

Opening the Doors to Family Tree Maker

or how to enter your information correctly



applies to Family Tree Maker 2012/14 for Windows and Family Tree Maker 3 for Mac



an Unlock the Past
guide book...

John Donaldson —

About the author



John Donaldson

John Donaldson started using Family Tree Maker when it was released as a two floppy disk program for Windows 3.1 in 1994. Since then he has used all the versions, and now uses both Family Tree Maker 2014 for Windows and Family Tree Maker for Mac 3.

In 1996 he applied to beta test the program, when Brøderbund Software in San Francisco was producing it. The program has gone through a number of owners and is currently owned by Ancestry.com. John has continued to be involved in beta testing, and has participated in some 17 consecutive releases.

In March 1998 he commenced writing a series of Family Tree Maker columns for Victorian GUM Inc. (www.vicgum.asn.au) newsletter and this series has continued unabated and now consists of some 180 plus tutorial articles www.vicgum.asn.au/downloads/FamilyTreeMakerArticlesIndex2013.pdf

John is also a former Hon. Secretary of Victorian Gum Inc. and in 2013 was awarded a life membership to GUM. He also edits the GUM newsletter.

In 2005, coinciding with the ownership of Family Tree Maker by Ancestry.com, He and three others were invited to become alpha testers to advise the developers on future ideas for the program and act as a conduit of experienced users to the development team. As part of that involvement (the alpha group is now the 'alpha 8'), John has visited Provo, Utah twice. He relates that being able to spend a day with the developers as something akin to being in genealogical heaven.

As well as writing about Family Tree Maker, John runs regular Family Tree Maker user groups and workshops for Victorian GUM and speaks at regional and interstate groups. He also actively participates in a number of Family Tree Maker Message Boards around the world as well as GUMNET, GUM's members only message board. In 2014 through GUM John was one of the key organisers and speakers at the very successful "Duff Downunder" seminars with Mr Duff Wilson, Senior Product Manager Family Tree Maker at Ancestry.com in Brisbane, Sydney and Melbourne.

John's comment about Family Tree Maker is that it is 'the most addictive, intuitive and FUN program that he has ever used.



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John Donaldson

2015



Published in Australia by
Unlock the Past
PO Box 119
St Agnes SA 5097
www.unlockthepast.com.au

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ISBN: 978 1 925323 12 2 (print edition)
ISBN: 978 1 925323 13 9 (ebook edition)

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Printed by Gould Digital, Ridgehaven, South Australia

Foreword

There are so many things to consider in the process of collecting, organising, preserving, and sharing your family story. This book, *Opening the doors to Family Tree Maker* is an excellent guide for helping you know how to correctly and effectively enter the information you have about your family story into Family Tree Maker. John Donaldson is an excellent guide, and was instrumental in helping me as I was introduced to Family Tree Maker 10 years ago.

That's when I first became acquainted with John and came to rely regularly on his expertise and guidance along with a few other carefully selected advisors. In the years that followed, Family Tree Maker has changed a great deal and John has been involved every step of the way. His expertise has helped countless others, as John has been teaching, writing and helping people with Family Tree Maker in Australia and abroad for more than 15 years.

Family Tree Maker is a powerful but easy-to-use program for helping you to discover, preserve, and share your family's heritage. It is available for Windows and Mac computers and John is versed and familiar with both. In this book, John uses his experience and friendly style to teach, guide, and help you learn where and how to enter your research and information into Family Tree Maker. Best wishes in this exciting journey.

Duff Wilson
Family Tree Maker
Ancestry.com



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Introduction

This book is a follow on from my first book on Family Tree Maker *So you are totally new to Family Tree Maker* (second edition). That book as the title implies was to assist very new users to Family Tree Maker (whether Windows or Mac) to load and start the program and get some basic output. The book was designed to be about as simple and non-threatening as it could be. If it was a book on learning to fly, it covered starting the engine, taking off, doing a circuit and landing safely.

Many new users have reported that they found the book helpful and I hope to do a third edition when the next versions of Family Tree Maker are released. Family Tree Maker 2016 (Windows) and Family Tree Maker 4 (Mac).

Note that Ancestry.com has renamed Family Tree Maker Mac3 to Family Tree Maker 3 (or FTM3). This is because they make it available in the Apple iStore and by definition all products in the store are 'Mac' so you can't have Mac in the title.

This book, *Opening the doors to Family Tree Maker* has been designed to take the user to a higher level and is part one of a two-part series.

Opening the doors is designed to explain how you correctly enter your various data and research into Family Tree Maker, whether it be Windows or Mac. My experience shows that many users are unsure as how to correctly add information into the program. A long time ago a person told me that if you 'lie to your database (with incorrect information entry) it lies right back to you with incorrect reports and charts'. Well family Tree Maker is nothing more than a genealogical database so data entry is **very important**.

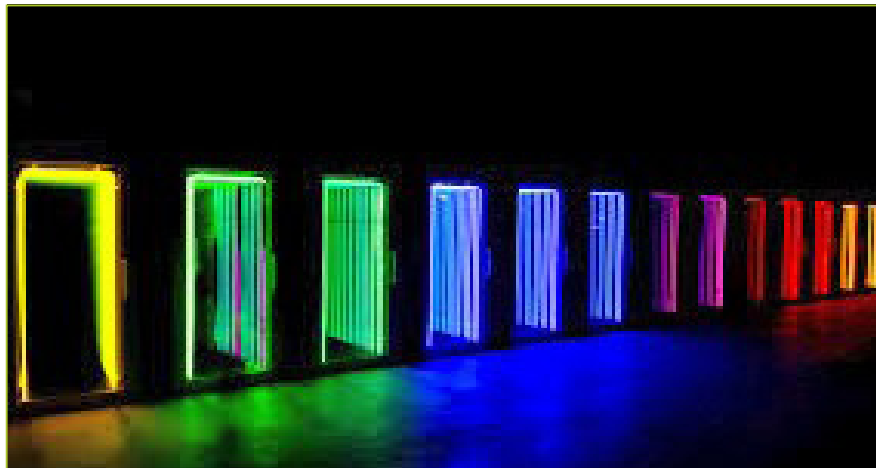
My reference to 'doors' is to convey the sense that there are various doors for entering data, each appropriate to the data being entered. You enter names in a different location to where you enter dates or places or media etc.

The second part of this two-part series, working title, *Exiting the doors to Family Tree Maker* will focus on output, reports, charts, books, online trees, smart phones and tablets as well as how to use Family Tree Maker with other applications such as MS Word, MS Excel, image editing programs, etc.

Both books have been designed to be small and compact and something that is easy to read and understand and above all applying the understanding to enjoy the program.

John Donaldson
March 2015

Opening the doors into Family Tree Maker



Family Tree Maker 2014

Family Tree Maker 3

Family Tree Maker is essentially a database program. It is in fact a relational database consisting of a number of tables with the data connected by internal links or pointers. Sometimes I like to think of Family Tree Maker as a large building with a number of doors to enter and a number of doors to exit.

In this book, I am going to have a look at all the ‘entry doors’. By entry doors I am referring where you enter Family Tree Maker by adding data like: names, dates, places, media, notes and sources etc. Many of these entry doors are located in the People Workspace, but of course you have the Places, Sources and Media Workspaces as well. So let’s start and where most people begin by using the ‘name door’ or entering names into the program.

I am planning a second book that will talk about the exit doors of Family Tree Maker. The ones used to generate reports, charts, books and to produce files to be used in other applications like MS Word, MS Excel, etc.

Chapter one

Door number one—the name door

Everyone has a name (except perhaps Javert Prisoner 24601 in *Les Misérables*). Names are usually the first thing that you enter into Family Tree Maker. Usually names consist of a surname or family name and first or forenames, often called Christian names. So I am going to commence by looking at how names are handled in Family Tree Maker.

Entering names

In the western world we normally write names as forename (given name) surname e.g. John Smith. This is how Family Tree Maker expects them and this is how most people enter names. Note that when entering names for females, you use the maiden or unmarried name e.g. Jane Smith.

Alternative names

Often in our research we come across a person who is known in the various sources with different or alternative names, and more commonly spelling differences.

Family Tree Maker allows you to record as many alternative names as you wish. To do this, go to the People>Person view and add a new name fact. Now enter the alternative name. Now Family Tree Maker allows you to define which one is the Preferred name fact and marks it as Preferred.

This will be the name fact that is displayed in reports and charts etc. Now, later research may clarify the person's name, and if that is the case, you can go back into the Person view and delete the alternative name. The quickest way to do this? Select the fact then right click and select Delete.

Also known as (AKA) Nickname

You can also add a nickname or 'AKA' for a person. Again, as above, go to the Person view and add a new fact 'Also Known As'. Now enter the Nickname.

Note that Family Tree Maker will also list this fact as Preferred. The Also Known As, or AKA fact can be used in report or charts etc. to display the name and/or the AKA. Don't forget to add a source and/or a note about the derivation and use of the AKA.

Way back when Family Tree Maker did not handle AKAs very well, I got into the habit of entering AKAs along with the name, e.g. Herman (Buck) Donaldson. I have continued with this method, which to me has the advantage of one less fact to control and both the name and the nickname show up in all reports and charts without me having to deliberately select the AKA. Others use quotes. It doesn't matter what you use, just be consistent in its use throughout your file. Note that these will show as potential name errors by Family Tree Maker unless you turn off these warnings in the Tool>Options dialogue.

Titles in Name fact

You can have a title (such as 'Dr or Major'). Titles are not entered into the name field but are entered as a Title fact one of Family Tree Maker's standard Fact names. You can then choose to use the title fact as part of the name in charts and reports etc.

Text in quotes (nicknames) in the Name fact:

You can have the name in quotes copied to the Also Known As field or have it left in the Name field.

Name suffixes

Name suffixes such as Jr (Junior), Sr (Senior) and III (the Third) are often used in identifying ancestors with similar names. To enter a suffix go to the Person view and enter the suffix without a comma e.g. Elspit Donaldson Jr.



Do not enter name suffixes such as Jr or III, in the Title field. This field is reserved for appellations such as Rev, Dr or Major. Suffixes entered in the Title fields will be printed in front of the name e.g. 'Jr Elspit Donaldson'. This may not be what you want.

The name edit dialogue

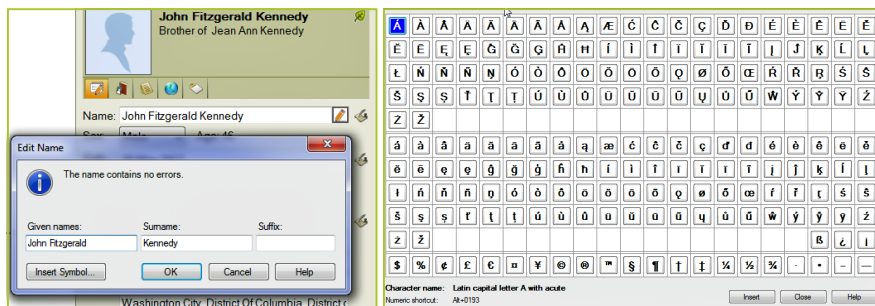
This is a great but often overlooked dialogue. If you click in the name field you will reveal a pencil icon. Clicking on this icon reveals a name edit box. This is also where you can add a suffix and also adjust names. You can add suffixes and also correct names that Family Tree Maker is having problems with resolving. You can also add umlauts or diacritical marks.

How to create umlauts, diacritical marks or accents in names

You may have noticed in the examples that I have used so far that many of the names have accents or diacritical marks.

These are common in many languages such as French, German, Spanish, Portuguese and many others. Often these are also referred to as symbols and way, way back before Windows; the early computers were programmed with these symbols that were referred to as ASCII codes. You can see a list of them on this link.

www.ascii-code.com

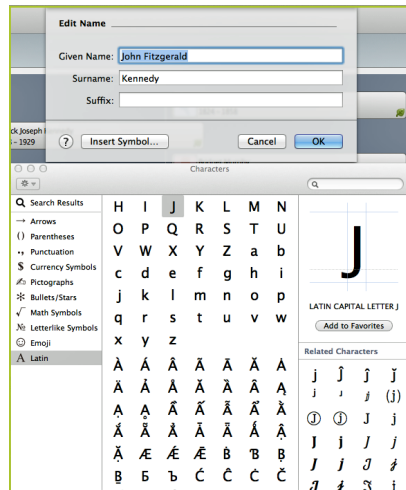


Edit Name dialogue (Win)

Symbol table (Win)

Note the slightly different arrangement of the diacritical table between Windows and Mac.

ASCII codes are still there, but nowadays we tend to use them from the Insert Symbol in MS Word and now you can do it in Family Tree Maker. All Windows or Family Tree Maker is doing is translating from a symbol table to the ASCII code, so you don't have to remember the ASCII codes.



Edit Name dialogue and symbol table (Mac)

To include a symbol in a name

Simply click on the edit pencil to the right of the name. This opens an edit box that includes a link to the diacritical list (insert Symbol). This opens the symbol table.

Tip: This symbol table is also available in Notes in the Person view.

Name editing options

The following table describes the options in the Edit Name dialog box:

Option	Description
Auto Fix	Auto Fix appears only when there is an error in the name. Family Tree Maker will attempt to determine the intent of the name and make adjustments accordingly. For example, if a nickname is included in the name in quotation marks, Family Tree Maker will remove the nickname from the name and put it in a new 'Also Known As' fact.
Ignore	Ignore appears only when there is an error in the name. You can use Ignore to have Family Tree Maker leave the name as it is. Ignored names display as they are entered in the Name field without a warning icon.
Name status	Notes whether the name is in a format understood by Family Tree Maker. If there are any problems, they are explained here.
Given names	The first and middle names of the person, as Family Tree Maker understands them. You can edit the names as needed.
Surname	The last or family name of the person, as determined by Family Tree Maker. You can edit the surname as needed.
Suffix	Jr., Esq., Dr., or any other title included in the name. You can edit the suffix as needed.

Multi-word surnames (sometimes called 'dit' names)

As a general rule, Family Tree Maker 2008/2014/Mac1/2/3 assumes the last word entered in the name field is the individual's surname. However, it also recognises many common surname prefixes e.g. 'van den Dungan'.

Here is a list of recognised prefixes in Family Tree Maker:

o', d', van, von, ver, st., saint, der, de, la, del, della, las, te, ten, ter, le, du, des, da, dos, le, detto, di, dit, du, in't, lo, 't, te, tan, uit, den, uyt, vulgo

The significance of these prefixes is that the name will usually be correctly sorted, e.g., François Le Smith will show in the index as Le Smith, François.

See also <http://genealogy.about.com/b/2010/07/08/understanding-dit-names.htm>, or put 'dit names' into Google.

Hyphenated surnames

This can happen when women use both their maiden and surnames together e.g. Hilary Rodham-Clinton. You can record the surname as an alternative fact or in the Also Known As (AKA) fact.

Duplicate surnames

This can occur when a female ancestor whose last name at birth is the same as her husband's e.g. cousins marrying. To avoid confusion, use the personal note field to also record the details.

My method of uniquely identifying people in my file

You won't see this one in the books on Family Tree Maker (unless it is a book that I have written). Many years ago I was getting confused with ancestors with the same name. This was before Family Tree Maker did a double sort of the index by alpha then by date of birth. So to identify people with the same name and make everyone in my file unique, I used a number in square brackets between the forenames and the surname, e.g. Elizabeth [04] Marris. To my joy, the index also sorted them by my unique ID number.

Note the use of a leading zero (0) in the number. This stops the 10 being incorrectly sorted. Also, again to my great joy, the numbers do not interfere with Ancestry searches.

The Ancestry search algorithms ignore the number. Thank you Ancestry. The advantage to me is everyone is unique. So if I am sharing research with someone, I can refer to Elizabeth [04] Marris, confident that she is the only person in my file with that name and I don't have to list any other parameters, e.g. like date of birth or parents to positively identify her.

The other little side benefit is that as my Ancestry Member Tree (AMT) is

Marris, John [01]	1488 - 1522
Marris, John [02]	1749 - 1824
Marris, John [03]	1769 - 1820
Marris, John [04]	1808 - 1808
Marris, John [05]	1822 - 1893
Marris, John [06]	1823 - 1823
Marris, John [07]	1823 - 1893
Marris, John [08]	1836 - 1899
Marris, John [09]	1855 - Unknown
Marris, John [10]	1862 - 1931
Marris, John [11]	1890 - 1890

public, I often see other researchers who have used my data in their trees, merging the data complete with the square brackets. I don't mind as I have a public AMT, but it is amusing to see how your data are used.

Using slashes

In some cases an individual entered into Family Tree Maker may have two surnames, e.g. 'Aquirre Chanquin'. To ensure that multi-word surnames are not indexed incorrectly, you can insert a backslash (\) before and after the surname. e.g. Maria Graciela \Aquirre Chanquin\.

In the index it will show correctly as 'Aquirre Chanquin, Maria Graciela'. Note: Once entered, the backslashes do not appear. They are merely used to initially assign names appropriately as given names or surnames. They are called 'delimiters'.

Note: This also works in earlier versions of Family Tree Maker. You see the slashes in the Family View but you don't see them in reports or charts.

Surname variations

As you research you will inevitably discover that surnames in the same line can change over the generations. Often this can be associated with a migration event, especially where a European name is anglicised or perhaps shortened. This also of course means that you have to search for names in many variations, but that is the thrill of the chase. As noted above, you can have as many name facts as you wish as well as the AKA field and I would also strongly suggest that you utilise the notes and research note capability of Family Tree Maker.

Unknown names

Unfortunately you cannot always find the name or part of a name in your research. There are numerous ways to handle it but whatever strategy you adopt, be consistent. I use ?? for an unknown forename and 'Unknown' for an unknown surname e.g.

?? Unknown,
?? Smith,
John Unknown

Being consistent lets me use the much beloved Custom Report to keep track of where I have work to do. Others use a number of spaces or underlines, or a combination e.g. '?. It doesn't matter what you do, but find a method you like and stay with it. Be consistent and the Custom Report will always work correctly!!

Non-breaking space

This was in fact my very first tip in my first column in March 1998 but it is worth reminding people. Consider the example. I have just used for the compound name 'Aquirre Chanquin'.

Instead of using the (\) I could use the non-breaking space Alt+0160.

Note this must be entered from the numeric keypad.

Type 'Aquirre<Alt+0160>Chanquin' (no quotes). That is hold down the Alt key and from the numeric keypad type in 0160. 'Aquirre Chanquin' will be displayed but the

space between the names is actually the non-breaking space that is read as an ‘invisible’ character so Family Tree Maker thinks that it is one name. Note in the example, I have used the carats < and quotation marks ‘ ’ simply to make the example clear. In doing it for real you don’t enter them.

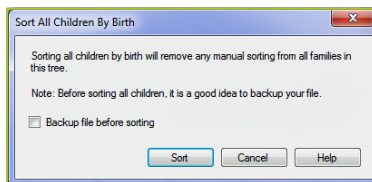
I used to be very keen on this method over slashes but be aware that whilst the name looks and sorts correctly in Family Tree Maker it may not be recognised correctly by Ancestry in searching or leaf hints. I would suggest that if you are going to use the non-breaking space technique that you also check that it is recognised correctly by online search indexes.

Sorting children and blended families



You can sort children in birth order by simply clicking on the sort children button (arrows) in the Tree view or go to Tools>Sort All Children By Birth.

Once you have sorted children you can also invoke Blended Families (picket fence button) to show all issue where there has been multiple marriages. Note that as both controls work on the same data (children) you can’t use both together. I suggest sort children first then show blended families where appropriate.



Order of names in different languages

This is not strictly a Family Tree Maker issue, but be aware that the order of first names and surnames can vary. Consider:

Spanish: John <father’s surname> <mother’s surname> Juan López Rodríguez. In Spanish, that is the first surname.

Enter under López. Portuguese: John <mother’s surname> <father’s surname> João Rodrigues Lopes. In Portuguese, it is the last surname. Enter under Lopes.

So you need to be careful how you enter the surname, which may in fact not be the last name as it is in this country. I am indebted to GUM member Peter Matthews who many years ago sent me this excellent link as to all the various ‘rules’ applying in various countries.

http://genealogy.wikia.com/wiki/Family_name



Convert (case) names

This is a useful routine on the Tools menu that will convert names from UPPER to Mixed case and vice versa. This can be particularly useful if you have your names as ‘Smith’ and you merge a file with names as ‘SMITH’.

Simply run the Convert Names routine selecting the format you want. I always use the form ‘Smith’ as it then lets me display names as Smith or SMITH in reports and charts.

Using names in reports and charts—options

Having set up your names you can include some of the various facts that you have included with your names. Note that you can have surnames all caps and for this reason I always enter my names as mixed case so I can use this option when I want it. If you choose to enter all your surnames upper case and/or use the convert name tool, you don't have this option.

I also acknowledge that there are many different ways to display names. For example, some people use upper case surnames for their direct lines and use mixed case for the rest. It is your database, your family and your choice.

The index (introduction)



As you add names, Family Tree Maker automatically creates an index of these names which is available in the People Workspace Tree view. The index is the primary navigation tool to move around your file. It is a multi-door tool.

Home person

Just to the right of the people count is a small house icon similar to one of those houses that you had when you played Monopoly. This designates the home person. In Family Tree Maker you can designate a home person.

To set a home person simply right click on the person's name in the Index or use the person menu. In this shot I have nominated Kennedy John F as the home person and you can see the home icon next to his name.

Usually I have myself as the home person as in the top right hand panel where you have the focus person showing (and a photo if you choose) you always see the relationship of that person to the home person. If I am the home person it tells me instantly what the relationship is and helps me understand what I am entering.

But on some occasions I change the home person especially if I am working on someone else's file, or am entering data for some line in the file and want to see the relationship to (say) the eldest in the line. My point is that you can be flexible with this to suit your particular needs.

Family name, Given name(s)	Lifespan
Kennedy, Christopher George	1840 -
Kennedy, David Anthony	1955 - 1984
Kennedy, Douglas Harriman	
Kennedy, Edward Moore	1932 - 2009
Kennedy, Edward Moore Jr.	
Kennedy, Elizabeth	
Kennedy, Eunice Mary	1921 - 2009
Kennedy, Francis	1889 -
Kennedy, Fred	1960 -
Kennedy, Jean Ann	1928 - 1990
Kennedy, John	1715 -
Kennedy, John	1740 - 1803
Kennedy, John	1769 - 1836
Kennedy, John Fitzgerald	1917 - 1963
Kennedy, John Fitzgerald	1960 - 1999
Kennedy, Joseph Patrick	1888 - 1969
Kennedy, Joseph Patrick	1935 - 1944

Home person is shown by a 'house' icon beside their name

Take me home!!

If you click on this home icon on the index top line from wherever you are in the People Family view, you will immediately be taken to the Home person. You also can see the Home person on a file in the Plan view in the summary block. If you would like to get a

little more information on this feature, have a look at the FTM Blog:

<http://blogs.ancestry.com/ancestr/2011/01/24/family-tree-maker-home-person>

Show additional index data

If you click on the icon immediately next to the home icon you get the opportunity to expand the index to show additional data, e.g. birth, marriage or death dates in the index.

If you have these additional data items displayed, you can drag the columns to show all the information much like you do in Excel or Outlook.

Sorting the index

I noted that the default in the index is a sort alphabetically by family then given name. But there are many other ways to sort the index. Immediately below the first line is the Sort Box.

Two-level index sort



Users of earlier version of Family Tree Maker before version 2011 may have noticed in using versions 2011 and above that when opening the Family View, the index takes a little longer to build and you see the rotating wheel for a moment. What is going on?

Well what it is doing is making a second sort pass through the index.

The first pass is sorting alphabetically by family name, but then it goes back and looks at the given names and dates of birth and sorts them by birth date. So, if you have as I have, 10 persons named Marris, John, when I see the list of them in the index, I immediately see them in age chronological order. This was a very nice little enhancement and is in the Mac version as well.

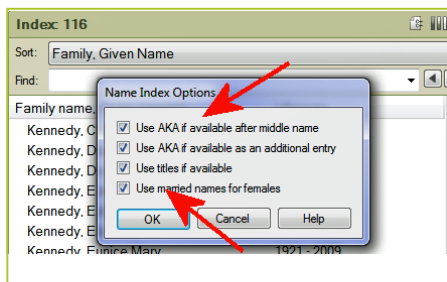
Displaying alternative names in the index

Family Tree Maker lets you determine how names are displayed in the index. You have the option to include titles, Also Known As (AKA) names and also married names for females.

To do this you need to go to the Tools menu and click on Options. Then you click on the Names/Dates/Places tab.

The options are:

- Use AKA if available as a middle name: If an alias is included in quotes after the middle name, both the given name and AKA (Also Known As) are listed in the index.
- Use AKA if available as an additional entry: If an alias or nickname has been entered for an individual, both the given name and AKA are listed in the index.
- Use titles if available: If a name includes a title, both the given name and title with name are listed in the index.
- Use married names for females: Lists married females by their married name instead of their maiden name.



Finding individuals in the index

Working down the index you will see a Find box with a couple of arrows next to it. You can use this to find someone in the index. If the index is sorted family then given name it is best to type in the family name, then a comma, then the given name e.g. Smith, Robert. The search is progressive, and depending on the size of your file, you will get to the name within a few letters.

If you have the index sorted given name then family name, then it is best to start with the given name e.g. Robert, Smith. The arrows let you also progress to the next or previous match. I suggest a little practice, but it works very well. This also is useful if you are searching for a first name.

Number of people in your file

The top line of the index shows the number of people in your file. In this example it shows 116 people.

Follow the 'yellow brick road' home

No matter where you are in a pedigree view in the People Workspace, if you see a yellow arrow in the children's area, clicking on that will always take you to the next yellow arrow, which will eventually take you back to the home person.

Very helpful if you get lost. So as Dorothy and the Munchkins discovered, all you have to do is to 'follow the yellow brick road'. 🎵 🎵

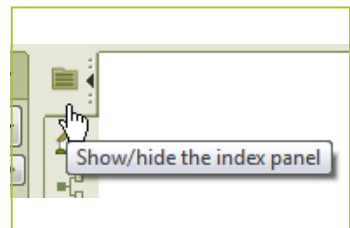
Marriage: 12 March 1853 in Aber	
Go	Children: 6
◀	Jean [02] Donaldson
◀	George [03] Donaldson
◀	William [01] Donaldson
◀	Margaret Kennedy Dona...
◀	Charles Alexander Dona...
◀	John [03] Donaldson
	Add Child

Show additional index data

If you click on the icon immediately next to the home icon (vertical arrow in Fig 2) you get the opportunity to expand the index to show additional data, e.g. birth, marriage or death dates in the index. If you have these additional data items displayed, you can drag the columns to show all the information much like you do in Excel or Outlook.

Hiding the index

Note that next to the show additional data icon there is another icon that lets you hide (minimise) the index pane and so leave more screen real estate for other views in the Family view. This can be useful if you are working with a small screen e.g. on a laptop. As the People Workspace in Family Tree Maker is very configurable, this can sometimes be useful. To reopen the index pane simply click on the same icon.



Sorting the index

I noted that the default in the index is a sort alphabetically by family then given name. But there are many other ways to sort the index.

Immediately below the first line is the Sort box. This lets you sort the index in different ways.

The options in the index are quite clever when it comes to the three date sort options. It groups the dates in ranges so that the display is easier to display.

Filtering the index

This function has actually been in Family Tree Maker even before the new format version 2008 was released. It was actually in versions 2005, 2006 and 16 yet, when I talk about it in workshops, I often get a blank look, as if it was totally new. So what is it all about?

As your tree gets bigger you can have thousands, or hundreds of thousands of people listed in the index. It can become cumbersome to scroll through them if you want to work on say a branch of your tree, or people from the same location, or people born on, before, after, or between certain dates, or were buried in a certain cemetery. This is where the filter in the index comes in.

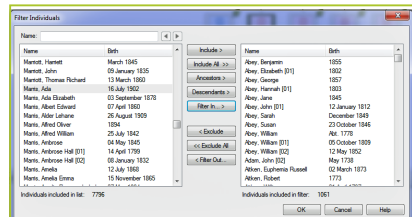
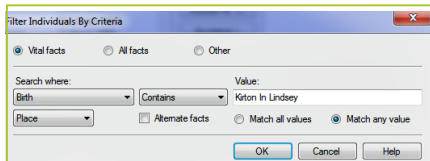
To invoke a filter, click on the filter button in the index. This opens the filter, which should by now be well known to most users of Family Tree Maker.

Option	Description
Name	Lets you search the Name list for people to include in the filter.
Name list	Lists all of the people in your tree. You can select people from the list to determine who will be included in the filter.
Include	Moves the selected person into the Filter list.
Include All	Moves every name in the Name list to the Filter list. This is helpful if you want to exclude people from the list rather than include them. After all the names are included, you can use the Exclude and Filter Out options to remove the names you don't want in the filtered list.
Ancestors	Moves all of the direct ancestors of the selected person into the Filter list. The Ancestors option allows you to include all ancestor parents and spouses, or only preferred parents and spouses as well as all ancestors' descendants (children/grandchildren, etc.) and specify the number of generations from the selected person to include.
Descendants	Moves all of the descendants of the selected person into the Filter list.
Filter In	Opens the Filter Individuals by Criteria dialog box where you can establish criteria for filtering people into the Filter list.
Exclude	Removes the selected person from the Filter list.
Exclude All	Removes all people from the Filter list.
Filter Out	Opens the Filter Individuals by Criteria dialog box where you can establish criteria for filtering people out of the Filter list.
Filter list	The list of persons who will be included in the index when the filter is active.

Let me give you an example. I want to work only on people who were born in Kirton-in-Lindsey, so instead of having a visible index of over 7000 people, I just want to show the people in the geographic area that I am working on. This allows me to focus on the area or group that I am considering.

So I Filter In as follows:

In this instance, I have used Vital facts, for Birth Place contains Kirton-in-Lindsey with Match any value and clicked OK. This gives me 1162 people in this example who match my filter criteria.



Filter In

and Filter Results

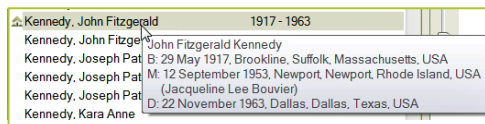
This is much more convenient to work with if I am looking at a received file of people from that area, or I am going to the records office there, etc. Note the Apply Filter check box is now checked indicating that you have an index filter applied.

Unchecking the box closes the filtered view and returns you to the full index. Also Family Tree Maker remembers your last filter so you can reapply it by simply checking the filter check box again.

The index filter is the same filter that is used in custom reports and to export selected people from your file. It is also used to select people in reports and charts, so learn it once and you have learned it all through Family Tree Maker. It is worth understanding, as it is one of the core capabilities of any database to be able to extract and set or sub-set of data. Also, there are some great examples on pages 53/54 in *Beyond the basics 2012*.

Mousing over the index

One of the nice little tricks is to mouse over a name in the index by pausing or hovering the mouse pointer over a name.



This provides you key details of the person. You can see that it gives me the birth date and place, marriage date, place (and partner name) and death date and place. Very useful. (You can do the same thing by mousing on any name in the pedigree view in the family view).

Bookmarks

We all know what bookmarks are in books. They identify a particular page in a book. Similarly the idea is extended to Bookmarks for your favourite websites in your browser. Well Family Tree Maker has bookmarks in the index. So why would you use it?

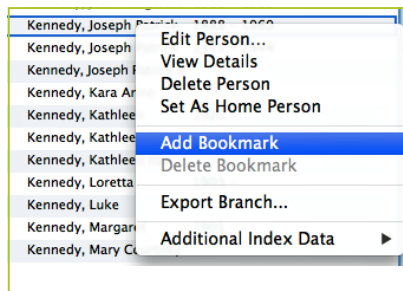
I use bookmarks for a range of things. You may want to bookmark (tag) say grandparents, or someone in a line that you are working on. I have found them particularly

useful if I am troubleshooting a tree where there is a problem with a relationship and to understand what the problem is, you need to jump back and forward between people to find the error. By bookmarking the suspect people lets you quickly focus on the problem and hopefully fix it.

To apply a bookmark is simply right click on the name in the index (or the person's box in the pedigree view) or use the Person Menu and apply a bookmark. This will cause a little book icon to appear against that person's name in the index.

To remove a bookmark simply right click on a bookmarked person and use the Delete Bookmark (or again use the Person Menu).

You can view the people that you have bookmarked by clicking on the Bookmark button on the index. Of course what you are seeing is an index filter for bookmarks that Family Tree Maker creates and yes, you can use bookmarks to group individuals.

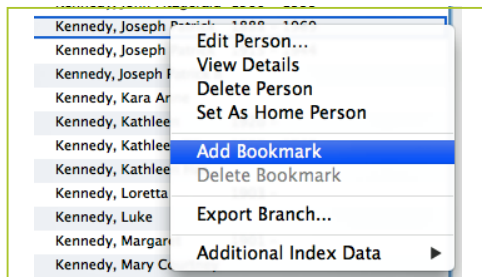


History

So finally we get to the bottom of the index—History. History allows you to see the last 200 entries that you have made and this is the important bit, with the most recently edited person at the top of the list! This list can be very useful especially if you haven't used Family Tree Maker for a while, or you have been working on various files. History lets you answer that vital question, 'what was I working on last week that I want to go back to'?

But there is a little bit more to History.

Earlier I mentioned how useful mousing is with names to quickly show additional data. Well mousing in the History list gives you information on what you did and when.



Printing or sharing an index

Simply use the Index of Individuals report in the Publish Workspace.

Also, like every other report, it can be shared (Share Button) as a PDF file, RTF and if you want to use it in a spreadsheet or external database like MS Access, as a CSV file.

Fixing mistakes

People do make data entry or merging mistakes when entering data into Family Tree Maker. Follows are a couple of techniques to help you correct these mistakes. There are also the excellent Data Errors and Find Duplicates reports but I will cover those in the second book. Incidentally, when you add names to Family Tree Maker it does check in the background to see if you are entering a duplicate and warns you if it detects a duplicate.

A play file

Those who have attended any GUM Family Tree Maker workshops over the last three years or so will know that we strongly advocate using an old file or creating a small one and use it as a play file. The idea is that you experiment with a new idea or technique in your play file before committing to your main file. A bit like a golfer having a few practice swings before hitting the shot. I have one based on the Flintstone characters which I find useful. I even get the odd shaky leaf hint when I put the tree online.

Deleting or detaching?

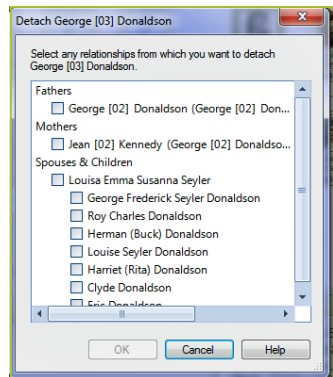
This is one that often trips new users up. It goes something like this. ‘Help, I have added the wrong spouse, children etc. to a person. Do I have to delete them all and start again?’

I have found after a number of painful experiences, that unless you are at the very top or the very bottom of a family line, that deleting often causes very unpleasant and unexpected consequences!!!!

Family Tree Maker has a much better system called attach and detach. Now a small hint. When you detach someone they exist in the index but may not be anywhere else. My fail safe method is to get a pencil and paper (really) and draw the relationship as it is then another little diagram of how I want it to be before I begin the attach/detach exercise. So this is how you do it.

Detaching incorrect relationships using Family Tree Maker

1. Under the People Workspace, select the individual you want to detach from a relationship from the index on the left.
2. From the top of the window, click the Person menu and select Attach/Detach Person, then Detach Selected Person.
3. In the Detach window, select the individual(s) you want to detach this person from, and then click OK.
4. The individual is now detached from these relationships.

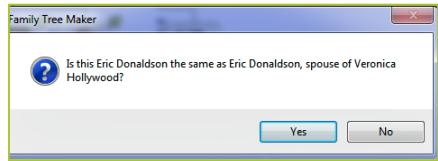


Reattaching individuals using Family Tree Maker

1. Under the People Workspace, select the individual you want to reattach family to from the index on the left.
2. From the top of the window, click the Person menu and select Attach/Detach Person, then select Attach Father, Mother, Spouse, or Child.
3. Scroll through the list of individuals and find the person you want to attach. Select their name, and click OK.
4. In the Attach window, choose the existing or new family you want to attach this person to and click OK.
5. The individual will now show with the correct family listed.

Duplicates

When you are entering people, Family Tree Maker checks your data entry and warns you if it thinks you are entering a possible duplicate. You have the option of saying ‘**Yes**’ and it will merge the new person with the existing, or ‘**No**’ and it the entry of the new person proceeds.



Summary

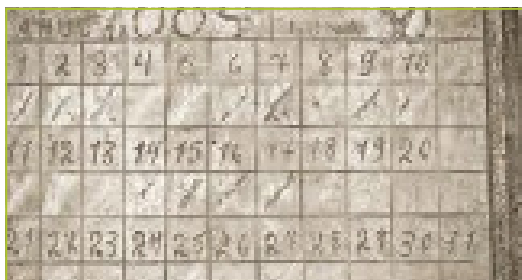
An understanding of how names are used in Family Tree Maker together with your knowledge of your family can help in ensuring that you enter names correctly and that you can then use in your research.

Chapter two

Door number two—the date door

A part from names, dates are probably the next most common items that you enter. Family Tree Maker considers everything that you enter into your file as a fact. So a name, a date are all facts. So what are dates?

Now most of you reading this would answer that dates are shown on a calendar. So that gets down to what is a calendar? If you do a bit of research, you will discover that there are many types of calendars, and they all don't agree. If for example you go to this link, www.fourmilab.ch/documents/calendar you will find that you can convert to and from many calendars, including Gregorian, Julian, Hebrew and Islamic.



Gregorian calendar

Most of us now use the Gregorian calendar and its history goes something like this:

The Gregorian calendar was proclaimed by Pope Gregory XIII and took effect in most Catholic states in 1582, in which October 4, 1582 of the Julian calendar was followed by October 15 in the new calendar, correcting for the accumulated discrepancy between the Julian calendar and the equinox as of that date. When comparing historical dates, it's important to note that the Gregorian calendar used universally today in Western countries and in international commerce, was adopted at different times by different countries. Britain and her colonies (including what is now the United States), did not switch to the Gregorian calendar until 1752, when Wednesday 2nd September in the Julian calendar dawned as Thursday the 14th in the Gregorian.

Now carefully note this date 1752. This is the default in Family Tree Maker but it can be altered as many countries adopted the Gregorian calendar at different times. Here are some examples

Greece 1924, Hungary 1587, Japan 1783, Netherlands 1583, China 1912 or 1929, Germany 1610.

See: www.webexhibits.org/calendars/year-countries.html

The point of all of this? Early dates can be affected depending on the country and when it changed its calendar and 1752 may not be correct for (say) China. Unfortunately Family Tree Maker only lets you use one cut-over date and I have yet to see a genealogy program that looks at the country a person was born and applies a cut-over date that is appropriate to that country. Now that is a challenge for the developers.

Double date format

Double Date Format warns you of the possibility of a date that falls into a special category. The following table describes the options available:

Options	Description
Leave this date as it is	Does not change the date you entered in the Date field.
Use double date formatting	Changes the date to the double date format, and shows an example of how it will be entered in the Date field.
Always use this setting	Makes your selection the default for future double dates. The Double Date Format dialogue box will not open again to alert you of a double date. To reset the dialogue box to open again, click Tools > Options >Warnings >then select Prompt me from the Double Dates drop-down menu.

If you look at Family Tree Maker help you will see the following.

Beginning in 45 B.C., many parts of the world used the Julian calendar to mark the passage of time. According to the Julian calendar, March 25 was the first day of the year and each year was 365 days and 6 hours long. In 1582, Pope Gregory XIII determined that the Julian calendar was incorrect: each day was just a little bit too long. This meant that the human calendar wasn't keeping up with nature's calendar, and the seasons kept arriving slightly earlier in the year. To solve the problem, Pope Gregory XIII created the Gregorian calendar.

This is the calendar that used officially in the UK, Australia, New Zealand, Canada, the US and many other English speaking countries. This new calendar changed the first day of the year from March 25 to January 1. Pope Gregory also had everyone jump ahead by 10 days to make up for the days that were lost when the world was using the old Julian calendar.

The practice of writing double dates resulted from this switch from the Julian to the Gregorian calendar, and also from the fact that not all countries and people accepted the new calendar at the same time. For example, England and the American colonies didn't officially accept the new calendar until 1752. Before 1752, the English government still observed March 25 as the first of the year, but most of the population observed January 1 as the first of the year.

For this reason, many people wrote dates falling between January 1 and March 25 with both years, as in the following examples.

Julian or Old Style	Gregorian or New Style	Double Date
25 December 1718	25 December 1718	25 December 1718
1 January 1718	1 January 1719	1 January 1718/19
2 February 2	2 February 1719	2 February 1718/19
25 March 1719	25 March 1719	25 March 1719

By the time England and the colonies adopted the new Gregorian calendar, the discrepancy between the two calendars was 11 days, instead of 10. To resolve the discrepancy, the government ordered that 2 September 1752 be followed by 14 September 1752. Some people also added 11 days to their birth dates (a fact which is not noted on their birth certificates).

New users to Family Tree Maker occasionally post to an Family Tree Maker help site along the lines of ‘Help, every time I add 2 February 1718 I get 2 February 1718/19. What have I done wrong?’ The short answer is nothing and welcome to double dates.

Incidentally, in researching this article I put ‘double dates’ into Google and got a lot of information not related to calendars. It appears that the term ‘double dates’ can have other meanings!

Date entry options

Family Tree Maker lets you set how you want you enter your dates and how you want your dates to appear in reports and charts.

The key bit to understand is that Family Tree Maker allows you to enter the date in one format, e.g. (say) Month, Day, Year and display it in another format (say) Day, Month Year. Normally though most users would have the date options set to be the same. You can alter the way dates are handled in Tools>Options>Names/Dates/Places (Win) or Family Tree Maker 3>Preferences>Dates/Names/Places (Mac). It is important to get this correct as if you entered a date 10 September 1878 with the date input set at DMY, (9/10/1878), it would display as 9 October 1878. So think through how you want your dates to be entered and displayed.

Date Options (Win)

The screenshot shows the 'Options' dialog box with the 'Names/Dates/Places' tab selected. The 'Date display format' is set to 'Day Month Year' (selected with a radio button). Below it, 'Day' is set to '05' and 'Month' is set to 'March' in dropdown menus, with a 'Sample' of '05 March 2004'. The 'Date input format' is also 'Day Month Year'. The 'Double dates' section has a 'Cutoff year (normally 1752):' set to '1752'. The 'Ancient date notation' section has 'For dates before 1000 AD:' set to 'Use BC & AD'. The 'Place Options' section has 'Check place authority when entering place names' checked. The 'Name index options' section has several checkboxes: 'Use AKA if available after middle name', 'Use AKA if available as an additional entry', 'Use titles if available', and 'Use married names for females'. The 'Fact labels' section has 'About: Abt.' in a text box. The 'Use Defaults' button is at the bottom right.

Date Preferences (Mac)

The screenshot shows the 'Preferences' dialog box with the 'Dates/Names/Places' tab selected. The 'Date Display Format' is set to 'Day Month Year' (selected with a radio button). Below it, 'Day' is set to '05' and 'Month' is set to 'March' in dropdown menus, with a sample of '05 March 2004'. The 'Date Input Format' is also 'Day Month Year'. The 'Double Dates Cutoff Year' is set to '1,752'. The 'Ancient Date Notation' is set to 'BC & AD'. The 'Fact Labels' section is empty. The 'Name Index Options' section has several checkboxes: 'Use AKA if available after middle name', 'Use AKA if available as an additional entry', 'Use titles if available', and 'Use married name for females'. The 'Home Country' is set to 'None'. The 'Use this option to specify the suffix to use for dates before 100 AD.' is also present.

Displaying dates

Note that you also have options to not only display dates as DMY or MDY but also how that date is displayed. Take the example given

5 March (Year). Options

Day:	5,	05,	5.,	05.
Month	March	Mar	3	03
Separator	/	-	,	

Note also that you can have a different input format to the output. So you could enter your dates DMY, and have them displayed as MDY in reports etc. For example, if you were sending material to someone in the USA. Conversely, if someone sends you a Family Tree Maker file or GEDCOM file and after it loads it displays dates as MDY simply altering the date display in Options/Preferences and you see it as DMY.

Date formats in various countries

Various countries use varying date formats. Here are some examples:

- Australia: day month year with slashes as separators e.g. 26/3/1911.
- Canada: officially uses year month day with hyphens as separators e.g. 1911-3-26.
- Germany: day month year with full stops as separators e.g. 26.3.1911.
- UK: uses what is generally considered the 'European Standard' day month year with slashes as separators 26/3/1911. Written out this date would be 26 March 1911, which is the 'genealogical standard' for dates.
- USA: uses month day year with slashes as separators e.g. 3/26/1911.
- Family Tree Maker can understand them all.

Date keywords

As well as entering an exact date e.g. 5 March 1832 or 5/3/1832, you have some great options to enter dates in a more inexact form. These are called Date Keywords.

Certain keywords can be used in the date field to help define the date. For example, you may be uncertain about the birth date of a person but know it falls somewhere in the year '1900'. In the Date field you can express that by typing 'Bet. 1900–1901'.

The following table describes the keywords you can use and how Family Tree Maker expresses them:

Keyword	Result
About, ABT, or A	Abt. 12 Dec 2004
AD	68 AD
After or AFT	aft. 12 Dec 2004
Ante	Bef. 12 Dec 2004
Before, BEF or B	Bef. 12 Dec 2004
Between, BET, or BTW . . . and	Bet. 9 Dec–12 Dec 2004

BC	22 BC
Calculated or Cal	Cal. 12 Dec. 2004
Child	Child
Circa, Cir, or C	Abt. 12 Dec 2004
Dead	Dead
Deceased	Deceased
Estimated or EST	Abt. 12 Dec 2004
From . . . to	Bet. 9 Dec-12 Dec 2004
Infant	Infant
Never Married	Never Married
Post	Aft. 12 Dec 2004
Stillborn	Stillborn
Unknown	Unknown
Young	Young
?	Unknown

Tip

I like the ‘?’ for Unknown. If I have for example a person who I know has died and I don’t know the date of death, I type ‘?’ in the Date of Death field and Family Tree Maker shows it as ‘Unknown’. So one keystroke gets me a 7-character word and aids my consistency and you all know how I love that word!

Y2k

Remember the year 2000 when everyone was worried about how dates in the 19xx format (most commonly written xx and that was the problem) were going to work when the calendar got to 1 January 2000? Well, Family Tree Maker has always been Y2k compliant. When you enter a date you have to put four characters in for the year.

If you enter 3 March 13, Family Tree Maker does not know if you mean 2013, 1913, 1813 etc, so it prompts you for a full year input.

Date calculator

If you click at the RH side of any date field or Tools>Date calculator (Win) or (Mac) you get a nifty little date calculator that can help you determine various date facts including the day that an event occurred; e.g. I know my birth date but what was the day?

Actually, I think the Mac version is a little friendlier, but both work the same way as follows:

Date Calculator helps you determine the birth date of a person, the age of a person at the time of an event, or the date of an event. You need two of the details to calculate the third.

For example, imagine you find a tombstone or death record that says: Died March 15, 1886, Age 52 years 6 months 5 days. What was this person’s birth date? Use the Date Calculator to find out.

The date calculator has the following options:

Option	Description
Item to calculate	Select which detail you want to calculate. In the Calculate area, the detail you select is made inactive so you can't enter any data. The results of the calculation will appear in the inactive field.
Date of known event/ Known birth date	Enter the date of birth or the event. The more precise the entry, the more precise the answer will be.
Age at time of event	When calculating the Birth date or Other event date, enter the age of the person at the time the event took place. The more data you can enter here, the more precise the answer will be. When calculating Age, the calculated age will be displayed in these fields.
Calculated birth date/ Date of calculated event	When calculating the Birth date or Other event date, the calculated date is displayed in these fields. When calculating Age, enter the date when the person was born. The more data you can enter here, the more precise the answer will be..
Calculate	Determines the third detail according to the other two details entered. The answer is displayed in the inactive field.
Clear	Removes all of the data currently in the calculator.
Copy	Copies the data in the field into the clipboard so you can paste it elsewhere in Family Tree Maker or in a different program.

Date Calculator (Win)

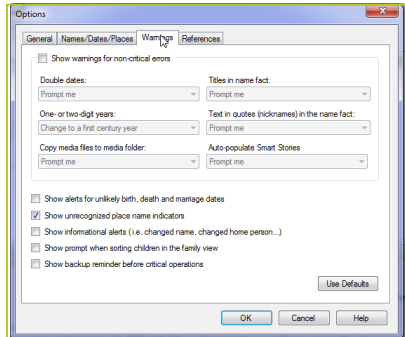
Date Calculator (Mac)

So if you have never used the date calculator I encourage you to try it out.

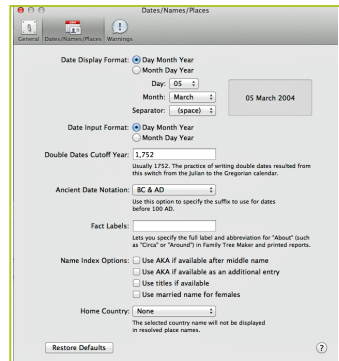
Date errors

It is inevitable that as you work on a file, you can make unintentional errors when entering dates. There are two ways to trap them.

The Tools>Options/Dates (Win) or FTM3>Preferences>Date (Mac). You will see also that there is a warnings tab associated with each dialogue.



Date Error Setting (Win)



Date Error Settings (Mac)

I recommend that you set the warnings initially to how they are shown, particularly the ‘Show unlikely birth, death and marriage dates’. Family Tree Maker will warn you if you enter a birth date for example where the mother is already deceased.

Options	Description
Date display format	Lets you specify how dates are displayed in Family Tree Maker and for printed reports. The generally accepted format is Day Month Year with a three-character month (for example, ‘12 Dec 1931’).
Date input format	Lets you specify how you want Family Tree Maker to read your date inputs. You can have either the month or the day first.
Name index options	<p>Lets you select how names are displayed in the Index of Individuals and the Index panel in the People workspace. You can select from the following options:</p> <p>Use AKA if available as a middle name: If an alias is included in quotes after the middle name, both the given name and AKA (Also Known As) are listed in the Index.</p> <p>Use AKA if available as an additional entry: If an alias or nickname has been entered for an individual, both the given name and AKA are listed in the Index.</p> <p>Use titles if available: If a name includes a title, both the given name and title with name are listed in the Index.</p> <p>Use married names for females: Lists married females by their married name instead of the maiden name.</p>
Double dates	Lets you specify the year after which double dates are no longer calculated.

Finding date errors

Family Tree maker has an excellent tool for finding errors including date errors. It is the Data Errors Report (DER) and it is in the Publish>Person Reports.

I am using just the Mac screen shot on this occasion as the dialogue box is larger and I can fit all the potential date errors in. You can find the same date errors in Windows version.

As with all reports of this nature in Family Tree Maker, you can run the report for the immediate family of the focus person, all individuals and selected individuals which brings the Family Tree Maker filter into play.

Note: I am planing a companion to this book where I will be discussing reports, charts, books and online trees in Family Tree Maker.

Using the Data Errors Report (DER)

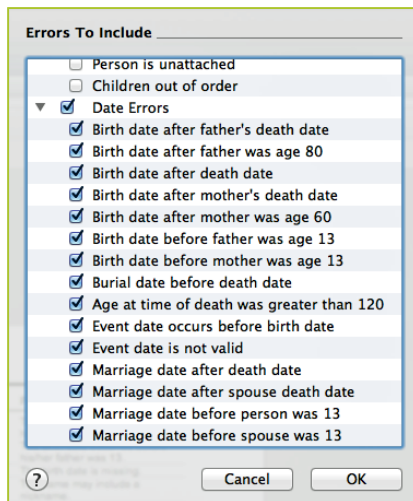
Go to Publish>Person Reports and open the DER and click on the errors to include button in the RH editing panel, (arrowed button with the green arrow) and the Errors To Include dialogue opens. I would suggest that you don't tick all the error boxes; otherwise you may get a very big report. Rather, select (say) the first potential date error, e.g. 'Birth date after the father's death date' and select 'All individuals' and run the report.

If you have any suggested errors go and examine each one in turn and correct. Repeat the process for the next potential error.

The process is repeated until you have fixed all the errors. Note that you can trap other potential errors as well as date errors. Your aim is to get a zero return for all errors in you file. (I am down to 10 pages in a 7500-person file, so I am nearly there). Wish I could say the same about undocumented sources but that is for another day.

Summary

If you get all your dates correct, they of course will show correctly in all reports, charts and books and in particular a timeline report will be correct. Happy dating.



Chapter three

Door number three—the place door

Places fill a key part of family history research. Most of us are keen to discover where significant events in the life of our ancestors took place and to record them in a sensible and consistent manner. Family Tree Maker has addressed this issue since version 2008 with a Place Name Authority that has been significantly updated and linked to Bing Maps, but also the program added a Description field to the program that greatly assists in recording place data. Finally in a very welcome update the PNA was significantly enhanced with a hierarchy view of places. In this chapter, I am going to walk you through how it all works.

The Place Name Authority (PNA) was added to Family Tree Maker 2008 and consists of an inbuilt database of places, some three million of them. This allows you to standardise your locations to ensure a great deal of consistency, (regular readers will know that is my favourite word in Family Tree Maker). Do not confuse the inbuilt PNA and the ability to display places in Bing Maps when connected online. The PNA is fully available in Family Tree Maker regardless if you are online or not.

The PNA and places in general have been progressively enhanced since being introduced in version 2008 and with version 2010 significant enhancements to places and general navigation capability were added with further significant updates with version 2012. So let's start on our places journey.

Description field

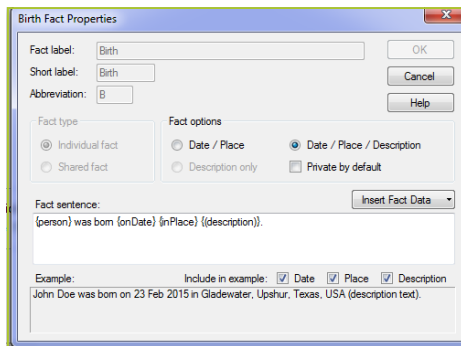
A major defect existed in Family Tree Maker from version 2 through the version 16 which was corrected as part of a re-write of Family Tree Maker 2008 and above with the addition of a Description field in the locations. If you haven't turned on the Date/Place/Description view, do this.

- Go to the People>Person view for any person
- Select (say) the Birth fact
- In the right hand editing panel click on the Options button
- Select Fact Properties and click on the Place Description radio button
- Click OK

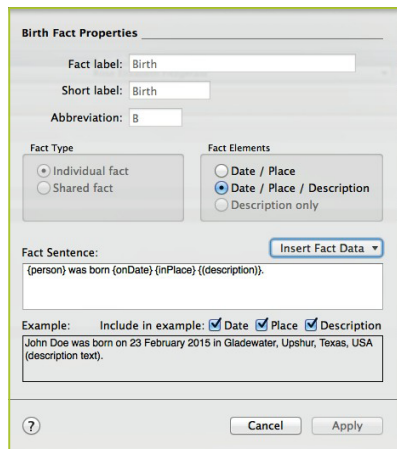
Repeat this for other date type facts, e.g. christening, marriage, death and burial. You will then find that you have a description field available to you.

The description field is a free-form text field that you can record additional information, anything associated with a location, name of a hospital, a street address, cemetery location, etc. It also has Family Tree Maker's fastfield capability which lets you be very consistent with description entries.

If, for example, you are entering (say) a cemetery location in the Burial Description field, entering a few of its first letters e.g. Melbourne as part of Melbourne General Cemetery, the fastfield will complete the entry. You can turn on the fastfield function in Tools>Options or Family Tree Maker 3>Preferences.



*Turning on the Description Field (Win—above)
(Mac—right)*



Now the significance of this revision is to suggest that the PNA can be very useful in getting your place names both accurate and consistent as well as working with the mapping database, MS Bing Earth, (previously MS Virtual Earth).

Now a few comments about the PNA

Firstly you don't have to use it at all. You can use it for as many or as few places as you want. I personally think it is great and I also like the ability in the PNA to remove duplicate places with the 'replace with other place names'. Great when web merging and the merge produces different ways to express a place.

When I first looked at the PNA in version 2008, I suggested that I tended to try to standardise a more major place (say) Melbourne, Victoria, Australia in the Place field and use the Description for the minor place, e.g. a suburb or a church name etc. What I have found with the updated PNA, is more minor places are recognised in their own right and can go straight into the Place field as they then plot best on the map. So Lilydale, Victoria, Australia is now supported by the PNA. So I have tended to use the PNA suggestion if it fits and, if not, use the next largest place and add the minor detail in the Description field.

Also, be aware, especially with historical named places, that the PNA is unlikely to recognise the place. In this instance I think it is best to 'Ignore Place Warning' in the PNA and leave the historical name as is. So, with a bit of care you can make a very good job of resolving place names. It is worth the effort to get it right.

Short place names

Now all this is well and good and you end up with highly accurate place name data, but the problem is that the full name can be very large, e.g. 'Kirton-in-Lindsey, Lincolnshire England', or even better, 'Levin, Horowhenua, Manawatu-Wanganui, New Zealand'. Yes, that is straight from the PNA.

If you wish to use these names in (say) a boxed descendant chart, you very quickly use up the real estate inside the box. What is needed therefore is the super accurate full place name in the database, but the ability to use a 'short place name' in a chart or report. Best of both worlds. Enter the Short Place Name enhancement in version 2010.

Frankfort, Philadelphia, Pennsylvania, USA

Name: Frankfort, Philadelphia, Pennsylvania, USA

Short: Frankfort

Location: 40.0147° N, 75.0789° W

Associated People: 1 Go To

Linked to This Linked to All

Kennedy, Anthony (1749 - 1828)

Short Name and location advised

If you go into the Places Workspace for any particular place you see the right hand edit panel like the above. Note the new Short place field and also the geographic locator. More on that shortly.

Now what you can do is add a short name place and in my example I have used Frankfort. Also note the Associated People number. More on that later.

Now, Family Tree Maker can use the short place names in any chart or report. If a short place name is not available, it will of course use the full place name. To invoke the short place name in any chart or report, in the Publish Workspace, click on Items to Include and check the Display user-defined short place name.

Geographic locations

New to Family Tree Maker 2010 was the ability to add a geographic location (latitude and longitude) coordinates and have them converted to a place or a location. You may for example have a location of an overgrown cemetery or perhaps you have ancestors who were on the *Titanic* and by adding the coordinates Family Tree Maker can plot the location. This is great if you have an 'at sea' event and have the coordinates. To do this, simply add the coordinates in the location field. There are three ways to add coordinates and Family Tree Maker has a new Location Calculator.

The Location Calculator converts the latitude and longitude coordinates between different coordinate styles.

Family Tree Maker displays the coordinates in decimal degrees format.

You can use the calculator to enter the coordinates in degrees, minutes, seconds format or degrees and decimal minutes format, and the calculator will display the coordinate in decimal degrees. You can also use the calculator to convert any of the formats to another format for other purposes you may have.

Entered Location: 42.4855° N, 71.3853° W

Coordinates: ☒ Degrees minutes seconds

Latitude: 42° 29' 7.8" N

Longitude: 71° 23' 7.08" W

☐ Degrees and decimal minutes

Latitude: 42° 29.13' N

Longitude: 71° 23.118' W

☐ Decimal degrees

Latitude: 42.4855° N

Longitude: 71.3853° W

Reset to Defaults Cancel OK

Location Calculator (Win)

Location Calculator

Entered: 40.0147° N, 75.0789° W OK

☒ Degrees minutes seconds format

Latitude: 40 0 52.93 N

Longitude: 75 4 44.05 W

☐ Degrees and decimal minutes format

Latitude: 40 0.882 N

Longitude: 75 4.734 W

☐ Decimal degrees format

Latitude: 40.0147 N

Longitude: 75.0789 W

Cancel Help

Location Calculator (Mac)

The following table describes the options available:

Options	Description
Entered	Displays the coordinate entered in the Location field.
Degrees minutes seconds format	Lets you enter or view the coordinates by degrees, minutes, and seconds. The degrees and minutes must be whole numbers. Seconds can be expressed with a decimal. Latitude degrees cannot be higher than 89. Longitude degrees cannot be higher than 179. Minutes for latitude and longitude cannot exceed 59. Seconds for latitude and longitude cannot exceed 59.99.
Degrees and decimal minutes format	Lets you enter or view the coordinates by degree and minutes. Degrees must be whole numbers. Minutes can be expressed with a decimal. Latitude degrees cannot be higher than 89. Longitude degrees cannot be higher than 179. Minutes for latitude and longitude cannot exceed 59.999.
Decimal degree format	Lets you enter or view the coordinates by degrees. Degrees can be expressed with a decimal. Latitude degrees cannot be higher than 89.9999. Longitude degrees cannot be higher than 179.9999.
Set to Default	Resets the location to the coordinates recorded for the place in the place authority database. This button appears only when you have set the coordinates for a place that Family Tree Maker recognises.

Being more exact with locations

One of the comments about the Places feature in versions 2008 and 2009 is that sometimes the location pin was not located correctly and there was no way to correct the error.

This has now been addressed with the ability to use the push pin adjacent to the location coordinate field.

- To set the exact location of a place.
- From the Places Workspace, make sure Place is selected in the List by drop-down list. Select the place for which you want to set the exact location.

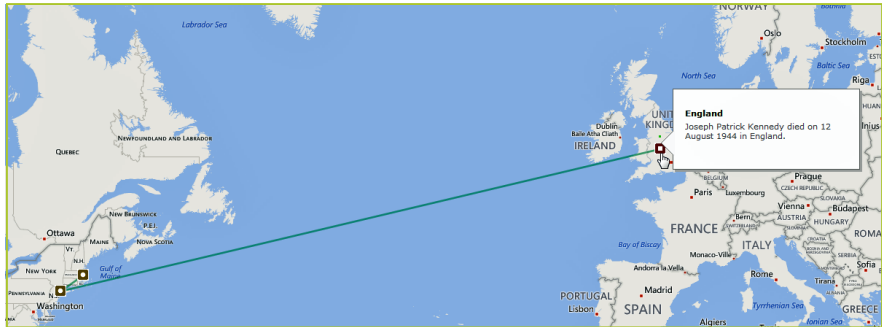
Do one of the following:

- Enter the GPS coordinates in the Location field.
- Enter the latitude and longitude in the Location field.
- Click the push pin button, and then on the map, click the location where the place should be. You will see a cross hair then the pin will be precisely located.

Coupled with the updated places and corrections, you can now enter locations on a map very precisely. Even although the MS Bing map is very good, inevitably there will be places missed, misplaced or too small to show up. Now you have the tool to make the corrections right down to 'micro hamlet' level.

Migration paths

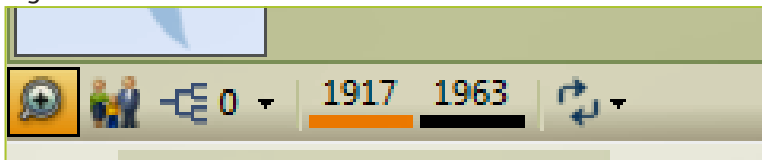
In Family Tree Maker 2009 a new capability was added to the Places Workspace to allow you to visualise the migration path of a person. You clicked on the drop down menu in Places and selected Person. This produced a path on Bing maps with nodes for significant events in your database, e.g. birth, death, etc. Hovering over a node provided node detail.



Well this was significantly enhanced in Family Tree Maker 2010. What you can now do is add additional plots for family members and generations. It is all done through the Migration Toolbar.

Places>Person View Migration Path Tools

Looking at the tools from the left



- The + magnifier lets you centre and zoom on a selected person, the family icon lets you include immediate family
- The pedigree icon lets you include ancestor generations up to four generations
- The coloured bars allow you to change the line colours. Clicking on the bars brings up a colours selection box
- The final icon is a sort tool that lets you sort your paths in different ways.

Migration path



Also note carefully the name list below the tools. These change as you select different people and also depending on what check boxes are ticked what nodes appear on the migration path. It should be apparent that you have a lot of options and the resultant map can rapidly become crowded!

In part one of this chapter I have focused on the Places, Mapping and Navigation enhancements in Family Tree Maker 2010. I have tried to summarise the new features as follows:

- Enhanced PNA
- Short Place Names
- GPS support
- Location Calculator
- Pin pointing locations
- Multiple migration paths
- Associated people

The places update- revisited- hierarchy listing

In October 2012, one of the **major enhancements was the complete overhaul of the Places Workspace** in Family Tree Maker. The key thing to understand is that this is additional new capability in managing and using the Places Workspace within Family Tree Maker. There are perhaps two key things to appreciate.

Places flat form view retained

With place hierarchy turned off, the place list performs just as it did in previous versions of Family Tree Maker e.g. a flat form view of each place. For example, Melbourne, Victoria, Australia. When the hierarchical view is displayed two new buttons then allow you to expand or collapse the entire hierarchy.

One of the additional benefits of this hierarchical structure is that **you can now view all of the people that are associated with a specific place or any place within it.**

This is the first major update of a Workspace since Family Tree Maker 2008 was released. To understand what is going on and to explain the concepts to be covered shortly, journey back to Family Tree Maker version 16 or earlier. The program only had one field to record place data. When maps came into Family Tree Maker (version 7), the developers at the time took a short cut and added a slash delimiter to make the rudimentary maps function introduced in version 7 (and maintained through to version 16), work. What they wanted you to do when adding place detail, was to add it in the format 'comment/location'. Thus you could enter:

'257 Collins Street / Melbourne, Australia'

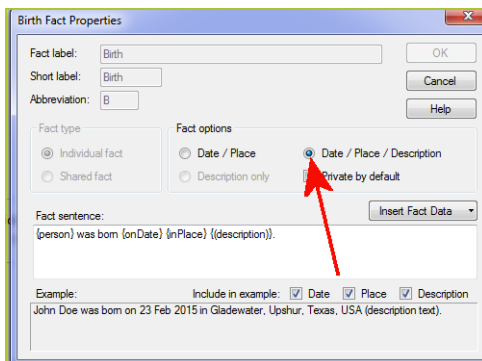
The bit before the slash was treated as a comment and the bit after the slash was treated as a location and plotted to the map feature and the Maps Legend report.

When Family Tree Maker was rewritten and appeared initially as version 2008, the new developers at Provo Utah added an optional Description field to every fact in Family Tree Maker. This new Description field was particularly useful for place information as you could add a place name in the place field and an expansion in the Description field. This may be a street address, hospital name, church, etc.

If you did not use the slash delimiter correctly, when you first came to use version 2008 or later, you found all your comments mixed up with places and you had to go through a once-off resolve place names exercise. As well as resolving places, you had to move all the comments into Description fields.

To turn on the description field

Let us say you want to turn on the description field for the Birth Date event.



Birth Fact Properties

Go to the Birth Date event in the People>Person view and select it. Now in the right hand editing panel click on Options>Fact Properties and check the Date/Place/Description radio button. Repeat for other facts that you also want to display the description field. I usually have the description Birth, Christening, Marriage, Death and Burial facts. Note you only have to activate the Description field once per fact type. You can add details like Church, Hospital, Street address, Cemetery etc. in the description field.

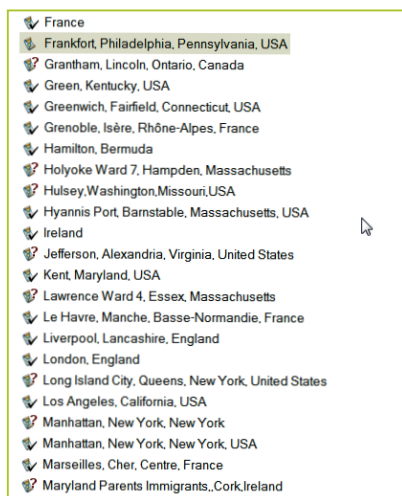
The Hierarchical View for Places. What is a Hierarchical View?

This is a way of listing places in a cascading form e.g.

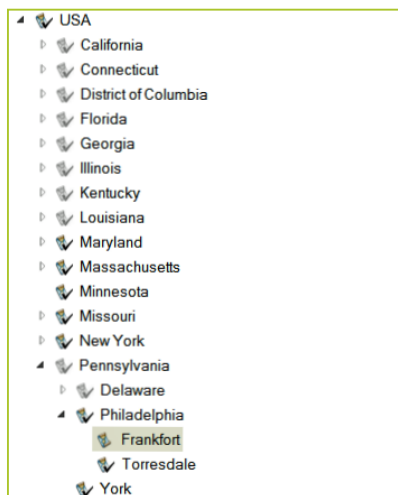
Country>State>City

This allows grouping of locations which will become apparent over the next page or so.

Flat vs. Hierarchical Display of Place Names

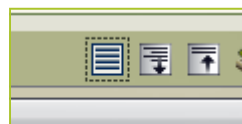


Places Flat Form view



Places Hierarchical view

The header above the place name index now includes a new option for switching between the traditional flat view of place names, and a new hierarchical view. The new hierarchical view is on by default, but you can switch to the flat view by clicking the 'Turn off place hierarchy' button.



With place hierarchy turned off, the place list performs just as it did in previous versions of Family Tree Maker.

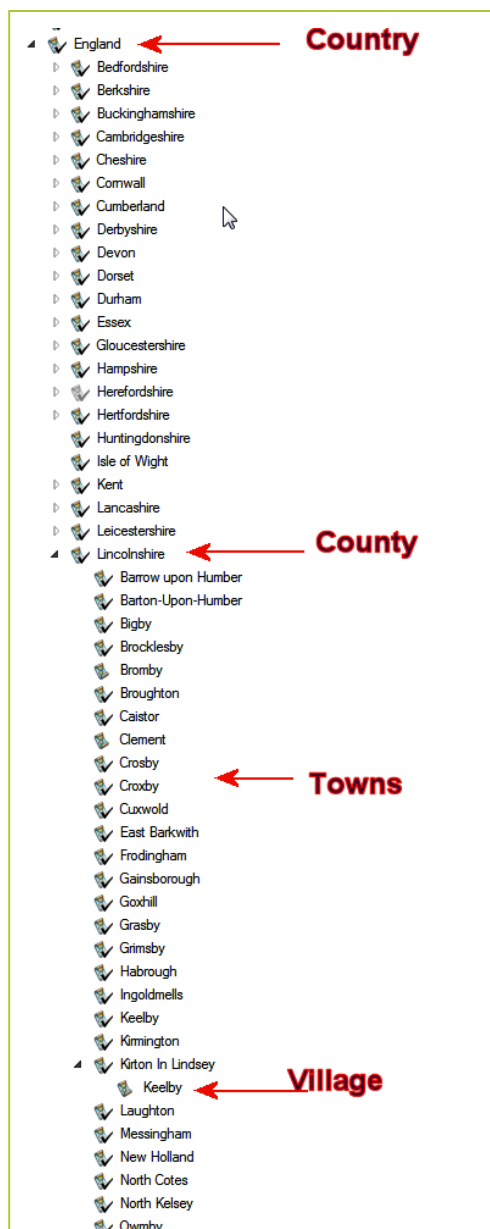
Now if I have towns or villages in my county, we can go down another level. So in this example I have gone England>County>Town>Village e.g.

England>Lincolnshire>Kirton-in-Lindsey>Village e.g. North Kelsey

If you happen to have any additional place detail within the city/town, (such as a church, cemetery, address), that information could be shown by expanding the detail under the city or in the description field.

This can be done because of a change, which allows place detail to be excluded when resolving place names. This is a brilliant way to group locations without having to do way with seeing the full flat form location as well.

Showing three descending views of a Hierarchy list—Country to Village. Clicking on the twistie icon reveals the next level down. This is the real benefit of the hierarchical view.



Viewing associated people

One of the additional benefits of this hierarchical structure is that you can now view all of the people that are associated with a specific place or any place within it. In the example below, Kirton-in-Lindsey, Lincolnshire, England is selected in the place index and there are 299 people listed in the right panel who are specifically linked to this place.

Notice the two new options above the list of people: 'Linked to This' and 'Linked to All'.

The Linked to This option

This option shows only those people who are linked specifically to Kirton-in-Lindsey as an end point.

Linked to all

The 'Linked to All' option shows all the people linked to Kirton-in-Lindsey and all localities within it. With this option selected the right panel displays the people linked to Kirton-in-Lindsey and those linked to places within it (say) churches.

When the list of people's facts is expanded, each fact that is associated with the place specifically is marked with a red pin.



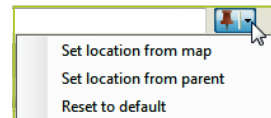
The other facts are associated with a locality within the selected place.

Action on Library, Locumotors, England	
Name:	Kirton in Lindsey, Lincolnshire, England
Shut:	Kirton
Location:	53.4799 N 0.5812 W
Associated People: 301	
<input checked="" type="radio"/> Linked to This <input type="radio"/> Linked to All	
<ul style="list-style-type: none"> Abey, Benjamin (1855 - Unknown) Abey, Elizabeth (21) (1802 - 1807) Abey, George (1821 - Unknown) Abey, Hannah (21) (1803 - Unknown) Abey, Hannah (22) (1836 - 1809) Abey, Jane (1845 - Unknown) Abey, John (21) (1812 - 1896) Abey, Sarah (1848 - 1881) Abey, Susan (1848 - 1834) Abey, William (1798 - 1835) Abey, William (21) (1800 - 1844) Abey, William (22) (1802 - Unknown) Andrew, Joseph (1876 - 1945) Barrett, Elizabeth (1728 - 1809) Barrett, Austin (1759 - Unknown) Barrett, Emma (21) (1772 - 1844) Beckwith, Martha (1820 - 1871) Bethel, David (1805 - Unknown) Beverley, Florence (1827 - Unknown) Beverley, Frederick John (1885 - Unknown) Beverley, Susan (1804 - Unknown) Beverley, William (1881 - Unknown) Binn, Alfred (1826 - 1877) Binn, Ann Maria (1832 - 1832) Binn, Eliza Ann (21) (1833 - 1917) Binn, Eliza Ann (22) (1834 - 1830) Binn, Elizabeth (21) (1830 - Unknown) Binn, Elizabeth (22) (1835 - 1835) Binn, Emma (1836 - 1860) Binn, Emma (1884 - 1933) Binn, George (1836 - 1879) Binn, Harriet (1843 - 1844) Binn, Jane (21) (1837 - 1855) Binn, Jane (22) (1868 - 1891) Binn, John (22) (1818 - Unknown) Binn, Kate (1854 - 1891) Binn, Margaret (1881 - 1882) Binn, Mary (21) (1841 - 1915) Binn, Mary (1856 - Unknown) Binn, Matting (21) (1792 - 1870) Binn, Thomas (21) (1828 - 1868) Binn, Thomas Henry (1862 - 1901) Binn, Walter (21) (1848 - 1861) Binn, Walter (22) (1848 - 1869) Binn, William (21) (1830 - 1916) Binn, William Cooper (1863 - Unknown) Boulton, Frances (1861 - 2007) Bowers, Ann Elizabeth (1866 - 1843) 	

Moving the pin

If a place is not exactly located on the map with the pin, you can move the pin simply by right clicking on the pin icon at the right of the location window—the pin changes to cross-hairs.

Drag these to where you want them re-located on the map and release the left mouse button. The pin will be located as you want it.



Place images resolved or unresolved

The new facility has introduced some new icons to denote place states. You need to understand what they mean!!!



Denotes and unresolved place name



Denotes a resolved place name that has people/fact specifically linked to it



Denotes a resolved place name that does not have people facts linked specifically to it




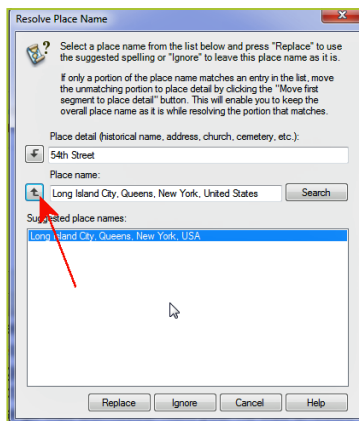
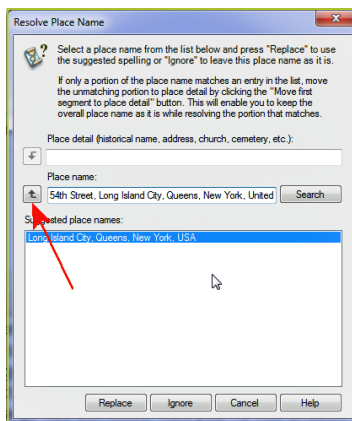
Used to indicate unresolved place details within an otherwise resolved place name

Resolving place names

The 'Resolve Place Name' dialogue has some new options for designating place details. The example below shows how the dialogue would look before resolving a place name that includes the name of a church. All of the place name information is in the 'Place name' field and of course there is not direct match in the list of suggest place names. Of course there is no problem with leaving the place this way if desired.

'54th Street, Long Island City, Queens, New York, USA'. This is flagged by Family Tree Maker as not recognised by the PNA. I select the place and click on Resolve Place Name.

I look at the first place element '54th Street, (the comma is critical) and using the  I move '54th Street' up one level to the Place detail box. This leaves Long Island, Queens etc. in the Place name field which the PNA in Family Tree Maker recognises. So I click Replace.



I have now resolved the place and it will list hierarchically if I choose, but I still have the full flat form address.

When this option came out in version 2012, I went through my 1540 place names and gradually resolved them one by one.

It was quite cathartic as I gradually resolved all my place names (and merging duplicates) until I got all my places showing at country view at the highest hierarchy level, right down to street detail in some cases at the lowest level view. It took me a weekend but it was worth it. Of course you don't have to resolve all your place names nor do you have to do them all at once.

If you understand how this section works and in particular the above dialogue, you have understood the core of how to resolve place names.

Just one simple arrow. 

Resolve all place names

Family Tree Maker also has a resolve all place names tool. If you click on the Resolve All Place Names button you get a table of unresolved places that you can rapidly resolve.

Resolve All Place Names

For each place name, choose the desired option by clicking the corresponding column:

- Unrecognized Place Name--keep the unrecognized place name as it is
- Suggested Place Name--replace the unrecognized place name with the suggested place name
- Desc.--move unrecognized text to the description field
- Ignore--stop marking this place name as unrecognized
- Other--search for another spelling of this place name

Unrecognized Place Name	Suggested Place Name	Desc.	Ignore	Other
<input checked="" type="checkbox"/> . . . Ireland	<input type="checkbox"/> Ireland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Donegal, . Ireland	<input type="checkbox"/> Donegal, Ireland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Atlantic Ocean, Off Marthas Vinyard, Mass...	<input type="checkbox"/> Massachusetts, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Boston	<input type="checkbox"/> Boston, Middlesex, Massachusetts, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Brookline, Suffolk, Massachusetts, USA	<input type="checkbox"/> Suffolk, Massachusetts, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Cambridge Ward 9, Middlesex, Massachu...	<input type="checkbox"/> Middlesex, Massachusetts, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Cherbourg, France	<input type="checkbox"/> Cherbourg, Manche, Basse-Normandie, Fr...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Cunningham, Donegal, . Ireland	<input type="checkbox"/> Donegal, Ireland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Dunganstown, 5323, . Ireland	<input type="checkbox"/> Dunganstown, Wexford, Ireland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Grantham, Lincoln, Ontario, Canada	<input type="checkbox"/> Lincoln, Ontario, Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Holyoke Ward 7, Hampden, Massachusetts	<input type="checkbox"/> Hampden, Massachusetts, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Hulsey, Washington, Missouri, USA	<input type="checkbox"/> Washington, Missouri, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Jefferson, Alexandria, Virginia, United States	<input type="checkbox"/> Jefferson, Alexandria, Virginia, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Lawrence Ward 4, Essex, Massachusetts	<input type="checkbox"/> Essex, Massachusetts, USA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Whilst this appears less work, I still found going through the places one by one and subjecting them to the 'eyeball test' was at the end more satisfying.

The Resolve All Place Names options are:

Options	Description
Unrecognised Place Name	Lists each place name that is not found in the Family Tree Maker places database. A place name might not be resolved because it is misspelled, is entered in an incorrect format, the city no longer exists, or the city population is too low.
Suggested Place Name	Lists the closest match that Family Tree Maker could find. To replace the Unrecognised Place Name with the Suggested Place Name throughout the tree, select the check box to the left of the Suggested Place Name
Desc.	Select the Desc. check box to move the Unrecognised Place Name from the Place field to the Description field in each fact it appears. This is an easy way to move descriptions that were imported into the Place field to the Description field.
Ignore	This is an easy way to move descriptions that were imported into the Place field to the Description field.
Other	Select the Ignore check box to have Family Tree Maker remove the Unrecognised Place Name from the list and ignore the spelling or format in the future. The place name will be removed from the Resolve Place Names dialogue box. The place will no longer be marked as unrecognized in your tree.

Historical place names—best ignored

Note that historical place names like the old name for Los Angeles, USA, ‘El Pueblo de Nuestra Señora la Reina de los Ángeles de Porciúncula’ are best not resolved but ignored.

Place find function changed operation

The Find Function in Places works differently now. After typing in the find field, press Enter or click the ‘Find Next’ button. Because of the hierarchical nature of the list, it will search anywhere within the place name. Then to find the next match, press Enter again. Because of the way this find works now, the developers opted to not execute the search automatically, but wait for the user to press Enter or click.

Find next

Because it can now find matches in the middle of a place name, it seemed that executing the search automatically caused too many false positives.

Undocumented feature—place usage report

One change that has been made is to the ‘Place Usage for this Place’ report when run from the Places Workspace.

Select Linked to All in the right panel and then Print or Share the report. This should give a list of all people and facts associated with a place (directly or indirectly). Selecting Canada should give you a list of everyone in Canada and all of the places resolved under Canada in the hierarchy.

Merging duplicate places

Often you have a situation where you have one or more places that are the same but have been entered slightly differently so they show as additional places. This of course corrupts your Linked to This Place list and also the custom report if you are looking for all people who had an event at a particular place. My method is to first resolve one place in this case New York. Then with the other two ‘New Yorks’ either resolve each or better still use Replace with another Place name in this case the resolved New York. Do it one by one and you will be rewarded with a very accurate place database plus the hierarchical option.

Summary

You can do many things with Places, especially since the hierarchy feature has been added.

The more that I have played with the new places hierarchy the more that I have come to appreciate it. I now have all my places

- resolved
- in hierarchical order by countries.

This gives me a very compact place list that can be expanded to whatever level that I want to examine.

More information?

Try this Knowledge base article

http://ftm.custhelp.com/app/answers/detail/a_id/5526/kw/places

Chapter four

Door number four—the sources door

Sources should be an integral part of recording information when using Family Tree Maker, as they provide assurance of the accuracy of your data. Sources also let you know when and where you obtained your data. Sources also allow anyone reviewing your work to form a judgment as to the accuracy or otherwise of your scholarship. Shown Mills puts it as the most basic question a genealogist should ask: ‘where did it come from and who produced it?’

Theory of sources

Probably the guru of sourcing in terms of family history is Elizabeth Shown Mills in her book, *Evidence! Citation & analysis for the family historian*.

www.amazon.com/Evidence-Citation-Analysis-Family-Historian/dp/0806315431

It is also available locally from genealogy bookstores.

Book Description—Amazon (124 pages)

Publication Date: January 1, 1997 | ISBN-10: 0806315431 |

ISBN-13: 978-0806315430 | Edition: Genealogical Publishing Company

Every devoted genealogist is concerned with citations in their analysis for their genealogy.

Accurate citations are necessary so that the evidence can be judged and if necessary allows for the research to be repeated. The author makes it easy to help genealogists (particularly the non-expert), to make sense out of citations and to improve their genealogy search. This book is considered a genealogy must!

Shown Mills has also published a companion volume *Evidence explained: citing history sources from artefacts to cyberspace* 2nd edition.

www.amazon.com/Evidence-Explained-History-Artifacts-Cyberspace/dp/0806318066

Book Description—Amazon (885 pages)

Publication Date: October 5, 2009 | ISBN-10: 0806318066 |

ISBN-13: 978-0806318066 | Edition: 2nd

Following its enthusiastic reception in 2007, we are pleased to announce a new edition of what is now the definitive guide to the citation and analysis of historical sources, a guide so thorough that it leaves nothing to chance, whether you want a podcast or a census record.

The new second edition of *Evidence Explained* includes updates to numerous websites, new models for electronic sources such as blogs and online forums, and new model citations to traditional and non-traditional genealogical sources, thus continuing its role as the single-most comprehensive style manual for genealogical writing and publishing.

I strongly recommend that you buy a copy of *Evidence: citation & analysis for the family historian*. But I would suggest that you look at *Evidence explained* in a library.

Why the focus on Shown Mills?

Why have I focussed on this at the beginning of a Family Tree Maker chapter? Because, Family Tree Maker has incorporated Shown Mills' methods in its handling of sources and has also incorporated 170 of her source templates into the program.

So, if you want to get a handle on using sources effectively and consistently in Family Tree Maker, you need to understand the theory behind it.

I could of course stop here and get those of you using the Windows version of Family Tree Maker to simply go to Help>Training Tutorials and run the animated source tutorial complete with its American accent. (They haven't as yet developed the technology to let you select your own voice type preferences like you can with GPS devices).

Users of Family Tree Maker 3 (Mac) don't get the built in training tutorials for some reason, but you can download them from:

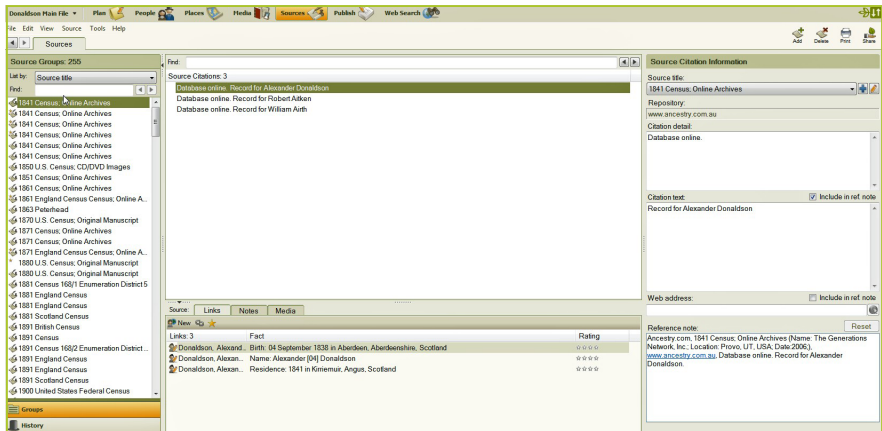
www.familytreemaker.com/Learn/Tutorials



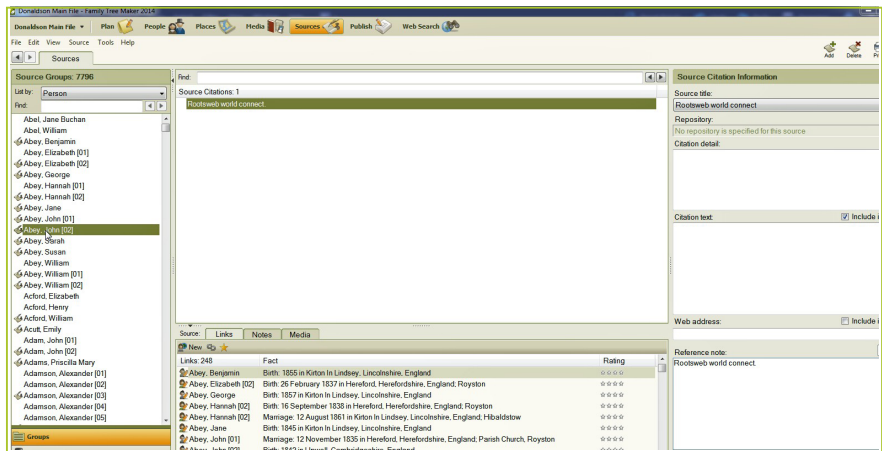
Ignore the 2012 after Family Tree Maker, it hasn't been updated

The Sources Workspace

The Sources Workspace is where you can manage all your sources. There are many views and arrangements. Perhaps List By the Source Title (top image) and by Person (lower image) are the two that you are most likely to use. As I go through some of the details in sources, I would encourage you to occasionally refer back to these views in the Sources Workspace.



List by Source title



List by Person

A few thoughts on sources

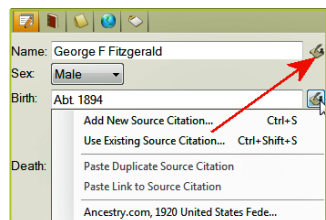
I am not going to try and précis Shown Mill's books, but she starts with a couple of good concepts.

Any statement of fact that is not common knowledge must carry its own individual statement of source.

Source notes have two purposes:

- to record the specific location of each piece of data
- to record details that affects the use or evaluation of that data

This leads to a consideration of source titles that you are going to use in your research. The source title



should be sufficiently wide as to allow it to be used multiple times unambiguously, but not so general that it is misleading. Let me give you my favourite example. In Australia, the recording of births, marriages and deaths is a state government responsibility. So a good source title for a birth event could be: **State of Victoria, Birth Certificate**

This allows me to record birth events for people born in the State of Victoria using as a citation the individual details. It is easy to know where one may go and obtain a State of Victoria, Birth Certificate.

Now an example of a poor source title may be: **Australian Birth Certificate**

It is poor source title in my opinion as there is no such thing as an Australian Birth Certificate. If you cite a source this way you do not know which Birth, Marriage and Death (BDM) office has issued the certificate. It fails the Shown Mills test at the start of this article namely; 'where did it come from and who produced it?'

The point of this is you should consider what source titles you are going to use before you start to use them. Fortunately in Family Tree Maker you can rename sources without losing any links, but better to think it through first.

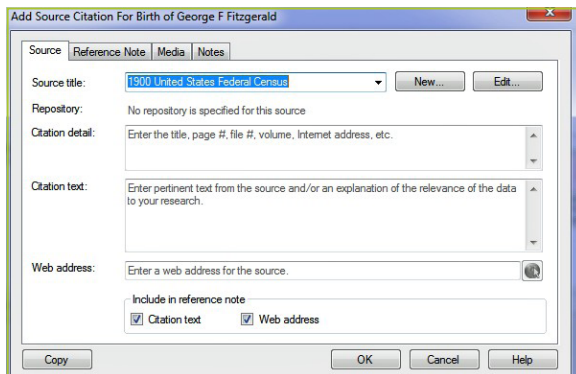
My final thought on this is that I wish that I had known about the science of sourcing when I started family history, as I know now.

Adding sources in to Family Tree Maker

I am going to cover the basic or classic method then I am going to consider source templates. I also should note that Family Tree Maker considers every item as a fact, which can be sourced.

So names, dates, places, events, etc., are all facts and you can attach as many sources to each fact as you wish. There may be a limit to the number of sources to a fact (maybe 99 or something like that), but for all practical purpose you won't find any limits in the program.

The classic or (simple) method of adding a source (in 3 steps)



1. Click on a field that you want to add a source. The new source citation box is active

If you wish to add a source to a fact in the Person >Fact view, simply click on the new Source in the right hand editing panel, or Ctrl+S or Cmd+S (Mac)

2. Click on the Add Source Citation. This opens the key source citation dialogue.

Now this is where the rubber hits the road and where you add your Source title. If you have an existing source title you would use the Source title drop down to locate it. If you are just starting off you can type in your source title. If it is new Family Tree Maker will ask you if this is a new title, or alternatively you can click New and then add it. Now you have a lot of very useful options in this dialogue and it is worth understanding them as you can make your source very comprehensive.

Option	Description
Source title	The publication in which the citation is found. This may be a book, volume, record, etc. You can click New to create a new source or Edit to modify the existing source. As you type, fastfields displays the matching source names. If you type in a new name, Family Tree Maker prompts you to create a new source. You can create the new source with only the name or open the Add Source dialogue box to define the source.
Repository	Lists the repository where the source is housed as defined in the Edit Repository dialogue box.
Citation detail	The title of the article, page number, Internet address, etc. where the source citation text can be found in the source.
Citation text	The actual text from the source that pertains to the fact.
Web address	The URL of the site where the record is found. Click Go To Web Address to view the site in your default Internet browser.
Include in reference note	Specifies whether to include the Citation text or Web address (or both) as reference notes in charts and reports.
Copy	Copies the current source citation, including all of its properties, to the clipboard. Copied source citations can be copied or linked to any fact in your tree. See To copy and paste a source citation in the Family tab.
This citation is linked to X facts	If the citation is associated with any other facts, a note is displayed at the top of the dialogue box. Click the link to open the Source Usage dialogue box, which lists the facts associated with the source.
View Source Online	If the source was found in Ancestry.com and you have access to the Internet, you can click this link to view the cited record.
Reference Note tab	See Add Source Citation: Reference Note.
Media tab	See Add Source Citation: Media.
Notes tab	See Add Source Citation: Notes.

All that from one little dialogue!

3. Add the information

Congratulations! You have now entered your first source!

Comments

Now we could stop here, and to all the recent new users that I have met at various regional and city workshops, this is a good thing to practice in your play file or test file.

Source templates

Out of Shown Mills came the concept of Source Templates as a means of standardising how sources should be recorded in terms of data. As an example, the details you record about a book used as a source may well be different from a certificate. By using source templates you can capture exactly what you want.

Appendix B

Source Templates

Family Tree Maker includes more than 170 source templates based on the Quick-Check models used in Elizabeth Shown Mills's book *Evidence Explained*—the premier reference for citing genealogy sources. Source templates take the guesswork out of citing facts: no more wasted time entering irrelevant information; no more hoping that you've captured the right data; and no more wondering whether other family members will be able to follow your research paths. And templates also ensure that your sources are consistent.

This appendix lists all the source templates that are available, organized by source group and category.

Archives and Artifacts

Category	Templates
Archived Material	Artifact Digital Archive Manuscript Record by Collection Manuscript Record by Document Manuscript Record by Series Personal Bible Portrait Research Report Unpublished Narrative Vertical File

The key bit in all this source template business is knowing what is called the ‘quick check’ terms that select the templates to use. For reasons that I have never understood, they are not in the program Help nor in the knowledge base. They are in Appendix B of the excellent *Beyond the basics* book, but I obtained Tana's permission to list them all on the GUM downloads page at:

www.vicgum.asn.au Public Downloads

Adding a source template

Access the Add Source Citation window. For help, see ‘Adding a Source from the Family Tab’ or ‘Adding a Source from the Person Tab’.

1. Click New on the Add Source Citation window. The Add Source window opens.
2. To choose a template, do one of these options:
3. To search for a template, enter a keyword in the Source template field. To narrow the list, enter multiple keywords. For example, ‘property’ brings up 11 results, while ‘property grant’ brings up one result.
4. Click a template from the drop-down list that appears. Skip to step 8.

5. To choose a template from a categorised list, click More. The Select Source Template window opens. Continue with step 4.
6. In Source group, choose the group that most closely matches the item you're sourcing. The categories list changes to reflect the selected source group.
7. Choose the appropriate category from the Category drop down list. The templates list changes to reflect the selected source group and category.
8. Choose a template from the Template drop-down list. A description of the template is displayed beneath its title.
9. Click OK to return to the Add Source window; the fields that appear now reflect the template you've chosen.
10. Complete these fields as necessary and click OK.

One of my tasks is to convert all my sources to source templates and you can do this as follows.

Transferring an existing source to a source template

If you have created your sources using the basic format as described above, and now want to use the source templates instead, you don't have to re-create your sources. Instead you can map the fields from the original basic format source to the fields in the desired template and transfer the contents over automatically (i.e. no typing).

Click on the Sources Workspace button on the main toolbar

1. In the Source groups, double click on the source you want to transfer to a template. The Edit Source dialogue opens.
2. To find the template you wish to use, enter keywords in the Source Template field or click Change to select a template from a categorised list. The change Source Type dialogue opens.



Hint from Tana Pedersen: (author of *Beyond the basics*) 'I like to drag the Change Source Type dialogue so that I can see the Edit Source dialogue. That way I can see the original source and don't have to guess what information appears in each field'.

Do one of these options:

- Select Existing Template to view the fields from the original (basic format) source. The drop-down lists contain the template view that you can map.
- Select New Template to view the fields available in the template. The drop-down lists contain the original fields you can map to the new template.

Note: If your original source includes a source repository but the template does not use the source repository field, your repository information will be discarded.

You might want to add the repository information to the comments field at the end of the template.

For each field do one of these options:

- Choose discard data from the drop-down list to leave the field blank.
- Choose a field to move the contents to. You can map multiple fields to one field.

If you can't decide which field your source information belongs in, map the information to the Comments field. You can copy it to a different field later if necessary.

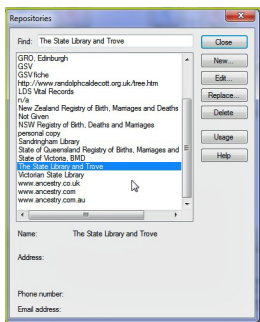
Click OK to return to the Edit Source dialogue. The contents of the original source now appears in the template's fields.

If you want to use the source templates, I would download the free PDF file, print it out and have it handy. There are 170 source templates in Family Tree Maker, which should cover most needs although Legacy Family Tree also uses Shown Mills' methods and templates and provides 700 of them!

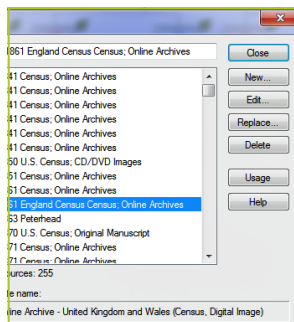
A mea culpa. One of the jobs that I have set myself is to convert all my sources to templates and generally clean them up. I have some 232 sources and 3700 citations and they have grown from right back to my Family Tree Maker 2 days and they need some urgent renovation.

Managing sources

You can manage your sources from the excellent and often overlooked Edit>Manage Sources and the related Edit>Manage Repositories. It is worth having a good look at these two excellent tools. One thing you can do is merge duplicate sources. So if you have a source, 'State of Victoria, Birth Certificate' with various citations attached and another 'State of Victoria Birth Certificate' again with numerous citations attached you can merge them and still preserve all the links etc.



Edit Manage Sources



Edit Manage Repositories

Edit Manage Sources options

Option	Description
Find	Lets you locate a source in the list by typing words contained in the source name. The closest match is highlighted as you type.
Total Sources	Lists the number of unique sources found in your tree.
Template name	Lists the template used to create source, if a template was used.
Source list entry	The list displays sources that are based on a template with an icon .
Sample full reference note	Displays how the source text is displayed when used as a reference note in a document or book.
New	Lets you add a source to the Sources list.
Edit	Lets you change the properties of the selected source.
Replace	Opens a dialogue box that lets you remove the links to all source citations connected to the selected source and link those source citations to a different source. The replacement cannot be undone.

Delete	Permanently removes the source from the Sources list. The source citations linked to the source will also be deleted. Deleted sources cannot be restored.
Usage	Opens a dialogue box that lets you view the facts that reference the current source and source citations.

Edit Manage Repositories options

Option	Description
New	Lets you add a repository to the Repositories list. See Add Repository.
Edit	Lets you change the properties of the selected repository. See Edit Repository.
Replace	Opens the Replace Repositories dialogue box that lets you remove the links to all sources connected to the selected repository and link those sources to a different repository.
Delete	Permanently removes the repository from the Repositories list. Sources that cited that repository will no longer have the linked repository.
Usage	Opens Repository Usage dialogue box that lets you view the sources linked to the current repository.

Merging files



One of the reasons that I recommend thoroughly examining a donor file before merging is to try and get all the sources consistent BEFORE you merge!

Rating a source

Obviously there are good sources and not so good sources. And there has been a lot written about the subject and a walk through 'Dr Google' will give you a lot of reading.

But Family Tree Maker lets you self-rate your sources.

Quality score

Lets you set the quality level you believe is correct for the source. Click the stars to set the rating. A higher quality rating has more stars. When you set the rating yourself, the stars are blue.

Use standardised ratings

Guides you through the process of rating the source based on four criteria: Source, Clarity, Information, and Evidence. As you indicate the quality of each criterion, the overall quality of the source is displayed as gold stars.

Rate Source For Birth of Mary Bigsley

Source:
1941 census, digital image.

Quality score: 1 gold star
★☆☆☆☆ [X] Use standardized ratings

Quality measures

Source: ☐ Original ☒ Derivative
Clarity: ☒ Clear ☐ Marginal
Information: ☐ Primary ☒ Secondary
Evidence: ☐ Direct ☒ Indirect

Direct: The source plainly states the fact I have just entered.
Indirect: The source suggests the fact but does not plainly state it. Proof will require better or additional evidence from other sources.

Reset

Justification:

OK Cancel Help

Adding source citations

Source Citations are the details that distinguish source usage. For example you may have a source called 'State of Victoria, Birth Certificate' but each certificate differs with the citation detail. There are many things that you can do with source citations in Family Tree Maker and the following is a compilation of procedures.

Adding a new source citation

1. Access the Add Source Citation window
2. Complete these fields on the Source tab
3. Click OK

Linking a fact to an existing source citation

1. Click the People button on the main toolbar.
2. Make sure the individual you have entered a fact for is displayed.
3. Click the Person tab.
4. Click the Facts button (if necessary). The Individual and Shared Facts section opens.
5. Click the fact you want to add a source citation to in the Individual and Shared Facts section.
6. On the Sources tab in the editing panel, click the New button and choose Use Existing Source-Citation from the drop-down list.
7. Click the citation you want to link to from the list.
8. Click Link to Citation. The citation information appears on the Sources tab.

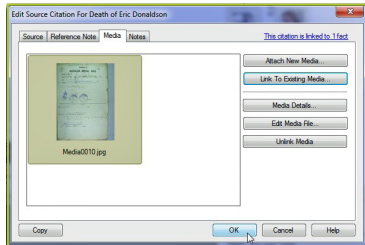
Copying and updating a source citation

1. Click the People button on the main toolbar.
2. Make sure the individual you have entered a fact for is displayed.
3. Click the Person tab.
4. Click the Facts button (if necessary). The Individual and Shared Facts section opens.
5. In the Individual and Shared Facts section, click the fact that has the source citation you want to copy.
6. On the Sources tab in the editing panel, right-click the source citation you want to copy and choose Copy from the drop-down list.
7. Access the Person tab for the individual you want to copy the source citation to.
8. In the Individual and Shared Facts section, click the fact that you want to add the source citation to.
9. In the editing panel, click the New button on the Sources tab and choose Paste Duplicate Source-Citation from the drop-down list.
10. In the Sources tab, double-click the source citation you just added. The Edit Source-Citation window opens.
11. Update the source citation as necessary and click OK.

Formatting a source citation

1. Click the Reference Note tab in a source citation. The citation details and citation text you have entered for the source citation are displayed.
2. To italicise text, highlight the appropriate text and click the Italics button. To underline text, highlight the appropriate text and click the Underline button.
3. Click OK.

Attaching a media item to a source citation



1. Click the Media tab in a source citation.
2. Click Attach New Media. The Select Media Item window opens.
3. Locate the media item and click Open.
4. Click OK.

Adding a note to a source citation

1. Click the Notes tab in a source citation.
2. Enter a note. The notes are automatically saved.
3. Click OK.

Summary

Sources form a vital part of good family history research and ideally your aim is to have every fact that you add to your file sources at least once! The Undocumented Facts in the Publish Workspace will in fact produce a list of 'work to do'. In the companion to this book I will be discussing the source reports and also how to incorporate sources in reports and charts.

Chapter five

Door number five—the media door

Media greatly assists in adding interest to your family history story, whether it is family photos, historical data/photos from newspapers or books, sound or video clips or maybe scans from documents or photos. From the perspective of Family Tree Maker, they are all ‘Media’ and that is the term that I will use for the rest of this chapter. Note this chapter applies equally to the Windows and the Mac version of Family Tree Maker unless otherwise noted.

Organising media

In my view the key to managing media is to effectively organise it. Digital cameras can take many shots most of which you will probably never print, but you will likely retain many of them. I have found that by organising my media before linking selected ones into Family Tree Maker makes a lot of sense.

Why organise your media?

I think that there are four primary reasons why some form of organisation is desirable

1. It lets you be more selective
2. It lets you pre-edit
3. It collates and organises your media
4. It gives you control

All of these reasons mean that you should consider some media organisational method.

Software to help you organise your media

In Windows 7 and 8, Windows Live Photo Gallery.

<http://windows.microsoft.com/en-au/windows-live/photo-gallery>

Windows XP has a much simpler media organiser. In the MAC you have the excellent iPhoto. Additionally, there are some good free organiser programs around like Google Picasa or Irfan Skiljan’s Irfanview. All of these have media organising features and are worth looking at.


I still use *Photoshop Elements 12 for Windows* as my media organiser. I started with earlier versions and have simply grown used to how well it works, even although I have updated to an iMac, I have not converted to iPhoto, which also has excellent photo organising capability. My point is that it really doesn’t matter what organising software you use, so long as you use one of them.

Captions

The key point that I want to stress in all of this is that if you use captions in your media organiser to help you categorise your media, these same captions will be transferred as EXIF data when you link them into Family Tree Maker. Hence, I use the same caption system in both programs. This to me makes a lot of sense.

EXIF—Exchangeable Image File Format

Exchangeable Image File Format (also called metadata) is a specification for an image file format used by digital cameras. The specification uses the existing JPEG, TIFF Rev. 6.0, and RIFF WAV file formats, with the addition of specific metadata tags. It is not supported in JPEG 2000, PNG, or GIF. The EXIF metadata associated with an image and is retained in the image file.




SUMMARY

DETAILED


UPLOAD

P1070978.JPG



(click for original)

Thumbnail



Camera

Panasonic DMC-FZ7

Date of Creation

2011:11:04 12:24:46

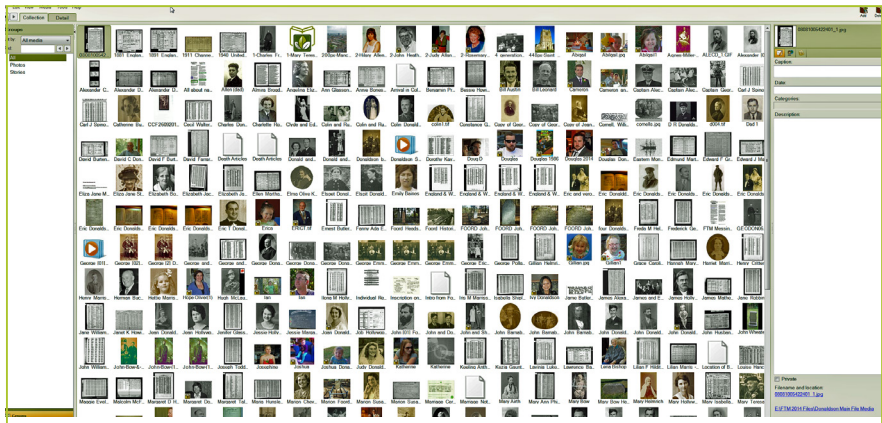
Resolution

2816x2112

Make	Panasonic
Model	DMC-FZ7
Aperture	7.1
Exposure Time	1/400 (0.0025 sec)
Focal Length	28.0 mm
Flash	Off, Did not fire
File Size	2039 kB
File Type	JPEG
MIME Type	image/jpeg
Image Width	2816
Image Height	2112
Encoding Process	Baseline DCT, Huffman coding
Bits Per Sample	8
Color Components	3
X Resolution	72
Y Resolution	72
Software	Ver.1.0
YCbCr Sub Sampling	YCbCr4:2:2 (2 1)
YCbCr Positioning	Co-sited
Exposure Program	Program AE
Date and Time (Original)	2011:11:04 12:24:46
Max Aperture Value	2.8
Metering Mode	Multi-segment
Light Source	Unknown
Color Space	sRGB
Sensing Method	One-chip color area
Custom Rendered	Normal
Exposure Mode	Auto
White Balance	Auto
Digital Zoom Ratio	N/A
Focal Length In 35 mm Format	168 mm
Scene Capture Type	Standard
Gain Control	None
Contrast	Normal
Saturation	Normal
Sharpness	Normal
Burst Mode	On
Sequence Number	1
F Number	7.1
Exposure Compensation	N/A
Focus Mode	Auto
Flash Fired	No
ISO	80
Color Mode	Normal
Compression	JPEG (old-style)
Orientation	Horizontal (normal)

SUMMARY

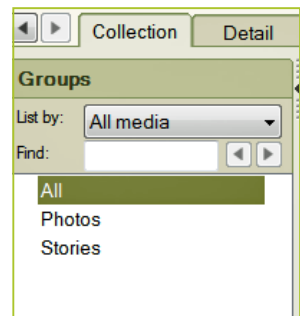
Media Workspace



Media Workspace

You can view your media in different ways via the Groups—list by

- All media
- Media category
- Source title
- Person
- Immediate family

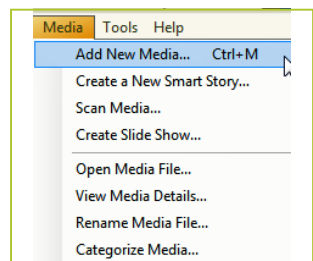


To add media

There are a number of ways to add media. In the Media Workspace, click on Media and then add new media and navigate to the media item that you want to add. Then you can link the media item to an individual or fact as described below. You can also add media from the People Workspace in either the Tree or Person>Media view. The outcome is identical as the media still ends up in the Media Workspace. Note that when you ‘add’ media you are in fact linking it to where it resides on your hard drive and or the Media Center, which is described further on.

Family Tree Maker creates the link and also makes a thumbnail image which it can use if you lose the media link. If you ‘delete’ media you are actually breaking the link.

As Family Tree Maker is only creating a link, which is not very large, you can add (link) as many media items as you like. Further, if you use a media item a number of times, all you are doing is making more links. Family Tree Maker is very efficient the way that it handles media.



Media categories in Family Tree Maker

Media categories are an extremely useful tool when linking media into Family Tree Maker. By using categories you can organise your media and readily find specific media items.

Family Tree Maker comes with a number of default media categories and you can also create your own. When you add media, Family Tree Maker requires you to create at least one media category. You can have more if you wish.

Categorised media lets you apply categories to several media items at a single time. The following table describes the options available:

Options	Description
Media	Lists all of the selected media items so you view the categories selected for a single media item or for all selected media items. When you select a single media item, you can select or clear the selections of the categories specifically for that item. You can do that for each item and then save the change simultaneously.
Categories	Lists the categories that you can assign to the selected media files. The check box indicates three possible states of selection for category: Indicates that the category is not selected in any of the media files. Indicates that the category is selected for all of the media files. Indicates that the category is selected for at least one media item but not all media items.
Add	Lets you create a new category.
Edit	Lets you edit the name of the currently selected category.
Delete	Lets you delete the currently selected category.
Clear	Removes the selection from all of the category check boxes.
Reset	Sets the category check boxes to what they were when you originally opened the dialogue box.

Creating media categories

Click the Media button on the main toolbar.

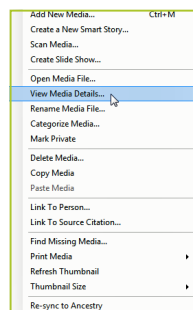
Double-click the image of the media item you want to open, or click the image and then click the Detail tab. In the editing panel, click the Edit button. The Categories window opens. Do one of these options:

1. To create a new category, click Add
2. To edit a category, click the category name; then, click Edit
3. The Add or Edit Category Name window opens
4. Enter a name for the category
5. Click OK

When you finish adding and editing your categories, click OK.

BIG TIP.....right clicking on media

One of the most useful tips that I can give about Family Tree maker is the support for right clicking. With media this is particularly true and as you can see from the adjacent screen shot, a simple right click on a media item reveals 19 actions associated with media.



I have found that over many versions of Family Tree Maker, right clicking is my ultimate ‘get out of jail card free’ option. Not only in media, but no matter where you are in Family Tree Maker and don’t know what to do next, right click. In most cases right clicking reveals all the options available in a particular file or view. I would encourage you to use it often.

Linking a media item to an individual

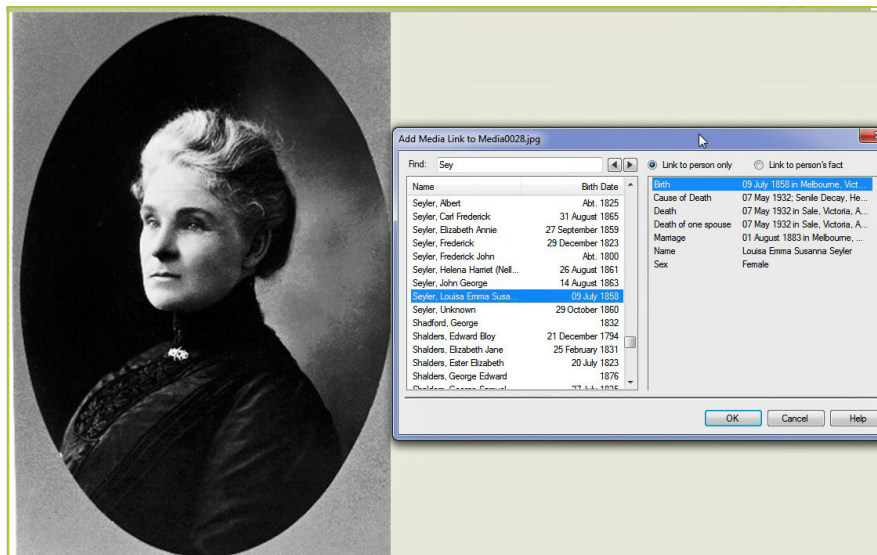
Media can be linked to an individual. This is how you do it.

1. Click the Media button on the main toolbar
2. Double-click the image of the media item you want to link to a person, or click the image and then click the Detail tab
3. Click the Links tab at the bottom of the window (if necessary)
4. Click the New button and choose Link to People from the drop-down list
5. The Add Media Link window opens
6. In the Name column, click the name of the individual you want to link the item to

Do one of these options:

1. To link the item to the person, click Link to person only
2. To link the item to a specific fact (such as birth or marriage), click Link to person’s fact
3. Then, click the fact in the list below
4. Click OK

Linking a media item to a source



Linking media to a source

And you can also link media to a source. Do this.

1. Click the Media button on the main toolbar
2. Double-click the image of the media item you want to link to a source, or click the image and then click the Detail tab
3. Click the Links tab at the bottom of the window (if necessary)
4. Click the New button and choose Link to Sources from the drop-down list

The Find Source-Citation window opens

1. Choose one of these options from the View by drop-down list
2. Choose All source-citations to view every source citation in your tree
3. Choose Source title to group the source citations by their master sources
4. Choose Repository to group source citations by the location (such as a courthouse) they are found in
5. Choose People to view source citations for each individual in your tree

As you choose different source options from the drop-down list, you'll notice that the corresponding groups are displayed.

1. Click the appropriate source or individual
2. In the Source-citations section, click the source citation you want the media item to be linked to
3. Click OK

Finding a media item

1. Click the Media button on the main toolbar.
2. Click the Collection tab (if necessary).

In Groups, choose one of these sorting methods from the List by drop-down list:

1. All media. This is the default sort. Every photo, record image, video, and audio file in your tree is displayed.
2. Media category. Items will be sorted according to the category you assigned them. (Because items can be assigned to more than one category, they can appear in multiple sorts.)

Source title

Items are sorted according to the sources they are linked to. (Because items may be linked to more than one source, they can appear in multiple sorts).

Person

Items are sorted according to the individuals they are linked to. (Because items may be linked to many individuals, they can appear multiple times).

Click a category, source, or individual from the list. (A photo icon appears next to each group that contains media items.)

The Media Workspace displays every item that matches the sort.

Searching for a specific media item

1. Click the Media button on the main toolbar
2. Click the Collection tab
3. In Groups, choose a sorting method from the List by drop-down list
4. Enter the appropriate name or keyword in the Find field

Find missing media links

Family Tree Maker does two things when you ‘add’ media.

It actually creates a link between the media item and the item you are linking it to. It creates a thumbnail of the media item in case you lose the link.

Whilst I recommend letting Family Tree Maker copy your media item to the Media Center created by Family Tree Maker for a particular file, sometimes Family Tree Maker can lose the link. This can happen for example if you move media to a different folder.

Fortunately there is a routine to search for unlinked media and to try and re-establish the link. It is a global command.

The options are:

Options	Description
Media	Lists the media item in the Media Workspace that have been disconnected from their source file.
Path	Lists the directory path to the file after it has been found. When the file has not been found, you can click the message in this column to open a dialogue box and browse for the media item.
Status	Indicates whether the file has been found. You can hover the mouse pointer over the icon to view the status message for the file.
Attach	Lets you select whether to copy the file to the tree’s media folder or link to it from its existing location.
Select All	Selects each media item in the list to include it in the search. An item is selected when a check appears in the box.
Clear All	Removes each item from the list so none are included in the search.
Search	Initiates the process to locate each selected media file by searching through directories on your computer.

The Media Center

(Yes it is spelt that way).

Since version 2008, as I have used Family Tree Maker I have come to the conclusion that using the Media Center is a good idea. I noted above that when you ‘add’ media to Family Tree Maker you are actually creating a link to the media item on your hard drive. Now you have two options.

1. You can link directly from the media item to the Family Tree Maker File
2. You can allow Family Tree Maker to create a Media Center for the file and link from there

Effectively, the Media Center is just another folder that Family Tree Maker creates. Then when you link, Family Tree Maker makes a copy of the media item into the Media Center and links from there.

Now this makes an additional copy of your media item and hence uses more hard drive space, but it puts all your media associated with a particular file in the one place, so it is easy to find and back up.

Further, if you have multiple files, a Media Center is created for each file. And of course, if you restore from a Family Tree Maker backup file (.FTMB) created by doing a

File>Backup from Family Tree Maker and the file contains media, a Media Center will be created. Finally if you have missing media links the global find described above will probably work better if it finds all the missing links in the one place.

So for a number of reasons, I now use the Media Center for linking to my files. The options are:

Options	Description
Copy this file to the media folder for this tree and link to it there	Use this option when you want to keep all of your media files together in one folder. Family Tree Maker copies the file to the media folder assigned to the tree (usually located within the Family Tree Maker folder that is in My Documents). This is your best option when the media is located on a removable drive, such as a CD-ROM, DVD, or flash memory drive.
Link to this file where it is (without copying it)	Use this option when you want to save storage space on your computer or don't want multiple copies of a file on your computer.
Categories	Lets you select one or more categories to apply to the media files that you are adding to your tree file. Note: To select None, clear the check mark from all of the category check boxes.
Edit	Opens the Categories dialogue box so you can add, remove, or edit categories in the list.
Always use this selection without prompting me	This option lets you bypass the Copy To Media Folder dialogue box in the future. Every time you add a new media file, Family Tree Maker will use the Copy or Link option and assign the categories you have selected without opening the Copy To Media Folder dialogue box. To change the Copy/Link option or to be prompted again, click Tools > Options > Warnings, then select the option you want from the Copy media files to media folder drop-down menu.

You can also set your link preferences once for a file and Family Tree Maker will use this preference every time you add media, 'Always use this selection without prompting me'. You can of course change it if you wish.

Other things to do with media

If you click on the Media Menu button you will see that there are a lot of additional things that you can do with Media in Family Tree Maker.

Most of these are fairly obvious and don't really need further explanation, however a couple are more complex which I will cover.

Create a new Smart Story

This capability lets you capture various facts in your database for inclusion in a book. The dialogue allows you to create a new Smart Story from a blank page but the more useful option is to auto-populate the smart story with facts already in your file. (Text Wrapping)

Create Smart Story prompts you to specify how you want to begin creating a new Smart Story. A Smart Story is a description of the life of an individual from your tree. You can use facts, media, and sources to help you build the story. The facts from your tree can be inserted so the narrative text is already inserted to help you write the story.

The following table describes the options available:

Options	Description
Auto-populate Smart Story	This option creates the story using the person facts and relationships that have already been entered. Each fact includes text that is entered to create sentences that fit the narrative of the story (you can edit the text for individual facts in the Fact Properties). When the Smart Story opens, you will see the text from the person's record and can add to or edit the text as needed. For more information, see Compiling a Story .
Start with a blank page	Opens the Smart Story editor without the automatic text from the person's record. You can add facts with prepared text, type your own text, add media from the tree or from other sources, and create the story in other ways.
Always use this selection without prompting me	Specifies that whichever selection you make this time will be used in the future without opening this dialogue box. Note: To reset this option to open the dialogue box for future Smart Stories, click Tools > Options, then choose Prompt me from Auto-populate Smart Stories.

The following can be added to a Smart Story.

Facts

Lists the facts that have been entered for the selected person. The facts that are displayed depend on the option selected in the drop-down list. You have these options:

Option	Description
Personal Biography	Compiles all of the facts for the person into a short biography beginning from birth to death. You can drag the biography to insert it into the text.
Notes	Lists the notes that have been included for the person. Each note is listed separately. You can drag any note to the Text Item to insert it into the text.
Facts	Lists each fact entered for the selected person. When you click a fact, Family Tree Maker lists different formats of the fact information that you can drag into the Text Item.
Fact Sources	Lists the facts for the selected person. When you select a fact, all sources for the fact are listed in a drop-down list at the bottom of the pane. Select a source to view the citation text. You can drag the citation text to the Text Item to insert it into the text.
Insert	Copies the currently selected text field to the Text Item at the insertion point.

Media

Lists the image files that are attached to the selected person.

Important

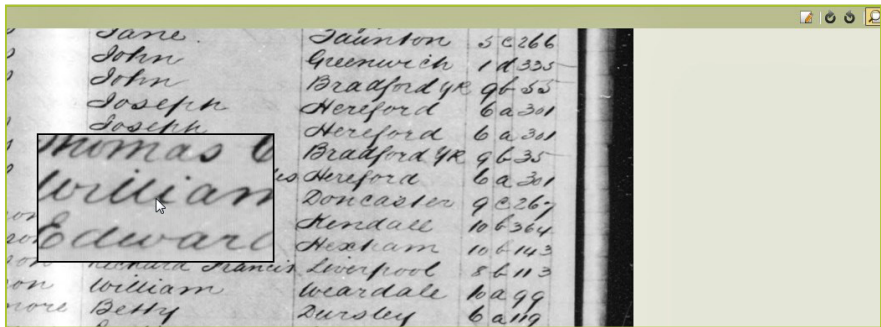
The performance of the book editor is affected by the memory size of the images and charts you include in the Smart Story, the number of media items and charts you include, and the memory capacity of your computer. As you prepare images and charts for a Smart Story, save colour image files at a resolution of 200 dots per inch (dpi) or less with a physical size of less than 8 inches by 10 inches.

Grayscale or black and white images should not exceed 300 dpi. This provides crisp images with smaller memory sizes. When the memory requirements of the book exceed the capabilities of your computer, your book may not display or print correctly.

You have these options:

The magnifier

This was added to Family Tree Maker 2012 and has carried over into version 2014 but unfortunately has not made it yet into Family Tree Maker 3. It can be invoked on any media item in the Detail view of media workspace by simply clicking on the magnifier icon



PDF viewer

This very useful tool (2012/14 only) lets you view a PDF file inside Family Tree Maker and also if you wish incorporate the magnifier. Note in the first screen shot you see the first page of the PDF document not a PDF icon.

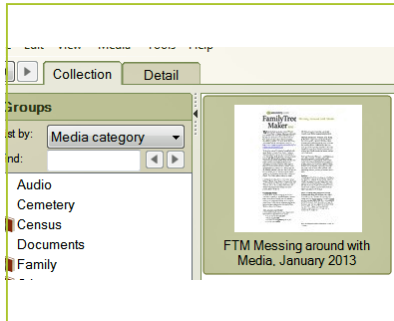


Double clicking opens it in the detail view where you can navigate each page. The arrow is point to the pages control being the usual forward and back arrows.

A wish

I wish that the PDF viewer (and magnifier) makes it into FTM 3 or FTM 4.

If you have a PDF media item in FTM 3, double clicking opens your PDF viewer, e.g. Adobe Reader, or whatever is your nominated PDF viewer.



FTM 2014 PDF in Collection view



FTM 2014 PDF in Detail view

Chapter six

Door number six—the notes door

Why notes?

Notes have the ability to add detail to your research, whether they be in the way of stories or biographical Person notes, Research notes, Fact notes, Relationship notes, Source Citation notes and Media notes. As you can see Family Tree Maker has many note options and they all have a role and all add to your research.

Notes can vary from a brief one-sentence description to lengthy analysis of a source to significant biographical details.

Notes can of course be included in reports and Smart Stories. (Smart Stories Windows version only).

Types of notes—person notes

Person notes are probably the most common form of notes in Family Tree Maker. They can be added in the Tree view, Person view and also during Web Clipping.

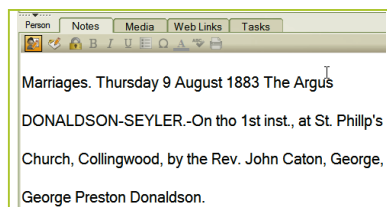
Adding person notes to Family Tree Maker

From the Tree view

1. Select the person that you want to add a note
2. Click on the People>Tree view
3. Click on the Notes tab in the right hand editing panel.
4. Type in your notes

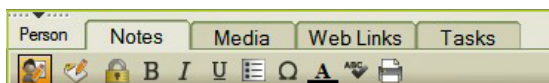
From the Person view

1. Select the person that you want to add a note
2. Click on the People>Person view
3. Click on the Notes tab
4. Type in your note



Notes toolbar

One of the most useful things in Notes is the ability to format your notes by the Notes toolbar.



You can make all or some of your notes bold, italic or underlined exactly as you can in a word processor like MS Word. You can also add bullet points and also add 'international characters', as Family Tree Maker calls them.

You can also colour the note text as well as spell checking. You cannot adjust the typeface or font size. Those are determined when you prepare a report to print. Finally you can print a note.

Copy and pasting into notes

You can copy and paste into Notes from another application such as MS Word.

Open MS Word, select your text and copy it. I use the left and right mouse keys to do this, but there are other methods.

Now go to the Note in Family Tree Maker that you want to paste the text into.

Again using the mouse, left click in the Notes field where you want to paste your note then right click>paste.

Copy and pasting tables

Now, normally I make a comment along the lines, 'that a feature in the Windows version is not in the Mac version', but in the case of copying and pasting tables, the reverse is the case. Consider this simple Chronology table.

1892	Arrived Australia, 5 February
1892-98	Beaudesert
1901-1909	Wellshot Station near Isisford
1908	Calboolture
1928	James died

But if I paste this into Notes in Family Tree Maker 2014 Win (or any other Win version), I get this displayed as one line:

1892 Arrived Australia,5 February1892-98Beaudesert1901-1909 Wellshot Station near Isisford1908Calboolture1928James died.

The table formatting is lost !!!

If on the other hand if I paste it into Notes in Family Tree Maker 3, I get the table exactly as it was set out in MS Word. Further, the table structure is preserved in reports and charts.

I understand that table formatting was deliberately removed from the Windows versions, which is a pity, as it seems to work perfectly well in the Mac versions. I would like to see table support included in future Win versions.

Where can you use person notes?

Person Notes can be included in Ahnentafels, Descendant reports, Family Group Sheets, Individual Reports and Custom Reports as well as Smart Stories (Win version only).

Privatising notes



You can privatise any note by simply clicking on the padlock icon in the Notes toolbar. Then you can choose whether or not to include it in reports or when you export your tree.

Research notes

Research Notes can be used to remind you of next steps. These notes can be quite detailed and include dates and dot points etc. Russ Worthington in his blog has a good commented short video on how he uses Notes.

<http://ftmuser.blogspot.com.au/2014/06/ftm2014-barefoot-genealogist-view-on.html#uds-search-results>

Where can you use research notes?

Research Notes can be included in Ahnentafels, Descendant reports, Family Group Sheets, Individual Reports and Custom Reports as well as Smart Stories (Win version only).

To enter a Research Note, go to the individual's Person tab in the People workspace. Click on the Notes tab at the bottom of the window and click on the

Research Note icon.

All the formatting in Person Notes is also available in Research Notes.



Fact notes

Fact Notes allow you to make specific notes about important information that you don't want to 'get lost' in a long Person note. In this example I have noted under an Occupation Fact, some specific information about the individual's occupation.

To enter a Fact Note, go to the individual's person tab on the People Workspace. Click on the Facts button and select the Fact you want. In the editing panel on the right hand side of the window click the Notes tab.

Enter text or copy and paste from another application.

Where can you use fact notes?

Fact Notes can be included in Ahnentafels, Descendant reports, Family Group Sheets, Individual Reports and Custom Reports as well as Smart Stories (Win version only).

Relationship notes

Useful for recording conflicting information about marriage dates, spouses and all that sometimes-confusing information, especially multiple marriages and remarrying, etc.

Go to the individual's Person tab in the People Workspace, click on the Relationships tab and click the spouse entry.

Where can you use relationship notes?

Relationship Notes can be included in Ahnentafels, Descendant reports, Family Group Sheets, Individual Reports and Custom Reports as well as Smart Stories (Win version only).

Source citation notes and media notes

Again, an under used feature in Family Tree Maker. Whilst the media items do have a description field sometimes you need more space to describe the media. You may have background information about an old photograph or where it was taken for example. To enter a Media note go to the Media Workspace, double click on the Media item you want to add a note to and click on the Notes tab.

To delete a note

To Delete a note simply select all the text by pressing Ctrl+A (Win) or Command + A (Mac). Then press Delete or Backspace key.

Putting sources into notes

I have seen a number of Family Tree Maker users putting their sources into Person Notes. Whilst this may well capture the source detail, it effectively denies the user the excellent source features in Family Tree Maker like the:

- 170 Source Templates
- Source Bibliography Report
- Source Usage Report
- Documented Facts Report
- Undocumented Facts Reports

I would strongly urge people to not do this as it reduces or eliminates the excellent utility of source features in Family Tree Maker. It is 'sources for courses'. Notes go in Notes and Sources go in Sources.

Notes report

The Notes report was significantly improved in Family Tree Maker 2012. (I described it as 'an almost new report' when I first reviewed it).

It has the ability to show:

- Private Notes
- Person Notes
- Fact Notes
- Relationship Notes
- Research Notes

As with all Family Tree Maker reports, you can include the immediate family of the focus individual, the extended family, all individuals or selected individuals (which of course invokes the Family Tree Maker filter).

Notes online

I have mentioned in other places when reviewing Family Tree Maker 2014 and Family Tree Maker 3 that putting your tree online in the free Ancestry Member Tree (AMT) has a big advantage as virtually all your tree is now online and forms an excellent Cloud backup. This applies even if you never want to share your tree. As you can also link and sync your desktop and online trees, you always have a very good online backup.

I have said also that whilst you have backed up your tree online to your AMT, you cannot see all the information online.

So how are notes handled by the AMT?

There are three options:

1. Synced Person Notes are visible to the tree owner (you) and any editor role you create/invite
2. Synced Research Notes are on the AMT but are not visible
3. Fact/Media/Relationship/Source Citation Notes are synced with the AMT but are not visible

So, another very good reason to use the free AMT facilities, even if you never plan to share your tree. If something goes wrong on your desktop, you have an online backup.

An Ancestry.com YouTube on notes

Crista Cowan, the Barefoot Genealogist, has a 26-minute video on Notes on this link:

<http://ftmuser.blogspot.com.au/2014/06/ftm2014-barefoot-genealogist-view-on.html#uds-search-results>

Summary

I encourage you to explore the comprehensive Notes features in Family Tree Maker. Using notes creatively can richly improve your research not only for your own use, but if you share data with other researchers.

Chapter seven

Final thoughts

I have used Family Tree Maker in its many guises for over 20 years and have often said it is the most addictive, intuitive and fun program that I have ever used. Over the years it has developed and matured and has taken advantage of confluence of the computer, the Internet, online databases and related developments.

In this little *Opening the doors* book, I have tried to guide you to a number of the program's many features and how and where you should enter data. My aim has been to get you started in a way that you are not overwhelmed. I would encourage you to play with the program.

One of the suggestions that I often make to Family Tree Maker user groups and workshops that I run is to make a dummy file and practice new ideas with it before committing yourself to your main file. Bit like a golfer having a few practice swings. You can simply make up some names and dates or use a copy of a backup file, but being able to practice 'in the sandbox' is a great way to gain confidence. I have explained this in chapter 1.

You will also benefit by joining a genealogy group that has expertise in Family Tree Maker. I am the past Secretary of Victorian GUM Inc. based in Melbourne.
www.vicgum.asn.au. See page 71.

GUM was formed by enthusiasts in 1984 just to help folk use and enjoy their computers and genealogy software. You might consider joining fellow users in GUM.

There are also numerous other local family history groups scattered around Australia and New Zealand and a search online can quickly find them. Join one and I guarantee you will enjoy it and learn a lot faster.

But nothing beats a bit of practice and encouragement and support of fellow users. FTM is the most popular genealogy software program in Australia and probably the western world and there is a lot of support out there.



VicGUM® was founded in 1984 by a group of far-sighted persons who could see advantages to genealogy recording by means of the new personal computers then becoming available.

VicGUM® exists to provide technical support and assistance to members. This technical assistance is provided by those members in the group who have the available expertise. Members have shown that they are willing to share their knowledge and expertise to benefit all members.

This technical expertise is not restricted to genealogy programs, but also includes related equipment such as computers, scanners and digital photography.

Members also receive the monthly Newsletter by e-mail. This contains a wide range of information including many articles about using the more popular genealogy computer programs and related technical issues.

Support is also provided by eight Self-Help User Groups. These groups have informal monthly meetings to provide assistance with the more popular genealogy programs and publishing. Each group is facilitated by a person experienced in the particular program. Details of meeting dates and locations are included on the website and in the Newsletter.

Another important method of assistance is the e-mail discussion group, GUMNET. This network is available to members only to obtain suggested solutions for technical problems. Using this resource the expertise of our membership is freely available to all.

VicGUM® holds monthly meetings at which technical issues are presented to the members. In addition, there are a number of full day workshops covering software and technical equipment in detail.

More information can be found on our website at **www.vicgum.asn.au**. On this website is all the information needed about participating in the various meetings and workshops which are held by the Association. It is also possible to download a membership application form. This web site has recently been rewritten and now includes a members' only section where members can download previous newsletters back to 2005 as well as enjoying 10% discount on the Recommended Retail Price of all software.

John Donaldson, the author of this publication is a Life Member of VicGUM® as well as being the GUM newsletter editor and former Secretary.

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www.vicgum.asn.au
<http://www.facebook.com/VicGUM>

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More Unlock the Past guide books

So you are totally new to Family Tree Maker

by John Donaldson

Family Tree Maker, usually called FTM, is Australia's largest selling genealogy program. It has enjoyed huge success and is now in its 22nd iteration as FTM 2014. In December 2013 Ancestry.com announced Family Tree Maker Mac 3 which was released in Australia in March 2014.

This book is intended to be the first of a series about Family Tree Maker, and covers the absolute basics that new users, with very little computer understanding can use to get up and running.

The book takes new users through installation, registration, activating an Ancestry.com subscription, followed by an introduction to creating or importing files. It then introduces the eight workspaces within the program with enough simple explanation to start using it.

Extensive use is made of screen shots to assist the user to understand what he or she is seeing on the screen.

500 best genealogy & family history tips

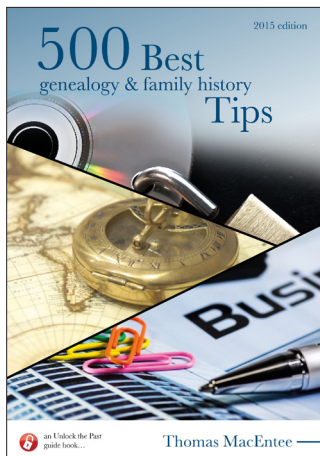
by Thomas MacEntee

500 best genealogy & family history tips could best be described as a 'brain dump' of me, Thomas MacEntee, and my many years of knowledge about genealogy and family history. Basically what I've done is to extract my favourite tips and tricks from over 85 presentations, 10 books and numerous articles. In addition, I've reviewed the social media posts and conversations from Facebook, Twitter and other platforms to highlight those issues most important to today's genealogists.

What will you find in this 'best tips' guide?

Everything from practical ways to use Google, advice on protecting your privacy online, information about secret or little known resources for genealogy research, and more. The best way to use this guide is to browse the table of contents to find a topic of interest. Also simply search the book when trying to find a solution to a problem, such as how to cite a source or locate an app to generate bibliographic information.

I hope you enjoy *500 best genealogy & family history tips* and put it to good use in the coming year.



These and other Unlock the Past guide books are available in print and ebook editions from
www.gould.com.au and other resellers www.gen-ebooks.com

More Unlock the Past guide books

Evernote for family historians

by Carole Riley

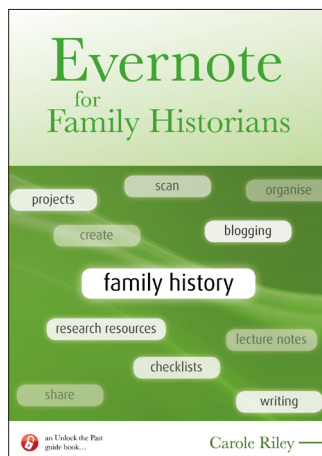
Family historians have more need than most people to be organised. We have a lot of electronic and paper files in different places in different formats. Evernote can collect everything together, all in one place:

- digitised images and digital photographs
- scanned documents
- research notes and database printouts
- PDFs and eBooks
- web pages and links emails
- voice recordings and family videos

We can organise all of this treasure, access it quickly and easily, and synchronise it between our computers, phones and tablets. We can search across and within many files at once, even PDFs, handwriting and audio files. We can share with others and collaborate on projects.

Evernote can change the way we go about our research and can reduce the need for printing and hardcopy storage. We can also use Evernote to organise other areas of our lives – writing, travelling, shopping, finances, technology – the possibilities are limitless.

Evernote can change your life. This book will show you how.



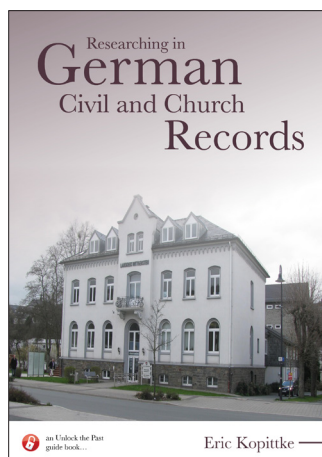
Researching in German civil and church records

by Eric Kopittke

This book answers the question ‘How can I obtain a birth or marriage certificate from Germany for an immigrant ancestor?’ In Germany the system of registration of births, marriages and deaths by civil authorities, and the issue of associated certificates, has some significant differences to the system that the researcher may be used to.

Prior to the introduction of civil registration, churches kept registers of baptisms, marriages and burials, and such church records may allow researchers to follow the family back for several hundred years.

This practical guide, aided by many illustrations, will allow the reader to become familiar with the types of information available on German civil certificates of birth, marriage and death and church records of baptism, marriage and burial. The book then explains how to access these records and builds on the information given in the companion volume *Locating your German ancestor's place of origin*.



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More Unlock the Past guide books

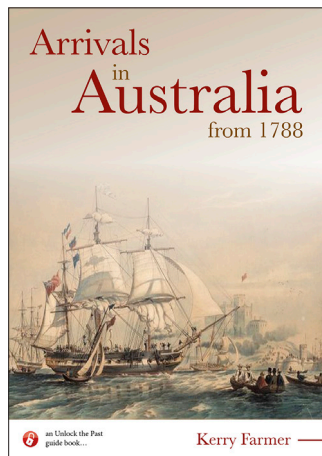
Arrivals in Australia from 1788

by Kerry Farmer

This book introduces the history and records of migration to Australia from 1788.

Migrating to a new country was one of the most dramatic life changes anyone undertook and it certainly affected the lives of their descendants. Investigating their journey is a key part of your family history research.

However immigration records in Australia are not all held in one place – when, where and how they arrived affect where (and whether) records of their arrival can be found. Understanding categories of arrivals and the immigration schemes in place as well as the general principles of where documents are held, will give you confidence that you have looked in all the right places



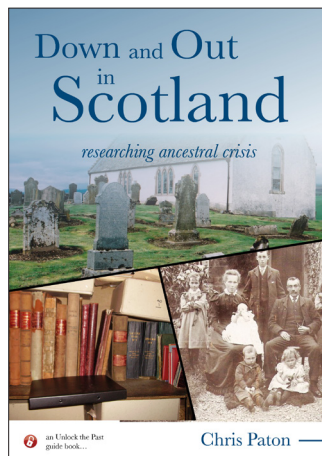
Down and out in Scotland

by Chris Paton

It is one of the greatest truisms of family history research that we will often find that the lives of our ancestors were best documented when the chips were truly down.

There were many battles that our forebears fought for and against, both on a personal level and a part of the society within which they lived. There were the laws of the local parish church and the punishments awaiting those who breached kirk discipline; the struggles to avoid poverty and the stigma of being a debtor; the darkest moments of the soul, from mental health issues and illness, to murder and suicide; and the dramatic moments of rebellion, when our forebears drew a line in the sand against a perceived tyranny or democratic deficit. Illness, death, bigamy, abandonment, accidents, eviction, ethnic cleansing - a dramatic range of challenges across a lifetime, and at times, outright tragedy. And close to each of them, a quill and ink.

But through all of these episodes, there is an even greater story that emerges, of how our ancestors overcame such struggles. This guide helps us to truly understand the situations that our ancestors had to endure and overcome across the generations, to help us become the very people who we are today.



These and other Unlock the Past guide books are available in print and ebook editions from
www.gould.com.au and other resellers www.gen-ebooks.com

Unlock the Past publications — all available in both print and ebook editions

Ron Austin

- AIF unit histories of the Great War 1914-1918

Carol Baxter

- Guide to convict transportation lists: Part 1, 1787-1800
- Guide to convict transportation lists: Part 2, 1801-1812

Leslie Berry

- Organising a family reunion
- Writing and publishing your family history

Christine Clement

- Migration to New Zealand: a guide for family history researchers

John Donaldson

- Opening doors to Family Tree Maker: or how to enter your information correctly
- So you are totally new to Family Tree Maker (2nd edition)

Kerry Farmer

- DNA for genealogists (3rd edition)
- Arrivals in Australia from 1788

Janet Few

- The ones that got away: tracing elusive ancestors who move into, out from and within Britain
- 'Til death us do part: causes of death 1300-1948

Sauna Hicks

- Discover your sporting ancestors: it was not all work and no play!
- Family history on the cheap
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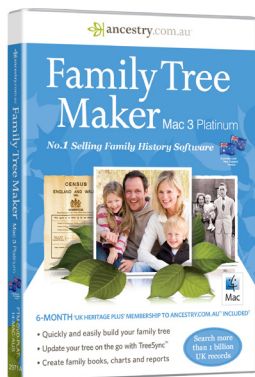
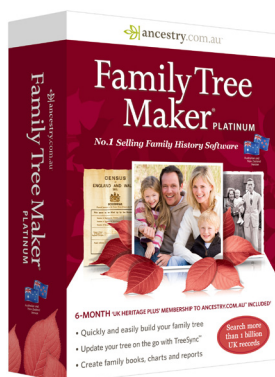
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The book takes users through the various data entry 'doors' in Family Tree Maker encouraging them to focus on correct data entry so that the program can deliver the best outcome and output to the user.



ISBNs: 978 1 925323 12 2 (book)

978 1 925323 13 9 (ebook)