panel. Ultimate Family Tree supports 8 1/2 × 11 inch and A4 portrait page formats. The Box Chart has additional options. You can export the report to a word processor for other page formats.

## Printing to a File

Using the Print Setup window, you can designate Ultimate Family Tree Editor, Microsoft Word for Windows, or another word processor as your primary word processing application.

1. From the File menu, choose Print Setup.

**Note** In the Windows Control Panel, you can configure your printer to print to a port such as LPT1 or to a file. The Ultimate Family Tree Print to File option does not change the default setting for the printer.

2. Check Print to File.

3. In the File Contents group, select the radio button for the type of file to create.

- *Printer Codes* — Prints your report to a file containing embedded printer codes for the currently selected printer. Use this option print a report to a file and then later send the report from DOS to the appropriate printer.
- *ASCII* — Creates the report in ASCII text format, 10 characters per inch, with no printer codes included.
- *Rich Text Format* — Creates reports using RTF. Ultimate Family Tree does not export reports via RTF that are highly structured, such as the five- and six-generation Family Tree Charts and Calendar, or others such as an index, that are created in a word processor used for formatting the report.

**Note** When Rich Text Format is selected, the Editor (RTF) options are activated. See the next section, “Rich Text Format.” Select the destination word processor in which the report will be edited and printed.

4. Check the Launch Editor box in the Editor (RTF) Options group. When this box is checked, Ultimate Family Tree Editor or Word for Windows will open automatically when you create a report.
5. Select the word processing application you want to use from the Editor Choice drop-down list.
6. Click Browse if the executable file for the word processor you have chosen does not appear in the Path to Editor field.
7. For information on using the Ultimate Family Tree Editor, see “Ultimate Family Tree Editor” on page 228.
8. To include indexing codes if you are printing the report to an RTF file, check Include Index.
9. Click Close to leave the Print Setup window.

**Note** Table of Contents and Index codes are normally included in Ultimate Family Tree RTF files. Some word processors, such as AmiPro, do not import index codes. When creating an RTF file for a word processor that does not import index codes, do not check the Include Index option. Table of Contents codes can sometimes create a double section or chapter title in word processors that do not support Table of Contents data. Redundant titles can be manually removed using the word processor.

## 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 many IBM-PC and Macintosh word processing programs for further editing and formatting. Word for Windows, Microsoft Word, WordPerfect for Windows, WordPerfect 6.0, Professional Write Plus, and Ami Pro are examples of word processing programs that accept RTF files.

The menu options for reports that are not exported are not available when the RTF radio button is selected. If you want, these reports can be exported as ASCII files, and then imported into any word processing program. ASCII files, however, contain only text and not the other attributes available for RTF files.

The following characters should not be used with the Rich Text Format feature:

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

## Using the Page Setup Window

To select various print options that affect how most reports appear, choose Page Setup from the File menu. In Page Setup, you are given a first and second choice in name preferences from which to choose. If the name field for the first choice is blank, Ultimate Family Tree uses the name entered in the second choice. If the second choice name field is blank, Ultimate Family Tree defaults to the Main name field. This gives you the option to use a woman's married name instead of her maiden name. You can also use aliases or a religious name. If a name is entered in the Long Name field of the Miscellaneous window, the Long Name is used instead on free-form reports such as Family Journal reports.

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.

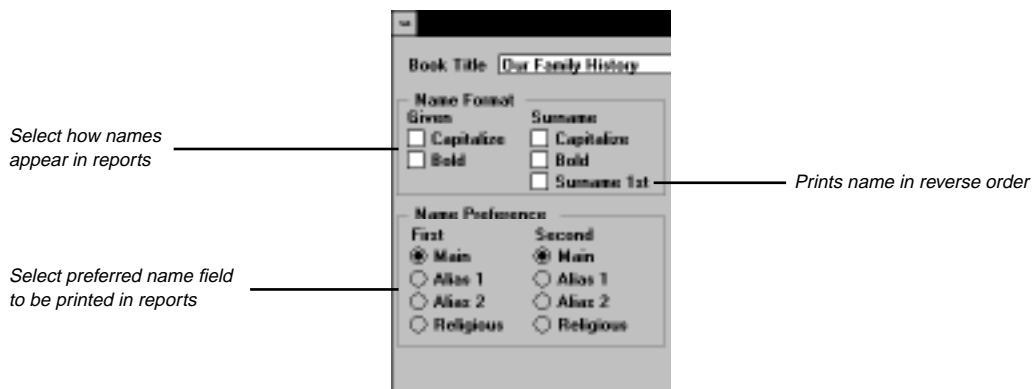
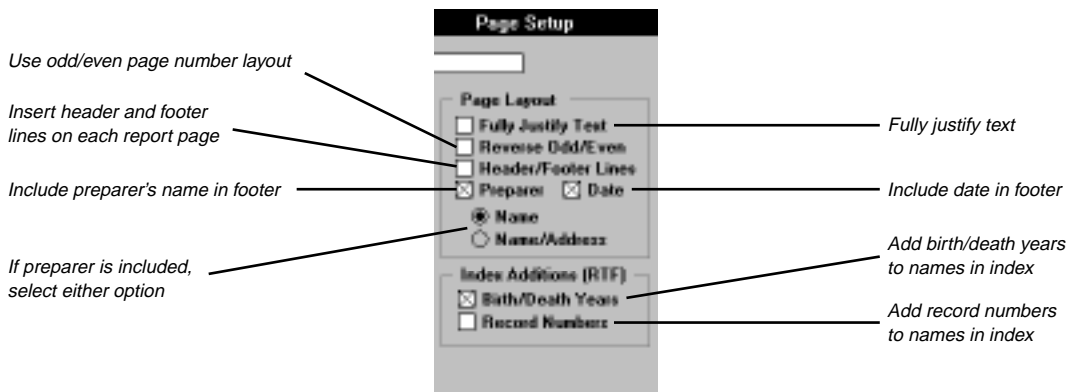


Figure 5-2: Page Setup Window (left side)

Choose any of the options to customize your report:

- *Book Title* — Prints in the header of every page in reports. Limited to 25 characters.
- *Name Format* — Capitalizes and uses bold for Given names or Surnames. Select Surname 1st to print the Surname before the Given name.
- *Name Preference* — Prints the preferred name in reports.

**Note** In the Ultimate Family Tree Miscellaneous window (opened from the Individual Record window) you can enter many variations for a person's name.



**Figure 5-3: Page Setup Window (center)**

- *Page Layout* — Sets the page layout in reports. Select Reverse Odd/Even to use an odd/even page number layout. 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.
- *Index Additions (RTF)* — Adds information to names in the index. Select Birth/Death Years to add birth and death years to names in the index for RTF reports. Select Record Numbers to add record numbers.

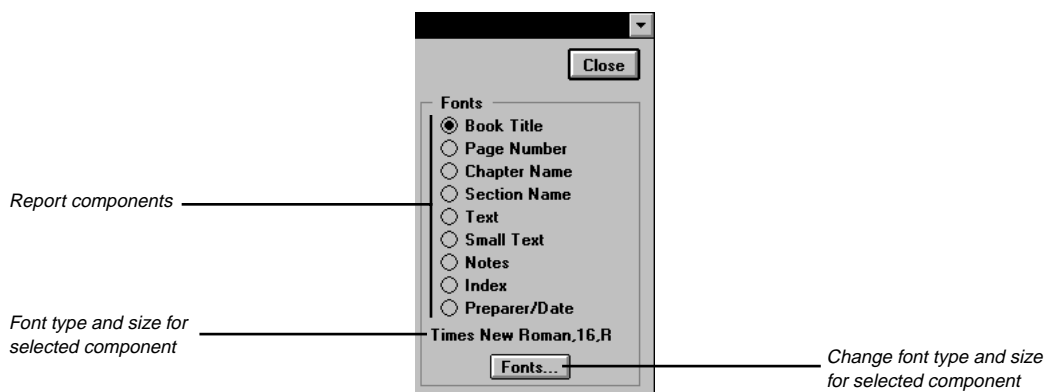
**Note** The preparer's name is the name you entered in the Researcher field in the Project Information window. You might include "Prepared by:" before the name to have the footer of your reports printed in this way.

## Changing Font Style and Size

To select different fonts for the various components of a report, choose Page Setup from the File menu. The Ultimate Family Tree default fonts are Ariel and Times New Roman. Suggested font sizes for each component follow:

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

Specific fonts, font styles, and font sizes can be changed for various components of a report. Windows scalable fonts can be used in Ultimate Family Tree reports. However, Ultimate Family Tree determines both the font style and size in Box Calendar and 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.



**Figure 5-4: Page Setup Window (right side)**

1. Select the report component (for example, Book Title).
2. Choose the Fonts button.
3. Select a font from the Font list.
4. Select a font style: Regular (upright), Italic, Bold, or Bold Italic.



Figure 5-5: Font Dialog Box

5. Select a font size.
6. Choose 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 select 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. Choose a report from the Reports menu.
2. Click the Find button on the Toolbar or Press F10 to find the individual you want to use as the focus of the report. See page 80 for information on using the Find Individual window. Some reports, such as Calendar, Index, End Notes, Text and List reports, do not require a focus person.
3. Type a Chapter Title (up to 40 characters). A title is required if you want to include this report in an index, the table of contents, or in end notes reports. A title is not required when using Print Preview. The report title is used as the chapter name and appears at the beginning of the report.
4. Choose any of the available options for customizing the report.
5. Enter a number in the Generation limit field (if available) to limit the number of generations included in the report.
6. To include an introduction in a report, check Introduction, and then choose 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 list of command buttons for formatting that text. See page 37 for more information on formatting text. See page 39 for information on using the import button if you want to import introductory text from an external text file.

7. To use a subset of the individuals in your project, locate and list individuals in your project that meet specific 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, Calendar and List reports

8. Choose the Print or Preview button on the report window.

**Note** Print Preview is not available if you choose Print to File in the Print Setup window. In this case, choose Print to print to a file. A Save As window opens when the report is formatting. Type a file name for the report file, without an extension. Ultimate Family Tree automatically adds the appropriate file extension to the print file. Select the drive and directory where you want to place the report file. The current directory will be displayed above the directory listing box. You can then preview, edit, and print the report from your word processing program.

## Print Window

After selecting a destination for reports and Page Setup options for printing, you can print reports in Ultimate Family Tree in two ways: Print or Print Preview. See Print Preview on page 91 for information about previewing and printing a report.

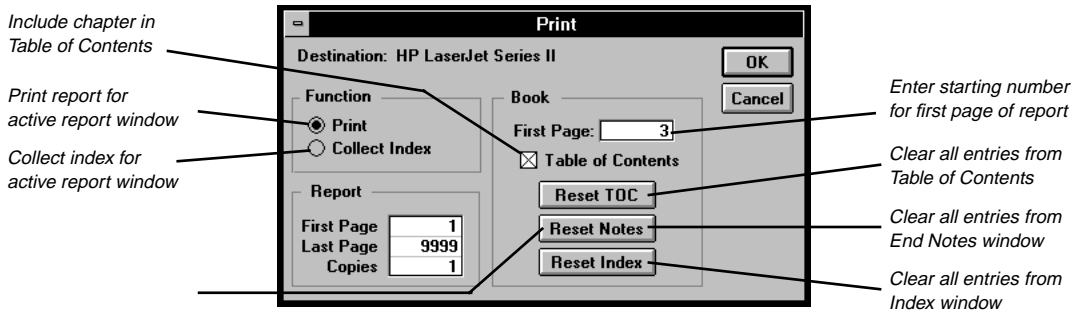
Use the Print command to print and collect several reports in a book format. In the Print window, you can choose a starting page number for a report, collect an index for each chapter, and include the reports you've generated in a table of contents.

1. Open a report window and choose the report options you want. Choose Print in the report window or from the File menu to open the Print window.
2. The Print window includes options for printing reports. If you want to collect an index for the report, select Collect Index. Check the Table of Contents check box if you want to include the report chapter name and page number in the table of contents.

**Note** If the selected report cannot be indexed or a chapter title has not been entered for the report, then Collect Index is not available. Reports that cannot be indexed include Box Chart, Calendar, End Notes and Index. Collect Index is also not available if you are printing to a file. See page 85 for more information.

3. Use the First Page field in the Book group to specify the first page number for the report in relation to the entire book. This number appears in the report header. The number in this field defaults to the next available page after you have printed a report. Use this field to skip one or more pages when printing multiple reports.





**Figure 5-6: Print Window**

4. In the First Page box in the Report group, enter the page to start the report. If you want to print page five, enter 5 in the First Page field. The First Page field determines which page of a report will be printed, not the page number that appears at the top of the page.
  5. In the Last Page box in the Report group, enter the page number to stop the report. If you want to print only pages five and six of the report, enter 5 in the First Page field, and 6 in the Last Page field.
  6. Enter the number of copies of the selected report to be printed in the Copies box.
  7. Use the Reset buttons to clear all Table of Contents, End Note and Index entries that have been collected and stored for previous reports. Choose Reset TOC to clear all entries from the Table of Contents report window. Choose Reset Notes to clear all entries from the End Notes report window, and choose Reset Index to clear all entries from the Index report window.
- Note** The Reset buttons are dim if a Table of Contents, End Notes, or Index has not been collected and stored in the respective report windows.
8. Chose OK to start printing the report or collecting the index.

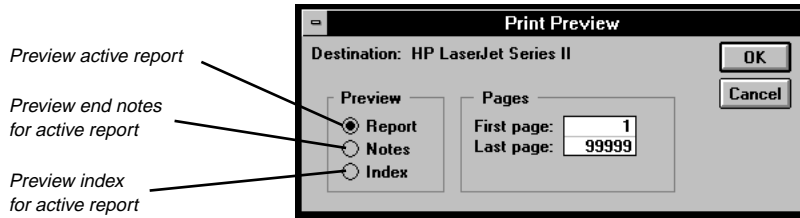
## Print Preview

Print Preview shows how a report will appear when printed. While previewing the report, you can print the entire report or a single page of the report. Use Print Preview to print a single copy of a stand-alone report. When using Print Preview to print instead of using the Print window, be aware of the following differences:

1. All reports start with page 1.
2. The report is not included in a table of contents.
3. The report is not included in the index. (An index for the previewed report can be created, however.)
4. The footnotes are not stored in the End Notes report window. (End notes for the previewed report can be created.)

## Using Print Preview

1. To use Print Preview, open the window for the report you want to prepare.
2. Choose the report options you want.
3. Choose the Preview button in the report window or Print Preview from the File menu.



**Figure 5-7: Print Preview Window**

**Note** If the Preview button or Print Preview from the File menu are dim, either the Report window is not open or the report is set (in the Print Setup window) to print to a file.

4. Enter the first page of the report you want to view in the First Page field. If you want to view page five, enter 5 in this field. To preview from the beginning of the report, leave this field set to 1.
5. Enter the last page of the report you want to preview in the Last Page field. If you want to stop previewing at page ten, then enter 10 in this field. To view the entire report, leave this field set to 99999.
6. Choose Report, Notes, or Index for the selected report. Choosing Report allows you to preview the selected report before printing it.
7. Select the Notes option if you want to view and/or print the end notes (footnotes) for the report. The Notes option is not available for reports that do not include End Notes, such as the Family Tree (Pedigree) and Images reports.
8. Select the Index option if you want to preview the index before printing.
9. Choose OK.

**Note** When you preview your report, the first page of the report is displayed on the screen. At the top of the Preview window is a Toolbar used to control the view of the report. Select the options for viewing the report.

10. Click the Printer button in the Print Preview Toolbar to print the report you just previewed.

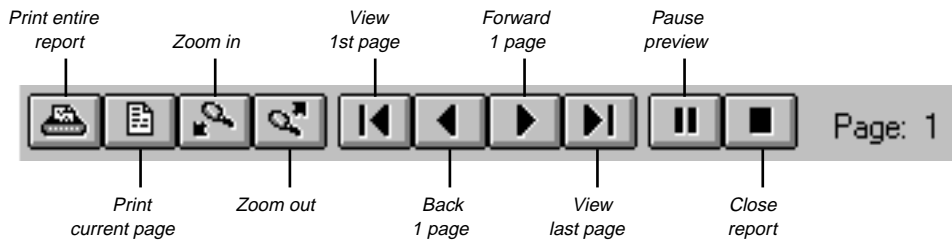


Figure 5-8: Print Preview Toolbar

## 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 this 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 *ancestral order* and *descendant order*. Ultimate Family Tree is designed to automate preparation of these types of books.

**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, Individuals
- Index, Marriages
- Index, Places

**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, Individual
- Index, Marriages
- Index, Places

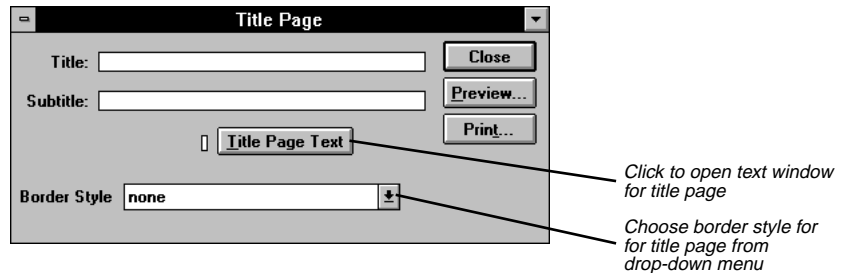
After deciding on your outline, be sure to open the Print window and reset the Table of Contents, Index, and End Notes so that the final output will not contain any erroneous data from previously printed reports. Collect the index before printing each report so that the starting page numbers will match. After collecting the index and printing each report, print the Table of Contents and End Notes reports, edit the index (if necessary), and print the Index report.

See page 89 for basic steps for printing reports. See page 118 for steps to collect an index. See page 91 for information on resetting Table of Contents, Notes and Indexes.

Another option for printing a final book is to print the reports to an RTF file that can be opened with many word processors. The table of contents and index codes are transferred with the report and are created in the word processor. Any page numbering changes are reflected in the Table of Contents and Index reports generated by the word processor. You can then further customize your reports by changing margin sizes, moving text, rewriting sentences, and adding pictures within the report text.

# 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 5-9: Title Page Report Window**

The following fields are available in this window:

- *Title* — Enter the title of the book in this field (up to 48 characters), for example, you might title your book The Kennedys. The title prints in a large font in the center upper third of the page.
- *Subtitle* — Enter a subtitle for the book of 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 book title page. You can include the preparer's name, the date the book was written, and the publisher information, or any other text you want.

**Note** The Title Page Text information is right justified and prints in the lower-right corner of the title page. The text can be formatted as bold, italics, and/or underline. Ultimate Family Tree prints up to ten lines of text, approximately 40 characters per line. Lines containing over 40 characters of text wrap to the next line. Any text over ten lines is cut off. To create a new line press the ENTER key twice. Choose Preview to see how the text will appear. Blank lines are included in the ten line-limit.

- *Borders* — Select a border style from the Border Style drop-down list to print a border on the Title page. Choose None in the list for no border.

## 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 the progenitor are assigned, in order of birth, a small Roman numeral. In addition, each child can be given an Arabic number 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 individual's names print in bold, uppercase letters. In the Modified Register format, the main individual's 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 Style Report

1. Click the Family Journal button on the Toolbar, or choose Family Journal Format from the Reports menu.
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 use a plus (+) to indicate a child whose line continues. The main individual's 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 individual's names print in bold, uppercase letters.

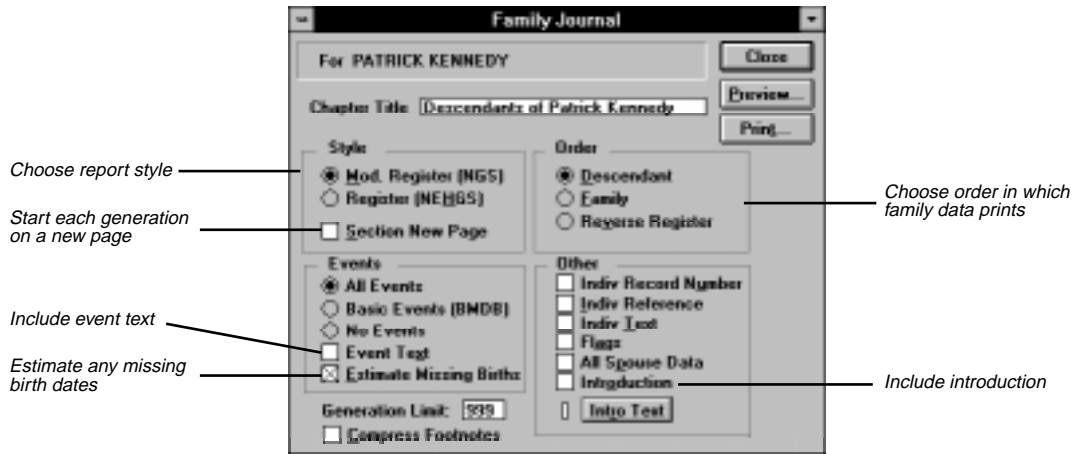


Figure 5-10: Family Journal Report Window

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 section.
  - *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 any of the other options by clicking the corresponding boxes:
  - Include or exclude events and Event Text.
  - Estimate Missing Births. Choose this option to estimate the birth date from other events when no birth date is available.
  - Set number of generations to include in report.
  - Compress Footnotes. Choose this option to reuse footnote numbers for identical footnotes.
  - Add Other options.
  - Check to include Introduction (introductory text entered by clicking the Intro Text button).

- Print the report. See page 89 for basic steps for printing reports.

**Note** The compressed footnote style does not conform to the recommendations in *Chicago Manual of Style* or *Cite Your Sources* by Richard Lackey. It is provided only to reduce the number of pages required to print end notes.

## Ancestor Reports

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

### Family Tree (Pedigree) Chart

The Family Tree Chart graphically traces ancestral lines back through an individual's parents, grandparents, and so on. It starts with an individual and traces the family lines for each parent. In Ultimate Family Tree you can choose to print four, five, or six 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 four-generation Family Tree Chart includes the date and place of the birth, death, marriage and resides events (if known) for each individual. If dates and places are unknown, the corresponding line on the chart is blank. Because of limited space, five- and six-generation charts include a subset of the above information.

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 "continued on later chart" reference.

To print a Family Tree (Pedigree) Chart:

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

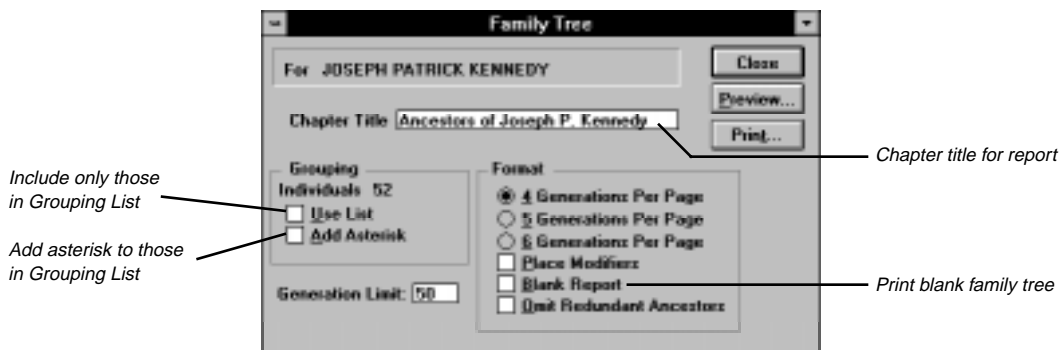


Figure 5-11: Family Tree (Pedigree) Chart Window



2. Select the number of generations to include per page from the Format group.
3. Select Blank Report to produce a Family Tree Chart form for use in research.
4. Check Omit Redundant Ancestors, if desired. (Redundant ancestors occur when cousins marry.)

**Note** 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.

5. Check Use List to include only those individuals in the Grouping List.
6. Check Add Asterisk to print an asterisk next to the name of each individual in the Grouping List.
7. Print the report.

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)

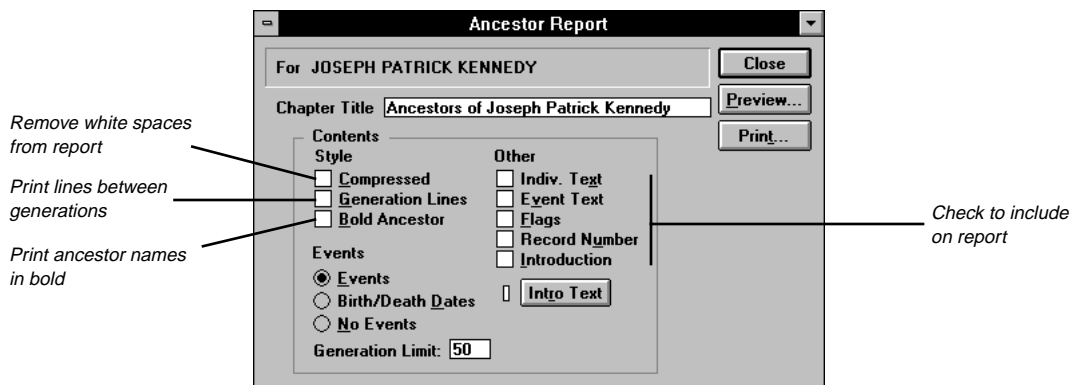
## Ancestor (Ahnentafel) Report

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.
2. From the Style section, select any of the three options:
  - *Compressed* — Removes white spaces from the report
  - *Generation Lines* — Prints lines between generations
  - *Bold Ancestor* — Prints names in bold type



**Figure 5-12: Ancestor Report Window**

3. 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.

4. Check to include options in the "Other Group" or an introduction.
5. Print the report. See page 89 for basic steps for printing reports.

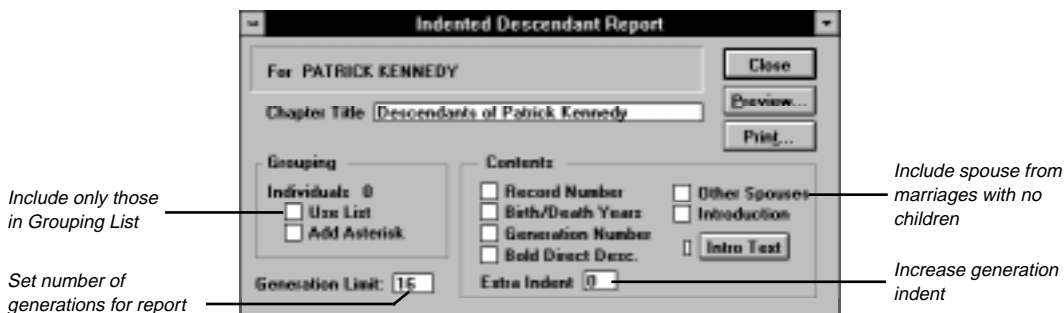
## Descendant Reports

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, or press the Descendant report button on the toolbar.
2. Choose to include any additional options from the Contents group. Choose Other Spouses includes spouses from marriages with no children.



**Figure 5-13: Indented Descendant Report Window**

3. Choose 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 0 to 10) if you want to increase the number of columns that each generation is indented. When Extra Indent is 0, generations are indented three columns. Up to ten extra columns can be added for each generation. Use Print Preview to view the results of using the Extra Indent option and name shortening.

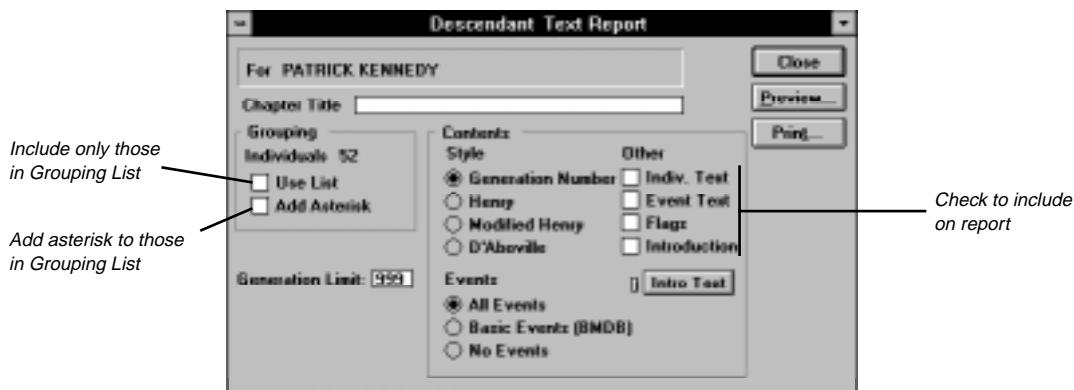
**Note** You can change the spacing between generations for ease of reading with the Extra Indent option. This option is useful when there are only a few generations or when names are short. The space for names is based on the options selected to be printed: generation number, birth and death dates, 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, the common name is used when a name is shortened.

6. Print the report. See page 89 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 in Descendant Text Reports.



**Figure 5-14: 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, Basic (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 selecting Use List. See page 78 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 89 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 5-15: 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 choosing the Close box.
4. Choose to include any additional options from the Contents box: Record Number and/or Birth and Death Dates plus an 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 the middle names (one-by-one) and finally the first name.

5. Print the report. See page 89 for basic steps for printing reports.

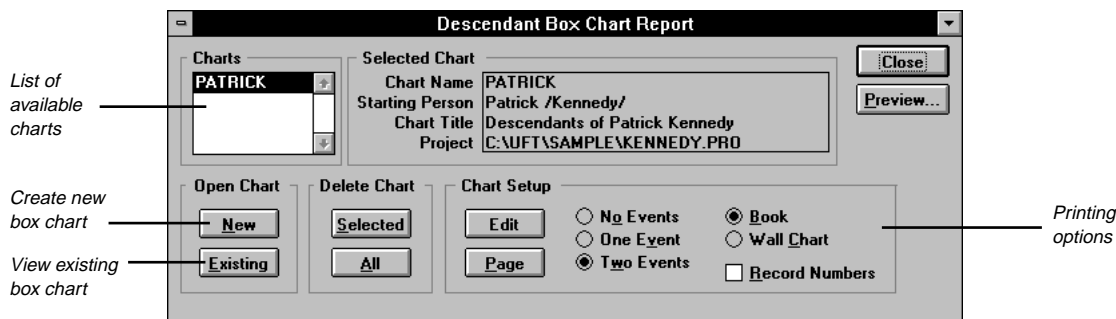
**Note** If you choose to include introductory text, the Direct Drop report starts on the next full page.

## 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 or as a wall chart. 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.

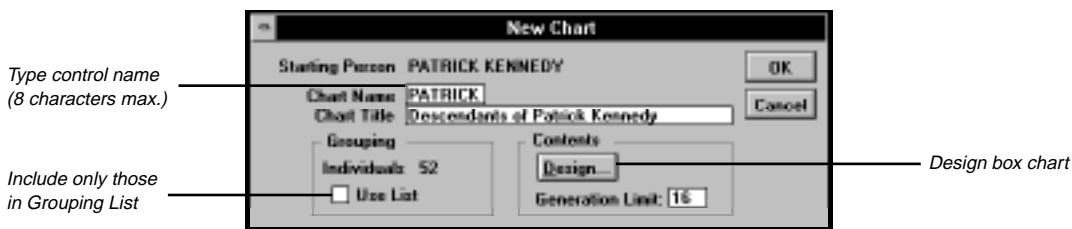
## Creating a New Box Chart

1. From the Reports menu, choose Box Chart, or choose the Box Chart report button on the Toolbar to open the Box Chart window.



**Figure 5-16: Descendant Box Chart Window**

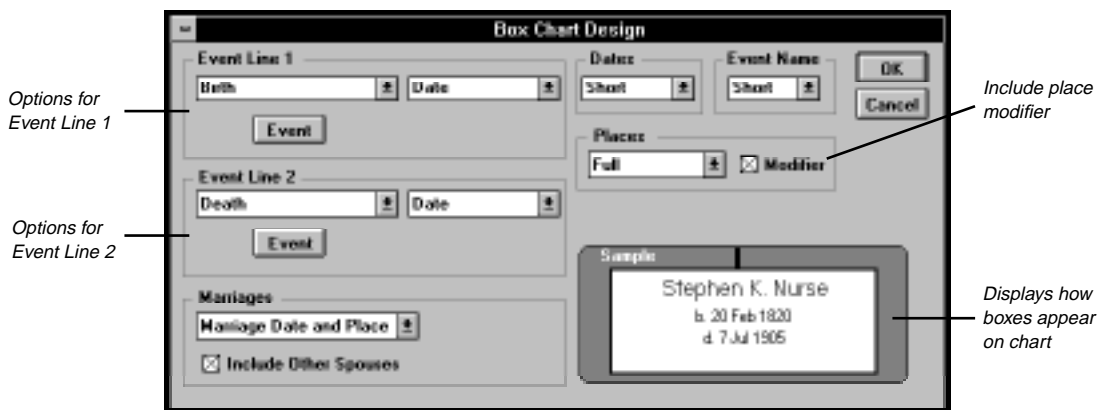
2. Choose New in the Open Chart group.



**Figure 5-17: New Chart Window**

3. Type a name of up to eight characters in the Chart Name field. This is the control name that appears in the Charts list.
4. Type a title (optional) for the chart in the Chart Title field. This title appears at the top of the chart window and can be included on printed charts.
5. Enter a number in the Generation limit field if you want to limit the number of generations to be included in the chart.
6. 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 that meet specific criteria, and add them to the Grouping list. See page 78 for information on grouping.

7. Choose Design from the Contents group to open the Box Chart Design window.



**Figure 5-18: Box Chart Design Window**

8. Choose the appropriate options you want included in the chart. The sample window in the lower-right corner displays how the options chosen will appear in the boxes on the chart.
9. Select any of the options from the appropriate drop-down lists as described below:

#### **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 corresponding event line
- *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 choose the Events button. Select the event you want included in the report and choose 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.

**Marriage Group**

- *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

**Dates Group**

- *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.

**Event Name Group**

- *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

**Places Group**

- *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*)

10. After making your selections, choose OK to return to the New Chart window.
11. Choose OK in the New Chart window to open the Chart window you have designed.

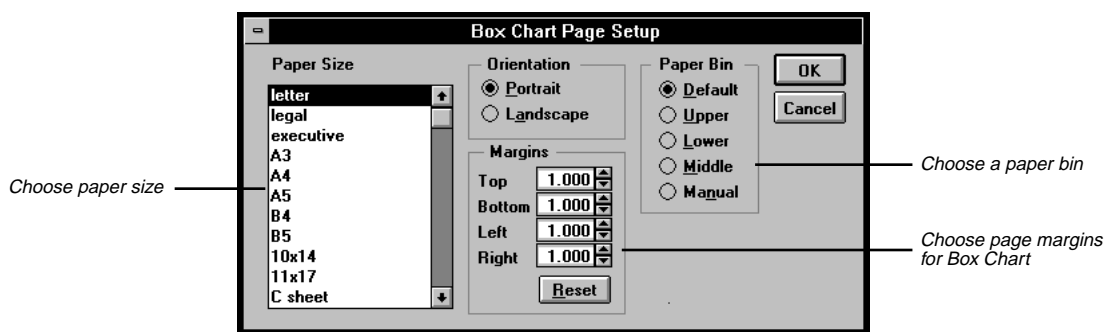
**Note** The Box Chart Design sets the overall design of a chart. Once the chart is created, the basic design options cannot be altered. However, changes, additions, and customizing details can be made from the Descendant Box Chart window, the Box Chart Page Setup window, and on the Box Chart itself.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



## Preparing a Box Chart for Printing

Selections made in the Box Chart Page Setup window are used only for printing box charts. They do not affect the default printer settings in Windows or other Ultimate Family Tree reports.

1. If a box chart is open, close it. Open the Descendant Box Chart window by choosing Box Chart from the Reports menu.
2. Choose Page in the Chart Setup box.



**Figure 5-19: Box Chart Page Setup Window**

3. Select a paper size from the Paper Size list.
4. In the Orientation box, choose to print the chart in either Portrait or Landscape mode.
5. Select the default paper bin or choose a special bin in the Paper Bin box for your printer.

**Note** You can set margins for pages on the box chart. This is particularly useful if you are printing a wall chart. Be aware that some printers (such as the HP LaserJet series) 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. Type or select the distance between the top, bottom, left, and right edges of the page and the chart. Choose the Reset button to return to the default settings of 1 inch.

6. Choose OK to return to the Descendant Box Chart window.
7. Include one, two, or no events on the chart you want to print.
8. 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. Choose Book to print charts with the Ultimate Family Tree headers and footers. Choose Wall Chart to print charts without headers and footers.

**Note** Headers and footers can contain the book name, page number, preparer information and date. If you are printing in landscape, only printers that support type orientation commands (such as the HP LaserJet 4 and later) will print the headers and footers correctly. If you do not have a printer that supports type orientation commands, print landscape charts as wall charts.

9. Choose whether or not to include individual record numbers on the printed chart.
10. Choose Preview to open the Chart to be printed. With the selected chart open, choose Print from the File menu.

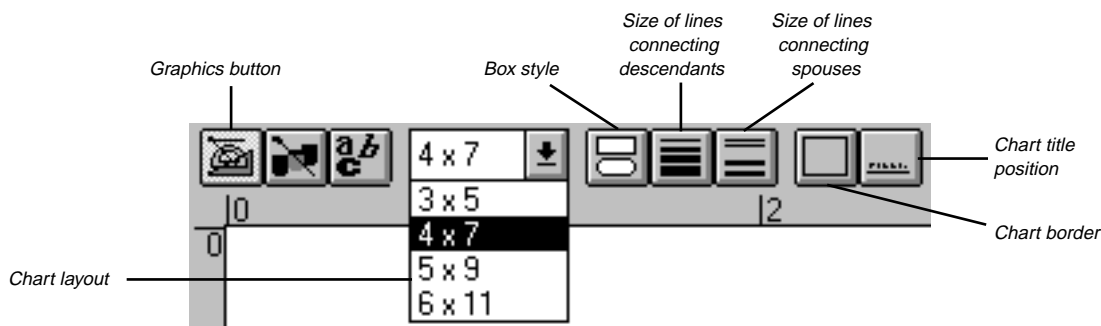
**Note** The original Box Chart Design sets the overall design of a chart. Once the chart is created, the basic design decisions cannot be altered. However, changes, additions, and customizing details can be made from the Descendant Box Chart and Box Chart Page Setup windows, and on the Box Chart itself.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

## Chart Window

Use the Toolbar at the top of the Chart window to modify the displayed chart. Three buttons on the left end of the Toolbar determine which functions are available. Click the Edit Graphics button to change the overall design of the chart, the Edit Colors button to make color selections, and the Edit Fonts button to change the fonts used.

**Edit Graphics** You can select the number of boxes across and down to be printed 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. View the changes on the chart as you make your selections.

1. Choose the Edit Graphics button and then choose an option within the Density drop-down list to determine the number of boxes per page.



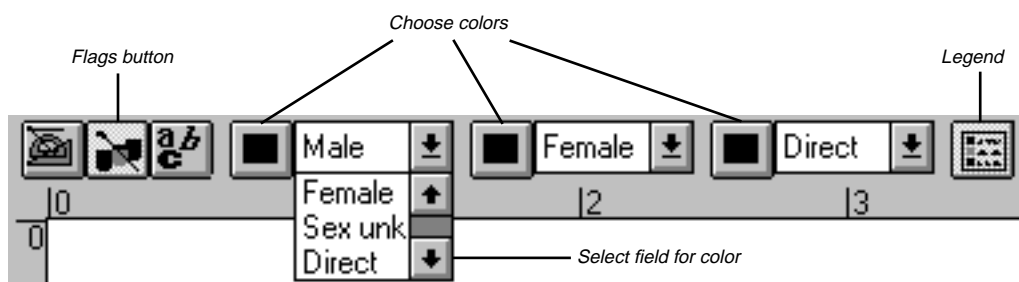
**Figure 5-20: Graphics Toolbar**

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

2. Select the style of box you want for the chart by choosing the Box shape button. A check mark appears next to the box style chosen for the displayed chart.
3. Select the size of the lines that connect descendants by choosing the Single Lines button. A check mark appears next to the size of the lines chosen.

4. Select the size of lines that connect spouses by choosing the Double Lines button. A check mark appears next to the choice.
5. Select a border for the entire chart by choosing the Border button.
6. Choose the placement of the title of the chart on the bottom of the chart by choosing the Title button. The title can be left justified, centered, or right justified.

**Edit Colors** Choose the Edit Colors button to display the Flags Toolbar 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 5-21: Flags Toolbar**

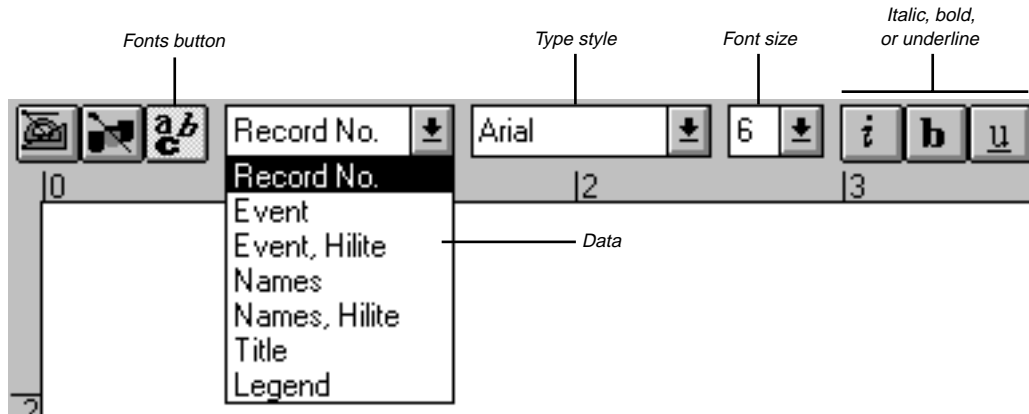
**Note** Choices appear in color on printed reports only if you have a color printer.

1. Choose the Edit Colors button to display three color options: red, green, or blue.
2. Choose a color button.
3. Choose the down arrow next to this color to select an attribute, such as male, female, or spouse.
4. Repeat steps 2 and 3 for the remaining color options.
5. Select the Legend button to include the color legend on the chart.
6. View the changes on the chart as you make your selections.

**Edit Fonts** Choose the Edit Fonts button to display the Font Types Toolbar where you can make font and formatting choices. Available choices include:

- *Record Number* — The unique identifier for each individual.
- *Event* — Any event text that has not been selected as Event, Hilite in the Chart Edit window.
- *Event, Hilite* — Event text you have selected in the Chart Edit window by enclosing the target text in braces. See “Editing Names, Dates and Places in a Box Chart” on page 111.
- *Names* — The given name for each individual.

- *Names, Hilite* — The surname for each individual.
- *Title* — The title you have selected for the report.
- *Legend* — The key for color selection in the box chart.



**Figure 5-22: Fonts Toolbar**

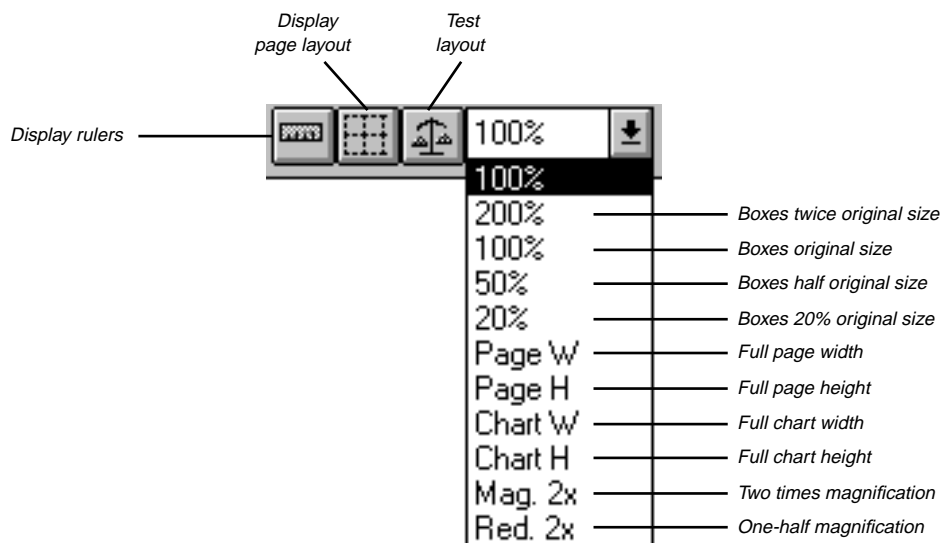
1. Select a field from the drop-down list.
2. Select a font and size for the selected field.
3. Choose the *i*(talics) button to print the selected data in italics.
4. Choose the **b**(old) button to print the selected data in bold.
5. Choose the u(nderline) button to underline the selected data.
6. Repeat steps 1–5 for each data item.
7. View the changes on the chart as you make your selections.

**Note** Use narrow fonts to allow more information to be included in each box.

## Additional Options for Display

Use the buttons on the Chart Display Toolbar for additional options.

1. Choose the Ruler button to display ruler guides for the chart.
2. Choose the Page Grid button to display pages and numbers. The page layout depends on the choices made in the Chart Page Setup window.



**Figure 5-23: Chart Display Toolbar**

3. Choose the Test Mode button to highlight boxes where text might overflow the boxes. These boxes are displayed in red. Make changes to the font type and size or edit individual boxes until all boxes are displayed in black.

**Note** The Test Mode function is most accurate when using a 100 percent or 200 percent zoom factor.

4. Choose the down arrow next to the Zoom button to change the zoom factor for the chart.

## Zooming Chart Areas

1. To drag a box over the chart boxes you want to zoom, position the mouse pointer over the top left corner of the box, press the left mouse button, and drag the mouse pointer to the lower-right corner.
2. Press the right mouse button, and then click the Zoom to Fit button.

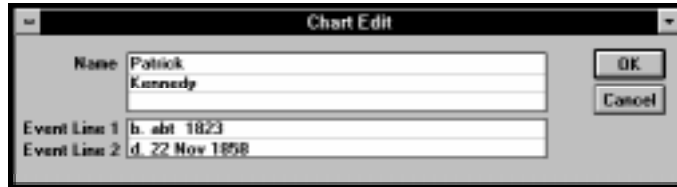
**Note** Use the arrow keys to move around a chart and view parts not displayed on screen.

## Editing Names, Dates, and Places in a Box Chart

The contents of each box can be edited while the chart is displayed.

1. Double-click a box to select it.
2. Click the Descendant Box Chart window to activate it. Click the Box Chart button on the Toolbar, or from the Reports menu, choose Box Chart to open the Descendant Box Chart window.

3. Choose Edit.



**Figure 5-24: Chart Edit Window**

4. Insert braces { } around any portion of the data entered in Event Line 1 or 2 to designate it as Event, Hilit. To format that portion of the text use the Font Types Toolbar in the Chart window. These braces do not appear in the report.
5. After making any changes, choose OK to return to the Descendant Box Chart window. Choose Close to return to the Box Chart, or simply click on the chart itself.

**Note** Changes made to the contents of a box are stored with the chart and do not affect any data in the Project.

## Finding an Individual in a Box Chart

1. To locate a person in the chart, press F10 or click the Find button on the Toolbar.
2. Type the first few characters of the name of the individual you want to locate (or the record number if known) and press Enter (or choose Find).
3. Choose OK to close the Find window and move the focus of the chart to that individual.

## Viewing Multiple Charts at One Time

1. Open an existing chart.
2. Resize the chart to a smaller size by dragging one of its borders. See the Windows manual for more information on resizing windows.
3. Move the chart, if necessary, to display the underlying Descendant Box Chart window (or from the Reports menu, choose Box Chart).
4. Select another chart in the list and open it.
5. Resize this chart, if necessary, so that both charts display on the screen.

**Note** In addition to the scroll bars, you can use arrow, PgUp, PgDn, Home, and End keys to move around a chart to view parts not displayed.

## Deleting a Chart

1. In the Descendant Box Chart window, select a chart in the Charts List.
2. Choose the Selected button in the Delete Chart box.
3. If you want to delete all charts, choose All in the Delete Chart box.

## Printing a Chart

1. With the chart open, choose Print from the File menu.
2. See page 89 for basic steps for printing reports.

**Note** Print Preview in the File menu is not available for Box Charts because the chart is previewed during customization.

## 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.

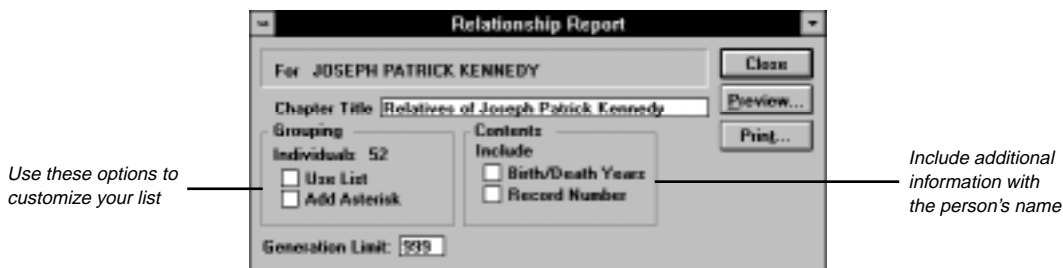


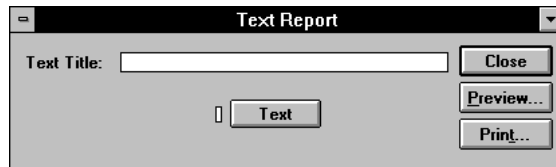
Figure 5-25: Relationship List Report Window

2. Include any additional options from the Contents group.
3. Print the report. See page 89 for basic steps on 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 5-26: Text Report Window**

2. Type a title for the Text report and choose the Text button to open an Edit Text window.
3. You can type up to 65,000 characters of text. Choose import in the Edit Text window to import an external text file. See pages 39 for information on importing text. The indicator next to the Text button is on when text is present.
4. Choose Print or Preview. See page 89 for basic steps for printing reports.

## Image Reports

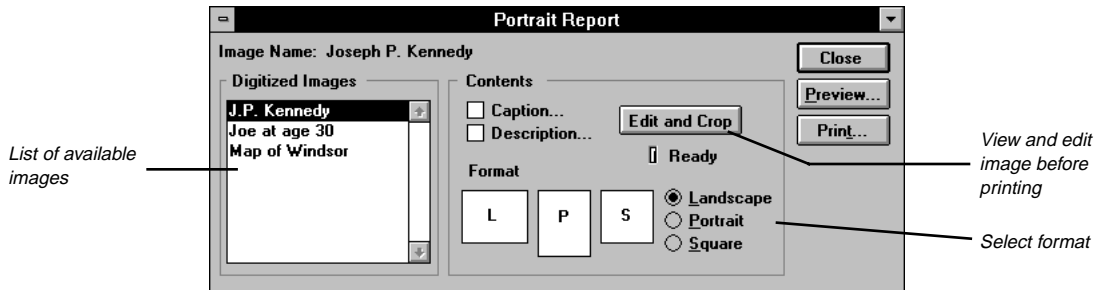
The two Image report styles in Ultimate Family Tree are Portrait and Gallery. The Portrait report prints an image and text connected to the image. The Gallery report prints any combination of up to 20 images on a single page. Ultimate Family Tree prints black-and-white and color images if your printer supports color. If you want to include an image in the body of a report, such as the Family Journal report, you must send the report to a file (RTF) and import it into a word processing program where the image can be inserted. See page 85 for information on printing to a file.

### Printing a Portrait Report

1. Choose Images from the Reports menu, and then choose Portrait.
2. Select the Image you want to print from the Digitized Images list. The name of the selected image is displayed at the top of the window.

**Note** OLE objects cannot be included in Portrait or Gallery reports.





**Figure 5-27: Portrait Report Window**

3. Choose Caption and/or Description to include the caption and/or description you entered for that image in the Multimedia Library. If you have not entered a caption or description for the image in the Multimedia Library window, you can enter one at this time but the caption and description entered here will not be saved in the Multimedia Library. The caption prints directly under the image and should be limited to 50 characters or less.
4. Choose Landscape, Portrait, or Square to determine the format of the image you're printing.
5. Choose Edit and Crop to view and edit the file before printing. Choose OK to close the Edit window.
 

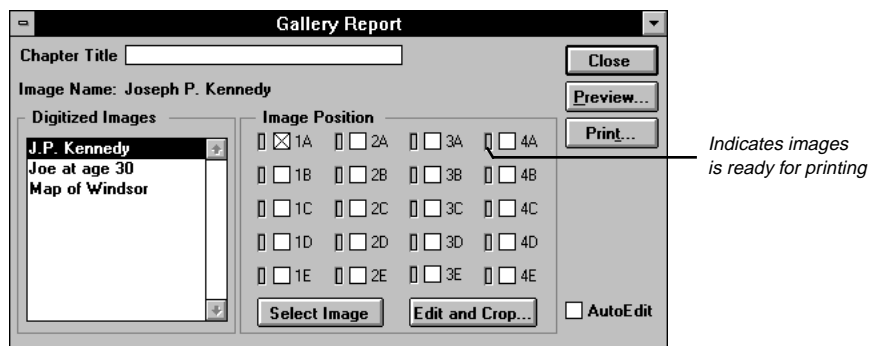
**Note** Edit or crop the image before printing to guarantee that the image is properly positioned. After an image has been edited, the Ready indicator is green.
6. Choose the Print or Preview button to print the report. See page 89 for basic steps for printing reports.
 

**Note** Depending on your hardware, the image may not display with true colors or shades in Print Preview, even though the image will print correctly.

## Printing a Gallery Report

1. From the Reports menu, choose Images, and then Gallery.
2. Specify the picture space by checking any one of the 20 image positions (1A through 4E).
3. Select the image for that position from the Digitized Images List.
4. Choose the Select Image button to place that image in the selected position.
 

**Note** Select AutoEdit to open the Edit and Crop feature automatically as you position images.
5. Choose Edit and Crop to view and edit the image file. Choose OK to close the Edit window. The Gallery report is designed for images having a 2:3 landscape ratio. Use Edit and Crop to center the image. After an image has been edited, the ready indicator is green.
6. Repeat steps 3–5 for the remaining images you want included in the report.



**Figure 5-28: Gallery Report Window**

7. To remove an image from the report, select its position and choose Edit and Crop. Choose Cancel to return to the Image Gallery report window.
8. To replace an image, specify the space by selecting the image position, select a new image from the Digitized Images List, and choose the Select Image button. Choose Edit and Crop to view and/or edit the replacement image file.
9. Choose the Print or Preview button to print the report.

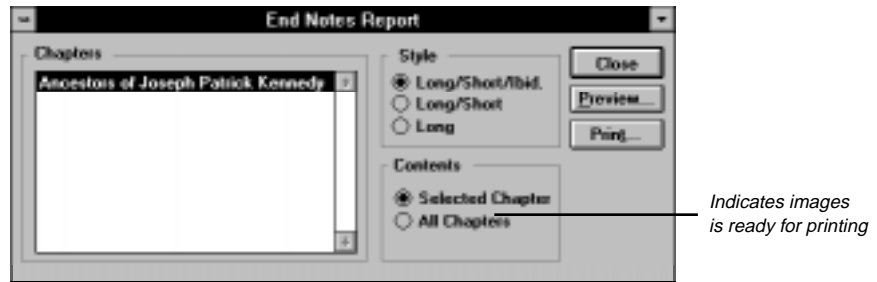
**Note** The information entered in the descriptive name field for the selected image appears below the image when printed.

## End Notes Report

End Notes can be printed after you create footnotes. If Ultimate Family Tree does not find footnotes because they have not been created or they have been reset, the End Notes menu selection is not available. Ultimate Family Tree gives you a choice of including footnotes at the end of each chapter or report, or at the end of the book.

**Note** Notes that are compiled and numbered on a chapter-by-chapter (report-by-report) basis, start with number 1 for each chapter.

1. Choose End Notes from the Reports menu.
2. In the Contents box, choose which chapters will be included in the notes section: All or Selected.
3. If you choose Selected Chapter, highlight the chapter for which you want to print End Notes in the Chapters list.
4. Choose one of the footnote options in the Style group:



**Figure 5-29: End Notes Report Window**

- *Long/Short/Ibid.* — End notes are printed in long form the first time a bibliographic reference appears. After the source is cited in full, the short form built from Abbreviation 1 and Abbreviation 2 is used. When successive notes use the same reference, the *ibid.* form is used.
- *Long/Short* — End notes are printed in the long form first, and then in the abbreviated form for subsequent references.
- *Long* — All references are printed in full.

5. Choose Print or Preview in the report window. See page 89 for basic steps for printing reports.

**Note** If you have chosen embedded notes for a Family Journal format report by selecting the Register format, source citations are included in the body of the report. Individual Record Footnotes and Event Footnotes always print as end notes.\*

## Index Report

An Index is a list of individuals, marriages, or places with page numbers to reference where the names, marriages, or places appear on various reports. The Index provides a reference to all reports and other materials included in a book. Ultimate Family Tree reports that cannot be indexed include Images, Calendar, End Notes, Box Chart, and Index.

You can collect an index for a report either before or after you have printed the report, but be sure to use the same option selections when collecting the index as you do when printing the report. We recommend collecting the index immediately before printing the report to prevent any errors in the index.

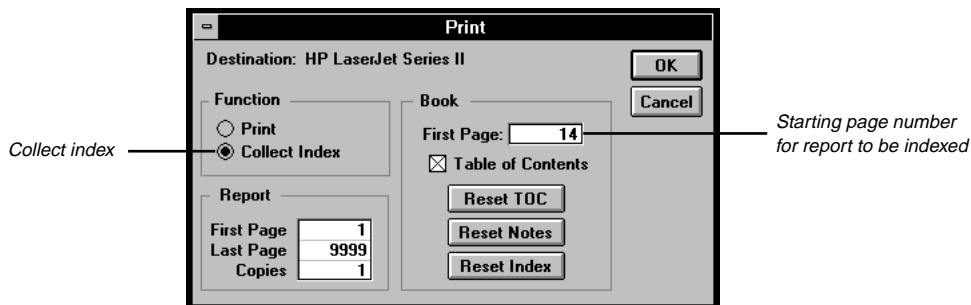
**Note** Because of differences in how printers process fonts and movement commands, the index can accumulate errors. To review and correct the index before printing, choose Edit on the Index Report window. See page 119 for information on editing an Index Report.

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\* The method used in Ultimate Family Tree for preparing and printing footnotes is covered by US Patent No. 5,097,418, dated March 17, 1992.

## Collecting an Index

1. Open the report for which you want to print an index.
2. Set the options you want to include in the report.
3. Choose Print in the report window.
4. Type the page number of the first indexed page in the First Page field.



**Figure 5-30: Print Window**

5. Select Collect Index.
6. Choose OK to start collecting the index.

**Note** If Collect Index is not available (dim) in the Print window, a title has not been entered in the report window, the Print to File option is selected in the Print Setup window, or the report cannot be indexed. Use a unique chapter name, or the new chapter index will replace the duplicate. Indexes can be printed at any time.

## Printing an Index

You can print an index for a single report, or wait until you have collected the indexes for all the chapters in your book.

**Note** 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 text to wrap to the next page.

1. Choose Index from the Reports menu.
2. In the Include box, choose the chapters to include in the Index report: All or Selected.
3. If you choose Selected Chapter, highlight the chapter in the Chapters list for which you want to print an index. This list displays the chapter names of all the reports for which indexes have been collected. When creating reports, be sure to enter different titles for each chapter to avoid confusion when printing.
4. Include any other options by checking the appropriate boxes.

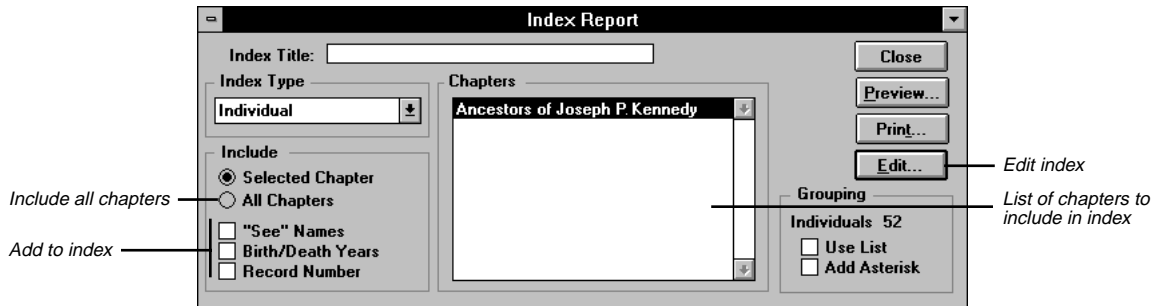


Figure 5-31: Index Report Window

5. Select the type of index you want to print from the Index type drop-down list.

**Note** If any of the Index Type options are not available (dim), Ultimate Family Tree has not found an associated index entry for the report.

6. Choose Use List in the Grouping box if you want to print an index for only those individuals in the Grouping list.
7. Choose Print or Preview in the report window to print the report.

**Note** Ultimate Family Tree prints cross references to alternative names in the Index. For example, if you have entered a woman's married name such as *Jane /Smith/* in the Alias 1 field, and her maiden name, *Jane /Doe/*, in the Individual Record window, the index will print *Smith, Jane, see Doe, Jane*.

Individuals without surnames are listed at the beginning of the index in alphabetical order by given name and indented on the page.

## Editing an Index Report

Because of differences in how printers process fonts and movement commands, an index can accumulate errors. The index can be reviewed and corrected before printing by choosing Edit on the Index Report window.

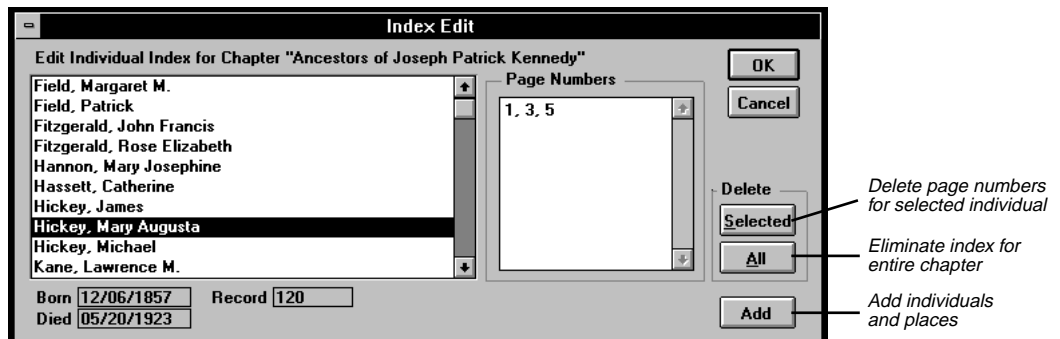


Figure 5-32: Index Edit Window

The Index Edit window provides a list of all individuals, marriages, or places in the selected chapter. Select the individual, marriage, or place you want to check from the list.

## Editing Page Numbers

The pages in the chapter for the selected item are shown in the Page Numbers edit box. You can add, change, or remove page numbers. Ultimate Family Tree reorders the page numbers automatically, so don't worry about keeping the page numbers in ascending order. Type a comma between page numbers.

## Deleting Page Numbers

To delete the page numbers for a selected individual, choose Selected from the Delete group. To eliminate the entire chapter, choose All from the Delete group. Note that you must repeat this last step for individuals, marriages, and places if you want to eliminate an entire chapter from the index.

## Adding Individuals and Places

Individuals and places not already in the index can be added to a chapter. Choose Add, and then select from the candidates list that is displayed. The individual or place you want to add must already be in the project to be included in the candidates list.

## Table of Contents

The Table of Contents lists chapters and page numbers to provide a general overview of the book's contents.

1. From the Reports menu, choose Table of Contents. The chapters you have created and named are listed in the Table of Contents Entries field.

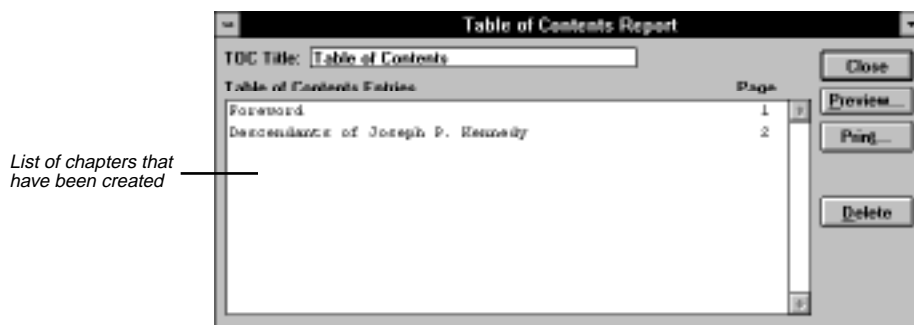


Figure 5-33: Table of Contents Report Window

**Note** The Table of Contents menu selection is dim until chapter titles have been added as you print reports.

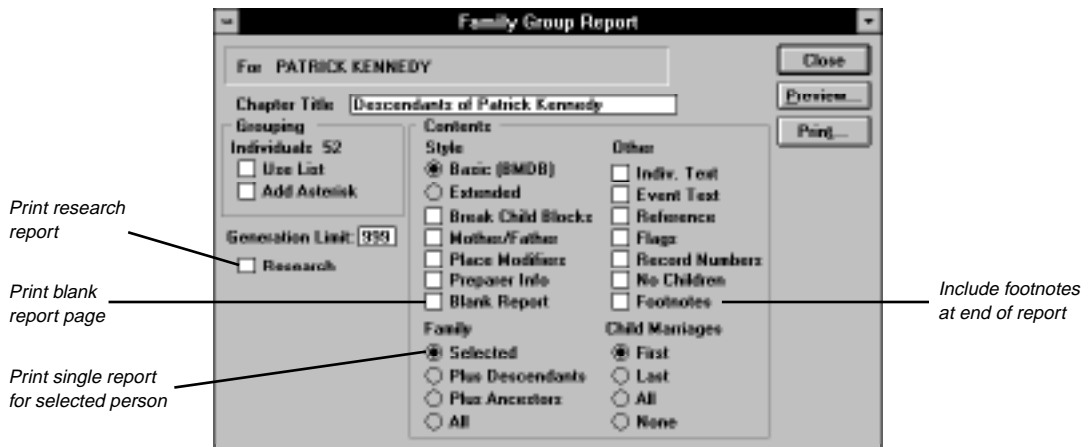
2. Enter a title for the Table of Contents Report. The title is centered near the top of the first page of the printed report.
3. Select a chapter name and choose Delete to delete a chapter from the list.
4. Choose Print or Preview in the report. See page 89 for basic steps for printing reports.

**Note** For proper text alignment during viewing, the text in the Table of Contents window appears in a different font.

## Family Group Report

The Family Group Report contains detailed information about a family unit, which is a 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 Ultimate Family Tree 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 5-34: Family Group Report Window**

2. Press F10, or click the Find button on the Toolbar to find the starting individual.

**Note** To print a blank Family Group report, choose 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, for example, *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 box 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 list.
7. Choose one of the options in the Child Marriage section: 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) or None (excludes child marriages).
8. Choose Research 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. Choose Footnotes if you want to include footnotes at the end of the report.
10. Print the report. See page 89 for basic steps for printing reports.



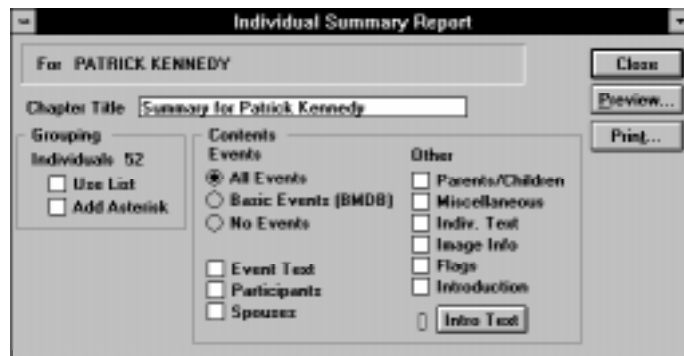
**Note** If an individual has more than one spouse, Ultimate Family Tree asks you to select one of the spouses from a list.

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 option, 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 5-35: Individual Summary Report Window**

2. Press F10 or click Find on the Toolbar 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 box of the report window. See page 78 for information on using the Grouping window.

4. Print the report. See page 89 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.

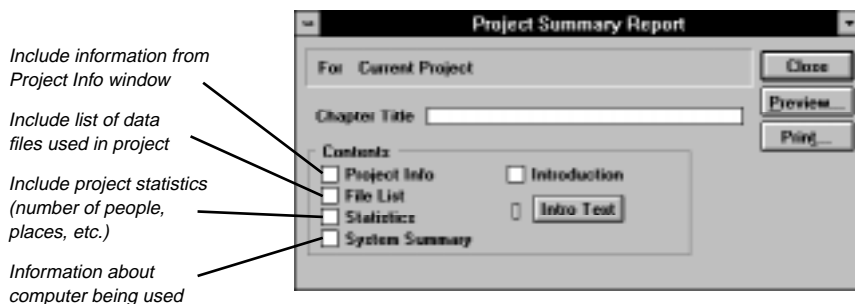


Figure 5-36: Project Summary Report Window

2. Include any of the options by checking the appropriate boxes.
3. Select Introduction and click Intro Text to enter an introduction.
4. Print the report. See page 89 for basic steps for printing reports.

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

- *Processor* — The microcomputer chip detected by Ultimate Family Tree. Note that Pentium processors are reported as 40486.
- *Graphics Card* — The graphics card detected by Ultimate Family Tree. VGA/CGA is shown for CGA and higher resolution boards.
- *Default Drive* — The drive where FAMGATH.EXE is located
- *Directory* — The current directory.
- *Start Directory* — The directory where Ultimate Family Tree was started.
- *Disk Size* — The size of the default drive.

# 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 GEDCOM file.

## Individual, Marriage and Source List Reports

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



Figure 5-37: Individual List Report Window

2. To select the items to include in the report, from the Field list, double-click an item (or highlight and press Enter). To insert a selected field in the field list to the spot above the selected field in the Selected list, click the Insert button at the bottom of the Selected list. When the selected field is added to the Selected list, the column numbers are 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 Enter key to remove it.

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

3. Choose Skip 1st Column to omit the first column in the Selected list from printing. This gives 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. Choose Line Numbers 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

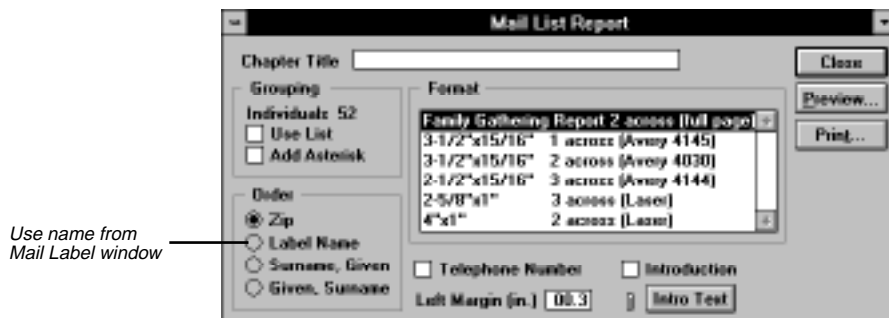
**Note** Selecting a font size determines the number of columns available for the report. The smaller the font, the more columns you are able to print. Ultimate Family Tree automatically determines the font size and style for the small, medium, and large options.

6. Print the report. See page 89 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 for mail labels. You enter mailing addresses and phone numbers for an individual in the Miscellaneous window opened through the Individual Record. Ultimate Family Tree automatically determines the font size and style for Mail List reports.

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



**Figure 5-38: Mail List Report Window**

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

**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 one of the formats from the Format list.

- *Ultimate Family Tree Report, 2 across (full page)* — Prints an address list on a full page, two across, with headers and footers

- *3 1/2" × 15/16", 1 across (Avery 4145)* — Prints mailing labels, one across on 3 1/2 × 15/16-inch Avery brand or equivalent dot matrix pin feed labels
  - *3 1/2" × 15/16", 2 across (Avery 4030)* — Prints mailing labels on 3 1/2 × 15/16-inch Avery brand or equivalent dot matrix pin feed labels, two across
  - *2 1/2" × 15/16", 3 across (Avery 4144)* — Prints mailing labels on 2 1/2 × 15/16-inch Avery brand or equivalent dot matrix pin feed labels, three across
  - *2 5/8" × 1", 3 across (Laser)* — Prints mailing labels on 2 5/8 × 15/16-inch laser printer labels, three across (30 per sheet)
  - *4" × 1", 2 across (Laser)* — Prints mail labels on 4 × 1 inch laser printer labels, two across (20 per sheet)
4. Enter a title you want to be printed at the top of the mail list. This field is available only when the Ultimate Family Tree Report format is selected from the Format list in this window.
  5. Adjust the size of the left margin on the mailing labels by entering the margin size, in inches, in this field. This field is not available when the Ultimate Family Tree Report format is selected.

**Note** Names and addresses are cut off if the text does not fit on the label. Take note when entering address information.
  6. To include introductory text in your report, enter the text in the Intro Text window and choose Introduction. These options are available only when the Ultimate Family Tree Report format is selected.
  7. Print the report. See page 89 for basic steps for printing reports.

**Note** Ultimate Family Tree determines both the font style and size in all List reports, including the Mail List.

## GEDCOM Exceptions List Report

The GEDCOM Exceptions List prepares a list of data that did not transfer into Ultimate Family Tree through a GEDCOM file. You can also view the missing data on screen by choosing Projects from the Utilities menu, and then choosing GEDCOM Exceptions to open the GEDCOM Exceptions window.

1. After importing a GEDCOM file, choose Lists from the Reports menu, and then GEDCOM Exceptions.
2. To select the items to include in the report, from the Field List double-click an item (or highlight and press Enter). To insert a selected field in the Field List to the spot above the selected field in the Selected List, click the Insert button at the bottom of the Selected List. When the selected field is added to the Selected List, the column numbers are 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 field and press the Enter key to remove it.



**Figure 5-39: GEDCOM Exceptions Report Window**

3. The choices available and columns used are:
  - *File Position* — The position (number of characters from the start of the GEDCOM file) in the GEDCOM file where the exception is located
  - *Level* — The level number of the exception 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. Choose Skip 1st Column to omit the first column in the Selected List from printing on the report. You can 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. Choose Line Numbers 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

The selections you make determine the number of columns available for the report. The smaller the font, the more columns you are able to print. Ultimate Family Tree automatically determines the font style and size for the small, medium, and large font options.

- *Col/Page* — Columns available on the report page for the font size selected. To increase this number use a smaller font size. To decrease this number use a larger font size.
  - *Col Used* — Total columns used when selections are made from the Field List.
  - *Col Left* — The number of columns still available.
7. Choose Print or Preview in the report window. See page 89 for basic steps for printing reports.

## Calendar Report

Ultimate Family Tree produces a calendar that includes birthdays, anniversaries, and other events for any or all individuals in your project. The calendar can be customized by using the grouping option. You can print calendars in a box style or text style. Ultimate Family Tree determines the font size and style for text inside the day boxes in Box Calendar reports. Names in the Calendar can't be printed in bold font.

**Note** The Calendar prints as it will (or did) exist for the date you select. If you select to print a calendar for June 1948, only events that took place on or before June 1948 appear in the calendar. The Calendar is designed as a stand-alone report and is not included in indexing, nor can it be exported in Rich Text Format.

1. From the Reports menu, choose Calendar. Type in a chapter title. (The chapter title is used only for the Text style calendar and is centered at the top of the first page.)

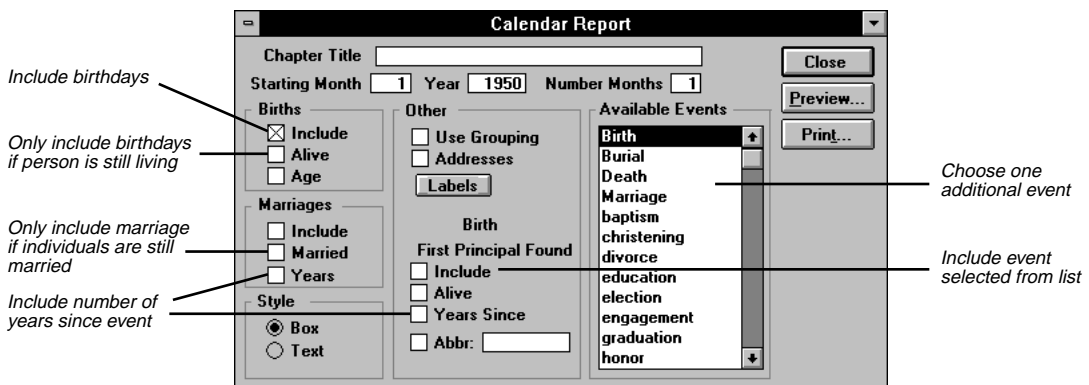


Figure 5-40: Calendar Report Window

2. In the Starting Month field, enter the numeric equivalent for the month in which you want the calendar to begin. For example, October should be entered as the number 10.
3. Enter the year in which you want the calendar to begin.
4. Enter the number of months you want to print from the starting month and year. This can be any number up to 99.
5. Select any of the options in the Birth Group. To include birthdays of individuals in your project choose Include. Select Alive to include birthdays for only those individuals who are still living as of the calendar date. If Alive is not checked, all individuals in the project are included.
6. Select any of the options in the Marriages Group. To Include the marriage anniversaries of individuals in the project, choose Include. Select Marriage to include the marriage anniversaries of those who are still married at the time of the date on the calendar. Years includes the number of years married. Ultimate Family Tree uses the sort date for this number. The number shown is the number of years the couple has been (or would have been or will be) married at the time of the date on the calendar.
7. Choose either Box or Text Style.
8. Check Use Grouping to include only those individuals listed in the Individual Grouping list.
9. Check Addresses to include the current address and telephone number from the Mail Label window for the individual shown on the calendar. For marriages, engagements, and divorces, Ultimate Family Tree uses the first valid address it finds for one of the two individuals involved. This option is available for the Text Style Calendar only.
10. If you do not want to include an additional event in the Calendar report, skip to step 17.
11. Select an event from the list of Available Events.

**Note** On the Text style calendar, both individuals are shown for engagements, marriages and divorces when one of these events is selected as the extra event. In the Box style, however, only one individual is included for events that have two individuals connected. Ultimate Family Tree uses the first individual found.
12. Choose Include to include the event selected from the Available Events List on the right side of this window. The event selected is shown in the Event Group title field.
13. Choose Alive to include the selected event only for individuals who are still living.

**Note** An individual whose Living field is marked as unknown will not be included if this option is selected.
14. Choose Years Since to include the number of years since the selected event occurred. Ultimate Family Tree uses the sort date for the selected event to calculate this number.
15. Choose Abbr: (Box Style Calendar Only) to include an event name or an abbreviation for the event (if the event name is long) on the Calendar.



16. Enter the event name, or abbreviation of up to 10 characters, in the Abbr: field. If nothing is entered in this field, only the name of the person connected to this event is printed. The abbreviation is used for the box style report. The text style report uses the full name of the event from the Event Library.
17. Choose the Labels button to open the Calendar Labels window if you want to edit the month names.



Figure 5-41: Calendar Labels Window

18. Enter any text in the Month Label field (up to 35 characters) that you want printed on the bottom left of the Calendar. Leave this blank if you want only the month and year to be printed.  
**Note** If you want to print a calendar with the months shown in a different language, edit the month name (up to 15 characters). The month is printed on the bottom right of the Calendar along with the year. You cannot change a month in this field, but you can rename it.
19. Choose OK to save changes and return to the Calendar report window.
20. Once you have made your selections, choose Print or Preview. See page 89 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 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 use out of the Tiny Tafel report, follow these guidelines when setting the AI and DI levels in your project:

### Interest level ranking

- 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 another researcher.
- 3 — Moderate interest; data quality is good or poor.
- 4 — Highest interest; data quality is good or poor.

**Note** Ancestor and Descendant Interest levels imported from ROOTS III are increased during import to the next higher number. (For example, 1 becomes 2, 2 becomes 3, and 3 becomes 4. 0 does not change.)

1. Press F5, choose Individual Record from the Build menu, or click the Individual Record button on the Toolbar to open the Individual Record window.
2. Press F10 or click the Find button on the Toolbar to find the earliest ancestor in a family line you are interested in.
3. Choose the More button, and then Miscellaneous to open the Miscellaneous 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. Choose OK.

Miscellaneous Individual Information

For John Fitzgerald /Kennedy/

Long Name

Mail Label

Interest

Ancestor 2

Descendant 2

Birth  Immigrant

Last Edit Date 04/03/1996

Reference KENN17

Common Name

Alias 1 Jack /Kennedy/

Alias 2

Signature

Nationality

Language 1

Religion 1

Religious Name

Web Link

Ancz. File #

Individual Flags

AnCem	T	E	F
ActPal	T	F	F
HatIni	T	G	F
GraLaw	T	H	F
PbBook	T	I	F

OK

Cancel

Language 2

Religion 2

Social Security No.

Figure 5-42: Miscellaneous Individual Information Window

6. Press F10 or click the Find button on the Toolbar to select the most recent individual in the family line.
7. Choose the More button and then 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. Before opening the Tiny-Tafel Report window you should specify the destination for the Tiny-Tafel in the Print Setup window. The Tiny-Tafel can either be sent to the printer or to an ASCII file. If you want to create a file, give it the extension .TAF.
2. Choose Tiny-Tafel from the Reports menu.
3. 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.

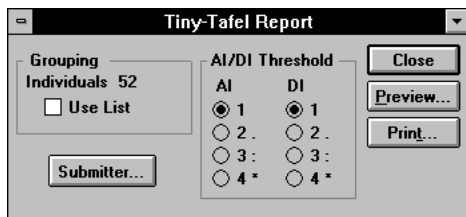


Figure 5-43: Tiny-Tafel Report Window

- Choose Use List if you want to limit the individuals to be included in the Tiny-Tafel Report to only those in the Grouping list.

**Note** To create a Tiny-Tafel for one 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.

- Choose the Submitter button. A submitter is the person offering his or her selected genealogical data, along with requests for further information.

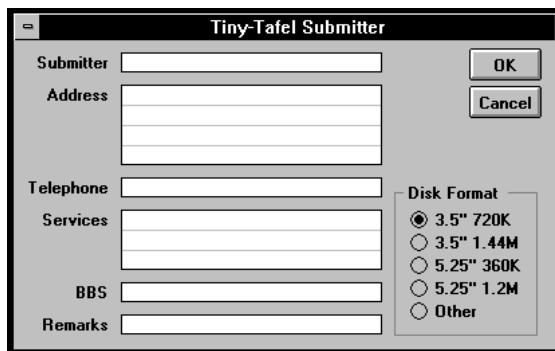


Figure 5-44: Tiny-Tafel Submitter Window

- Enter the submitter's name of up to 38 characters plus spaces. Enter your name here exactly as you do when you sign 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 (at a minimum) is not entered. The remainder of the header fields are optional.

- *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/ID Number.
  - *BBS* — Enter the Name of Bulletin Board/Telephone Number that you are using, 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 radio button that you would like to use to exchange information with other individuals. The selections are 3.5" 720K, 3.5" 1.4M, 5.25" 360K, 5.25" 1.2M, and Other. Other specifies no specific disk format. If you want to receive the Tiny-Tafel information by telephone or in writing, state your preference on the Remarks line.
7. Choose OK to return to the Tiny Tafel Report Window
  8. Print the report. See page 89 for basic steps for printing reports.

**Note** If you have created the Tiny-Tafel as an ASCII file, you can view and edit the file while in Ultimate Family Tree. Choose Open from the File menu. Select Text from the File Type list. Select the All Files check box to view all files. Change to the drive and directory of the Tiny-Tafel file. Choose the Tiny-Tafel file. The Text window appears with the Tiny-Tafel file showing.



## Section 6:

# Putting Your Family History on the Web

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Ultimate Family Tree can create Instant Web Page family histories suitable for publishing on the World Wide Web (WWW). The Modified Register genealogy report format is used for Instant Web Page files. Sample family histories can be seen at <http://www.uftree.com>.

## Strategy

- Plan your family history—style, format, graphics.
- Create or identify images in the Multimedia Library you want to use. Specify these as Preferred Images for each individual. See page 164.
- Create the Instant Web Page using the Web option. See page 141.
- 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

An Instant Web Page family history 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, 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.
- Images connected to the Title, Introduction, or any individual in the report.
- A file 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.



Miscellaneous Individual Information

For John Fitzgerald /Kennedy/

Long Name    Interest    Individual Flags

Mail Label    Ancestor 0    Descendant 0

Birth     Immigrant

Last Edit Date 10/27/1993

A	ArtCem	T	E	F
A	ActPol	T	F	F
B	HarUni	T	G	F
C	GrLaw	T	H	F
D	PbBook	T	I	F

Reference: KENNJF17

Common Name: JFK

Alias 1: Jack /Kennedy/

Alias 2:

Signature:

Nationality:

Language 1:

Religion 1:

Religion 2:

Religious Name:

Web Link: <http://www.anothersite.com/jfk.html>

Ancz. File #:

Language 2:

Religion 2:

Social Security No.:

Enter URL to link individual to that URL

Figure 6-1: Miscellaneous Individual Information Window

## File Organization

Ultimate Family Tree provides a number of options for saving a family history file. The family history can be saved in:

- one file
- multiple files in a single directory
- multiple files in multiple directories

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-directory option allows a large number of files to be divided into separate directories. MS-DOS slows significantly when accessing a directory having more than several hundred files. Use multiple files in multiple directories for uploading to the Palladium Ultimate Family Tree web site.

### Multiple File Option

The following files are created by Ultimate Family Tree when you choose the multiple file option:

- *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.TGZ* — GZip compressed TAR (Tape Archive) when Web option is selected.

## Multiple Subdirectory Option

Ultimate Family Tree places the main individual files in separate subdirectories when you choose this option. The subdirectories are created automatically below the starting directory if they do not already exist. The number of files in each directory can be set from the Options window described later. All other files listed previously are located in the starting directory.

The subdirectories created by Ultimate Family Tree have the name *Dnnn*, where *nnn* is the number of the directory starting with zero. If you have 500 files and have set the directory limit to 200, Ultimate Family Tree will create three subdirectories, D0, D1, and D2.

## Linking Files

### Images

If a preferred image (see page 164) is linked to an individual who is included in the Web Page report, it will be automatically extracted from your Multimedia Library as a .GIF file and located in the HTML\GRAPHICS subdirectory.

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 \UFT\IMAGES subdirectory.

## Sounds

You can also include a sound file.

- *Audio File* — Links a sound file such as a narrative description.

## 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 PKZIP.

## Connecting to Palladium Interactive

Ultimate Family Tree can create Instant Web Page family histories suitable for publishing on the Web. The Descendant Box Chart (which includes an Indented Descendant Report) and Modified Register Family Journal Report are available as Instant Web Pages.

To connect directly to the Palladium Interactive web site, from the Online menu, choose Connect to Palladium Interactive or choose Go Online on the Toolbar.

## Instant Web Page Tutorial

The following tutorial presents the sequence of steps you take to create a family history page on the Web.

1. From the Online menu, choose Instant Web Page or choose the Instant Web Page button on the Toolbar.
2. Choose Family Journal or Box Chart. For information on creating a Box Chart Web page, see “Descendant Box Chart Instant Web Page” on page 244.
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 97.



Figure 6-2: Instant Web Page Window

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 in the Instant Web Page. The notation (*still alive*) prints after the name.
5. Select the Local or Web option in the Destination box 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. In addition to the HTML files, it also creates a compressed file suitable for uploading to a web server. This file has the extension .TGZ.
6. Choose Options to open the Instant Web Page Options window.

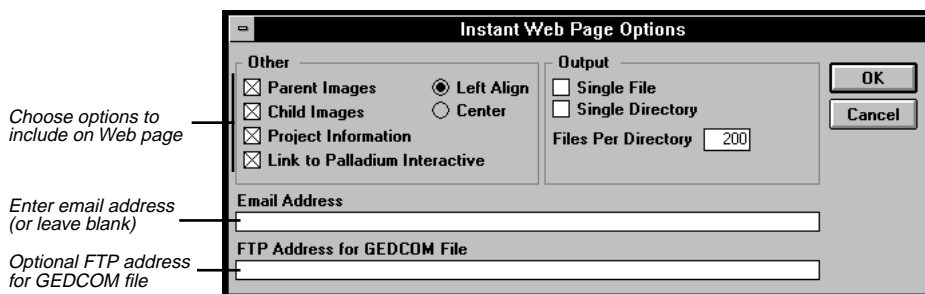


Figure 6-3: Instant Web Page Options Window

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 the individual's parents.
- *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 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 Directory* — Specifies a single directory when single file is not checked. Do not select this option if creating a web page for uploading to Palladium Interactive
- *Files Per Directory* — Specifies the number of files you want in each subdirectory. 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. Choose OK.
8. Choose the Graphics button in the Instant Web Page window.
9. Select any field and choose Browse to find an existing graphics file, or type the names of the various sound and graphic files in the appropriate field. Use standard DOS names. See Figure 6-4.
10. Select GIF files for each option you want to use, and choose 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 choose Preview to view the graphic. Choose OK to return to the Graphics window.
13. Choose Save As. Select from the existing list, or enter a name for the Instant Web Page. Ultimate Family Tree creates a subdirectory with the name you have chosen. The main web page file is named index.htm.

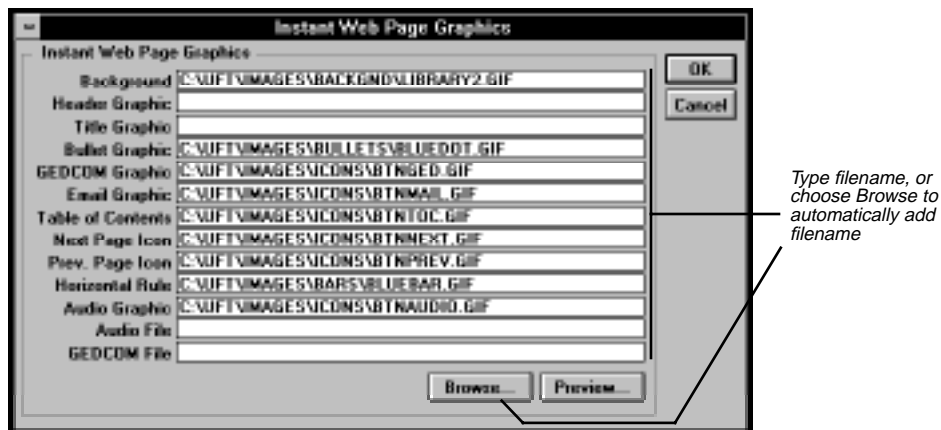


Figure 6-4: Instant Web Page Graphics Window

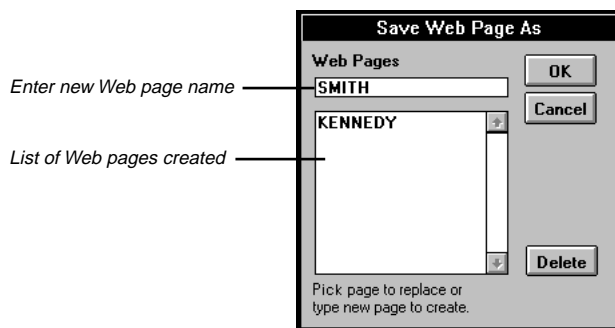


Figure 6-5: Save Web Page As Dialog

14. Choose OK to create the Web Page.

## Previewing an Instant Web Page

1. From the Online menu, choose Preview Instant Web Page or choose the Preview Web Page button on the Toolbar.
2. Select a web page from the drop-down list.
3. Choose OK. The web browser you configured in Ultimate Family Tree opens with the web page you selected. See page 6 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.

## 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. Choose Connect. Ultimate Family Tree will automatically connect with the Palladium Interactive web site. The program pauses until the connection is made. A registration window opens for user information. 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 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.

1. From the Online menu, choose Upload Web Page or choose Upload Page on the Toolbar.
2. Read the disclaimer (see Figure 6-6). Choose I Accept 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 choose 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 6-6: Palladium Disclaimer**

**Note** Although Ultimate Family Tree builds a compressed .TGZ file when you first create your Web page, it updates it from your HTML files just before printing.

3. Type the name and password you used to register online with Palladium.
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. Choose Upload.



## Section 7:

# Multimedia

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Using the multimedia features in Ultimate Family Tree, you can create and enhance family-oriented slide shows, and draw on a library of images, video clips, sound, and Windows objects through Object Linking and Embedding (OLE). Images can be scanned directly into the program, edited, cropped, displayed, and included in printed reports. Most image formats are supported, including Kodak PhotoCD™.

Media (images, audio, and OLE objects) is stored and maintained in the Ultimate Family Tree Multimedia 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 or audio recording once and then use it an unlimited number of times in any project. Digitized images and audio recording that are stored in a file on your computer can be displayed, played, 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 myriad ways in which this can be accomplished, from using media capture software and graphics programs to image scanners and sound boards.

In this section you will learn how to:

- ✓ Add, modify, or delete media files
- ✓ Import images and audio files
- ✓ Edit images and audio files
- ✓ Display images
- ✓ Select a preferred image (to display in various view windows)
- ✓ Scan an image into the media library

- ✓ Export a digitized image
- ✓ Create a Slide Show
- ✓ Play audio recordings
- ✓ Add sound to a Slide Show
- ✓ Add narrative to an image
- ✓ Link, embed, and import an OLE object
- ✓ Add OLE files
- ✓ Edit OLE objects

## 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 them in the Multimedia Library.

1. From the Build menu, choose Multimedia Library.
2. Choose the New button in the Add Media box. The New window opens.

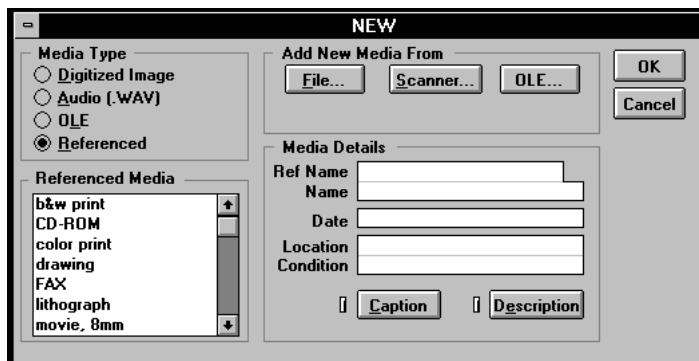


Figure 7-1: New Window

3. Select Referenced in the Media Type box.
4. Scroll the list of media types to 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. Choose 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. Choose 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. Choose OK to close the New Media window.

## Direct Media

Direct media are items that are digitized and stored on your hard disk. The three types of direct media are images, audio, and OLE.

### Images

Images can be stored in a wide variety of formats, such as bitmaps (.BMP), Aldus TIFF (.TIF), or Joint Photographic Experts Group (.JPG), 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 that has the JPG extension. See page 162 for a list of compatible file formats that can be used in Ultimate Family Tree.

Images can be scanned or sent to Ultimate Family Tree using a TWAIN-compatible device. A scanned image is an electronic reproduction of a picture or document that you can store in a file on your computer. To scan images you must have a scanner and scanner software. Consult your computer dealer for more information on scanners.

You can also import Kodak Photo CD pictures into Ultimate Family Tree. Storing your photos on a CD-ROM is a wonderful way to preserve your favorite family photos. A CD-ROM drive is required. Contact a Kodak processor to have your undeveloped film, old photos, or negatives placed on a Kodak Photo CD.

Images can be edited and modified. You can also record a narrative that is stored with that image and play it back in any image display window, including Media Tree, Slide Show, Multimedia Link, and Multimedia Library.

## Audio

Audio files come from a wide variety of sources including audio CDs, tapes, records, sound tracks, and voice recordings. When translated into a digitized format, the audio file must have the extension .WAV. Audio can be played in windows containing images. You need a sound board to record and play back digitized audio.

## OLE

Object Linking and Embedding (OLE) is a powerful Windows tool that you can use to create an object from any type of media, including text, images, video clips, sound clips and MIDI files, and place it in Ultimate Family Tree.

To transfer OLE objects to Ultimate Family Tree, you need a program such as Windows Object Packager, found in the Windows Accessory Group. For a more detailed discussion of OLE technology, consult your Windows manual.

## Using Media in Ultimate Family Tree

Once media is stored in the Ultimate Family Tree Multimedia Library, it can be linked to individuals and slide shows.

## Multimedia Library

The Multimedia Library is the repository for all Ultimate Family Tree media files. These files are added, edited, or deleted from the Multimedia Library window. This window contains detailed information about the images or audio recordings in Ultimate Family Tree projects. You can use this window to enter new images or audio recordings, to modify existing media records, to export image files, or to delete media records.

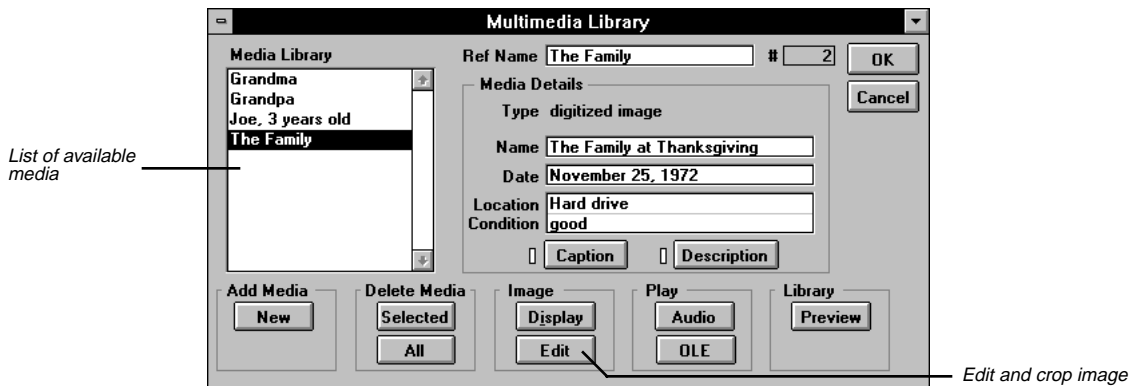


Figure 7-2: Multimedia Library Window

## Adding a Digitized Image or Audio (.WAV) File

1. From the Build menu, choose Multimedia Library.
2. Choose New in the Add Media group to open the New media window.

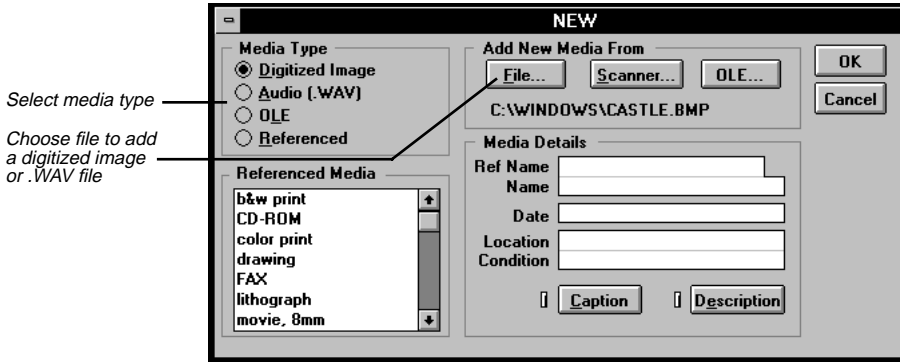


Figure 7-3: New Window

3. Select Digitized Image or Audio (.WAV) in the Media Type group.
4. Choose File in the Add New Media From group.



Figure 7-4: Open Dialog Box

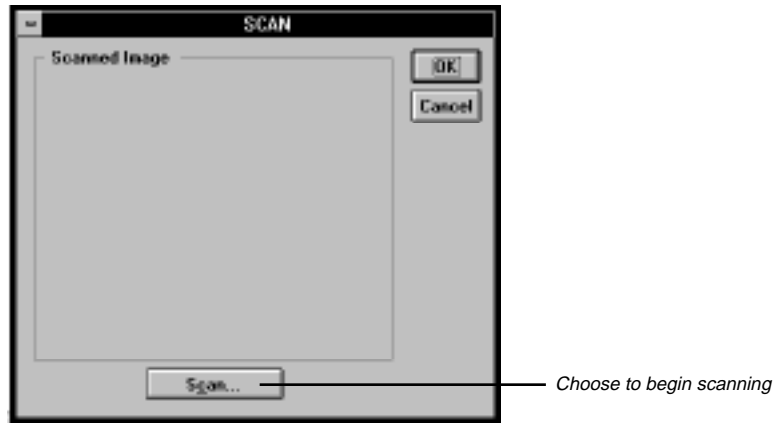
5. Select the drive and directory where you placed the image or audio recording file. A list of image or audio files appears in the Add Image File box, depending on the media type you selected in the Multimedia window.

6. Select the image or audio recording you want to add to the library and choose Open. If you choose an image, a preview window opens where you can view the image you are adding. Choose OK to return to the Multimedia 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 and will print below the image in Gallery reports. 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 hard drive location 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. Choose Caption (optional) to open a text window where you can enter a caption for the image. The caption is included below a digitized image when it's printed and should be limited to 50 characters or less.
13. Choose 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. Choose 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. Choose OK to close the New media window.
15. The Multimedia Library window displays the name you typed in the Name Field in the Media Library list. Choose OK to close this window.

## Scanning an Image into the Multimedia Library

**Note** You must use a TWAIN-compatible device (such as a scanner) to scan images in Ultimate Family Tree.

1. From the Build menu, choose Multimedia Library.
2. Choose New in the Add Media group.
3. Select Digitized Image in the Media Type group.
4. Choose Scanner in the Add New Media From group to open the Scan window.
5. Choose Select Source to select the scanner you wish to use.
6. Choose Scan to open the control window supplied by the manufacturer of your TWAIN-compatible device and begin scanning.
7. Choose OK to close the window.



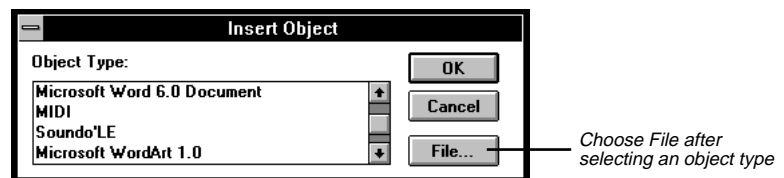
**Figure 7-5: Scan Window**

8. In the New window, enter a unique name (up to 20 characters) in the Ref Name field. The Ref Name is required because it is used in Media List Boxes.
9. Enter the optional Media Details for your scanned image.

## Adding an Existing OLE File in Windows 3.x

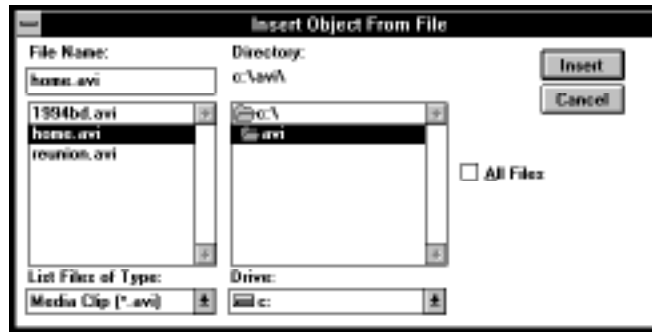
OLE objects, constructed from your media, are placed in Ultimate Family Tree. The program used to import OLE objects into Ultimate Family Tree is called the OLE server. The program in which an OLE object is placed is called the OLE client. Consult your Windows manual for a more detailed discussion of OLE technology.

1. From the Build menu, choose Multimedia Library.
2. Choose New in the Add Media group.
3. Select OLE in the Media Type group.
4. Choose OLE in the Add New Media From group to open the OLE window.
5. From the Edit menu, choose Insert Object.



**Figure 7-6: Insert Object Dialog Box**

6. In the Insert Object window, select the object type and choose File.



**Figure 7-7: Insert Object From File Dialog Box**

7. Change to the drive and directory that contain the file you want to add.
8. Choose Insert. An OLE window opens with an icon representing the object.
9. Close the OLE window by double-clicking on the close box.
10. In the New Media window, enter a unique name (up to 20 characters) in the Ref Name file.
11. Enter the optional Media Details for the OLE file.
12. Choose OK to close the window.

## **Adding an Existing OLE File in Windows 95 (or Windows 3.x)**

1. From the Build menu, choose Multimedia Library.
2. Choose New in the Add Media group.
3. Select OLE in the Media Type group.
4. Choose OLE in the Add New Media From group to open the OLE window.
5. From the Edit menu, choose Insert Object.
6. In the Insert Object window, select the object type and choose OK to open a server windows for the type you have chosen.
7. Carefully follow the instructions shown in the window. These instructions vary according to the individual server. When you close the server window, an icon appears in the OLE window.
8. Close the OLE window by double-clicking the close box.
9. In the New Media window, enter a unique name (up to 20 characters) in the Ref Name file.



10. Enter the optional Media Details for the OLE file.
11. Choose OK to close the window.

**Note** Some OLE servers (such as Windows Media Player) interfere with Ultimate Family Tree. If you lock (freeze) when exiting Windows, use Ctrl-Alt-Del to reset your system. To prevent this problem, use Object Packager to link OLE objects.

## Using Microsoft Object Packager with Ultimate Family Tree

Object Packager is a Windows program that converts images, text, video clips, and sounds to an OLE object that can be linked to Ultimate Family Tree. Object Packager is located in the Windows Accessories Group in Windows 3.x. It is located in the Windows folder in Windows 95. Read the Object Packager online Help to learn about its many capabilities.

Objects can be connected to Object Packager in one of two ways:

- Start Object Packager and choose Import from the File menu to import a file that can be embedded in Ultimate Family Tree.
- Choose Paste from the Edit menu to link an object from a server where you have previously copied that object to the clipboard.

The following procedure shows how to use Object Packager. It assumes that you have previously installed Video for Windows on your system. To link a video clip to Ultimate Family Tree through Object Packager, follow these steps:

1. Start Media Player from the Accessories Group or type media player in the Run window in Windows 95.
2. Choose Video For Windows from the Device Menu. The file Open dialog box is displayed.
3. Choose an AVI file from the file list, and then choose Open (or OK in Windows 3.1).
4. Choose Copy Object from the Media Player Edit menu.
5. Exit Media Player.
6. Start Object Packager. Type package in the Run window in Windows 95.
7. From the Edit menu, choose Paste.
8. From the Edit menu, choose Copy Package.
9. Exit Object Packager.
10. Start Ultimate Family Tree.
11. From the Build menu, choose Multimedia Library.
12. Choose Add Media, New.
13. Select the OLE Media Type radio button.

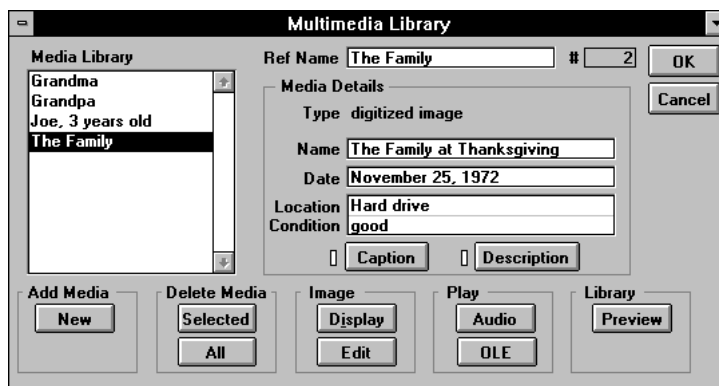


Figure 7-8: Multimedia Library Window

14. Choose OLE in the Add New Media From group.
15. From the Edit menu, choose Paste.
16. Close the OLE edit window.
17. Type a reference name for the clip and any other information you wish.
18. Choose OK.

The Video For Windows clip has now been linked to Ultimate Family Tree. To play the video clip, double-click the name of the clip in the Media Library list in the Multimedia Library window.

Copy and paste static objects, such as text or graphics, into Object Packager and embed them in Ultimate Family Tree using similar steps. The embedded objects can then be used in slide shows and linked to individuals.

## Paste Special

Use the Paste Special menu option to link or embed an OLE object on the clipboard to the Ultimate Family Tree Multimedia Library. The object retains the formatting and other characteristics it had in the application that created it. For example, you can copy part of a Microsoft Excel spreadsheet and paste it as an object into Ultimate Family Tree. You can then double-click the object to open it in Excel, and edit or print the object.

The Paste Special menu option is not available until you copy the object you want to paste. To use Paste Special, select information from the source document or application, and then use the Copy command from the Edit menu to place it on the clipboard.

The Paste Special dialog contains the following options:

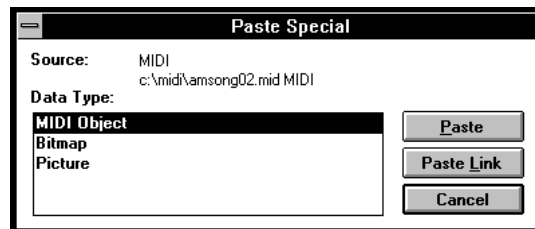
- *Source area* — Displays the application, directory, and file you are pasting from.
- *Data Type list* — Displays the available formats for the object. Select the format for the object you are pasting according to what you want to be able to do with the stored object in Ultimate Family Tree.

Use Object format to edit the object by opening its source application from Ultimate Family Tree. Choose picture or bitmap formats to display the object and minimize the space it occupies in Ultimate Family Tree. If you plan to change the size of the object, choose the Picture format. If an object has a picture or bitmap format, you cannot edit it from Ultimate Family Tree.

- *Paste* — Embeds the object from the clipboard into the OLE Edit window.
- *Paste Link* — Links the object to Ultimate Family Tree as the destination so you can modify the linked object in Ultimate Family Tree.
- *Cancel* — Exits the dialog without taking action.

To use Paste Special, follow these steps:

1. Copy to the clipboard the information from the server you want to embed or link.
2. Return to or open Ultimate Family Tree.
3. Choose New in the Multimedia Library window.
4. Select OLE in the Media Type list.
5. Choose OLE in the Add New Media From group.
6. From the Edit menu, choose Paste Special. The Paste Special dialog box appears.



**Figure 7-9: Paste Special Dialog Box**

7. From the Data Type list, select the format you want to use.
8. Choose the Paste button to embed the object or the Paste Link button to link it.

**Note** Depending on the application used to create the object, or whether the object is in a saved document, the Paste Link button may not be available.

9. Close the OLE window.

## Editing an OLE File

You can't edit OLE objects in Ultimate Family Tree. They are edited using the software program in which they were originally created. Objects that are embedded cannot be edited.

1. From the Build menu, choose Multimedia Library.
2. Select the OLE object you want to edit from the Media Library list.
3. Choose Edit in the Image Group. The OLE window opens.
4. From the Edit menu, choose Object.

**Note** If you choose Clear from the Edit menu, you clear the OLE object from the window and remove it. Choose Convert to Static to break the link between an object and its server

5. The program in which the OLE object was created opens, and you can edit the object.
6. To exit that program, choose Exit and Return from the File menu.

## Editing an Existing Digitized Image

Images can be edited in various ways. You can rotate the image and change brightness, contrast and sharpness. You can convert an image to gray or negative, and crop it. Additionally, you can add narrative for the image. If you want, you can save the edited image to a new file, and export it to any compatible image type. In Ultimate Family Tree you can compress 24-bit images and set image quality level.

1. From the Build menu, choose Multimedia Library.
2. Select the digitized image you want to edit from the Media Library list.
3. Choose Edit in the Image Group.

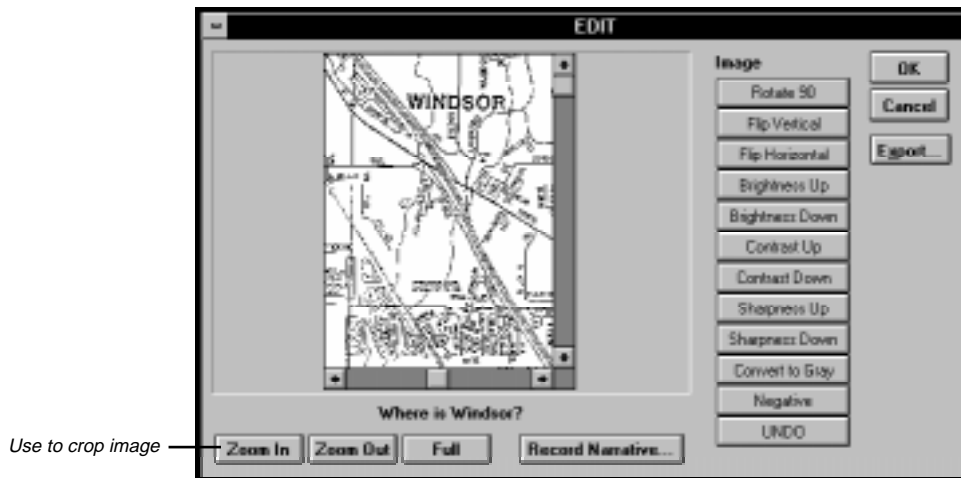


Figure 7-10: Edit Window

4. Choose any of the options listed in the Image field.

**Note** Image options are not available for all image types. Sharpness can be used for gray scale images, but not for color images or line drawings. If you choose an image function that does not apply to the current image, you'll see a message stating, "Format not allowed."

5. Choose Zoom In to magnify or crop the image.
6. Choose Zoom Out to shrink the image.

**Note** The zoomed view is saved when you close the window by choosing OK. Use Zoom and the scroll bars to crop the image.

7. Choose Full to view the entire image.
8. Choose Undo to return the image to its original appearance.
9. Choose Record Narrative to open the Windows Sound Recorder where you can record a narrative for this image.
10. Choose OK to close the window. In the Save window choose Cancel if you do not want to save the changes, or choose OK to save the changes. To confirm, choose Proceed to continue, or Cancel to return to the Save window to make the name changes.

**Note** If you want to save the original image and at the same time save the newly edited image, follow these steps:

1. Enter a different Reference Name for the newly edited image.
2. Enter a different Descriptive Name (optional). The descriptive name is limited to approximately 35 characters.
3. Choose Caption and/or Description (optional) to edit or enter a new caption or description for the image.
4. Choose OK to save the changes in a file with the new file name.

The edited image title will appear in the Media Library list.

## Adding Narrative

The narrative can be heard in various view windows, preview windows, slide shows, and the Individual Record Media window. Before you can use Sound Recorder, you must use the Windows Control Panel to install and configure the appropriate device driver and sound hardware. See your Windows manual for more information.

1. To record a narrative for a selected image, from the Build menu, choose Multimedia Library.
2. Select the digitized image for which you want to add narrative from the Media Library list.
3. Choose Edit in the Image Group.

- Choose Record Narrative to open the Windows Sound Recorder where you can record a narrative for this image.

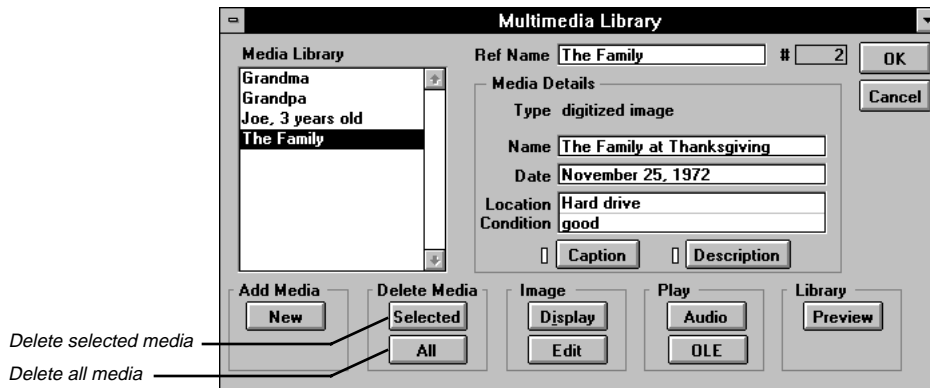
**Note** To use an existing .WAV file rather than recording a new narrative, choose Insert File from the Sound Recorder's Edit menu. Select the file you want as the narrative and choose Open. Choose Exit & Return from the File menu.

- Choose OK to close the window.

**Note** If you minimize rather than close Sound Recorder (or click the mouse anywhere on the desktop), the Image Edit window will not be active. Press Escape to close Sound Recorder and activate the Image Edit window.

## Deleting Media

- From the Build menu, choose Multimedia Library.



**Figure 7-11: Multimedia Library Window**

- Select the media you want to delete from the Library list on the left.
- Choose the Selected button in the Delete Media group to delete the selected media or choose the All button to delete all media from the Multimedia Library.
- Choose Proceed to delete the selected media or Cancel to return to the Multimedia window.

**Note** After deleting media, choose Project, Pack from the Utilities menu to permanently remove the deleted records and reduce the disk space used.

## 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 × 640 pixels and 256 colors 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 Windows Colors option. See page 196 for more information.

## Displaying a Digitized Image

1. From the Build menu, choose Multimedia Library.
2. Select the digitized image you want to view from the Media Library list.
3. Choose Display in the Image group.

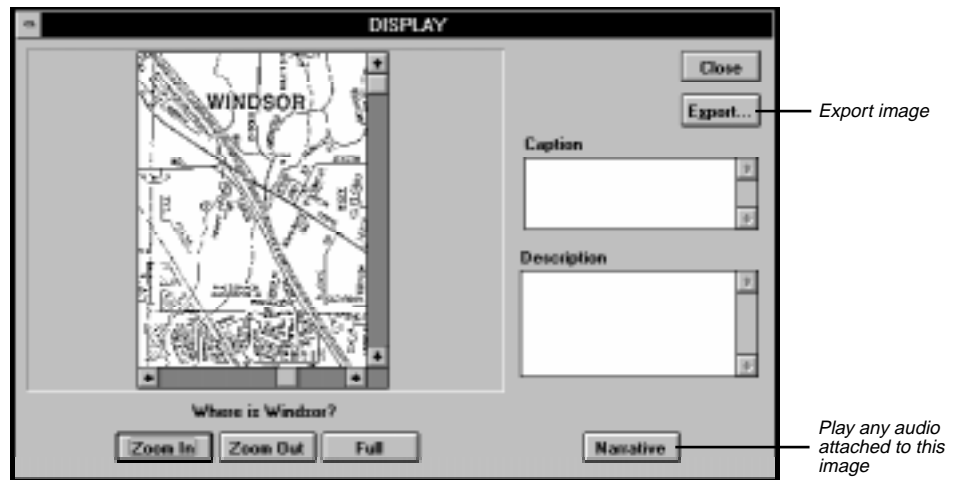


Figure 7-12: Display Window

4. Use the Zoom In/Out and Full buttons to view the image.
5. Play any audio attached to this image by clicking the Narrative button.
6. Add a caption for the image, or any descriptive text, in the appropriate fields.
7. If you want to export the image to an External file, choose Export.
8. Choose Close to return to the Multimedia Library window.

## Exporting a Digitized Image

You can export a digitized image to use in other programs. Follow these steps to export an image from the Multimedia Library window:

1. From the Build menu, choose Multimedia Library.
2. Select the digitized image to be exported from the Media Library list.
3. Choose Display in the Image group.
4. Choose Export.
5. Select the file type of the image you wish to export. File types include:
  - *BMP* — Microsoft, up to 16.7 million colors (24-bit)
  - *GEM IMG* — Digital Research, 16 colors (4-bit)
  - *GIF* — CompuServe, 256 colors (8-bit)
  - *JPG* — Joint Photographic Experts Group, 16.7 million colors (24-bit)
  - *MAC* — Apple Computer MacPaint, 2 colors (1-bit)
  - *MSP* — Microsoft, Microsoft Paint, 2 colors (1-bit)
  - *PCT* — Apple Computer, PICT, 16.7 million colors (24-bit)
  - *PCX* — ZSoft, 16.7 million colors (24-bit)
  - *TGA* — Truevision, TARGA, 16.7 million colors (24-bit)
  - *TIF* — Aldus TIFF, 16.7 million colors (24-bit)

**Note** Valid file types are in the File Type list. If a type is dim, it is because the file type is incompatible with the Ultimate Family Tree image. For example, a 24-bit format, such as .BMP, cannot be saved in an 8-bit format such as .GIF.

6. Choose Save.
7. Enter a file name in the Save As window. Ultimate Family Tree adds the file extension.
8. Change to the drive and directory into which you wish to export the image.
9. Choose Save, or Cancel if you do not want to save changes.
10. Choose Close to close the Display window.

## Playing an Audio Recording

1. From the Build menu, choose Multimedia Library.
2. Select the audio (.WAV) recording you want to hear from the Library list.
3. Choose Audio in the Play group.



## Previewing the Multimedia Library

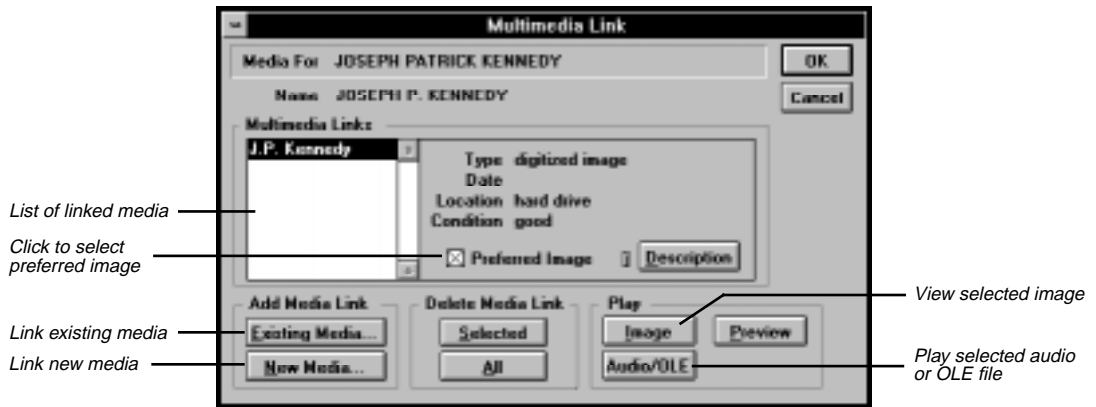
The Preview window displays media stored in the Multimedia Library. The media files are displayed in a slide format, up to eight at one time, with their control names.

1. From the Build menu, choose Multimedia Library, and then choose Preview in the Library group to view all media stored in the Multimedia library.
2. Choose More, and then Media in the Individual Record window, and then Preview in the Multimedia Link window to view all media linked to the individual.
3. Click the name under the slide in order to view the image in a larger format or play the recording or OLE object.
4. Choose the More>> button to view any additional media.
5. Choose the <<More button to return to the previous Preview window.
6. Choose Close to return to the Multimedia Link or Multimedia Library window.

## Linking Media

You can link an unlimited number of images, audio recordings, or object to an individual.

1. Choose the More button in the Individual Record window, and then Media to open the Multimedia Link window.



**Figure 7-13: Multimedia Link Window**

2. Make sure the name of the desired individual appears at the top of the window and choose Existing Media from the Add Media Link box.
3. Choose Proceed (if a Note window appears) to open the Media Select window.

4. Choose Multimedia Library in the Media Source group to add existing media found in the Multimedia Library.

**Note** If you wish to add media which is linked to another individual or an existing slide show, choose the appropriate option 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 choose OK.

5. Select the media you want from the Media Library list.
6. Choose the Add button or double-click the media to move the selected media to the Linked Media list.
7. Choose Add All to add all media to the Linked Media list.
8. Choose Remove to remove selected media from the Linked Media List or 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 Multimedia Library window.

9. Choose 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 Media Tree, Family Tree, Family, and Descendant windows (and will be included in an Instant Web Page Report). From the Multimedia Link window, highlight the image you want as the preferred image and check the Preferred Image box. Choose More, and then Media in an Individual Record window to open the Multimedia Link window.

**Note** NOTE OLE images and audio files cannot be Preferred images.

## Adding New Media to an Individual

1. Choose More, and then Media in the Individual Record of the person to whom you want to add media.
2. In the Multimedia Link window, choose New Media to open a New media window.
3. Select Digitized Image or Audio (.WAV) in the Media Type group.
4. Choose File in the Add New Media From group.
5. Select the drive and directory where you placed the image or audio recording file. A list of image or audio files appears in the Add Image File box, depending on the media type you selected in the Multimedia window.
6. Select the image or audio recording you want to add to the library and choose Open. If you choose an image, a preview window opens where you can view the image you are adding. Choose OK to return to the Multimedia window or Cancel if you change your mind.

7. In the Multimedia 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 hard drive location 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. Choose Caption to open a text window where you can enter a caption that is included below a digitized image when it's printed. The caption should be limited to 50 characters or less (optional).
13. Choose 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. Choose 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. Choose OK to close the New Media window.
15. Choose OK to close the Multimedia Link window.

## Unlinking Media from an Individual

1. Choose 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, and from the Multimedia Links list, select the media you want to unlink.
3. Choose Selected in the Delete Media group to unlink the selected media or choose All to unlink all media from the individual.

**Note** The Delete Media buttons do not delete the media from the Multimedia library. These buttons merely unlink the media from the selected individual.

4. Choose Proceed to unlink the media.

## Viewing Images Linked to a Selected Individual

1. Choose the More button, and then Media in the Individual Record to open the Multimedia Link window.
2. Select the image you want to view in the Multimedia Links list.
3. Choose Image in the Play group.

## Playing Audio/OLE Recordings Linked to a Selected Individual

1. Choose More, and then Media in the Individual Record to open the Multimedia Link window.
2. Highlight the Audio or OLE recording in the Multimedia Links list.
3. Choose Audio/OLE in the Play group.

## Viewing All Media Linked to a Selected Individual

1. Choose More, and then Media in the Individual Record to open the Multimedia Link window.
2. Choose Preview to view all media linked to the individual in a slide show style. Each image or sound icon is displayed with its control name.
3. Select the name on the slide to view the image or play the recording or OLE object.
4. Choose the More>> button to view any additional media.
5. Choose the <<More button to return to the previous Preview window.
6. Choose Close to return to the Multimedia Link window.

## Slide Shows

One of the most exciting features of Ultimate Family Tree is the ability to create a slide show presentation using the image and audio files stored in the Multimedia Library. You can also add a voice-over narration to each slide.

To better understand how to set up a multimedia slide show, note the following:

- Slides can contain digitized images, audio files, or OLE objects. The slides are shown sequentially during a slide show. Digitized images are shown for a length of time that is set for each slide. Background music from a MIDI OLE server can also be included with the slide show, depending on the server.
- Voice-over narrations are played with their associated digitized image. Slides following a digitized image that contain audio files are then played while the digitized image is displayed. To adapt narrations to the current slide show, arrange slides in the proper order.

**Note** OLE images do not play in the slide show without activating the server.

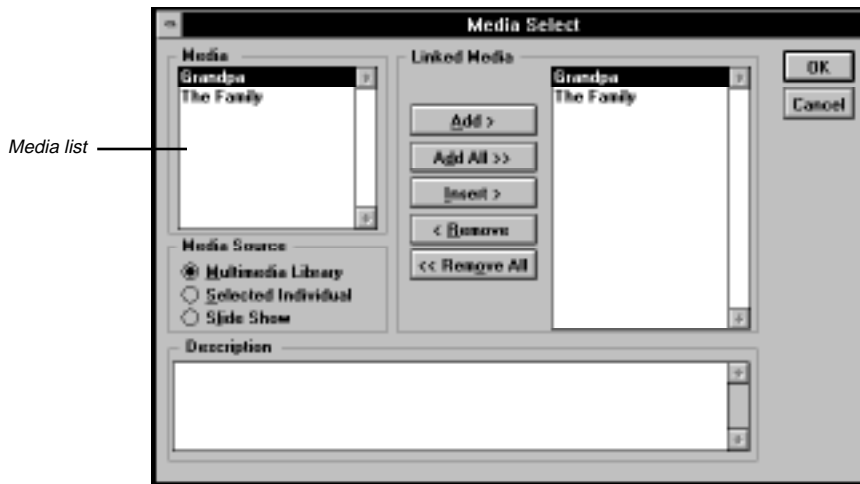
## Creating a New Slide Show

1. From the Build menu, choose Slide Show.
2. Choose New in the Add Show group.
3. Enter a name in the Show Name field. This required name appears in the Slide Show list.



**Figure 7-14: Slide Show Window**

- To add slides, choose Existing or New in the Add Slide group. If you choose Existing, continue with step 5. If you choose New, see “Adding a Digitized Image or Audio (.WAV) File” on page 151.



**Figure 7-15: Media Select Window**

- Choose Multimedia Library in the Media Source group. (Use the Selected Individual option to select media items linked to an individual. Use Slide Show to create a new slide show from an existing slide show.)
- In the Media List, highlight the media you want to include.

7. Choose 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** Use 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. Choose 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.

To view or hear any of the slides or view the complete slide show, choose any of the following buttons in the Play group:

- *Image* — Displays the selected image
- *Audio/OLE* — Plays the selected audio (.WAV) or OLE file
- *Slide Show* — Displays the entire slide show
- *Preview* — Displays all linked slides (up to 8 at one time) for the selected slide show

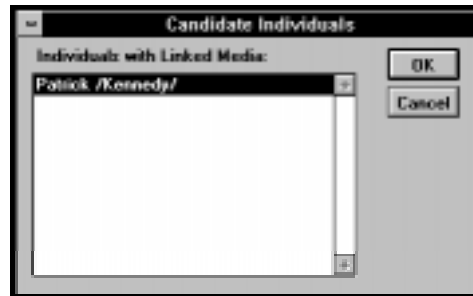
## Editing an Existing Slide Show

1. From the Build menu, choose Slide Show.
2. Highlight the slide show you wish to edit and choose any of the buttons in the Add Slide, Move Slide, or Delete Slide boxes to add new slides, to change the order that the slides display, or to remove slides from the Slide Show.
3. Choose 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 166.)
2. Highlight the slide show to which you want to link an individual’s linked media and choose Existing in the Add Media group.
3. In the Media Select window, choose Selected Individual 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 choose OK to open the Media Select window. The media linked to the selected individual is listed in the Media list.
5. In the Media List, highlight the media you want to include.



**Figure 7-16: Candidate Individuals Window**

6. Choose 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** Use 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. Choose 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. Choose OK to close the Slide Show window.

## Adding an Existing Slide Show to a Slide Show

1. From the Build menu, choose Slide Show.  
**Note** To create a new slide show, follow the steps in “Creating a New Slide Show” on page 166.
2. Highlight the slide show into which you want to link another slide show and choose Existing in the Add Media group.
3. In the Media Select window, choose 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 choose 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. Choose Add.  
**Note** To add all listed media to the slide show, choose Add All.
7. Repeat steps 5 and 6 until all media you want to add to the slide show has been linked.

**Note** Use 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. Choose 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. Choose OK to close the Slide Show window.

## Slide Shows and OLE

OLE objects can be used in Ultimate Family Tree slide shows. For example, you can link and play a Video For Windows clip as part of a slide show. One interesting source of video clips is Microsoft Encarta, which includes many historical video clips. Copy the .AVI files you want to use from the Encarta CD-ROM to your hard disk. The CD-ROM need not be present when you want to play the slide show. Be aware that video clips can be very large, and consume a significant amount of space on your hard disk. Use Object Packager to integrate video clips with Ultimate Family Tree because of conflicts some video servers create.

**Note** Some OLE servers (such as Windows Media Player) interfere with Ultimate Family Tree. If Windows locks (freezes) when you exit, use Ctrl-Alt-Del to reset your system. To prevent this problem, use Object Packager to link OLE objects. See “Using Microsoft Object Packager with Ultimate Family Tree” on page 155.

If you want to use a static object in a slide show, such as a drawing created with PC Paintbrush, use the Convert to Static option (active when editing an OLE object in the Multimedia Library window) on the Ultimate Family Tree Edit menu. Convert to Static breaks the link between an object and its server. When the object is then played in a slide show, the server is not activated.

You might want to activate the server during a slide show. For example, you can display a document produced in a word processing program, or a presentation from another source (such as Lotus Freelance), as part of a slide show. To keep the server active (rather than being closed by Ultimate Family Tree), set the Seconds to 999 for that slide in the Build Slide Show window. The slide will then be shown until you close the server.

With a few exceptions, only one OLE object and server can be active at one time in Ultimate Family Tree. This restriction is important if you wish to play music as the background of a show. MIDI music objects can be linked to Ultimate Family Tree and played in a slide show, but if a new server is activated while the music is playing, the new server overrides the one playing the music, and the music stops.

Play MIDI music in the background for a slide show that consists of digitized images that do not have narratives. Be sure to turn off the sound effects option. Narratives and sound effects are OLE objects, and they will stop the music.



## Section 8:

# Managing Your Data

---

In this section you will learn how to:

- ✓ Merge two projects
- ✓ Import data from another program (GEDCOM or ROOTS III)
- ✓ Export data from Ultimate Family Tree to another program
- ✓ Save a Project
- ✓ Backup (Archive) a project
- ✓ Restore an Archived 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 (clock, messages, date format, toolbar, image quality, name format, Windows colors, and wallpaper)

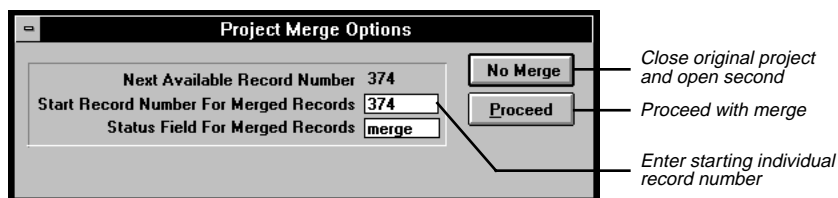
- ✓ Pack a project
- ✓ Use Check and Repair
- ✓ Reindex a project
- ✓ View a GEDCOM Exception List

## Merging Projects

At some point you may want to combine one project with another.

**Note** You cannot merge two projects that use different library files. To combine two projects that use different library files, use GEDCOM. If you're using Visual ROOTS or ROOTS IV, see "Using ROOTS IV and Ultimate Family Tree Together" on page 216.

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 Project from the File Type drop-down list.
4. Select the drive and directory where the second project is located. Select the project name from the file list. Choose OK to open the specified project. 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 1.) 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. Choose Proceed to merge the two projects. (If you change your mind, choose No Merge. Choosing 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. Choose Proceed 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 191.

## Data from Another Program

Ultimate Family Tree can import GEDCOM data from any another software program that is also GEDCOM compatible.

**Important Note about GEDCOM** The GEDCOM (GEnealogical Data Communications) standard provides a set of rules that allow software designers to create programs for exchanging genealogical information. The GEDCOM standard has been 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). Version 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. It 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, except where incompatibilities exist with version 4.0.

The GEDCOM standard, while providing an excellent starting point, can be interpreted differently by two designers, resulting in potential incompatibilities. For these reasons, the export and import of GEDCOM information to and from Ultimate Family Tree 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 these problems.

### Importing a GEDCOM File

Ultimate Family Tree imports GEDCOM files that use either the ANSEL or IBM-PC character sets. Because of the disk space used during the conversion, copy the GEDCOM file to your hard disk before attempting the conversion.

**Note** If you want to import a GEDCOM file from multiple floppy disks, copy the files from the floppy disks to your hard disk. When all the files are on the hard disk, use the DOS COPY command to combine the separate files into the .GED file. Example:

```
COPY SMITH.GED + SMITH.G00 + SMITH.G01 JONES.GED [Press Enter]
```

Once the files are combined in the JONES.GED file, you can import the GEDCOM file into Ultimate Family Tree.

1. From the File menu, choose Open.

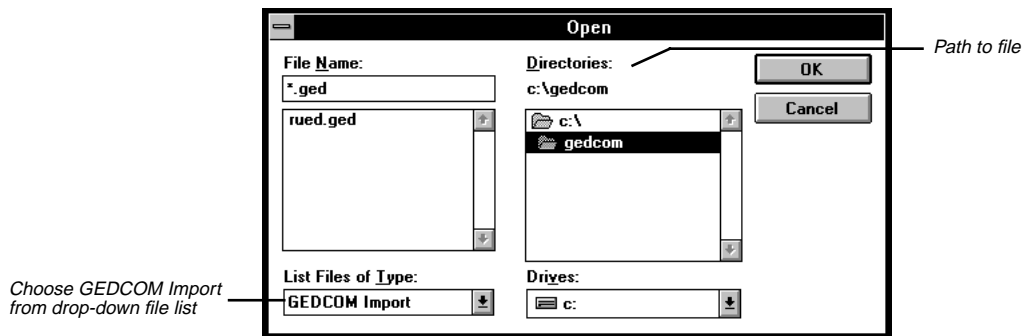


Figure 8-2: Open File Window

2. In the File Type drop-down list, select GEDCOM Import.
3. Select the drive and directory where the .GED file can be found.
4. Select the GEDCOM file to be imported and choose OK. The Import from GEDCOM Options window will open. See page 178 for additional information on the Options window.

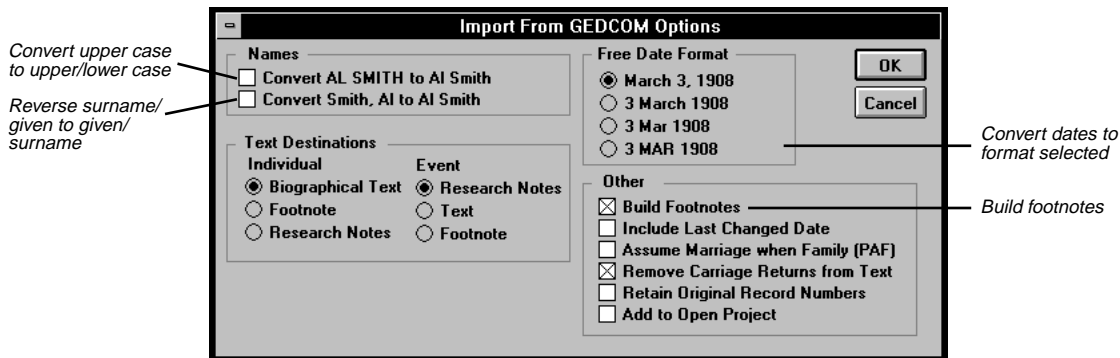


Figure 8-3: Import from GEDCOM Options Window

The following options are unique to the Import from GEDCOM Options window. See page 178 for options common to GEDCOM and ROOTS III imports.

**Text Destination: Individual**

- *Biographical Text* — Converts text notes attached to individuals to the Individual Biographical Text window 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 window of the Individual Record window.

**Text Destination: Event**

- *Research Notes* — Converts text notes attached to events to the Event Text Research Notes window of the Individual Record window.
- *Text* — Converts text notes attached to events to the Event Text window of the Individual Record window.
- *Footnote* — Converts text notes attached to events to the Event Text Footnote window of the Individual Record window.

**Other Group**

- *Assume Marriage When Family (PAF)* — Select this option if your previous genealogy program does not distinguish between family records and marriage records, but instead uses a FAM tag 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* — Select this option to remove carriage returns from text notes and allow Ultimate Family Tree to correctly wrap text.
  - *Retain Original Record Numbers* — Select this option 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 choose Proceed, any individuals with NUMB tags receive the original record number, and those without a NUMB tag receive the next available record number. Choose Cancel to abort the conversion.
5. Choose OK when you have made your option choices.
  6. In the Save As Dialog Box, enter a file name for the project, with the extension .PRO.
  7. Select a different drive and directory if you want. Use the PROJECTS subdirectory or a subdirectory other than the FG directory.
  8. Choose OK 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 200.
  9. Press any key on the keyboard or move the mouse to remove this message.

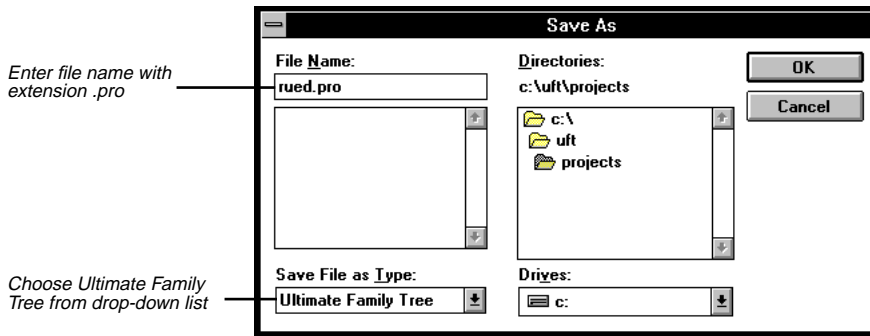


Figure 8-4: Save As Window

10. Enter the appropriate data in the Project Information window. See page 193 for more information on the Project Information window.
11. Choose OK to close the Project Information window.

**Note** If you import an Event 1.0 GEDCOM file that includes media, any OLE or .WAV files become referenced media. Only digitized images are imported in their true form and can be viewed in Ultimate Family Tree.

## Importing From ROOTS III

You can easily convert ROOTS III databases (familyname.edb) for use in Ultimate Family Tree. Because of the size of temporary files created during the conversion, the .EDB file should be located on the hard drive before attempting the conversion.

1. From the File menu, choose Open.
2. In the File Type drop-down list, select ROOTS III Basefile.
3. Select the drive and directory where the .EDB file can be found.
4. Select the .EDB file to be converted and choose Open. The Import from ROOTS III Options window opens. See page 173 for additional information on the Options window.

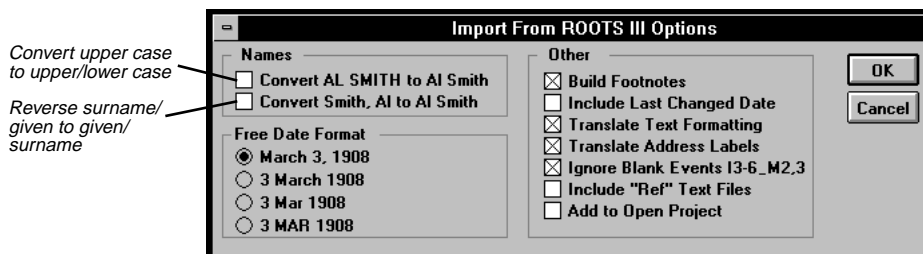


Figure 8-5: Import from ROOTS III Options Window

5. Choose the options you want. The following options are unique to the Import from ROOTS III Options window. See page 178 for options common to GEDCOM and ROOTS III imports.
  - *Translate Text Formatting* — Select this option to convert ROOTS III dot commands to Ultimate Family Tree formatting commands. The following commands are not supported in Ultimate Family Tree:
    - .. Remarks
    - .i Print line and set temporary indent
    - .# Set blank space
    - .e Blank page
    - .n Normal left margin
    - .s Superscript
  - *Translate Address Labels* — Select this option if you created mailing labels in the Resides field in ROOTS III and you want them directed to the Ultimate Family Tree mailing label fields. The caret (^) must be present in the ROOTS III Resides Detail Footnote for the address to be redirected to the Ultimate Family Tree Mail Label window.
  - *Ignore Blank Events I3-6 & M2,3* — Select this option if you have events that are defined but not used in lines 3, 4, 5, or 6 of Individual Edit Records and lines 2 and 3 of Marriage Records in ROOTS III. ROOTS III individual records have six fields for events, while marriages have three. If these fields are not used, they are considered blank events. To prevent them from being imported into Ultimate Family Tree, select Ignore Blank Events. This prevents Ultimate Family Tree from creating events for an individual when they did not occur. An event is not considered blank if it has at least a date, place, or footnote.
  - *Include "Ref" Text Files* — Include text files that are named using the reference field.  
See page 178 for import options common to GEDCOM and ROOTS III.
6. Choose OK.
7. In the Save As Dialog Box, enter a file name for the new project, with a .PRO extension.
8. Choose OK to start the conversion.
9. When the conversion is complete, enter the appropriate data in the Project Information window.
10. Choose OK to close the Project Information window.

For more technical information on how data in ROOTS III converts to Ultimate Family Tree, see the Appendix, "Notes for ROOTS III Users," page 220.

## Importing GEDCOM from Family Tree Maker for Windows

If your family's data has been stored in Family Tree Maker for Windows (version 2 or 3), here's how to transfer it to Ultimate Family Tree:

1. In Family Tree Maker, from the File menu select Copy/Export Family File.
2. In the File Format pulldown list, select GEDCOM (\*.GED). Make a note of the file name you are saving to. Click the OK button.

**Note** If you receive an error message that the file already exists, press OK, type an unused file name in the File Name box and press OK again.

3. In the Export to GEDCOM dialog box, make the following selections:

Destination: ROOTS  
GEDCOM: Version 4  
Character set: ANSEL

then click OK.

**Note** If you want to export data from the Title, Alias or Address entries in your database, or have used the Facts feature of Family Tree for Windows, before clicking OK you must first click Fields to Export and follow the procedures for GEDCOM export in the Family Tree Maker manual.

4. When Family Tree Maker has finished writing the file, close Family Tree Maker and start Ultimate Family Tree.
5. From the File menu, select File Open.

Follow the steps starting on page 174 to convert the GEDCOM file.

## Common GEDCOM and ROOTS III Import Options

### Names

- *Convert AL SMITH to Al Smith* — Select this option if your GEDCOM file has names in all uppercase and you want to convert the names to upper/lowercase.
- *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.

**Free Date Format** Select one of the four free-form date 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 free-form date prints on unstructured reports such as the Genealogy Reports.





- *Include Last Changed Date* — Select this option 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 window in the Individual Record window.
- *Add to Open Project* — Select this option 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 button is unavailable (dim). Cancel the options windows and open the project with which you want to merge the new project.

## Importing Unrecognized Events

Events in ROOTS III, for which you either created your own legend (for example, identifying name) or used the Extra event legend, transfer into Ultimate Family Tree with the characters #R3 directly in front of the event name (for example, #R3Name). Events from other genealogy programs 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 role text or GEDCOM tags. They will not print in text reports and will not be included in GEDCOM exports. To transform them into fully recognized and useable event records within Ultimate Family Tree, you must first find the event and individuals connected to it.

1. From Search menu, choose Events.

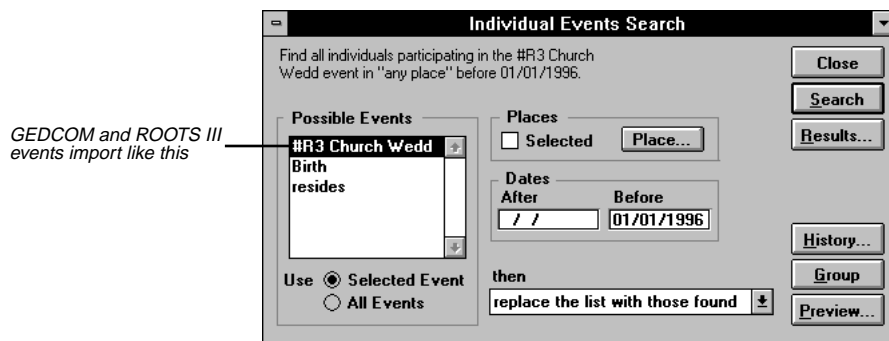


Figure 8-7: Events Search Window

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 Places check box.
5. Enter today's date in the Before Date field (leave the After Date field blank).
6. Select the option, Replace the list with those found.
7. Choose the Search button. The Results list opens.

8. Select the first name in the list, and double-click the left mouse button or press F5 to open the Individual Record for that person.
9. Create a new event for that person using either an Ultimate Family Tree event type or a New Event type you create. See “Adding Events” on page 3 and “Creating a New Event Type” on page 33.
10. Delete the original # event by highlighting the event name on the Individual Record and pressing the Del (delete) key on the keyboard.
11. Save the record by clicking the Save button on the Toolbar or pressing F9.
12. Press F4 or choose the next button on the Toolbar to move to the next person in the Events Search list.
13. Repeat Steps 1–12 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, ROOTS III, 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.

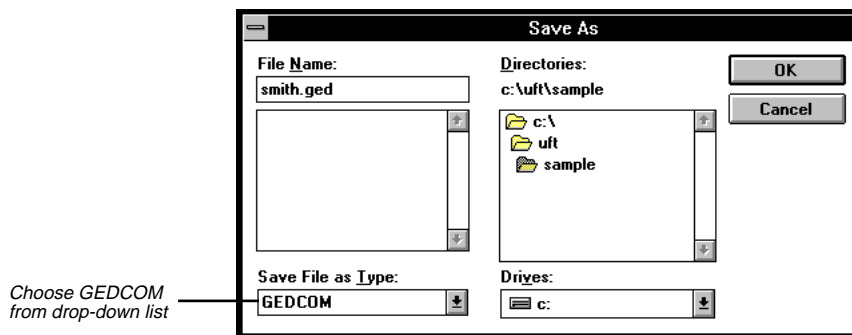


Figure 8-8: Save As Window

2. Select GEDCOM from the Save As File Type drop-down list. Type the name in the File name field. Choose OK. The Save As GEDCOM Options window opens, providing selections that determine the format and content of Ultimate Family Tree GEDCOM files.

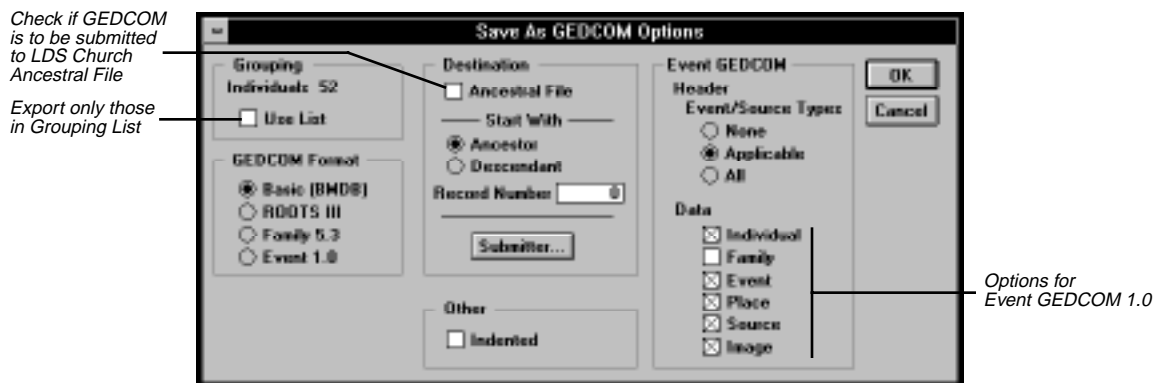


Figure 8-9: Save As GEDCOM Options Window

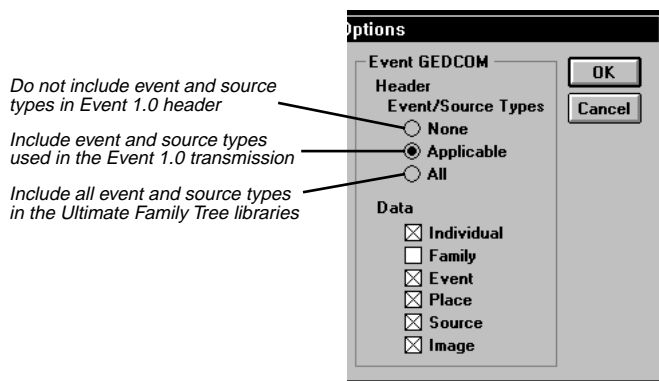
3. Use Grouping to create a GEDCOM export with only part of your project. To export a selected family line, use the Relationship Search window to define the family, and then add the results to the Grouping list. Check Use List under Individuals in the Grouping field to export only the individuals found in the Grouping List.
4. Choose a GEDCOM type from the GEDCOM Format Group:
  - *Basic* — Creates a GEDCOM file that contains information about the basic events of birth, marriage, death and burial in addition to family links. Basic GEDCOM export is useful for sending minimal data to programs, such as special purpose utilities used for creating genealogical charts.
  - *ROOTS III* — Creates a GEDCOM file similar to those created by ROOTS III. This GEDCOM format uses the GEDCOM 4.1 specifications and exports events accepted by ROOTS III.
  - *Family 5.3* — Uses the GEDCOM 5.3 specification. 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 information is not exported. Media files are not included.
  - *Event 1.0* — 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 ROOTS IV. At the current time, only Ultimate Family Tree, Visual ROOTS and ROOTS IV support Event GEDCOM.

**Note** Photo files are created for all linked images and are located in the directory in which the GEDCOM file was saved. They normally have an extension that includes their format, such as .PCX. If Ultimate Family Tree finds a file of the same name, it converts the extension to a number from 1 to 999.

### Creating 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 Event/Source Types radio buttons to determine how much event/source type information is included in the file.



**Figure 8-10: GEDCOM Options Window**

The Data selection options provide a way to tailor the data content of the GEDCOM file and create special files. For example, it is possible to create a GEDCOM file containing places for New England, or sources useful for California research before 1900.

- *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 (for example, .PCX, .TIF, etc.). Keep these media files with the GEDCOM file.

5. In the Destination group, choose Ancestral File, and then 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 a GEDCOM file to be submitted to the LDS Church do not check Ancestral File and skip to step 6.

An LDS submission requires these steps in order:

- 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.
  - Choose the Submitter button.
  - Enter the submitter name, address and phone number.
  - Enter any comments concerning the GEDCOM file in the Comments field.
  - Choose 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 Data Control  
50 East North Temple  
Salt Lake City, UT 84150
6. 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.

7. Choose OK.
8. Enter a file name with a maximum of 8 characters in the Name field with the extension .GED.
9. Change the Drive and Directory to the location you want to send the GEDCOM file, for example, \UFT\GEDCOM.

**Note** Do not export GEDCOM files to floppy disks. Be sure you have sufficient disk space on the hard drive before starting the GEDCOM export. After creating the GEDCOM file on your hard drive, use the Windows File Manager to copy the file to a floppy disk. If the file is larger than one floppy disk can hold, use the DOS BACKUP command (or MSBACKUP) to copy the file to multiple disks.

10. Choose Save to start the GEDCOM export.

## Saving and/or Backing up Data

Always make copies of your Ultimate Family Tree project files and library files to protect against disk corruption 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 Multimedia Library. If it is ever necessary to restore project, library or media files, you will have to reenter 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.

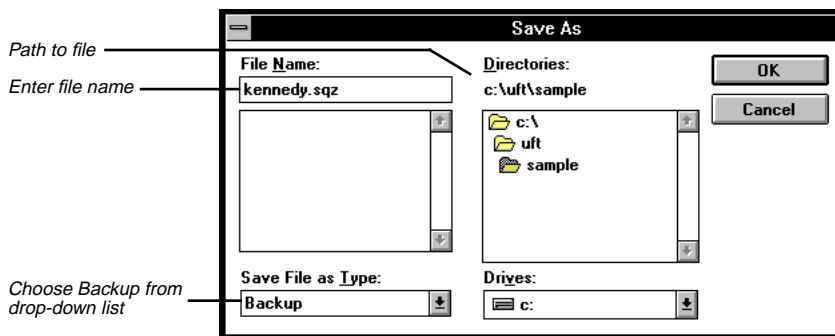
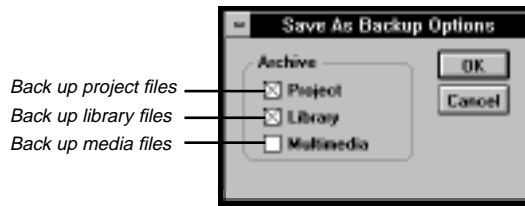


Figure 8-11: Save As Window

2. Select Backup from the Save file as type drop-down list.
3. Enter the file name, with the extension .SQZ, for the archive you are creating in the file name field. Remember, enter a different file name for each backup if saving the project, library, and multimedia files separately.
4. 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.
5. Choose OK. The Save As Backup Options window opens.
6. Select Project to back up the project files.



**Figure 8-12: Save As Backup Options Window**

7. Select Library to back up the library files.

**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 Multimedia files are common to all projects and need only be archived once for all projects.

8. Select Multimedia only if you have modified the Multimedia Library. (The Multimedia files greatly increase the size of your backup.)
9. Choose OK.

If you save the backup to your hard disk, use the Windows File Manager to copy the archived file to a floppy disk to protect it. If the file is larger than one floppy disk can hold, use the DOS BACKUP command (or MSBACKUP) to copy the file to multiple disks. Archive files have the extension .SQZ.

See your Windows and DOS manuals for further instructions on using the COPY and/or BACKUP commands.

## 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. Choose File on the menu bar.
2. Choose Open.
3. Select Backup from the drop-down list.
4. Select the drive and directory where you placed the backup. If the backup is on a floppy disk, select the drive that contains the floppy disk. The current directory name is displayed above the directory listing box.
5. Highlight the backup file to be restored. Backups have the extension .SQZ, such as FILENAME.SQZ.
6. Choose 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.”
7. Choose Proceed. A message at the top right of the window will state, “processing compressed file.”



**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, choose Cancel rather than Proceed.

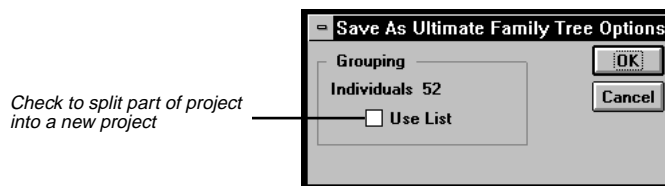
When processing is complete, the restored project opens.

## Save As Ultimate Family Tree Project

Use the Save As window to save the current project as an 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 directory 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 from the Save file as type drop-down list.
3. Enter a new file name for the new project, with the extension .PRO in the Name field.
4. Select the directory for saving the new project. Use a different project name to avoid confusion. If you are saving the project using the same file name, place the new project in a directory different from that occupied by the current project
5. Choose OK. The Save As Ultimate Family Tree Options window opens if there are individuals in the Grouping list.

**Note** Use the Grouping options if you want to split part of your project into a new project. For detailed steps on how to split a project, see “Splitting a Project” on page 188.



**Figure 8-13: Save As Family Gathering Options Window**

6. Choose OK. 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.
7. Choose Cancel if you want to close the Save As window and return to the current project without saving changes.

**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.

## 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 finding 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 find the individuals you want to use in a new project, follow these steps:

1. Choose Relationship from the Search menu.
2. Press F10 or click the Find button on the Toolbar 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 drop-down list.
7. To check the search without committing the results to the permanent search list, choose Preview. Press Escape to return to the Search window.
8. Choose Search to create the Search list.
9. Choose Group to move the contents of the search to the Grouping list.

To create the new project, follow these steps:

1. From the File Menu, choose Save As.
2. Select Ultimate Family Tree from the Save file as type drop-down list.
3. Enter a new file name with the extension .PRO for the new project in the Name field.
4. Select the directory for saving the new project. Use a different project name to avoid confusion, otherwise, you must place the new project in a directory different from that occupied by the current project.
5. Choose OK. The Save As Ultimate Family Tree Options window opens. The number of individuals in the Grouping List will be displayed.
6. Check Use List.
7. Choose OK.

**Note** 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 description name you entered 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.

8. Choose Cancel if you want to close the Save As window and return to the current project without saving changes.

**Note** Because the Save As Ultimate Family Tree feature creates a new project, be sure you 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. Do not save to a floppy disk.

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 steps you took previously to find the individuals for the new project.

1. Open the original project.
2. Choose Grouping from the Search menu.
3. Select Invert Selected.
4. Repeat the steps to create a new project.

When you complete these procedures, you will have two new projects from the original project, 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 191 for information on deleting projects.

## Deleting Data

### Deleting an Individual from the Project

1. To Delete an individual from the project, choose the Find button on the Toolbar 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 or press SHIFT+F9. An "Are You Sure?" message appears. Choose 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. Choose OK to delete the individual or Cancel if you want to keep the individual.

### Deleting Text

Select the text to be deleted and press the Del key on the keyboard. See page 37 for instructions on selecting text.

### Deleting an Event

To delete an event, select the event in the Individual Record window and press F8 or choose the numbered button to the left of the event field to open the Events window. Choose the Delete button below the OK and Cancel button on the right. The Events window closes and a message appears asking if you want to delete the event. Choose OK.

Another option is to select the event name, such as Birth, in the Individual Record window and press the Del key on the keyboard. To respond to the message, “Delete existing event?” choose OK to delete that event or Cancel if you want to keep it.

If you delete an event that is connected to another individual, for example, a marriage event, the event is still connected to the other individual. Open the Individual Record for that other person to delete the event or connect a new individual.

## Deleting a Place from an Event

To delete a place from an event in the Individual Record window, highlight the place and press the Del (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 delete.
3. Choose the Delete button in the Places window. A message appears stating whether or not this place is used in the current project.
4. Choose OK.

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 remove from the Source List.
3. Choose Selected in the Delete group.
4. Choose Proceed to delete the source and footnote reference (if present) or Cancel to return to the Evidence window without deleting the source.

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 the list and highlight the source you want to delete.
3. Double-click the left mouse button or choose Source Record from the Build menu. The selected source is displayed.
4. From the File menu, choose Delete Record.

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 button in the Delete Show box to delete the selected Slide Show.
4. To delete all slide shows, choose All in the Delete Show box.

## 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. Choose OK.
3. Another window appears with this message, “ARE YOU SURE? This project will be PERMANENTLY erased if you choose OK.” Choose OK.

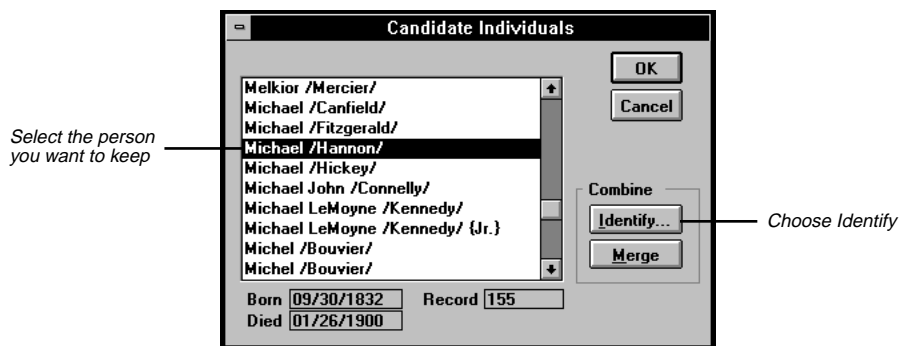
## Combining Individuals

The Combine Individuals feature is helpful when an individual is entered more than once in your project and you want to remove the duplicate person but retain that person’s links.

1. Select the name field and choose the Find button in the Individual Record window.
2. Select the person you want to keep.
3. Choose Identify. A note appears showing the name you selected as the surviving person and what to do.
4. Choose OK.
5. Select the individual to be merged from the Individual list.
6. Close the list by choosing the Close box or by pressing Escape.

**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 choose OK or Cancel.

7. Leave the Candidate Individual list as is (do not select another name) and choose 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. Choose OK or Cancel.



**Figure 8-14: Candidate Individuals Window**

9. If you proceed, another message appears asking if you would like to erase the individual who was merged from the project. Choose OK or Cancel. In most cases, you choose OK.
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. Delete duplicate events. Individual Evidence for the merged individual transfers to the surviving individual. Choose the Individual Evidence button and press the Save/Build Footnote button to rebuild the footnote.

**Note** If you started the combine feature at the main name field (not a Parent field) and then deleted that person during the combine, a blank individual record will open. If you don't want to create a new record, choose Undo from the Edit menu.

## 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 choose the Find button.
2. Select the place you want to keep.
3. Choose Identify. A note appears showing the name you selected as the surviving place and what to do.
4. Choose OK.
5. Select the place to be merged from the Places list.
6. Close the list by choosing the Close box or by pressing Escape.
7. Choose Merge in the Places window.

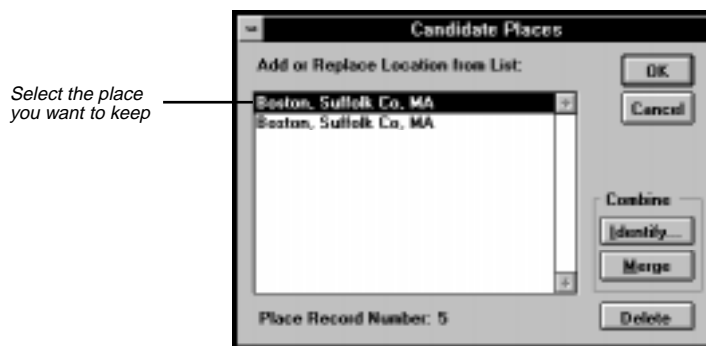


Figure 8-15: Candidate Places Window

8. Confirm the place names and choose 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.

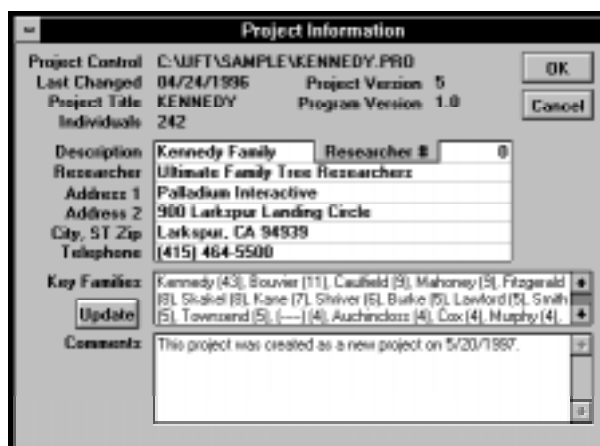


Figure 8-16: Project Info Window

2. The following information is provided:

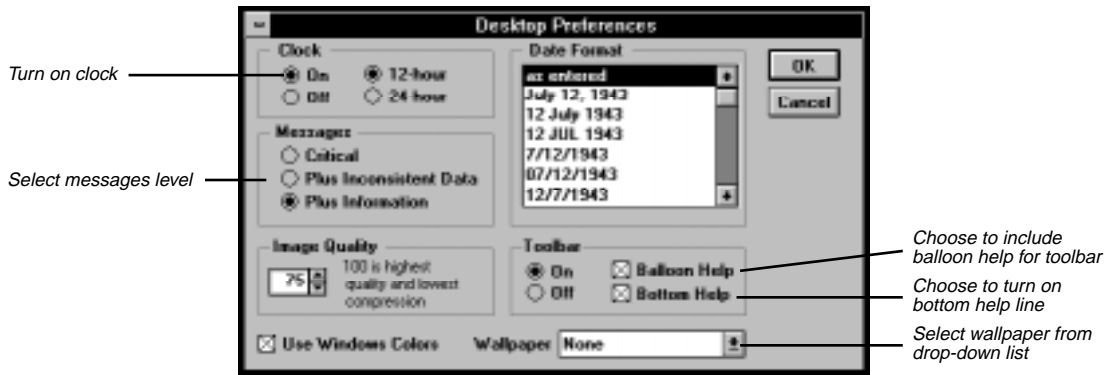
- *Project Control* — The name and path of the selected project control file.
- *Last Changed* — The date the selected project was last edited and saved.
- *Project Version* — The version number of the current project. In each session where the project is saved, the version number is increased by one.
- *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 on the Description line. This description appears on the Title Bar when the project is active.
- *Researcher* — The name of the principal researcher for the project in the Researcher field. This feature is optional. You can choose to have this name appear in the footer on printed reports.
- *Researcher #* — The Researcher's record number in the Researcher # field 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 Read Only 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* — 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, choose 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.





**Figure 8-17: Desktop Preferences Window**

Select any of the following options:

- *Clock* — Displays a clock in the lower-right corner of the Ultimate Family Tree window. Select ON in the Clock field 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.
- *Image Quality* — Sets image compression quality. JPEG compression is applied to 24-bit images imported into Ultimate Family Tree. Compressing an image reduces the storage space required but also reduces image quality. Experiment with the Image Quality setting to see its effect on the image. A setting of 100 provides the highest quality and the least compression.
- *Date Format* — Specifies the date format in the free-form 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 free-form date field, such as ABT to about.

**Note** Changes to the way dates display and print affect dates entered or changed after you've selected a preference. Dates entered before selecting a date 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).

- *Toolbar* — Controls balloon and bottom line help (visible when the mouse cursor is on an Ultimate Family Tree Toolbar button or a Descendant Box Chart Toolbar button. However, help on the Box Chart takes effect after you leave and return to Ultimate Family Tree. The Box Chart Toolbar is set up when Ultimate Family Tree starts. Note that there are two menu bars, long and short, in Ultimate Family Tree. The Toolbar is not active when the short menu bar is displayed.
- Ultimate Family Tree provides two styles for desktop display, Graphics and Windows Colors.
  - Use Windows Colors* — Sets Ultimate Family Tree to Windows colors selected in the Windows Control Panel.
  - Wallpaper* — Displays a wallpaper as the Ultimate Family Tree desktop background.

The graphics mode can reduce the performance of the program. If you suspect that Ultimate Family Tree is running more slowly than it should, switch to the Windows color mode.

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

2. Choose OK to close the Miscellaneous Desktop Preference window.
3. Exit and restart Ultimate Family Tree if you changed the Windows Colors or Wallpaper settings.

## Modifying the Name Format

To further customize Ultimate Family Tree, you can modify names 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.

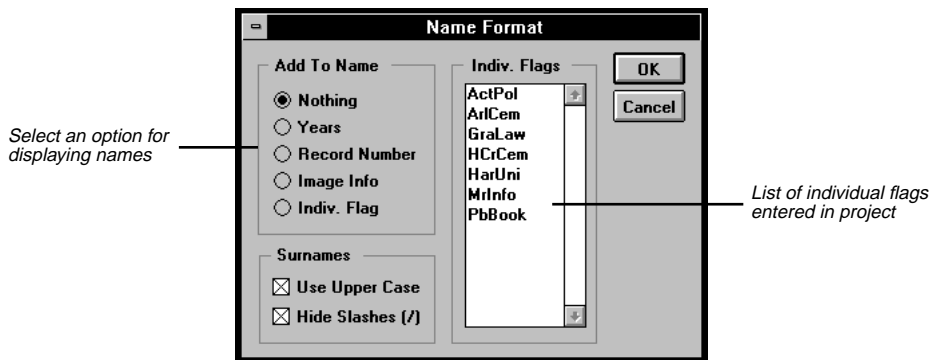


Figure 8-18: Name Format Window

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 that is activated when the 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 Use Upper Case to display surnames in all uppercase letters.
4. Check Hide Slash (/) to display surnames without slash marks. Checking also removes the braces { } from titles. This setting does not affect the Individual Record window.

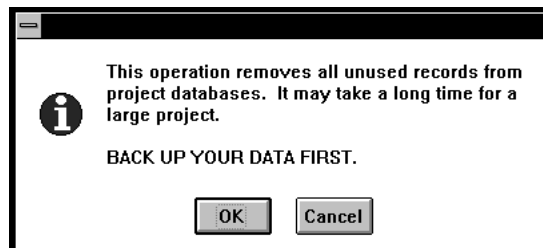
**Note** After changing the name format, click any open window to display the new name format.

## Project Utilities

Ultimate Family Tree offers several features to help you manage your project files. They are found under the Project option in the Utilities menu.

### Pack

Packing an 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.



**Figure 8-19: Pack Message Window**

The Pack process replaces your original project files. Make a backup copy of your project files before starting Pack.

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.

**Note** 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 207 for information on error messages.

## Check Window

The Check feature tests the files in an 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.

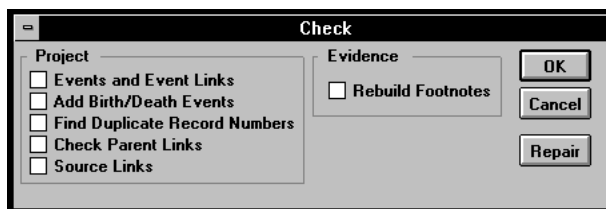


Figure 8-20: Check Window

2. Check any of the following options in the Project box:
  - *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 32 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 Duplicate Record Numbers” below.
  - *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 ROOTS III source type 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 or ROOTS III 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.

When you select any of the Project options, the Repair button is activated. You have two ways to check your data.

- Choose OK to check items selected on the left side of the window and prepare a report telling you what’s wrong. Choose OK to see the list of data that will be fixed when you choose Repair or that you can choose to edit yourself.
- Choose Repair to check the data and repair if possible.

A text file named CHECK.TXT is created when either OK or Repair is chosen. 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 option.

**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. Select the option to check for duplicate record numbers. Choose OK. When the Check routine is complete, a CHECK.TXT file displays showing any duplicate records. If no duplicates are found, the file will not be displayed.

To delete duplicate record numbers, follow these steps:

1. Press F5 or click the Edit Individual button on the Toolbar to open the Individual Record window. Press F10 and enter the record number, for example, 150. Press Enter, and then OK.
2. In the Individual Record window, change to a record number not being used, for example, change record # 150 to 10150. Press F9 to save.
3. Press F10, enter the record number for the duplicate, for example, 150. Press Enter and then OK.

4. Choose Delete Record from the File menu or press Shift + F9 to delete this record.
5. Once deleted, press F10, enter the changed record number (10150), press Enter and then choose OK. Change record number 10150 back to the original number (150). Choose Save from the File menu or press F9 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.

**Note** If you have deleted or moved the GEDCOM file from the directory 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.

2. View the contents of the GEDCOM Exceptions list.

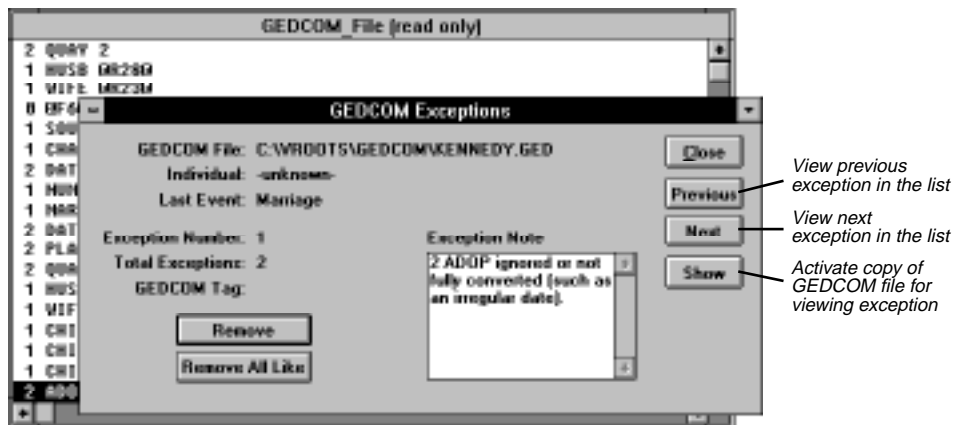


Figure 8-21: GEDCOM File Window

- *Individual* — Indicates the individual to whom the exception belongs.
- *Event* — Indicates the event to which the exception belongs.
- *Exception Number* — Indicates 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 words 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 words, unrecognized or ignored, indicate 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 words ignored or not fully converted, indicate that Ultimate Family Tree could not interpret the information correctly.

3. Choose the Next and Previous buttons to scroll through the Exception List in the GEDCOM Exceptions window.
4. Choose Show to activate a copy of the original GEDCOM file and view where the exception is located in the GEDCOM file.
5. Choose the Close box or press Escape to close the GEDCOM file and return to the GEDCOM Exception window.
6. Choose Remove to remove the GEDCOM exception displayed in the Exception Note box from the GEDCOM Exceptions list.
7. Choose Remove All Like to remove the GEDCOM exception displayed in the Exception Note box and all GEDCOM exceptions like it from the GEDCOM Exceptions list.
8. Choose Close to close the GEDCOM Exceptions window.

## Opening an External Text File

1. To open an external text file, from the File menu, choose Open.
2. Select Text from the File Type drop-down list.
3. Change to the drive and directory that contains the text file you want to open.
4. Select the file, and choose Open.

## Saving An Open External Text File Under a New Name

1. From the File menu, choose Save As.
2. Select Text from the File Type list and choose OK.

3. Select the drive and directory in which you want to save the file.
4. In the Text File box, enter a name for the file with a .TXT extension.
5. Choose OK.

## Exiting Ultimate Family Tree

You can exit Ultimate Family Tree two ways:

- Press Alt + F4 to cancel Ultimate Family Tree and quickly returns you to the Windows desktop.
- From the File menu, choose Exit, or choose the Close box.

**Note** It is not necessary to close a project before exiting Ultimate Family Tree. If you close 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 12 for more information on opening an existing project.



## Appendix A:

# Common Questions

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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 23 for more information.

## Installation Troubleshooting

If the installation takes more than a few minutes, the directory specified by the TEMP environment variable may be full of files. The Ultimate Family Tree install program stores temporary files in the directory specified by the TEMP environment variable. To determine whether your computer has a directory designated for temporary files, type *SET* at the DOS prompt, and check the text that is displayed for the TEMP variable. For example, *TEMP=C:\TEMP*.

Check for the directory specified by the TEMP environment variable. If it does not exist, create it. If it does exist, check the contents of the directory, and delete all temporary files with the extension .TMP. To avoid deleting temporary files that are in use, quit all applications, including Windows, before deleting the files. If the TEMP directory is C:\DOS, edit the AUTOEXEC.BAT file and change the TEMP variable to point to another directory, such as C:\TEMP or C:\WINDOWS\TEMP. If you specify a directory that does not exist, create it.

Consult your Windows and MS-DOS manuals for more information on deleting files, creating directories, and editing the AUTOEXEC.BAT file.

## Frequently Asked Questions

### How can I make Ultimate Family Tree run more quickly?

Ultimate Family Tree stores and displays the facts in your family history with sophisticated database software that requires considerable computing power. Depending on your machine, you may want to tune Ultimate Family Tree and your system to increase the program's speed.

A number of techniques to accomplish this are listed below. Some are easy; others are best done by someone with experience in configuring computer systems. The only way to find out which ones may be effective on your computer system is to try the ones you are comfortable with, and see what helps.

**Caution** Before changing your system's configuration, be sure to note the original configuration so that you can restore it if necessary. Save copies of any configuration files you edit.

- Configure Ultimate Family Tree to use the standard Windows colors in the screen display. Depending on your video card and driver, this may speed the program up considerably. See page 196 for instructions.
- Configure your video driver to use fewer colors. If your video driver is set to a 16-bit (65536 colors) or 32-bit (16.7 million colors) mode, you will speed the program up by switching to 256 colors.
- Do not use disk compression software. Use of programs such as Doublespace or Stacker can slow your system down.
- Your system's hardware speed affects the performance of Ultimate Family Tree. All other things being equal, a system with more memory, or a faster hard drive and video card, will perform faster. You can also speed your hard drive up by unfragmenting it periodically, using the DEFrag command in DOS 6, the Defrag tool in Windows 95, or a utility such as Norton's SpeedDisk.

The remaining techniques are useful for Windows 3.x only, and do not apply to Windows 95:

- Use a disk caching program such as SMARTDRV or a third-party program. This program will be specified in your CONFIG.SYS file. Also, if your system has less than 16 megabytes of RAM, do not use a cache size of more than 512K.
- Configure Windows 3.x to use 32 bit disk access. In the Windows 3.x Control Panel, select Enhanced, click on Virtual Memory, then Change. Select the Use 32 Bit Disk Access and File Access check boxes.

**Can I merge a Visual ROOTS or ROOTS IV project with an Ultimate Family Tree project?**

Although Ultimate Family Tree, Visual ROOTS, and ROOTS IV projects use the same basic file structure, you can't merge a Visual ROOTS or ROOTS IV project into an Ultimate Family Tree project unless the two projects are using the same library files. When you attempt to merge a Visual ROOTS or ROOTS IV project into an Ultimate Family Tree project, Ultimate Family Tree checks to make sure both projects are using the same library files. If they are not, the merge feature is disabled and you must use GEDCOM to merge the two projects. Print a Project Summary report for each project. In the file list, look for files that are being used for both projects.

**Can I Open a Visual ROOTS or ROOTS IV Project in Ultimate Family Tree?**

Yes. From the File menu choose Open. Select Ultimate Family Tree, Visual ROOTS, or ROOTS IV Project from the drop-down list. Change to the drive and directory that contains the Visual ROOTS or ROOTS IV project you want to open. See "Using Visual ROOTS, ROOTS IV, and Ultimate Family Tree Together" on page 219.

**How do I split my project?**

See page 188.

**Why can't I change the fonts for some reports?**

Ultimate Family Tree automatically determines the font size and style in some structured reports such as Lists and the Box style Calendar. The font style can be changed in Pedigree reports, but the font size is fixed. If you wish to use a different font style or size, print the report to a file and use a word processor to edit and print the report.

**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, press F8 on an event or choose 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 25.

**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 one of the parent fields. 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, from the Utilities menu, choose Desktop Preferences, and then Miscellaneous. In the Messages group, select Critical. Choose OK to close the Desktop Preferences window.

**How do I turn off graphics and wallpaper?**

Ultimate Family Tree runs faster without the default graphics and wallpaper. To turn them off, from the Utilities menu choose Desktop Preference and then Miscellaneous. Select Use Windows Colors and Wallpaper, None.

**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 multimedia. 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 multimedia 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 multimedia 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" on page 187 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 6.

#### **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" on page 187 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 6 for instructions.

#### **Error 43: Insufficient memory**

Refer to your Windows manual for information on freeing additional memory.

**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 202: Invalid path or file name**

Make sure the name in the File Name field is a valid DOS file name. The name must be eight characters or less, no asterisk (\*) or slash (/) characters. See your DOS manual for more information on valid file names. Ultimate Family Tree adds the extension for the file type being created.

**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” on page 187 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 6 for more information.

**General Protection Faults**

A GP fault signifies that something unexpected has happened in the Windows environment, usually an improper memory access. In other words, something running in the Windows environment is trying to access memory in a location that it did not have access to. All memory management in Windows is handled by Windows. When applications and Windows components directly access memory, the result is often a GP fault.

Certain video cards may cause a conflict. Set your monitor to Standard VGA in the Windows Setup to temporarily resolve the conflict. Contact the video card manufacturer for a new driver. For a list of video cards, screen savers and third party desktops that have been identified as causing possible conflicts, see Troubleshooting in the online help.

**Event Type not found**

The event type you selected from the event list is not in the library. This is usually caused when you use a ROOTS IV library in which the event type has been deleted. It also occurs when you start a project using a library different from the one used when a new event type was defined. If you wish to use this event type, create a new one by choosing New, and give the new event type a distinctive name.

**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.

**Error creating OLE object**

The file you are attempting to add to the Multimedia Library is not a valid OLE file.

**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 185. Choose Project from the Utilities menu, and then Check. Select all options in the Project group and then choose 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. Press F9 to save it. A message appears stating that the place was Missing Place no. nn and is now the name that you just typed. Choose 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 6.

**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.

**Computer locks when leaving Windows**

Some OLE servers (such as Windows Media Player) interfere with Ultimate Family Tree. This causes Windows to lock (freeze) when exiting, requiring that you use Ctrl-Alt-Del to reset your system. Using Object Packager to link OLE objects prevents this problem. See page 155 for information on using Object Packager.

## 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.

### **Individual, Marriage or Place Lists contain strange characters**

Ultimate Family Tree uses the Arial font in View lists. If the Arial font is not installed in Windows, strange characters can appear in View lists. Use the Windows Control Panel to install the Arial font. See your Windows manual for further help. Other fonts used by Ultimate Family Tree windows are Sans Serif, Courier New and Times New Roman.

### **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.

### **Event details are displayed twice when viewing an Individual Summary**

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

### **The windows are non-proportional, out-of-sync, or words overlap**

Ultimate Family Tree uses the Arial, Sans Serif, and Courier New fonts in various windows and lists. If these fonts are not installed in Windows, strange characters and distortion can occur. Use the Windows Control Panel to install the missing font. See the Windows manual for further help.

## 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 Windows Colors option. See page 196 for more information.



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## Media Troubleshooting

### Problem with a server program or media device

If you run into problems with any server, sound card, or scanner, make sure you are using the latest version of the software and drivers. Contact the manufacturer for advice and information.

### Error creating OLE

The file you selected to add is not an OLE file. Copy it to the clipboard and paste it into the OLE window.

### Image Edit window appears inactive when adding narrative

If you minimize rather than close Sound Recorder (or click the mouse anywhere on the desktop), the Image Edit window will not be active. Press Escape to close Sound Recorder and activate the Image Edit window.

### Link to OLE server not found appears when you try to play an OLE file

The file you selected is not on the hard drive or the file has been moved from the directory in which it originally was found when linked to the Ultimate Family Tree Multimedia library. This message will also appear if the OLE file has been converted to static.

## Slide Show Troubleshooting

### The server is activated during a slide show

Convert the slide to static (break its link with its server). See “Editing an OLE File” on page 158.

### MIDI file will not play during slide show

Use digitized images for the slide show without narratives. Turn off sound effects when playing the show. To test whether your MIDI server can play while another server is active, start the MIDI slide from the Multimedia window. After it starts, play a digitized image that has a narrative. If the music stops, it’s because two servers cannot be active at one time. See “Slide Shows and OLE” on page 170.

### This device is being used by another application when viewing a Slide Show

This message appears when no sound board is installed. Uncheck the Sound Effects option in the Slide Show window.

### First slide flashes before each slide

Preview and Play Slide Shows flash the first image before displaying the next image. This is normal.

## Printing Errors

If you have trouble printing reports or report formatting, be sure you have the latest printer driver installed for your printer. Contact the manufacturer of your printer for the latest driver. Consult the Windows manual for instructions on installing printer drivers.

### Cannot print an index

Before printing an index, the index must be collected using the Print window. You must enter a chapter title for reports before the Collect Index option is available. See page 118.

### The indexing starts on the wrong page number

Collect the index immediately before printing the report. Check the starting page number for the report to be indexed in the Print window before collecting the index. If the index has been collected properly and the starting page number for the report is still incorrect in the index, make sure you are using the latest version of the printer driver used to collect the index.

### The index is slightly off

Because of differences in the way printers process fonts and movement commands, the index can accumulate error. To review and correct the index before printing, choose Edit on the Index Report window. See page 119.

### Window says, “Now exporting” when I’m collecting an index

The index is printed to a file during the collection process. It is stored in the Index report window where it can be viewed or printed using your default printer.

### The Image, Endnotes, Index, and Calendar Report menu selections are dim

If you chose the Print to Rich Text Format (RTF) file option in the Print Setup window, these reports cannot be sent to an RTF file. Choose a printer instead.

### The Index and/or End Notes print options are dim

Make sure you have printed a report with Include Index selected and you have built footnotes. If the End Notes report option is dim, a report which includes footnotes has not yet been printed. See “Creating Footnotes” on page 44.

### The report Use Grouping options are dim

No individuals have been found in the Grouping list. See “Grouping” on page 78.

### Box Chart printing problems

If you experience problems when trying to print a large box chart (over 50 pages), check the About Help topic in the Ultimate Family Tree Help menu (Press F1). The percentage of system resources available is shown. To print a large chart, this figure may need to be at least 70–75%. Consult your Windows manual for information on freeing additional memory.

Before printing a large report, be aware of the amount of available space on your hard drive. During the printing process, special temporary files are created (spooler files), which can consume a considerable amount of hard drive space. A 200-page report will use approximately 9MB. Once the printing is completed, these files are automatically deleted.

### **Data is Cut Off in Structured Reports**

The font size is too large. Use Page Setup in Ultimate Family Tree File menu to reduce the font size.

### **Duplicate Chapter title found**

Another report has been printed using the same chapter title entered for the current report. If a chapter title has not been entered, another report without a chapter title was previously printed. If you proceed, all footnotes for the previous report with the same chapter title will be overwritten with the footnotes for the current report. Choose the Reset buttons in the Print window to clear all previous chapters, footnotes, and indexes.

### **Footnotes do not appear at the bottom of a Family Group Sheet**

Make sure you have checked the Footnotes check box in the Family Group Report window and that you have built the footnotes. See “Creating Footnotes” on page 44.

### **<ROOTS> or <F font name> appears in printed reports or print preview**

Ultimate Family Tree cannot find the ROOTS or font name font. The ROOTS font is supplied with Ultimate Family Tree. If you have just installed Ultimate Family Tree, be sure to restart Windows so Windows will recognize and use this font. Make sure that font is installed by checking the font list using the Windows Control Panel. Reinstall the font if necessary. See your Windows manual for information on installing fonts.

### **Place names are shortened or abbreviated in reports**

Some structured reports, such as the Pedigree Chart, are designed with a 30-character limit to place names. Ultimate Family Tree shortens these names, if required.

### **Print Preview is dim**

The Report window is closed or the report is set (in the Print Setup window) to print to a file.

### **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.

### **Portrait and Gallery reports will not print**

Make sure the Ready indicator is on next to each image position. Although you do not need to edit the image, you must choose Edit and Crop for each image to turn on the ready indicator before attempting to print the report.



## Appendix B:

# Using ROOTS, and Ultimate Family Tree Together

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Even though Ultimate Family Tree and ROOTS share the same databases and underlying design, they are not the same program. ROOTS IV and ROOTS V provide more control and flexibility for storing and manipulating genealogical data. Some data from a ROOTS IV or ROOTS V project is hidden when the project is opened by Ultimate Family Tree. Most hidden data can be viewed in the Individual Summary and included in printed reports but it cannot be edited in Ultimate Family Tree. To modify this hidden data, open the project from ROOTS IV or ROOTS V and make any appropriate changes.

ROOTS IV and ROOTS V data that cannot be edited in Ultimate Family Tree includes:

- Links connecting individuals to events other than through principal roles
- Sure levels
- Evidence except for the overall event and individuals
- Most event details
- Event flags
- Place levels
- Source details

It is important to note that no data is lost when opening a project from any of these five programs. All data entered in Ultimate Family Tree can be edited in ROOTS IV, ROOTS V, Visual ROOTS, and Family Gathering (except for multimedia data in ROOTS IV) even though the reverse is not true.

If ROOTS IV, ROOTS V, Visual ROOTS, Family Gathering, and Ultimate Family Tree are installed on your hard disk, projects can be opened and used by all five programs. The following sections provide guidelines for the coordinated use of the three programs.

## Using ROOTS and Ultimate Family Tree Together

### Installing Ultimate Family Tree When ROOTS or Family Gathering Is Already Installed

The Visual ROOTS and ROOTS IV installation programs usually install ROOTS IV in the ROOTS4 subdirectory and Visual ROOTS in the VROOTS subdirectory. Family Gathering is usually installed in the FG directory. ROOTS V is normally installed in the ROOTS5 directory. Do not install Ultimate Family Tree and ROOTS IV in the same subdirectory because important control files will be overwritten. Ultimate Family Tree can be installed in the same directory as Visual ROOTS or Family Gathering. If you install Ultimate Family Tree in the same directory as Visual ROOTS or Family Gathering, it will update that program and delete the VROOTS.EXE or FAMGATH.EXE file. Since Visual ROOTS or Family Gathering has been removed, be sure to delete your Visual ROOTS or Family Gathering icon. In Windows 3.x, select the icon and choose Delete from the Program Manager File menu. In Windows 95, drag the icon to the Recycle Bin.

### Managing Libraries when Using Ultimate Family Tree, Family Gathering and ROOTS

Genealogical data is stored in an Ultimate Family Tree, Family Gathering, or ROOTS project. The project control file (extension .PRO) keeps track of the files used by the project. The files managed by the project control file include those containing data unique to the project, such as names and family links, and those containing data shared with other projects, such as places and sources. The latter files are referred to as library files.

Under normal operation, new projects opened by Ultimate Family Tree, Family Gathering, or ROOTS use the library files associated with their respective program. If you open a new project with ROOTS IV, ROOTS V, Visual ROOTS or Family Gathering, and then open a second new project with Ultimate Family Tree, the two projects will have different library files. Once a project is created, you can't convert its library files to another set unless you export the project via GEDCOM and then import it into another project that has the desired library files.

Maintaining a single set of library files when using ROOTS, Family Gathering, and Ultimate Family Tree together has the following advantages:

- *Data Consistency* — Items such as event definitions, GEDCOM tags, event sentences used in reports, locations, and source data are identical for all projects.
- *Merge Flexibility* — Library files must be identical to merge two projects.
- *Storage Efficiency* — Multiple libraries can consume considerable disk space.

## Using ROOTS IV Library Files in new Ultimate Family Tree projects

Ultimate Family Tree and ROOTS IV have separate library files but you can use the ROOTS IV library files with Ultimate Family Tree, if you wish.

The following procedure uses a ROOTS IV library. To use your ROOTS IV library files in a new Ultimate Family Tree project:

1. Choose New from the Ultimate Family Tree File Menu.
2. Choose ROOTS IV in the New File window. The ROOTS IV library files are located in the ROOTS4\LIBRARY subdirectory

**Note** To import a GEDCOM or a ROOTS III file using the ROOTS IV library files, open the GEDCOM file and import with ROOTS IV. Then, open the project from Ultimate Family Tree.

## Opening a ROOTS or Family Gathering Project from Ultimate Family Tree

From the File menu, choose Open. Change to the directory that contains your project. Note that existing projects can be opened by choosing Ultimate Family Tree, Family Gathering, Visual ROOTS, or ROOTS IV. The first time you open a ROOTS IV project in Ultimate Family Tree, the project is updated to include several fields required by Ultimate Family Tree. This one-time procedure can take a long time depending on the size of your file.

Before a ROOTS IV project can be opened in Ultimate Family Tree, you must open it at least once using Version 1.1 of ROOTS IV.

## Opening an Ultimate Family Tree Project from ROOTS or Family Gathering

Ultimate Family Tree projects can be opened from ROOTS or Family Gathering. Choose Open from the File Menu, and then choose Family Gathering, ROOTS IV, or Visual ROOTS.

**Warning** While in ROOTS IV, do not merge an Ultimate Family Tree project with a ROOTS IV project unless they use the same library files. To see what library files are being used by a project, print a File List from the Project Summary Report window while you are in the project. Check the path and file names of the library files. The ROOTS IV library files are usually in the ROOTS4\LIBRARY directory and named X\_??BOOK.\*. The Ultimate Family Tree library files are named V\_??BOOK.\*. Ultimate Family Tree has safety checks to ensure that two projects using different library files cannot be merged. ROOTS IV Versions 1.0 and 1.1 do not have these checks. ROOTS IV Version 1.2 and later include the safety checks.

## Restoring a ROOTS or Family Gathering Archive Project from Ultimate Family Tree

If your ROOTS IV backup files have the extension .ZIP, use PKUNZIP to restore the files from DOS. Visual ROOTS, ROOTS IV Version 1.2, Family Gathering, and Ultimate Family Tree backup files have a .SQZ extension. You can restore .SQZ backup files from Family Gathering, Ultimate Family Tree, Visual ROOTS, or ROOTS IV Version 1.2. See page 186 for steps on restoring backup (SQZ) files.

## Events and Roles

ROOTS IV and ROOTS V can link an unlimited number of individuals to events through roles. A marriage event might have the bride, groom, best man, maid of honor, and minister linked as participants. Ultimate Family Tree provides linking for only the principal role players (for example, the bride and groom in a marriage). Before opening a ROOTS IV or ROOTS V project from Ultimate Family Tree, mark at least one principal for each event. When accessed from Ultimate Family Tree, those ROOTS IV and ROOTS V events without a designated principal role are hidden (not displayed).

If an event from ROOTS IV or ROOTS V does not appear in Ultimate Family Tree, make sure at least one principal is marked in ROOTS IV for that event. The event will then be included in that individual's event list in Ultimate Family Tree. If you have marked all roles as principal in ROOTS IV or ROOTS V, the event will be included in all participants' Individual Records in Ultimate Family Tree. Select the event and view the bottom line help to see what role the individual plays in that event. See "Searching for Non-Principal Events in ROOTS IV" in the online Help.

You can create new event types in all five programs, but in Visual ROOTS, Family Gathering, and Ultimate Family Tree, just one principal role player is assigned. You can assign additional roles in ROOTS IV and ROOTS V. Events are included in the Ultimate Family Tree event list if the individual is marked as a principal for that event in ROOTS IV.

Principals for user-defined event types added in ROOTS IV and ROOTS V appear in Individual Records in Ultimate Family Tree, but the events are not included in the Ultimate Family Tree Add Events list. Event types added in Ultimate Family Tree are included in all ROOTS IV and ROOTS V event lists. Event types that have been deleted from a ROOTS IV or ROOTS V library used in a project are not available in Ultimate Family Tree.

Ultimate Family Tree does not require a birth event. If you delete a birth event in Ultimate Family Tree and attempt to view that birth in ROOTS IV, an Undefined Event will appear. To restore birth events that have been deleted, run Check and Repair in either Ultimate Family Tree or ROOTS IV. See page 198.

**Note** Some role names were changed in Ultimate Family Tree to accommodate single role events.

## Event Details

ROOTS IV and ROOTS V provide two detail fields per event. Ultimate Family Tree provides one detail field for the following events:

Event	Detail
burial	cemetery
graduation and education events	institution or school



Event	Detail
resides	street address
resided	street address
employment	occupation
emigration	point of origin
immigration	destination
baptism	religion
LDS events	temple code

## Places

The ROOTS IV and ROOTS V Place Edit window accepts comprehensive information about places. Ultimate Family Tree places (up to 60 characters) are entered in the Event Place field of the Individual Record window or in the Events window accessed by choosing the numbered button to the left of the event name. Ultimate Family Tree creates the short place in ROOTS IV and ROOTS V terminology. If you wish to add additional information about places, open the project in ROOTS IV or ROOTS V and use the Place Edit window.

## GEDCOM and ROOTS III Import

Except for differences in options, Ultimate Family Tree, Family Gathering, and ROOTS projects created by importing a GEDCOM or ROOTS III file will have identical data when they use the same library files. Some imported data will be hidden in Ultimate Family Tree. In other words, it doesn't matter whether you import data into Ultimate Family Tree, Family Gathering, Visual ROOTS, ROOTS IV, or ROOTS V, except for options you have chosen. If you want to use the Family Gathering or ROOTS library files, be sure to import using that program.

## GEDCOM Export

Except for additional export options provided in ROOTS IV and ROOTS V, GEDCOM files created by either program will be identical.

## Multimedia

ROOTS IV does not support audio recordings, OLE, or slide shows. Digitized images stored by either program are compatible. Audio and OLE data stored by Ultimate Family Tree is hidden in ROOTS IV.

**Note** In Ultimate Family Tree, if you open a ROOTS IV project where the Image Library has not been accessed, the Open Dialog box will ask for the location of the Image Library. Access the Image Library in Ultimate Family Tree to make full use of the multimedia features available in Ultimate Family Tree. In the Open Dialog box, change to the UFT\IMAGES directory, select V\_PHBOOK.DBF, and choose Open. If you prefer to access the Image Library in ROOTS IV, change to the ROOTS4\IMAGES directory, select X\_PHBOOK.DBF, and choose Open.

## Source Types

Source type editing is not supported in Ultimate Family Tree. However, changes and additions made to source types in ROOTS IV and ROOTS V are accepted by Ultimate Family Tree.

## Citations and Sure Levels

Sure levels from ROOTS IV and ROOTS V or imported from a GEDCOM or ROOTS III file are hidden by Ultimate Family Tree. New citations added in Ultimate Family Tree are assigned a sure level of 1. Citations added to Ultimate Family Tree events are the same as the those in the ROOTS IV and ROOTS V overall event citation field. Citations created in ROOTS IV and ROOTS V that are hidden in Ultimate Family Tree are included in Ultimate Family Tree reports.

## Free-Form Text Indexing, Footnotes, and Citations

Ultimate Family Tree does not directly support index and footnote entry in free-form text. Citations are not supported in Ultimate Family Tree free-form text, although citations created using ROOTS IV and ROOTS V are used and processed.

## Notes for ROOTS III Users

### Converting ROOTS III Text Files

ROOTS III text files are converted to Ultimate Family Tree text files as follows. In the following list, *bb* represents the first two letters of the ROOTS III basefile name and *nnnnn* represents the record number of the individual to whom the text is attached.

- *bbRnnnnn.TXT* — Converts as biography text in the Individual Text window of the Individual Record. If you also have a #E.TXT file, this file is appended to it. Files of this type print as text in the Genealogy reports.
- *bbRnnnnn.SRC* — Converts as footnote text in the Individual Text window of the Individual Record. Files of this type print as footnotes in the Genealogy reports and as text on the Family Group Sheets.
- *bbEnnnnn.TXT* — Converts as biography text in the Individual Text window of the Individual Record. Files of this type print as text in the Genealogy reports.
- *bbFnnnnn.TXT* — Converts as research notes in the Individual Text window of the Individual Record. Files of this type print as text in the Family Group Sheets.
- *[ref].TXT* — Converts as biography text in the Individual Text window of the Individual Record. If you also have a #R.TXT file, this file is appended to it. Files of this type print as text in the Genealogy reports. [ref] is the contents of the ROOTS III Individual Edit reference field. It is used primarily in ROOTS II to link text files.

- *[ref].SRC* — Converts as footnote text in the Individual Text window of the Individual Record. Files of this type print as footnotes in the Genealogy reports and as text on Family Group Sheets. If you also have a #F.TXT file, this file is appended to it.

## Converting Footnotes from ROOTS III to Ultimate Family Tree

Major Footnotes in ROOTS III are converted into the Ultimate Family Tree Source Library using the ROOTS III source type. If there is an #R.SRC file attached to a Major Footnote, it is placed in the ROOTS III source type note field in Ultimate Family Tree.

Text on the Detail and Record footnote lines of each record in ROOTS III is converted to Free Notes in the Evidence window.

The Major Footnote is listed in the Source List by the Abbreviation 1 name, and the text is listed as a Free Note. Any text preceding or following a Major Footnote becomes a separate Free Note. If you have two Major Footnotes with text attached, two Free Notes are created. If you did not use the Abbreviation field in the ROOTS III Major Footnote, Ultimate Family Tree enters *R3 import #nnnnnnnn* in the Abbreviation 1 field instead. Use the Source Record window to replace *R3 import #nnnnnnnn* with a unique abbreviation for the source.

## What to Check After Converting a ROOTS III .EDB File

1. To take advantage of the longer name fields available in Ultimate Family Tree, or add aliases or religious names, press F2 to open the Individual List and double-click the left mouse button on any name that you'd like to edit. The Individual Record for that individual opens. Enter long names, common names, aliases, and religious names in the Miscellaneous window (choose the More button, and then Miscellaneous).
2. Edit place names that appear next to events on the Individual Record to remove any unnecessary commas that ROOTS III may have required. Edit places from the Place field on the Individual Record or Events window. See "Did You Know?" on page 23 and "Combining Places" on page 192 for more information.
3. Choose View, and then Source List to check for ROOTS III type sources and those that did not have an abbreviation in ROOTS III. Those without abbreviations are shown as *R3 import #nnnnnnnn* in the Abbreviation field. Edit the sources to take advantage of the source templates provided in Ultimate Family Tree. Double-click the left mouse button on the name of any source you'd like to edit to open the Source Record window for that source.
4. Review any text in the Ultimate Family Tree text windows and edit, move, or format if needed.

## Where to Find ROOTS III Data in Ultimate Family Tree

<b>ROOTS III</b>	<b>Ultimate Family Tree</b>
Individual Record	Individual Record
Record Number	Record Number
Name	Name
Sex	Sex
Parent Code	N/A
Birth Code	Birth, Miscellaneous window
Ancestor Interest	Ancestor Interest, Miscellaneous window
Descendant Interest	Descendant Interest, Miscellaneous window
Occupation	Employment event
Events (lines 1–6)*	Appear as separate events
Event Date	Event Date field
Event Sure Level	Hidden**
Event Place	Event Place field
Event Detail Footnote	Event Evidence window
Flags	Flags, Miscellaneous window
Father's Name	Father field
Mother's Name	Mother field
Revision Date	Last Edit Date, Miscellaneous window
Record Footnote	Individual Evidence window
#R.TXT Files	Individual Text, Biography
#R.SRC File	Individual Text, Footnote
#F.TXT Files	Individual Text, Research
@.TXT Files	Individual Text, Biography
@.SRC Files	Individual Text, Footnote
Marriage Record	Individual Record
Record Number	N/A
Husband's Name	Spouse, Marriage event
Wife's Name	Spouse, Marriage event
Event Type*	Events

---

<b>ROOTS III</b>	<b>Ultimate Family Tree</b>
Event Date	Event Date
Event Sure Level	N/A
Event Place	Event Place
Event Detail Footnote	Event Evidence window
Record Footnote	Event Evidence window
Revision Date	N/A
Marriage Flags	Hidden
Major Footnotes	ROOTS III Type Source
Record Number	N/A
Title	Title component
Reference	Reference component
Library Call Number	Call number component
Abbreviation	Abbreviation 1 field
Publisher Info	Publisher component
Author	Author component
Repository	Repository component

---

\* User defined events transfer with #R3 before the event name. These events should be deleted and reentered using Ultimate Family Tree events (or a new event type you create) before they will print or export via GEDCOM. See "Importing Unrecognized Events" on page 180.

\*\* Hidden means converted by Ultimate Family Tree and present in the project but not used by Ultimate Family Tree.



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## Appendix C:

# UFT Supplement: Version 1.1

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## Introduction

Ultimate Family Tree Version 1.1 contains exciting new features to assist you in presenting the information you have gathered on your family. The new features include:

- *Ultimate Family Tree Editor (FGE)* — Use this powerful new What-You-See-Is-What-You-Get (WYSIWYG) word processing program for Ultimate Family Tree charts and reports.
- *Images in reports* — Include preferred images in Family Journal reports sent to FGE or another word processing program to produce beautiful books complete with pictures.
- *Direct access to your word processor* — Start FGE or your favorite word processing program directly from Ultimate Family Tree.
- *Instant Web Page Box Chart* — Create multigeneration Descendant Box Charts for the World Wide Web, including an Indented Descendant Chart, a Family Tree style Box Chart, and an index.
- *Multiple Web page capability* — Publish multiple Web pages on Palladium Interactive's Ultimate Family Tree web site.
- *Web page privacy* — Protect the privacy of living family members included in your Instant Web pages with this new option.

This manual is a supplement to the *Ultimate Family Tree User's Guide*. It contains detailed information about the new features in Ultimate Family Tree Version 1.1.

## Ultimate Family Tree Editor

Ultimate Family Tree Editor (FGE) is a powerful Windows word processor for many reports created with Ultimate Family Tree. In WYSIWIG format, reports such as the Family Journal can be viewed, edited, enhanced, and printed with FGE. FGE also preserves end notes and individual index information from Ultimate Family Tree, automatically creating separate sections for each.

FGE can be used directly from Ultimate Family Tree, or it can be used as a stand-alone word processing program. The reports created in Ultimate Family Tree can be saved for later editing and printing. Several reports can be merged into a single document to create a comprehensive family history book complete with table of contents, end notes, and index.

**Note** FGE, the internal Ultimate Family Tree report writer, or an external word processing program, can all be used to create and print reports. While the internal report writer creates excellent reports, FGE permits you to edit and modify your work before printing. It also provides a way to add and position images and OLE objects. Menu selections for reports that cannot be edited with FGE or an external word processor are dimmed.

### Features

FGE provides many of the functions of a full-featured word processing program. Documents created by the editor are automatically saved in Rich Text Format (RTF) which can be exported to most popular word processing programs for further editing. The features of FGE include the following:

- *Character formatting and styles* — The editor allows for multiple fonts and point sizes within a document. Character styles include bold, underline, and italic.
- *Paragraph formatting* — Paragraphs can be left, right, or center justified. Hanging indents and double spacing are additional options.
- *Tab support* — Left, right, center, and decimal tab positions are available.
- *Embedded pictures* — Pictures can be imported from a disk file or from the Windows clipboard. The editor supports the standard Windows bitmap (BMP) and clip art (WMF) formats. Drag-and-drop can also be used to move BMP images into a document.
- *Cut and Paste* — Cut and Paste to the Windows clipboard is supported to and from other applications. Text formatting is preserved when you move text to or from another word processing application via the clipboard.
- *Editing* — Editing options include text selection, editing, formatting, and search and replace.
- *Multiple documents* — A number of documents can be open simultaneously in FGE. The document windows can be tiled or cascaded.
- *Footnotes* — Footnotes can be added and edited. Footnotes are numbered sequentially and appear at the end of the document as end notes.

- *Index* — Index entries for individuals can be added and edited. A two-column index appears at the end of the document after the end notes.
- *Headers and footers* — Headers and footers can be added and edited. Page numbering is automatic.

## Desktop Overview

This overview will introduce you to FGE's user interface.



**Figure 1: Family Gathering Editor Desktop**

**Menu Bar** — The Menu Bar contains a list of menu options extending across the top of the main FGE window. It provides easy access to all aspects of FGE.

To view a menu, click once on its name. The menu appears under the name. You can also use key-strokes to display menus using one of two techniques:

- Press the Alt key followed by the underlined letter in the menu name.
- Press the Alt key to activate the menu bar and then use the right or left arrow keys to move across the bar to the name you want. Press the down arrow key to open the menu.

**Toolbars** — The toolbars contain icons representing the tools available in FGE. From the View menu, check *Toolbar* to view the main toolbar. You can also check *Font Toolbar* to view that selection.

**Status Bar** — FGE uses the status bar, located at the bottom of the FGE window, to display messages, information prompts and status information. For example, a short message in the status bar explains the purpose of the menu name or command you have selected. To activate the Status Bar, check its name in the View menu.

The following list shows sample information that can appear in the status bar as you are working on a document:

- *Pg 1*      Page 1 of the document is currently displayed.
- *Ln 15*     The cursor lies in the fifteenth line of the current page.

- *Col 29*      There are 29 characters between the cursor and the left margin.
- *INS*          Characters typed will be inserted.
- *OVR*          Characters typed will overwrite existing characters.

**Ruler** — You can specify formatting features such as margins and tab settings by using the ruler. To access the ruler, choose the Ruler command from the View menu. The ruler appears above the document window.

## Opening an Existing Document

The bottom of the File menu displays a list of recently used documents. To open a recently used document, from the File menu, click the name of the document you want. If the name is not displayed in this short list, proceed as follows:

1. From the File menu, choose Open.
2. In the File Name box, type the name of the document you want to open or select it from the list.

**Note** If you do not see the name of the file you want, select a new drive or directory, or select a different type of file from the List Files of Type drop-down list. FGE can use Rich Text Format files having the extension .RTF, or plain text files, usually having the extension .TXT.

3. Click OK.

## Opening Multiple Documents

To compare your work, you can open several documents simultaneously, each in a separate document window. To open multiple documents, leave the current document open and follow the steps above for opening an existing document.

You can view these documents in various ways. From the Window menu, choose one of the following commands:

- *Cascade* — Causes the windows to overlap so that the title bar for each document is visible.
- *Tile* — Arranges the open windows in smaller sizes to fit next to each other.
- *Arrange Icons* — If you have minimized several documents to icons, these icons will be arranged along the lower edge of the FGE desktop.

## Changing the Size of a Document Window

You can change the size and position of a document window so you can view the contents of two or more documents simultaneously.

- *Maximizing a document* — To enlarge a document window to its maximum size, click the Control-menu box on the Document Title Bar and choose Maximize or click the Maximize button in the upper-right corner of the document window. If the document has been minimized to an icon, click once on the icon to activate the Control menu and choose Maximize, or double-click the icon to maximize it.

- *Minimizing a document* — Click once on the Control-menu box to the left of the Menu bar (if the document is maximized) to open the Control menu for the active document. Choose Minimize to reduce the document to an icon. Another method is to choose the Minimize button in the upper-right corner of the document window.



Figure 2: Control-Menu Box and Minimize/Maximize Buttons

## Setting up Ultimate Family Tree to Use Ultimate Family Tree Editor

Ultimate Family Tree can preview and print reports directly or through an external word processing program. Using the Ultimate Family Tree Print Setup window, you can designate FGE, Microsoft Word for Windows, or another word processor as your primary word processing application.

To designate which word processor you want to use:

1. Choose Print Setup from the Ultimate Family Tree File menu.

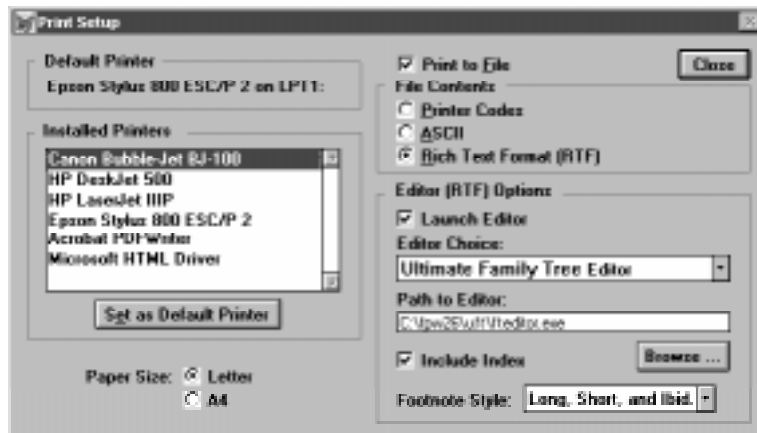


Figure 3: Print Setup Window

2. Check the Print to File box.
3. Select the Rich Text Format (RTF) radio button in File Contents.
4. Check the Launch Editor box in the Editor (RTF) Options group.

5. Select the word processing application you want to use from the Editor Choice drop-down list. The three options are Ultimate Family Tree Editor, Microsoft Word, and Other.
6. Click the Browse button to locate the executable file for the word processor you have chosen if it does not appear in the path to the Editor field. The path to the word processor and the executable file are displayed in the Path to Editor field. For example, \UFT\FTEDITOR.EXE.

**Note** If you select Ultimate Family Tree Editor, the correct path and file name appear automatically in the Path to Editor field.

7. Select Include Index if you want to include index codes with the RTF file.
8. Use the drop-down list to select a footnote style.
9. Choose Close.

FTE opens (launches) automatically after you create a report.

## Creating a New Document

To create a new document in FTE, choose New from the File menu. FTE displays a blank document. Ultimate Family Tree gives the new document a temporary name, for example, *Profill*. You give the document a new name when you save it.

## Editing Text

Here is a review of some basic text editing techniques.

**Selecting text** — Before you can change text, you must select it. To select text, move the mouse pointer to the beginning of the text you want to select, hold down the left mouse button and drag the insertion point to the end of the section. You can also select text by holding down the Shift key and pressing the arrow buttons on the keyboard. To select a single word, double-click the word. To select all text, from the Edit menu, choose Select All or press Ctrl+A.

**Cut, Copy, and Paste** — Once you've selected text, you can cut or copy it to the Clipboard and paste it elsewhere in the document. To copy text, select the text and choose Copy from the Edit menu, click the Copy icon on the main Toolbar, or press Ctrl+C. To cut text, select it and choose Cut from the Edit menu, click the Cut icon on the main Toolbar, or press Ctrl+X. To paste text, position the insertion point where you want to place the cut or copied text and choose Paste from the Edit menu, click the Paste icon on the Toolbar, or press Ctrl+V.

**Undo** — If you make a mistake or change your mind while you are working in FTE, choose Undo from the Edit menu or press Ctrl+Z. This will undo your last change.

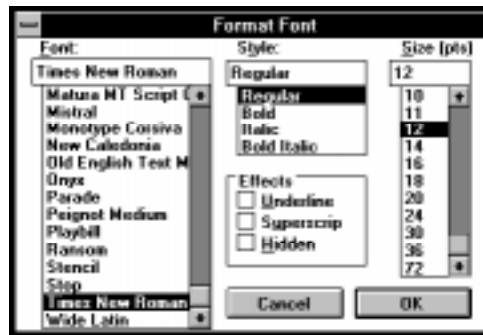
## Setting Fonts

Fonts and point sizes establish the basic look of characters in your document. Fonts can be changed using various methods.

**Using the Fonts Toolbar** — With the Fonts Toolbar, you can change the font or size of the text. You can also format the text as bold, italic, underlined, or superscript. Buttons are available for paragraph and tab stop alignments. Select the text you wish to format and choose a font and font size from the drop-down lists.

**Using the Format Font window** — To use the Format Font window:

1. Select the text you wish to format.
2. Click the right mouse button, or from the Format menu, choose Font to open the Format Font window.



**Figure 4: Format Font Window**

3. Select a font from the list of those available.
4. Select a style from the Style list.
5. Select a size from the Size (pts) list.
6. Select Underline, Superscript, or Hidden in the Effects box.
7. Click OK to close the window.

## Paragraph Formatting

Change the formatting of a paragraph by first selecting the paragraph and then applying the formatting you want. When Ultimate Family Tree formats a report, default settings are automatically applied. Change these by choosing Paragraph from the Format menu.

## Paragraph Marks

To display the marks which define the end of a paragraph, select the Paragraph Marks button on the Main Toolbar or choose Paragraph Marks from the View menu.



Figure 5: Format Paragraph Window

## Aligning Paragraphs

When you align paragraphs, you specify how you want to position the lines of text.

1. Select the paragraph to be aligned and choose Paragraph from the Format menu.
2. Select the Left, Center, Right, or Justify radio buttons to align the selected paragraph.
3. Click OK to close the window.

Alternatively, you can select the paragraph and choose the appropriate paragraph alignment button on the Fonts toolbar.

## Indenting Paragraphs

When you indent a paragraph, you specify how far from the margin you want the text to print. You can choose from three types of paragraph alignment:

- *Left* — Sets the left margin indent for the selected paragraph.
- *Right* — Sets the right margin indent for the selected paragraph.
- *Left, First line* — Sets the hanging indent for the first line in a paragraph.

## Adjusting Line Spacing within Paragraphs

You can adjust the spacing between the lines in one, several, or all of the paragraphs in your document.

1. Select the paragraph(s) you want to adjust.
2. From the Format window, choose Format Paragraph.
3. Enter a point size in the Before box in the Para Spacing group to increase the spacing before a selected paragraph.
4. Enter a point size in the After box to increase the spacing after a selected paragraph.



5. In the Line Spacing box, select one of the following:
  - *Single* — Sets the selected paragraph to single spaces.
  - *Double* — Sets the paragraph to double spaces.
  - *At Least* — A minimum line spacing that FGE can increase.
  - *Exactly* — Fixed line spacing that FGE does not adjust.

**Note** If you select *At Least* or *Exactly*, enter a number in the Points box.

6. Click OK to close the window.

## Adjusting Text Flow

You can specify that certain lines or paragraphs be kept together or that certain paragraphs start a page. To keep lines together on a page,

1. Select the lines you want to keep together.
2. From the Format menu, choose Paragraph.
3. Under Text Flow, select Keep Together.
4. Click OK to close the window.

To keep paragraphs together on a page,

1. Position the insertion point anywhere in the paragraph you want to keep with the next paragraph.
2. From the Format menu, choose Paragraph.
3. Under Text Flow, select Keep with Next.
4. Click OK to close the window.

## Tabs

You can insert, remove, or move tab stops using the ruler. To set tab stops,

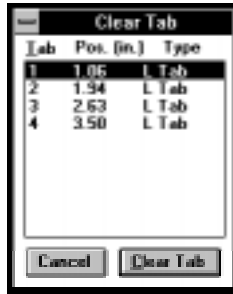
1. Select the line or paragraphs where you want to add tab stops or position the insertion point in the text where you want the formatting to start.
2. Click a tab stop style from the Tab buttons on the Toolbar or, from the Format menu, choose Insert Tab Mode and select Left, Center, Decimal, or Right.

**Note** The Left Tab button is used to left align text, the Center Tab button is used to center text, and the Right Tab button right aligns text. The Decimal Tab button sets a decimal tab.

3. Click the ruler where you want the tab stop to be set.

To remove tab stops,

1. From the Format menu, choose Tab Clear to open the Clear Tab window.



**Figure 6: Clear Tab Window**

2. Select the tab position you want to clear and click Clear Tab.
3. Repeat steps 1 and 2 for other tab stops you want to clear.

**Note** To remove all tab stops from a selected paragraph, choose All Tab Clear from the Format menu.

## Page Breaks

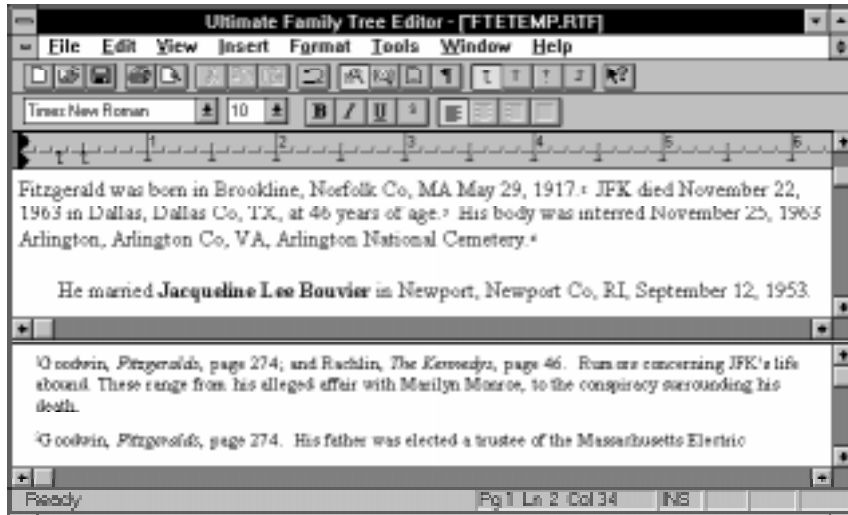
You can insert page breaks anywhere in a document. A page break appears as a solid line in the document. Physical page breaks are shown as dotted lines and are determined by the size of the page you are printing. A page break forces the text below the solid line to the next page. To insert a page break, position the insertion point where you want the page break, and choose Page Break from the Insert menu. To delete a page break, select the page break you want to delete, and choose Cut from the Edit menu, or press the Delete key on your keyboard.

## End Notes

When you create a Family Journal or Family Group Sheet, FGE automatically includes its footnotes as well. A section titled Notes and References is added after the last page of the body of the report.

**Viewing end notes** — FGE automatically numbers end notes and places them in the Notes and References section at the end of the current document. Notes are edited in a special window provided for that purpose. To view the End Note window, drag the window split bar, located at the bottom of the document window, to the top. You can also choose End Notes from the View menu.

End notes (and the index) can be viewed by scrolling to the bottom of the document. End notes can also be edited and viewed through the End Note window.



**Figure 7: End Notes**

**Editing end notes** — End notes are viewed and edited through the End Note window. The End Note window can be opened in several ways:

- Double-click the footnote number for the footnote you wish to view. The Footnote window opens showing that end note.
- Drag the End Note window bar up and use the scroll bar to scroll through the end notes.
- Choose End Notes from the View menu.

#### **Inserting end notes**

1. Move the insertion point to the position in the text where you wish to insert an end note. The End Note window opens.
2. Add any text you want for the new end note.

**Deleting end notes** — End notes are deleted from the main text window, not the End Note window.

1. From the main text window, select the end note number.
2. Press the delete key to delete the end note.

**Renumbering end notes** — Choose Renumber End Notes from the Tools Menu to renumber end notes.

## Index

Names of individuals can be included in an index for reports created by FGE. A two-column index listing individuals by surname and then given name, is automatically generated at the end of the report. Index information can be imported directly from Ultimate Family Tree, plus you can edit and add index information to any document.

### Marking an index entry

1. Place the insertion point after the name you wish to add to the index.
2. Choose Mark Index Entry from the Insert menu. The Add Index Mark window opens.
3. In the Entry field type the surname, and in the Sub-entry field type the given name for the individual you are indexing.
4. Click OK.

**Editing index marks** — Index marks are made visible by choosing Hidden Text from the View menu. Index marks are surrounded by curly brace characters { }. A typical index mark appears as follows:

*{XE “Kennedy:John Fitzgerald”}*

The name of the individual is enclosed in quotation marks. The surname appears first, followed by a colon, followed by the given name. The surname and/or given name can be edited as you wish.

### Removing an index entry

1. To view index entries, choose Hidden Text from the View menu.
2. Select the index entry you wish to delete and press the delete key.

**Note** You cannot see or edit index marks unless you activate the Hidden Text option.

**Updating the index** — To update an index with added or deleted index entries, choose Rebuild Index, Notes from the Tools menu.

## Headers and Footers

You can edit headers and footers in the same way you edit any other text in your document. All techniques for selecting, inserting, deleting, and overwriting text apply here. You can use the Cut, Copy, and Paste commands in the headers and footers just as you do in the document. When you edit a header or footer for one section of your document, your changes will also affect any subsequent headers or footers linked to that document.

### Viewing and modifying headers and footers

1. From the View menu, check Header/Footer or choose the View Head/Foot button on the Toolbar. The header on the first page is displayed allowing you to make changes.
2. From the Edit menu, choose Edit Header/Footer to activate the Edit mode.

### Adding headers

1. Choose Header/Footer from the View menu.
2. Choose Edit Header/Footer from the Edit menu.
3. Add the text you want to appear in the header.
4. To add a page number, place the insertion point in the header or footer where you want the page number to appear and choose Page Number from the Insert menu.

### Removing headers and footers

1. Choose Header/Footer from the View menu.
2. Choose Edit Header from the Edit menu.
3. Select the text you want to delete from the header or footer.
4. Press the Delete key.

### Removing lines and/or shading in the header or footer

1. Place the insertion point in the space between the lines.
2. Choose Borders from the Format menu.
3. Change the shading and side options as you wish.
4. Click OK to close the Format Borders and Shading window.

**Note** A Text Protection Error means FGE cannot edit header text and body text at the same time. This occurs when you attempt to edit a header or footer when not in the Edit Header/Footer mode. Select Edit Header/Footer in the Edit menu to activate the Edit mode.

## Images

**Inserting Photos** — One of the most exciting features of FGE is the inclusion of photos in a Family Journal report. Photos can be inserted into a document with or without a frame. When a photo is inserted in a frame, the frame and photo can be dragged to a new position in the document and any text that would have been covered by the photo will wrap around it. When inserted without a frame, the picture can be moved using paragraph formatting commands, including left, center or right justify, or by inserting blank lines or spaces in front of the image.

Images can be added to an Ultimate Family Tree document in the following ways:

- Importing an image directly from Ultimate Family Tree.
- Importing from a file containing an image in the BMP or WMF format.
- Importing a BMP image by dragging and dropping.
- Pasting an image from the clipboard.

**Importing Images from Ultimate Family Tree** — Pictures that have been designated as *preferred images* can be added automatically to Family Journal reports in Ultimate Family Tree. Specify an image you wish to include by marking a linked image as the preferred image. See page 164 in the *Ultimate Family Tree User's Guide* for more information on preferred images. The caption for the image is included in the report, centered below the image.

**Note** Preferred images are imported without a frame.

#### **Linking an image to an individual in Ultimate Family Tree**

1. Open the Individual Record for the desired individual.
2. Click the More button to open the Individual More window.
3. Click Media to open the Multimedia Link window.
4. Select an existing image from the Multimedia Links list, or link a new image to the individual (see the *Ultimate Family Tree User's Guide* for the steps required).
5. Make sure the Preferred Image box is checked to specify that the selected image is the preferred image for this person.

#### **Adding images to the Family Journal report**

1. Open the Family Journal report window by choosing Family Journal from the Reports menu.
2. Check the Parent Images box to have preferred images included for individuals who are parents.
3. Check the Child Images box to have preferred images included for individuals who are children.

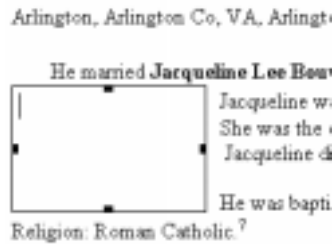
**Note** If both Parent Images and Child Images are checked, the same image will appear in two places in the report.

**Importing an Image from a File** — Images can be imported into FGE from a file. The image file must be in the standard Windows bitmap (BMP) or clip art (WMF) format.

1. Move the insertion point to the location in the document where you wish to insert the picture.
2. Choose Picture from the Insert menu to open the File Open window.
3. Locate the BMP image you wish to insert and choose OK.

#### **Inserting a Picture from a File into a Frame**

1. Move the insertion point to a line where you want to insert the photo.
2. From the Insert menu, choose Frame. A rectangular frame appears.
3. Select the frame by clicking the mouse anywhere on the frame. Make certain the sizing handles for the frame are displayed.
4. From the Insert menu, choose Picture. The File Open dialog box appears.
5. Select an image to be inserted and click OK.



**Figure 8: Inserting a Picture Frame**

**Note** Only image files having the bitmap (.BMP) or clip art (.WMF) format can be inserted. Photos that are inserted without a frame will displace any text that is covered by the photo. This photo can be positioned by selecting the photo and clicking the left, center or right justification push buttons.

**Importing an image by copying and pasting** — Images in any format compatible with a paint or image editing program can be copied to the Windows clipboard and pasted into a FGE document. Once the image has been copied to the clipboard, follow the steps below to paste it into the document:

1. Move the insertion point to the location in the document where you wish the image to be inserted.
2. Choose Paste Special from the Edit menu.
3. Choose Bitmap Image Object from the Paste Special window.

**Importing an image by dragging and dropping** — Images can be imported into FGE by dragging the image name from a directory or file list to the opened document in FGE. The image will be located in the document where it is dropped. The image file must be in the standard Windows bitmap (BMP).

#### **Resizing an image**

1. Select the image you wish to resize by clicking on the image. Four sizing handles are displayed on the image frame.
2. Drag the handle you wish to change to a new position.

#### **Moving an image in a frame**

1. Select the image you wish to move.
2. Move the mouse pointer to a position just outside the frame. The pointer changes to a cross hair.
3. Drag the image to its new location.

#### **Changing the borders of a frame**

1. Select the frame.
2. From the Format menu, choose Borders to open the Format Borders and Shading window.
3. Select the border options you want.

### Removing an image from a document

1. Click the image you want to remove to select it.
2. Press the Delete key on your keyboard.

## Objects

Windows objects such as sound clips or video clips can be inserted in FGE documents. Once an object has been inserted, it can be activated by double-clicking the object's icon.

### Inserting an object

1. Move the insertion point to the location in FGE document where you wish the object to appear.
2. Choose Object from the Insert menu.
3. Select the object type from the Object Type list you wish to use, such as Wave Sound. The object server opens, Sound Recorder for example.
4. Set up the object you wish to insert.
5. Close the object server window and return to FGE. The object is inserted at the insertion point.

**Inserting a rectangle** — Objects including rectangles, text boxes, and lines, can be inserted in a FGE document.

1. Move the insertion point to a location in the document where you wish to draw a rectangle.
2. From the Insert menu, choose Draw Obj and then Rectangle.
3. You can select the rectangle and drag the sizing handles on any side to change the size of the rectangle.

**Inserting a text box** — A text box provides a way to format text within a sizable box such as a sidebar. The box can be moved to any location within the document.

1. Move the insertion point
2. From the Insert menu, choose Draw Obj and then Text Box.

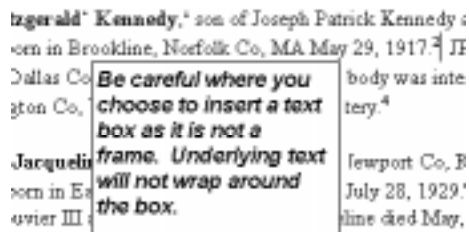


Figure 9: Text Box



3. Select the text box and drag the sizing handles on any side to change the size of the text box.

**Note** Be careful where you choose to insert a text box, as it is not a frame. Underlying text will not wrap around the box.

#### Inserting a line

1. Move the insertion point to a location in the document where you want to draw a line.
2. From the Insert menu, choose Draw Obj and then Line.
3. Drag the line to any location in the document, or select the line and drag the anchor at either end to change its position.

## Printing Documents

Before you can print, you must have installed a printer through the Windows Control Panel. Refer to your Windows manual for instructions on installing a printer.

**Using the Page Setup window** — To select various print options such as margins, paper size and orientation, use the Page Setup window.

1. From the File menu, choose Page Setup.
2. Select the Paper Size from the drop-down list.
3. Select Portrait or Landscape to select how the text will print on the page. A sample page on the Page Setup window changes according to your selection.
4. To set margins, enter the size, in inches, in the appropriate field.

**Note** Some printers (such as the HP LaserJet series) will not print all the way to the outer edges of the page.

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

**Using Print Preview** — Print Preview shows how a report will appear when printed. From the File menu, choose Print Preview or choose the Print Preview button on the Toolbar to open Print Preview and activate the Print Preview Toolbar. All page elements that appear within the printable area of the page are displayed in Print Preview.



Figure 10: Print Preview Toolbar

The following options are available in Print Preview:

- A zoom list to change the zoom factor for the view.
- An option to view one or two pages at a time. With two-page display, adjacent pages are shown side-by-side. Use the scroll bars to move to adjacent pages.
- Buttons to move through the report to view the first or last page, and to move ahead or back one page.
- A Print button to print selected text or the entire file.
- A Close button to leave Print Preview mode.

## Saving Documents

FGE documents can be saved for future use. Use the Save As dialog to save the current document with a different name. Documents are saved in Rich Text Format as supported by Microsoft and many other software publishers. FGE documents work best with Microsoft's Word for Windows.

1. From the File menu, choose Save As.
2. A Save As dialog box opens.
3. Specify a target directory and a file name.
4. Click OK.

## Ultimate Family Tree Editor as a Stand-Alone Program

FGE can be used as a stand-alone program or from within Ultimate Family Tree. To start FGE as a stand-alone program, choose one of the following options:

- Double-click the FGE icon in the Ultimate Family Tree program group.
- Type \UFT\FTEDITOR.EXE in the Run window.
- Choose Editor from the Utilities menu in Ultimate Family Tree.

**Note** If you have chosen Microsoft Word for Windows or another word processor as your primary word processing application in Print Setup, it will be started when you choose Editor from the Utilities menu.

## Descendant Box Chart Instant Web Page

Ultimate Family Tree can create Instant Web Page family histories suitable for publishing on the World Wide Web (WWW or Web). The Descendant Box Chart report and Modified Register Family Journal reports are available as Instant Web Pages. This section gives instructions on creating a Box Chart Instant Web Page. See page 138 in the *Ultimate Family Tree User's Guide* for instruction on preparing a Family Journal Instant Web Page.

## 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 Instant Web Page window, click Box Chart.
3. Click the Options button to open the Instant Web Page Options window.
4. Select any options as described below. Options not available for the Box Chart Web Page are dim.
  - *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 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 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 directory* — Specifies a single directory when single file is not checked. Do not select this option if creating a web page for uploading to Palladium Interactive.
  - *Files Per directory* — Specifies the number of files you want in each subdirectory. 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.
5. Click OK.
6. Click the Graphics button to open the Instant Web Page Graphics window.
7. Select any field and click Browse to find an existing graphics file, or type the names of the graphic files in the appropriate field. Graphic options not available for the Box Chart Web Page are dim.
8. Select .GIF files for each option you want to use and click OK.
9. Enter a GEDCOM or audio file in the appropriate field for inclusion in the Instant Web Page.
10. Select any field with a graphic entered and click Preview to view the graphic. Click OK to return to the Graphics window.

You can now generate an Instant Web Page from an existing chart or from a new chart. If you have already created an Instant Web Page Box Chart, select the chart name, click Existing and skip to step 10.

1. Choose New to create a new chart.
2. Specify the starting individual for your report. Press F10 to open the Find window.

3. Enter a name for the chart (up to 8 characters) in the Chart Name field.
4. Enter a title for the Chart in the Chart Title field.
5. Select Birth/Death Dates to include birth and death years in the report.
6. Select Hide Living Info to suppress information about living family members. Ultimate Family Tree determines individuals who are still alive by checking the Living field on the Individual Record for a (Y)es. The names of living individuals and the connections to their families remain intact, however birth and death years will not be included. The notation (still alive) prints below the name.  
  
**Note** 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. Ultimate Family Tree's Web Page Privacy option (Hide Living Info) is designed to protect the privacy of living family members on your Instant Web pages.
7. Specify the generation limit for the report (up to 16 generations) in the Generation Limit field.
8. If you want to limit the report to those individuals in the Grouping list, choose Use List in the Grouping box. See pages 78–80 in the *Ultimate Family Tree User's Guide* for information on Searches and Grouping.
9. Click OK. The chart is generated and opens.
10. With the selected chart open, choose Generate on the menu bar. A Save Web Page As window opens.
11. Select from the existing list, or enter a name for the Instant Web Page. Ultimate Family Tree creates a subdirectory with the name you have chosen. The main web page file, *index.htm*, is saved in the subdirectory you have specified.
12. Close the Chart window by clicking on the Close box in the upper right corner of the Chart window and choose Close.
13. Choose Close to close the Descendant Box Chart Web Page window.

## Editing the Contents of a Box

See pages 111–112 in the *Ultimate Family Tree User's Guide* for information on editing names, dates, and places in a Box Chart.

## Deleting a Descendant Box Chart Web Page

1. From the Online menu, choose Instant Web Page.
2. In the Instant Web Page window, click Box Chart.
3. Select the chart to delete and choose Selected in the Delete Chart group or choose All to delete all charts.
4. Click Close to close the Descendant Box Chart Web Page window.

## Previewing an Instant Web Page

1. From the Online Menu, choose Preview Instant Web Page or click the Preview Web Page button on the Toolbar.
2. Select the Web Page you want to view.
3. Click OK to view the Web Page. The browser you have set up to work with Ultimate Family Tree opens.
4. After viewing the Web Page, exit the browser to return to Ultimate Family Tree.
5. Click Close in the Preview Instant Web Page window.

## Going Online from Ultimate Family Tree

If you have a manual dialer, 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 click the Go Online button or choose Connect to Palladiumnet from the Online menu. The Go Online button will start your browser automatically. Use *task switching* to switch between applications. Do not click Go Online to return to your already running browser.

**Note** Task switching is a method of changing between Windows applications that are running. Press Alt-Tab to switch between programs. In Windows 95 you can also use the taskbar to switch between applications.

When using a manual dialer, after you click the Go Online button or 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 Program Manager and run your dialer. After dialing up, activate the ADMIN program by task switching. The reminder message should reappear. 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, available only to Ultimate Family Tree owners.

To go online from Ultimate Family Tree, follow these steps:

1. Quit your browser if it is running.
2. Click the Go Online button or select Connect to Palladiumnet from the Online menu.
3. Dial your Internet service provider (ISP), manually if necessary.

**Note** The Ultimate Family Tree Web Page has a proprietary Members Only section filled with exciting genealogical resources. To access the Members Only section of the Ultimate Family Tree Web Page you must go online from Ultimate Family Tree.

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.

## Uploading an Instant Web Page

Before you upload your first web pages from Ultimate Family Tree, you must go online and register in the Members Only section. See page 145 in the Ultimate Family Tree manual for instructions on registering with Palladium and 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, press Escape.

**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 Program Manager and run your dialer. After dialing up, activate the PDFTP program by task switching. The reminder message should reappear. Click OK.

## Uploading Multiple Web Pages

You can upload multiple Web pages to the Ultimate Family Tree Web Site. If you upload a Web page which has the same name as an existing Web page you have previously loaded, the existing Web page will be deleted and replaced by the new page.

## 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 its 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 on the Ultimate Family Tree CD-ROM.

**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.

# Ultimate Family Tree Application Notes

## 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 29 of the *Ultimate Family Tree User's Guide*.

## 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.
3. Highlight the incorrect name in the Spouse field and press the Delete key on your keyboard to remove the spouse.
4. Press F9 or click Save in the Events window.
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 correct 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 been entered already. If it is a different person, click New. If the person is already in the list, highlight the name and click List to link the individual properly. If you want to make any changes, click Cancel to return to the Individual Record window.

## Printing an Individual List

Follow these steps to print an Individual List report, sorted by surname, with the full name in the first column.

1. From the Reports menu, choose Lists, and then Individual.
2. Double-click the left mouse button on all selections (if any) in the Selected list to remove them.
3. Double-click on Surname in the Field List (it should be at the top of the Selected list).
4. Double-click on Name (Short) to move it to the Selected list.

5. Double-click on any other options in the Field List. Select a smaller font size to allow more columns to print. Click the Insert button to move the selected item in the Field list to the location above the highlighted item in the Selected list.
6. Choose Skip 1st Column to omit the first column in the Selected list from printing on the report.

**Note** The surname will print with the given name in the first column. However, the report will be sorted by surname, not given name. If you want the surname to print first, choose Surname 1st in the Page Setup window.



# 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.
- Acquire** To digitize an image by using a scanner, frame grabber, video digitizer, or other electronic device.
- Active window** The window affected by a current action, such as typing text or viewing a List.
- 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.
- Cascading menu** A menu that opens from a command on another menu. A command that has a cascading menu has a right arrow next to it.
- 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 left 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 in Windows 3.x. In Windows 95, the close box is in the upper-right corner. Choosing the close box closes the window. See also Control menu box.

**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.

**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.

**Control menu box** The Control menu box is at the left of the title bar. It opens the Control menu for the window. This menu contains commands that you can use to manipulate the window.

**Copy** An Edit menu command that copies selected text to the Clipboard without removing it from the original location.

**Cut** An Edit menu command that removes selected text 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.

**Desktop** The working area on the computer screen in which windows and other items appear.

**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. The three types of direct media are images, audio, and OLE.

**Directory** A collection of files and other directories (called subdirectories) stored under a common name on a 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.

**Drop-down list box** A single-line dialog box that opens to display a list of choices.

**Embed** To insert information (an object), that was created in one document, into another document (most often the two documents were created with different applications). The embedded object can be edited directly from within the second document. To embed, you must be using applications that support object linking and embedding.

**Emigrant** A person who departs from a country to settle elsewhere.

**Event GEDCOM** The Event GEDCOM Version 1.0 specification has been designed by COMMSOFT 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** This current GEDCOM standard, 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.

**Find Key (F10)** The F10 key brings up a window designed to find an individual in your project. See also Function Keys.

**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 needs more research, attendance at a certain college, or cause of death.

**Fonts** The complete set of characters including numerals, symbols, and letters in a single design, size, and style (for example: 10-point, Times Roman, italic). The character set is used on the computer screen and in printed reports.

**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.

**Function keys** The F keys are generally located on the top or side of the computer keyboard. These keys serve to help you use Ultimate Family Tree more efficiently. They assist in data entry and help you move up or down lists, find people or places, and access context-sensitive help.

**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 and files (programs, groups, documents) on the desktop.

**Ignore case** A search criteria option that instructs Ultimate Family Tree to ignore the case of letters when executing a search command.

- 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 an Ultimate Family Tree project.
- Inactive window** Any open window in which you are not currently working.
- 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. The index must be collected before can be printed.
- 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.
- Link, OLE** To create a reference in a destination document to an object in a source document. When you link an object, you are inserting a visual presentation of the object into the destination document. When the object changes in the source document, the changes appear in the destination document.
- List box** Within a dialog box, a box listing available choices—for example, the list of all available files in a directory. If all the choices will not fit, the list box has a vertical scroll bar.
- 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.
- Maximize button** The small box, containing an up arrow, at the right of the title bar. Mouse users can click the button to enlarge a window to its maximum size. Keyboard users can use the Maximize command on the Control menu.
- Media** A general term encompassing all types of information from text to sound, but used here to refer specifically to pictures, graphics, animation, sound recordings, and video.
- 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.

**MIDI files** MIDI is an acronym for Musical Instrument Digital Interface, a standard protocol for communication between musical instruments and computers. A MIDI file contains all the information required to play a sound by using a MIDI device.

**Minimize button** The small box containing a down arrow at the right side of the title bar. Mouse users can click the button to reduce a window to an icon. Keyboard users can use the Minimize command on the Control menu.

**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.

**Mnemonic characters** An alphabetic symbol that allows direct keyboard access to control functions when preceded by the Alt key. This character is a unique and distinctive letter in the Control name that is underlined.

**Multimedia** A combination of various media, such as sound, graphics, animation, and video.

**Narrative** Voice accompaniment to selected media items (specifically pictures) telling about an individual, his or her family, experiences, important events and people, and any interesting and significant details.

**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.

**Object** Information such as a picture, chart, text or sound file, that can be linked to or embedded into, another document.

**OLE (Object Linking and Embedding)** Windows technology to create items in one software program and place and/or access them in another software program. OLE objects include pictures, text, images, video clips, sound clips, and MIDI files.

**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 Cut.

**Preferred image** The selected image that can be displayed from the Media Tree, Pedigree, Family, and Descendant windows.

**Proceed button** The command to continue with the chosen action.

**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.
- Replace all** Substitutes new text for all text found in a Find search.
- Replace and Find Again** Substitute new text for text located in a Find search, and then repeat the Find and Replace commands.
- Research note** Free-form text that can be entered about past, ongoing, or future research on an individual.
- Reserved characters** A set of characters used by Ultimate Family Tree for internal processing. They are not available for use in data entry.
- Reverse Register** The COMMSOFT Reverse Register is a genealogical report format that uses a numbering system similar to the Register or Modified Register reports, but 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. Images can be scanned directly into Ultimate Family Tree. A TWAIN-compatible scanner is required.
- 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 Ctrl or Alt 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 in 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.

**Sure level** A method, used in ROOTS IV, to indicate the reliability of information included in your family history. The sure level can be used to cover all information concerning an 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.

**TWAIN** The software used by scanning devices to provide a consistent interface with other programs. TWAIN has become a de facto standard.

**Undo** An Edit menu command that reverses the last action that you performed on any text within a field, record or file. Undo deletes a new record 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. In DOS commands, 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** A rectangular area on the desktop in which information is entered, selections made, or information viewed.

**Window title** The title of the window that is found at the top of the window.

**Word wrap** A feature that moves text from the end of a line to the beginning of the next line as you type.



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