

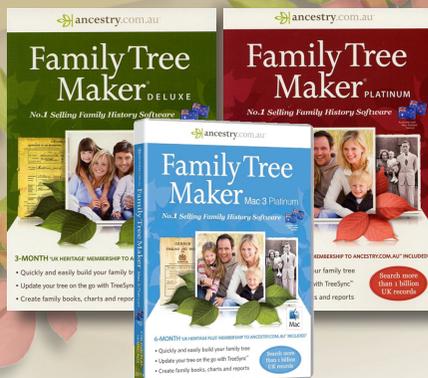
So you are totally new to Family Tree Maker second edition

Family Tree Maker 2012 and 2014

Family Tree Maker Mac 2 and Mac 3

John Donaldson

JOHN DONALDSON



UNLOCK
THE *past*

About the author



John Donaldson

John Donaldson started using Family Tree Maker (FTM) 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 FTM 2014 for Windows and FTM for Mac 3

In 1996 he applied to beta test the program, when Brøderbund Software in San Francisco was producing it. Whilst 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 16 consecutive releases.

In March 1998 he commenced writing a series of FTM columns for the Victorian GUM Inc. (www.vicgum.asn.au) newsletter and this series has continued unabated and now consists of some 160 plus tutorial articles. John is also the Hon. Secretary of Victorian GUM Inc.

In 2005, coinciding with the ownership of FTM by Ancestry.com, John 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. John relates being able to spend the day with the developers as something akin to being in genealogical heaven.

As well as writing about FTM, John runs regular FTM user groups and workshops for Victorian GUM and regional groups, as well as actively participating in a number of FTM message boards around the world.

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

**This booklet is another
in a series of publications
produced by**



Unlock the Past is about promoting history, genealogy and heritage in Australia and New Zealand. It is a collaborative venture involving a team of expert speakers, writers, organisations and commercial partners throughout Australia, New Zealand and overseas.

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- A user of, and educator in, social media
- **Promoting heritage tourism** ... and much more

So you are totally new to Family Tree Maker

2nd edition

John Donaldson

2014



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Contents

Foreword	5
Abbreviations	6
Getting started	7
Introduction	7
Family Tree Maker for Windows	7
Family Tree Maker for Mac	7
Obtaining the program	8
Windows versions of Family Tree Maker	8
Mac version of Family Tree Maker	8
Different operating systems, different files	9
What is a GEDCOM?	9
New development with 2014 and FTMM3—a common database	9
64 and 32-bit options	10
Can I install FTM on my computer?	10
What I use	10
Family Tree Maker for Windows	11
Family Tree Maker for Mac	11
My comments	12
Installing the program	12
Registering the program	12
How does Family Tree Maker relate to Ancestry.com?	13
Ancestry.com.au subscription	13
When should I take up my subscription offer?	14
How many copies of family tree maker can I install?	14
Getting started	14
The eight workspaces	14
Chapter 2—Files workspace	15
Chapter 3—Plan workspace	16
Family Tree Maker 2014/FTMM3	16
Family Tree Maker 2012/FTMM2	16
Linking to an online Ancestry Member Tree (AMT)	17
Using your online tree on smart phones and tablets	17
Free cloud backup	17
Starting a new file	18
Now a word about terminology, files, saving and backing up	20
A playfile	21
Options	21

Chapter 4—People workspace	22
Adding new information	22
The Index	22
Bookmarks	23
History	23
The views in the Family workspace	24
The Home person	24
Follow the Yellow Brick Road	25
Turning on the Description field	25
Leaf hints	25
Sorting children	26
Unknown dates	27
Blended families	27
Children Move, Sort and Blend controls	27
People Person view	27
Tabs	28
Facts	28
Timeline	29
Relationships	29
Help	30
The right mouse button	30
Chapter 5—Places workspace	31
Resolving place names	32
Hierarchical place names	33
Chapter 6—Media workspace	34
To add media	34
Changing the silhouette	35
Media categories	35
New in Family Tree Maker 2014	35
Chapter 7—Sources workspace	36
The two elements of sourcing	36
Adding sources in Family Tree Maker	37
Chapter 8—Publish workspace	38
Opening the Publish workspace	38
A descendant chart	40
Output options	43
Reports	43
New list and individuals to include options	45
Chapter 9—Web Search workspace	46
Merging from Leaf hints	47
Web clipping	48
Chapter 10—Final thoughts	49
Play with the program	49
Join a group	49
Appendix 1: Help resources	50
Index	52

Foreword

If you're totally new and just learning how to use Family Tree Maker, then you have in your hands one of the best tools for getting started. In fact, John Donaldson was instrumental in helping me as I was introduced to Family Tree Maker ten 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.

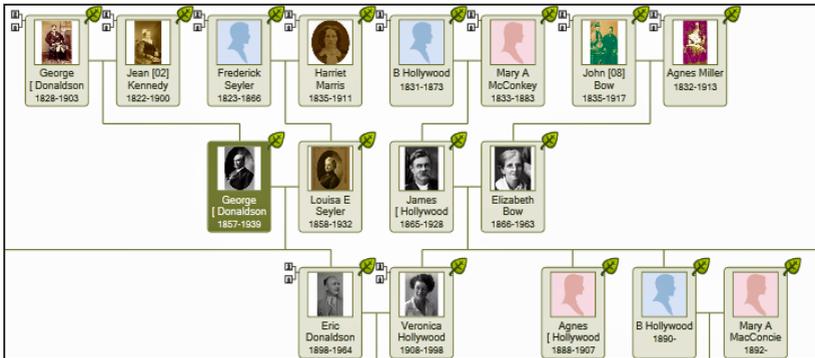
Family Tree Maker is a powerful but easy-to-use program for helping you to discover, preserve, and share your family's heritage. It is available for Windows and Mac computers and John is versed and familiar with both, given his long history with using the software. Although it is intended to be accessible and easy to learn, getting started with a new software program can be daunting at first. There are so many screens with so many options and terms you'll be unfamiliar with. In this book, John uses his experience and friendly style to teach, guide, and help you focus on what you need to know first. As you begin this new endeavour, you have the ideal companion at your side. Best wishes in this exciting new journey.

Duff Wilson
Family Tree Maker
Ancestry.com



Abbreviations

- CD Compact Disk
- CD-R Compact Disk Recordable
- DD/MM/YY Day/Month/Year (Date)
- DVD Digital Versatile Disk
- FTM Family Tree Maker
- GB Gigabyte
- MB Megabyte
- MHz Megahertz
- RAM Random Access Memory
- ROM Read Only Memory
- TV Television
- VicGUM Victorian GUM Inc.



Getting started

Introduction

There is no doubt that genealogy and family history have become very popular in recent years with the advent of capable computers, smartphones, the internet, online databases and also being popularised by TV programs such as, ‘Who Do You Think You Are?’

Computer programs that assist you with your genealogy have been available for many years, and have developed to offer more and more features as well as becoming internet and smartphone aware. They have also become much cheaper as well as being much more capable.

This book has been designed to assist users, (often seniors) or those that have not grown up with computers, to understand the basics of one of the most popular genealogy programs—Family Tree Maker.

Family Tree Maker for Windows

Family Tree Maker (normally abbreviated FTM) is Australia’s biggest selling genealogy program. It is available for both Windows and Mac computers. It has been around in a Windows version since 1990 and has grown a strong following. The program was purchased from Genealogy.com by Ancestry.com in 2003 and was totally rewritten and released as Family Tree Maker 2008. Since then it has significantly evolved and the current Windows version is Family Tree Maker 2014 released in September 2013.

Family Tree Maker for Mac

Ancestry.com has also released a version for the Mac operating system in 2014 called *Family Tree Maker* for Mac. It is now in its third version *Family Tree Maker* Mac 3. Both programs are available in Australia and are strongly supported by one of the major computer genealogy associations, Victorian GUM Inc. (VicGUM®) www.vicgum.asn.au.

This book has been written for those users who have recently purchased Family Tree Maker and want to know what to do next. It will cover the basics to get you going and gain confidence in the program.

Obtaining the program

Family Tree Maker is widely available in Australia. Whilst it can be obtained from some retail chains, it is perhaps better to purchase it from a specialised genealogy outlet that can provide active phone and Internet support, especially to new users. One such supplier is Victorian GUM Inc, (VicGUM®) a not for profit organisation established in 1984, with the view of assisting people use their genealogy software more effectively. Family Tree Maker can be purchased through Vic GUM® at this link: www.vicgum.asn.au/software.html

Windows versions of Family Tree Maker

The current version of Family Tree Maker for Windows is *Family Tree Maker 2014* and is available on CD in three versions:

- Platinum Edition, which includes 6 months subscription to Ancestry.com.au UK Heritage Plus
- Deluxe Edition, which includes 3 months subscription to Ancestry.com.au UK Heritage; and the
- Upgrade Edition, which is only available to users of previous versions of Family Tree Maker, and includes 1 month's subscription to Ancestry.com.au UK Heritage.

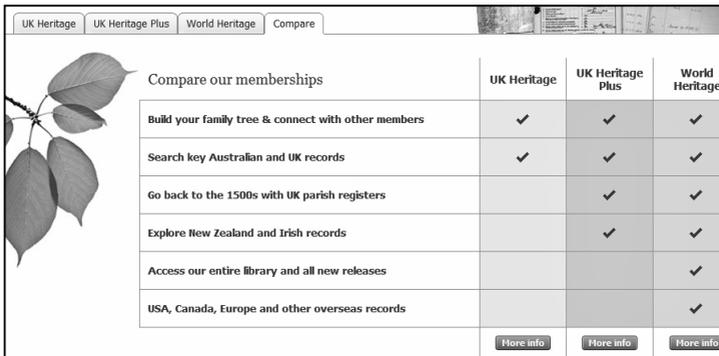
In all cases the version of Family Tree Maker is identical, the difference is the amount of Ancestry.com.au subscription.

Mac version of Family Tree Maker

The current version of Family Tree Maker for Mac is *Family Tree Maker for Mac 3 Platinum*. Like the Windows Platinum version, it comes with 6 months subscription to Ancestry.com.au UK Heritage Plus.

For details of the contents of Ancestry.com subscriptions see:

www.ancestry.com.au/14daysfree#compare



	UK Heritage	UK Heritage Plus	World Heritage
Compare our memberships			
Build your family tree & connect with other members	✓	✓	✓
Search key Australian and UK records	✓	✓	✓
Go back to the 1500s with UK parish registers		✓	✓
Explore New Zealand and Irish records		✓	✓
Access our entire library and all new releases			✓
USA, Canada, Europe and other overseas records			✓
	More info	More info	More info

Various Ancestry subscription packages

Different operating systems, different files

With Family Tree Maker 2011 and 2012 and Family Tree Maker Mac 2 the files for the Windows and Mac programs are incompatible.

The solution is to install the File Migration Utility that ships on the FTM for Mac CD, but has to be installed onto a Windows computer! That is correct. Even although the Utility comes on the Mac CD, it has to be installed under Windows.

The Utility will convert Family Tree Maker Windows .FTM files to Mac .FTMM files and vice versa. The Utility can also be downloaded from http://ftm.custhelp.com/app/answers/detail/a_id/5313/kw/file%20migrat%20ion%20utility

You can still use GEDCOM to transfer files between the programs.

What is a GEDCOM?

GEDCOM is the data transfer standard used by various genealogy programs. For example, if your cousin used Legacy Family Tree, which is a competitive program to Family Tree Maker, you could make a copy of your file (or part of it) as a GEDCOM file and he/she can open it with Legacy. Family Tree Maker can export your file as a GEDCOM via File>Export>GEDCOM.



Export to GEDCOM

New development with 2014 and FTMM3—a common database

Thankfully with the release of Family Tree Maker 2014 and Family Tree Maker Mac 3, the developers have made the database structure between the two versions compatible. That means that Family Tree Maker 2014 can open a file created in FTMM3 and vice versa. No more File Migration Utility! This is a big breakthrough.

64 and 32-bit options

Also note that Family Tree Maker 2014 ships in two varieties on the installation CD, namely 32-bit and 64-bit. If you have your version of Windows installed as 64-bit, Family Tree Maker 2014 will automatically detect this and install the 64-bit version of Family Tree Maker. 64-bit makes better use of your computer's resources and will run up to 50% faster on a given file and computer than the 32-bit version, which is the same speed as Family Tree Maker 2012. Note you don't have to do anything the program will detect the correct version.

Lots of references in Google and this one is quite good.

www.techsupportalert.com/content/32-bit-and-64-bit-explained.htm

Can I install FTM on my computer?

In order to install Family Tree Maker on your computer and to ensure that it runs satisfactorily, it is necessary for your computer to meet the minimum or recommended specifications. Note in the specifications that follow, the developers have recommended minimum specifications and recommended specifications.

I publish both, but note that Family Tree Maker is essentially a large database management application and the more memory (RAM) that you have in your computer, the better (faster) it will run. I have noted my recommendations, especially for large files (more than 1000 people) and 64-bit operation as well.

What I use

I use a 27" iMac (Mountain Lion OS-X 10.8.5) with Windows 7 Pro installed as well running under Parallels 7. This lets me run both Family Tree Maker Windows and Mac programs on the one computer—essential if I wish to write about both versions of Family Tree Maker. I have 8GB of RAM for the Windows side and another 8GB of RAM for the Mac side. Both Windows and Mac run in 64-bit mode.

I also have an older Windows XP Pentium test computer that has Family Tree Maker versions 16, 2009, 2010, 2011, 2012 and 2014 on it. Good for answering questions.

Family Tree Maker for Windows

Minimum requirements

Operating System	Microsoft Windows® XP SP2 / Vista™ / 7/ 8
Processor	500 MHz Intel Pentium® II (or equivalent)
Hard Disk	639 MB for installation
Memory	512 MB of RAM
CD-ROM Drive	2 x CD/CD-R. (Some supplemental products require a DVD-ROM drive)
Monitor	800 x 600 resolution monitor

Recommended requirements

Operating System	Microsoft Windows® XP SP2 / Vista™ / 7/ 8
Processor	1 GHz Intel Pentium® III (or equivalent)
Hard Disk	639 MB for installation
Memory	1 GB of RAM
CD-ROM Drive	32 x CD/CD-R (Some supplemental products require a DVD-ROM drive)
Monitor	1024 x 768 resolution monitor

Family Tree Maker for Mac

Minimum requirements

Operating System	Mac OS-X 10.5 or later
Processor	Intel-based Mac
Hard Disk Space	500 MB for installation
Memory	512MB of RAM
CD-ROM Drive	2 x CD-ROM (required for installation)
Display	800 x 600 resolution monitor

Recommended requirements

Operating System	Mac OS-X 10.5 or later
Processor	Intel-based Mac
Hard Disk Space	500 MB for installation
Memory	1GB RAM
CD-ROM Drive	32 x CD/CD-R (Some supplemental products require a DVD-ROM drive)
Display	1024 x 768 resolution monitor

My comments

My experience with both Family Tree Maker for Windows and Family Tree Maker for Mac is that even the recommended RAM of 1GB is really *too low* if you want to run a file over 1000 people. I would suggest that you have at least 4GB of RAM for 32-bit operation (that is the most that 32-bit Windows can use) and 8 GB of RAM for 64-bit operation. Other programs will run a lot better as well with more RAM. Intel Processors i3 or above, e.g. i5, or better still i7 (or equivalent), will also perform much better than the older Pentiums etc.

Installing the program

Installing the program is extremely straightforward and consists of inserting the program CD into your CD drive and following the prompts or as they say in the song, 'Follow the yellow brick road'.



One Tip: When installing any CD, have a look at surface and make sure that it is clean. Dirty CDs in any program can cause problems with the installation.

If your computer does not have a hard drive, e.g. a Mac Air, you can, on another computer, copy the files on the installation CD to a memory stick and then install from the memory stick.

Sometimes when you are installing the CD, you will see a message from Avanquest, who package the CDs for Australia and New Zealand. If you don't have any interest in receiving information from Avanquest, simply hit the escape key (esc) and proceed with the installation.

Family Tree Maker will not overwrite any previous version and will install as a separate program in its own right. In fact on my test computer, I have versions 16, 2009, 2010, 2011, 2012 as well as 2014 installed. I do this as I answer a lot of questions so I need the older versions there as a reference if required. Most people though, if upgrading from a previous version, once they have the latest version working correctly, uninstall (Windows) or delete (Mac) the older program so as to free hard drive space.

Registering the program

This is an important step as it activates a number of features. The program will ask you for a username and password. If you have registered a previous version of the program and/or have an Ancestry.com.au subscription you should use this username and password.



First program registration screen

How does Family Tree Maker relate to Ancestry.com?

Ancestry.com owns and develops Family Tree Maker and the Family Tree Maker program is very tightly integrated into Ancestry.com. By using the same Ancestry.com username and password ensures that you have access to all the Ancestry.com products/benefits whether you are utilising them through Family Tree Maker, from a browser, tablet, or smart phone, etc.

Ancestry.com.au subscription

I mentioned above that the product comes with a subscription of various lengths to the Ancestry.com paid databases. Once you have Family Tree Maker installed, you can activate this subscription via Help>Activate Ancestry subscription (Windows), or in Mac click on the Family Tree Maker button on the tool bar (next to the File button). Note that when you activate your Ancestry.com.au subscription that comes with Family Tree Maker, you will still be asked for valid credit card details. If at the end of the included period you do not wish to continue with your subscription, you need to cancel the subscription before it expires. You can do this online.



Activate Ancestry subscription

If you don't cancel your subscription will be continued, and of course you will be charged. Your subscription status and expiry is shown on the web dashboard in the Plan view (both versions).

When should I take up my subscription offer?

If you are a new user to Family Tree Maker, I recommend that you delay taking up your subscription until you are a bit more comfortable with the program as the subscription is time based, e.g. the clock starts ticking the moment that you activate it.

As far as I am aware, you can delay activation for as long as you like. You can also use it to extend an existing Ancestry.com subscription. I suggest that you do this when your current subscription expires.

If you have any problems with this you can ring Ancestry.com.

1-800-251-838 (toll free) in Australia or;
0800-442-100 (toll free) in New Zealand.

How many copies of family tree maker can I install?

A question often asked, and the rule is that you may install two copies of the program on any two computers that you own. You may have one on your desktop and the second copy on a laptop. Any combination, but the number is two copies.

Getting started

So we have covered the preliminaries and have installed and registered Family Tree Maker and possibly activated an Ancestry.com subscription. What happens next?

The eight workspaces

Family Tree Maker now has eight workspaces where you do the work. These are: Files, Plan, People, Places, Media, Sources, Publish and Web Search. Regard them as your eight pillars of family history wisdom as you will spend a lot of time in all of them.



The eight workspaces (Mac)

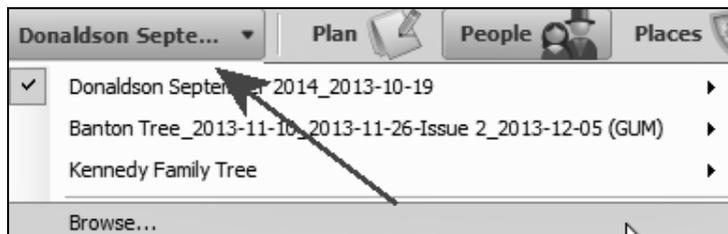


The eight workspaces (Win)

They all operate a bit like eight open tabs in a browser, and in fact one of the things that I really like with Family Tree Maker is that you can move to any workspace at anytime, but when you come back to a workspace, it is exactly how you left it. So you could be working with a family in the People workspace and jump to Places, then Media and then come back to the People workspace. Note Family Tree Maker 2012 and FTMM 2 only have seven workspaces, the file selection option is part of the Plan view.

Chapter 2—Files workspace

This is a new workspace in Family Tree Maker 2014 and FTMM3. It shows you a (shortcut) list of the last opened files.



Files menu

The reason the new workspace was created was to allow you to change files from anywhere in the program. Previously you had to go to the Plan workspace to change files. If the file you want is not listed in the Files workspace, you can click the browse button and locate it or go to File>Open and navigate to where you have saved your Family Tree Maker files, usually My Documents>Family Tree Maker. Once a file has been opened once, it is usually then available in the Files workspace and clicking on it will open the file. You can also rename, delete or remove a tree from the trees list.

Chapter 3—Plan workspace

Family Tree Maker 2014/FTMM3

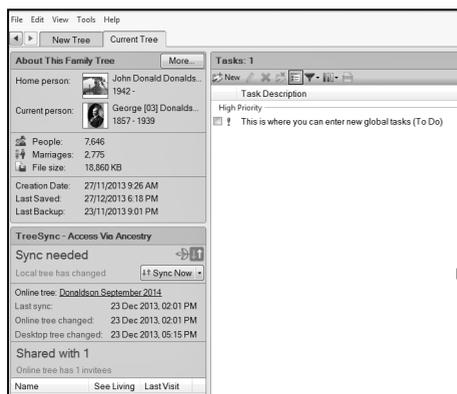
In Family Tree Maker 2014 and FTMM3 the Plan workspace has been updated. The developers will tell you that they have updated the UI (User Interface). Nothing new has been added, just rearranged from previous versions.

Here you can see details and statistics of the current file opened, you can see if the file is linked and synced to your online tree. You have a large area to record global tasks and you also see the Ancestry web dashboard and Ancestry connect activity.

Family Tree Maker 2012/FTMM2

In Family Tree Maker 2012 or FTMM2, when you start Family Tree Maker it will open in the Plan workspace. This workspace is where you see details of any files that you have.

You also have the ability to create a new file, or import a file from one that you already have, e.g. from an earlier version of Family Tree Maker right back to version 5, maybe a GEDCOM file, maybe your online Ancestry Member Tree, or maybe from another genealogy program like Legacy Family Tree, The Master Genealogist or Personal Ancestral File (PAF). Family Tree Maker can import them all. Also, you can create a totally new tree from scratch, e.g. enter just what you know. You can also list global tasks (To Do items) in this workspace.



The Plan workspace (Win)

Linking to an online Ancestry Member Tree (AMT)

Versions 2012/2014 and FTMM 2/3 both allow you to create an online Ancestry Member Tree (AMT) and link and sync your Family Tree Maker data to the online tree and vice versa. Many people (including me) have done this as a convenient way to share data, but you don't ever have to do this if you don't want to.

It is an option that you can avail yourself of at anytime. The advantage of an online tree is that you can selectively share your research. I regard it as an extension of the Publish capability, an 'online chart/report' if you will. Both versions allow you to link and sync your tree from Family Tree Maker online so if you make a change to (say) your Family Tree Maker tree it will be synchronised to your online tree and vice versa.

Using your online tree on smart phones and tablets

Additionally, you can look and edit your online tree from any browser or better still from a tablet, smart phone or iDevice. To do this you need of course to install an Ancestry.com app. This lets you look and edit your online tree from anywhere in the world that you have a phone or Wi-Fi connection and if it is linked and synced the changes will be transferred back to your Family Tree Maker tree next time you open it. Both apps are free and are great for travelling.

The links are:

Apple

<https://itunes.apple.com/us/app/ancestry-com-tree-to-go/id349554263?mt=8>

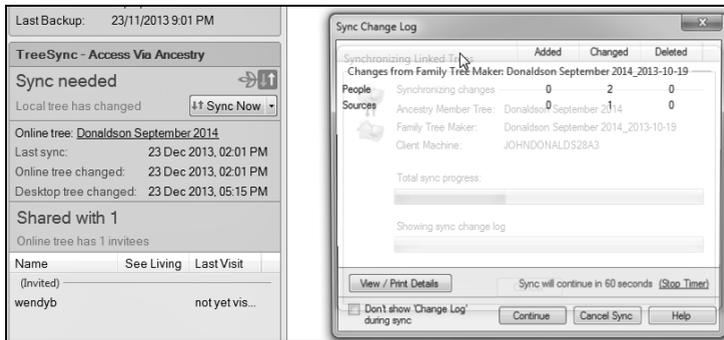
Android

<https://play.google.com/store/apps/details?id=com.ancestry.android.apps.ancestry>

Free cloud backup

With 2014 and Mac 3 the online tree now has all your data (though not all will be visible) so it is a great way to backup your tree (free) online. Note the capability to create an online AMT is not related in any way to the paid subscription service Ancestry.com has to give you access to their numerous databases and merge them into Family Tree Maker.

The online AMT capability is free and will always remain free. It is part of your ownership of Family Tree Maker.



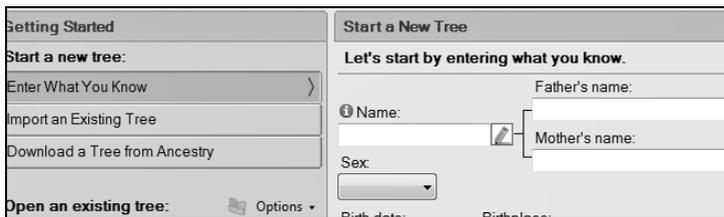
Linking with an online tree

Starting a new file

There are three ways to start a new file.

A new tree—enter what you know

Let us say that you have never put any of your information into a computer genealogy program like Family Tree Maker and you have boxes full of paper with notes, diagrams photos and other memorabilia. From the Plan workspace, click on the 'New tree' tab. You can also import from other sources here but let us just focus on a total new start.

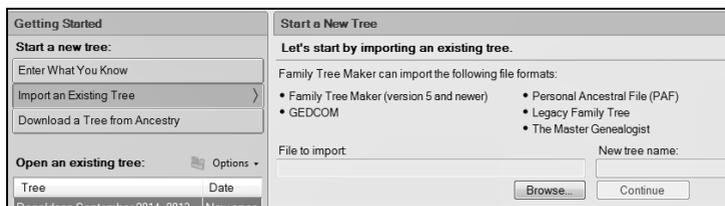


Enter what you know

First add a name. But what name? I suggest that you start with yourself. Reason.... you are likely to know more about yourself than anyone else. So add a few details (even just your name will do) and press Continue. Family Tree Maker will create the file and open you in the People workspace Family view.

Import from an existing file

The second way is to import a file from an earlier version of the program, or from a GEDCOM, from Legacy Family Tree or from The Master Genealogist. Obviously this is the quickest way to get started.

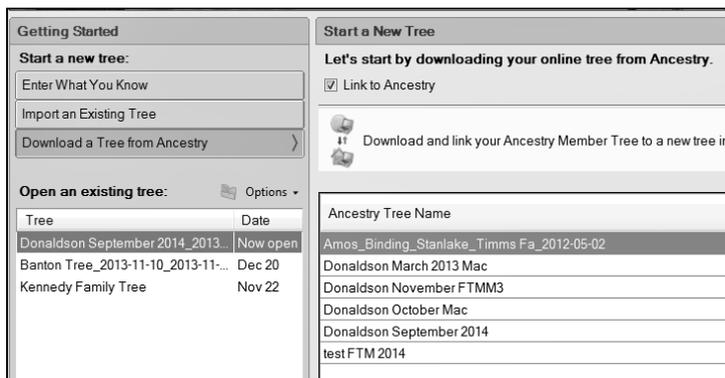


Import from an existing file

Import from your Ancestry Member tree

If you already have an online Ancestry Member tree, you can import this into Family Tree Maker.

So three ways to get started. Use the one that suits your needs. Once you have your file into Family Tree Maker it will open it when you start the program, or you can open it from the Files workspace.



Import from an existing Ancestry online tree

Congratulations, you have just created your first file. Now you can start to add other data like date of birth, place of birth, parent's details, spouse, siblings, children etc. You will in fact spend most of your time in the People workspace and a warning, this is where you will likely catch the genealogy disease. Fortunately it is non-fatal, but there is no known cure.

The symptoms include finding yet another name, or date, or photo or story. Assuming your ancestors and their records survived Noah's flood, when you get back to the lady who ate the fruit, you may consider that you have finished your family tree.

Now a word about terminology, files, saving and backing up

When I talk of a file I am talking about a computer file created by Family Tree Maker. This is like any other file that you create in another application like (say) a Word file in Microsoft Word. Other terms are also used like, 'Family file', 'Data file', etc. This is the file that has all your hard work. In my case, years of work, so it pays to back it up on a regular basis.

But where is the Save button?

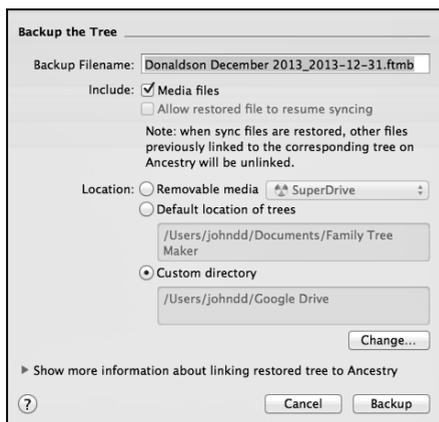
By now you may have noticed that Family Tree Maker does not have a save button anywhere.

What is going on?

Well every time you add or remove any data, Family Tree Maker saves it behind the scenes. When you close Family Tree Maker, a copy of the file is also backed up to your operating drive (C:) drive. It has the form 'Myfile.FTM' (Windows) and 'Myfile.FTMM' (Mac).

File Backup command

Hard drives can fail, so have a copy on another hard drive or CD. I cannot emphasise enough the importance of using the File>Backup command in Family Tree Maker. This command backs up your file, media and links to your online tree (and historical events in 2012/14 Mac 3).



Backup file dialogue

The backup is a zipped file (compressed) with the extension '.FTMB' (Windows) and '.FTMMB' (Mac).

I strongly suggest that you make regular backups to external media e.g. CD, offline hard drives, memory sticks, the Cloud, e.g. Google Drive, etc. Note in this example I have selected Google Drive.

Your online tree is a good free cloud backup

With 2014 and Mac 3, the new enhancements to the link and sync and online Ancestry Member Trees mean that these online trees now offer a free cloud backup for your precious data.

It is good insurance and good risk management of your computer data. It applies to other vital data as well, e.g. documents, photos, etc. Also, don't keep all your copies of your backup files in one place. Australia has had its share of bushfires, floods, etc. Enough warnings.

A playfile

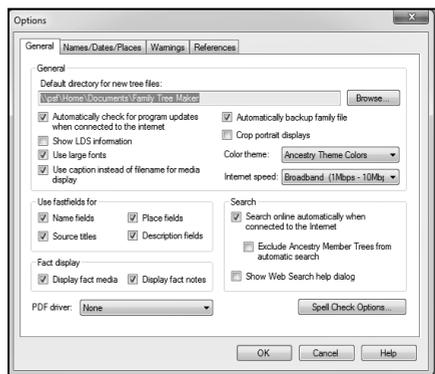
At the various workshops that I participate in, I always advocate having a playfile or sandbox file. This is a copy of an old file, or part of it, or maybe just a short file with some names and media, etc., in it. You can use this file to experiment with new ideas or procedures that you may not be comfortable in. Once you have mastered them you can then apply your skill to your main file. Regard a playfile like a golfer who has a few practice swings before hitting his/her shot. It does not matter if you wreck your playfile; simply make another one. I have one with a few Flintstones TV characters in it and was amused when showing it to my Family Tree Maker user group that I got an Ancestry leaf hint for Fred Flintstone!

Options

At this stage you may also want to have a look at the options in FTM to define how you will enter dates DD/MM/YY or MM/DD/YY, how the screen looks, your internet connection etc. Having a look at the options is useful in any new program. In Family Tree Maker for Windows go to Tools>Options and make your adjustments. In Family Tree Maker for Mac 2/3, go to the Family Tree Maker for Mac button on the toolbar and select Preferences.



FTM Mac 2/3 preferences



Family Tree Maker 2012/14 options (Win)

Chapter 4—People workspace

Welcome to where you will spend most of your time. In this view you see an index, a pedigree view, parents' and children's view and in the right hand panel an editing area.

Also note that you can configure the various panels by dragging on the little dots on the edges of the views so that you can focus on a particular area. This is really useful if you are working with a small screen laptop.

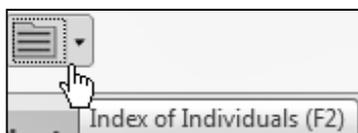
Adding new information

As you grow your family tree, you will add more information such as names, dates, places, notes etc. You add information in the People workspace. To add a child simply click on the Add Child field at the bottom of the existing children's list. The name will appear in the right hand editing panel where you can add further details. You can add even more details by clicking on the person tab and look at the Facts area—see illustration below.

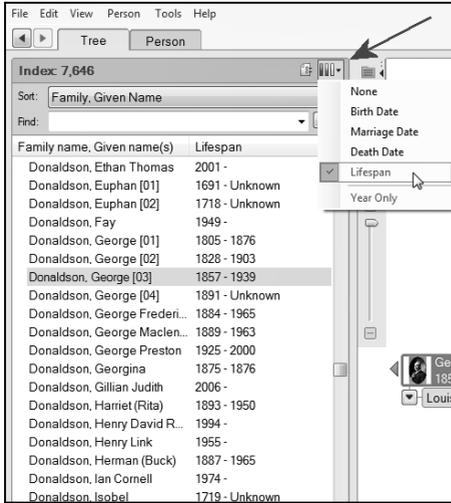
If you want to add new parents, click on the Add Parents in the centre view. Again, as with children, as you add a new name the new name appears in the right hand editing panel. Note when entering female names, you should enter them with their maiden name.

The Index

As you add a name, it is added to the Index that is shown in the left hand panel when in the People>Tree View. Note the Index also appears in many parts of the program where you need to use it with an icon looking like this.



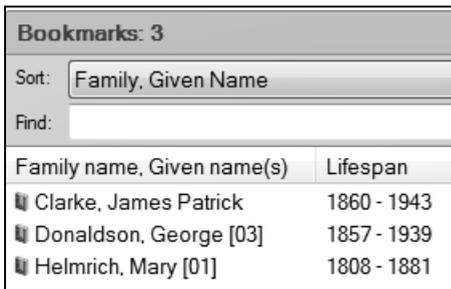
Note with the Index you can have it displayed in many ways including showing lifespan—my favourite but sorted by birth date, marriage date or death date as well as displaying names as Family Given or Given Family and AKA (Also Known As), titles and married name for females. The Index also allows you to Bookmark a name (right click on the name and add Bookmark).



Index (part)

Bookmarks

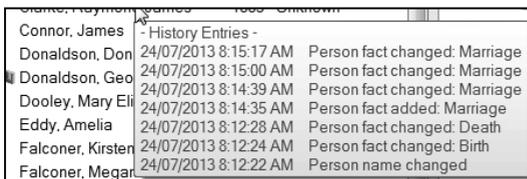
Bookmarking names allows you to use the Bookmark list below the Index so you can focus on particular names. It is sometimes useful to Bookmark the oldest person in each line for quick reference.



Bookmarks

History

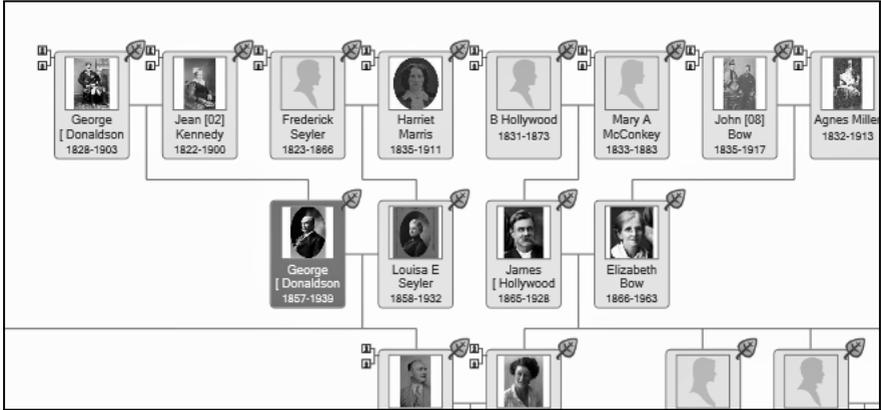
The History tab allows you to see a list of recent edits and hovering your mouse over a name will provide detail history information. Note the person also bookmarked with the book icon next to their name.



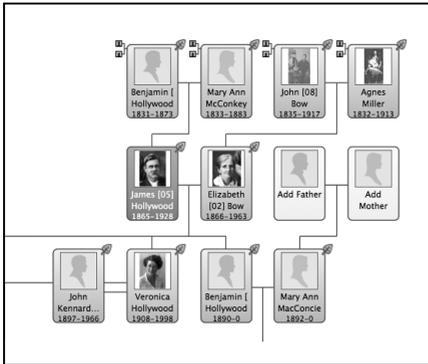
History

The views in the Family workspace

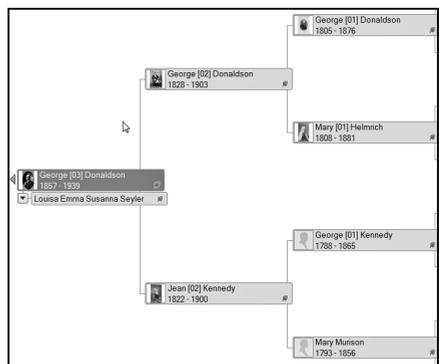
Family Tree Maker 2014 and Family Tree Maker Mac 3 have added a new family view, which is similar to the view that you see in the online Ancestry Member Tree. The old Pedigree view is there as well and a small vertical toolbar allows you to toggle between the views.



FTM 2012/14 People Family view



FTM 2012/14 People Family view



Family Tree Maker 2014 Pedigree view

The Home person

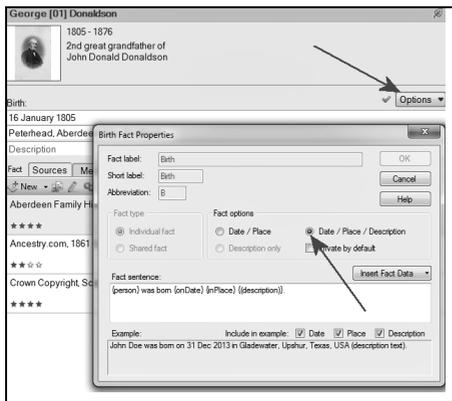
This is a particularly useful feature for as you add people, their relationship to the home person appears in the top right hand silhouette box. This is not only interesting as you add names, but also assists in validating that you are not doing something wrong. I usually make myself the home person. To designate a home person, right click on the person in the index and then set as a home person. You can change this to someone else at anytime. The home person is shown in the index with a small 'Monopoly' house icon next to the name. No matter where you are in Family Tree Maker, clicking on the home person icon will always take you home.

Follow the Yellow Brick Road

You may have noticed in the children's area are arrows pointing to the next lowest generation. If you see a yellow arrow this is the route back to the home person. Another neat way to navigate.

Turning on the Description field

At this point I want to introduce the Description field that goes hand-in-hand with the Date and Place. You may have an entry (say) Born 30 May 1890 in London, England and you want to add a description (say) a hospital name.



Turn on Description field

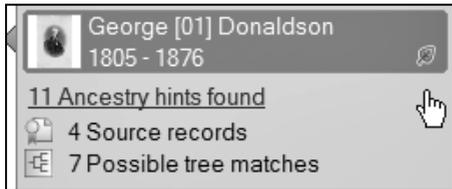
How do you see the Description field in the People workspace? This is how you do it.

For any person in your file, go to his/her Person view and select the birth fact. Now in the Options button in the right hand editing panel, select Fact Properties and check the Date/Place/Description radio button. This will turn on the Description field for all the birth events in the file. Repeat the process for other fields that you want a Description field. I normally have a visible Description field for birth, christening, marriage, death and burial events. Note that you only have to do this once for any event in your database, so do birth once and it applies to all births in that particular file. Highly recommended.

Leaf hints

When you are entering names in the Family view you may notice little leaves (called leaf hints) appear in the boxes in the pedigree and family views and also in the silhouette view in the top right-hand corner of your screen. What do these mean? What is going on is that Family Tree Maker is constantly checking the Ancestry.com paid databases to see if there is a likely match to what you are

entering, and what other data may already exist. It indicates a possible match by displaying the leaf hint. If you mouse over the leaf hint you will see what Family Tree Maker has discovered. Clicking on the leaf hint takes you to the Web Search workspace where, if you have a subscription to Ancestry.com, you can view and merge the data. I will cover that when I get to the Web Search workspace.



Indicated leaf hints

Sorting children

When you look at the children's area you will see that there are some buttons for moving children up and down the list according to their ages. Also next to the up and down buttons is a sort children button, which sorts them all at one click. These are useful but only apply to any one family. If you have a number of children out of birth orders scattered around various families then things get a bit more tedious. Whilst you can using the data errors report find them and fix them one by one, in Family Tree Maker 2014 and FTMM3 the developers have provided the user with a new global children sort capability. And it is a real boon.

Automatic/manual (global) child sorting

A big hurrray!!



Global sort children

A family's children can be sorted manually or automatically. All existing families are initially sorted manually as they were before they were imported into Family Tree Maker 2014, and will remain so unless the user changes them to be sorted automatically. New families are sorted by birth automatically by default. Once any family is sorted manually, it will stay manually sorted unless the user changes it to be sorted automatically.

Automatic sorting options are available from the Family panel child sort button or by choosing 'Sort All Children By Birth' from the 'Tools' menu.

Unknown dates

Of course you can have a situation where you don't know the children's birth date. Family Tree Maker provides a number of date options.

These are, About <date>, Before<date>, Circa<date>, Between <date-date>, After <date>. So you could enter a date 'Before 1863', or 'After 30 June 1766', etc. When you have a person with two spouses and you don't know the marriage dates, consider adding some dummy dates so spouse one appears before spouse two. I have found a good dummy date for spouses marriage in the eighteenth century is about 21 years after their birth. Later research may disclose the correct information and then of course you change it.

Blended families

This is a great new feature that had been added to both Family Tree Maker 2012 and Family Tree Maker for Mac 2 and of course continues into 2014 and FTMM3. Sometimes you have a situation of multiple spouses with issue from both spouses.

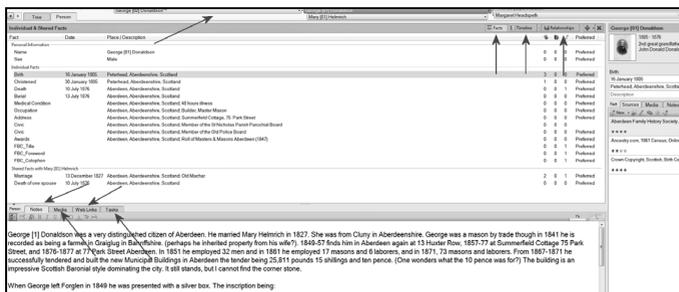
Turning on Blended families lets you see all the children in one view. You can also engage it in the Family Group Sheet. The Blended families control is next to the children's sort button.

Children Move, Sort and Blend controls

Note as Sort Children and Blended families work on the same set of data, i.e. a list of children, it follows that they cannot both be active at the same time. If you have blended families turned on, the sort will be greyed out and inactive. So best to do your sorting first, even quicker with the new global sort, then turn on blended families if required.

People Person view

This tab takes you to three additional views that allow you to enter a whole lot more information about a person or family. Here is where you enter Facts, Notes, Media, Web links, Individual Tasks (for the person), as well as being able to see their timeline and set family relationships.



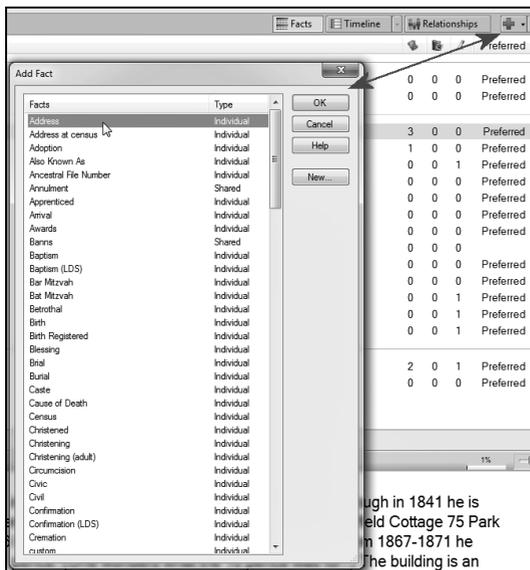
People workspace
Person view

Tabs

In this person view you have three main tabs, **Facts**, **Timeline** and **Relationships** (arrowed). Notice also at the bottom of the screen is an area for Notes, which can also be made private or even research, only you can see them. Private notes don't show up in reports, book, charts or stories. You also have tabs for Media, Web Links and Tasks. The Web Links feature is not in Family Tree Maker for Mac 2 but is in Mac 3. So, to enter data into the various fields such as birth, date, place, description etc, you simply type in the information. Note also the mini-pedigree chart at the top of the page, which allows you to easily navigate around. It also includes an index button. The screen shot (People workspace Person view) does not do justice to the screen as it is almost the full screen. I encourage you to study it in detail as it has a lot of important capability.

Facts

It is here where you add the Facts for a person, or shared facts like a marriage. Adding facts involve clicking on the Blue **+** icon where you will get a list of Facts that you can add. Duplicate facts are also supported. For example, you may have two dates of birth for a person. You can enter both and make one preferred. This is the one that will appear in charts and reports. Later research may clarify the correct date and then you would delete the now unwanted duplicated fact by pressing the Red **X** button and confirming delete or, my method, right clicking on the unwanted fact and then deleting it. You can also create your own facts by pressing 'new' on the fact select list.



People workspace Person view
Facts

Timeline

Clicking on the Timeline tab reveals the timeline of a person. Again you can enrich this by right clicking and adding family events and also historical events. In Family Tree Maker 2012 and Family Tree Maker 2014, (but not Family Tree Maker for FTMM3), you can also add your own historical events by the Edit>Manage Historical Events menu button. One could imagine the Kerrigan family of the ‘The Castle’ fame adding a family historical event of winning in the High Court of Australia. Historical Events is not in FTMM3.

Timeline			
Year / A.	Event	Date / Place	Description
1805	Birth	16 January 1805 Peterhead, Aberdeenshire, Scotland	
1805 14 da	Christened	30 January 1805 Peterhead, Aberdeenshire, Scotland	
1808 3	Birth (Spouse) Mary [01] Helmrich	24 July 1808 Cluny, Aberdeenshire, Scotland	
1827 22	Marriage Mary [01] Helmrich	13 December 1827 Aberdeen, Aberdeenshire, Scotland	Old Machar
1828 23	Birth (Son) George [02] Donaldson	12 June 1828 Ellon, Aberdeenshire, Scotland	
1829 24	Birth (Son) Alexander [03] Donaldson	04 June 1829 Aberdeen, Aberdeenshire, Scotland	
1829 24	Death (Son) Alexander [03] Donaldson	July 1829 Aberdeen, Aberdeenshire, Scotland	
1831 26	Birth (Daughter) Margaret [04] Donaldson	14 February 1831 Aberdeen, Aberdeenshire, Scotland	Old Machar
1834 29	Birth (Daughter) Mary [02] Donaldson	14 May 1834 Aberdeen, Aberdeenshire, Scotland	Old Machar
1835 29	Birth (Daughter) Elsipit Donaldson	1835 Aberdeen, Aberdeenshire, Scotland	
1838 33	Birth (Son) Alexander [04] Donaldson	04 September 1838 Aberdeen, Aberdeenshire, Scotland	
1841 35	Death (Daughter) Mary [02] Donaldson	Bef. 1841 Woodside, Aberdeenshire, Scotland	
1841 36	Birth (Son) Thomas [04] Donaldson	27 May 1841 Turniff, Aberdeenshire, Scotland	Forglen
1842 36	Death (Mother) Margaret Headsbeth	Bef. 1842 Peterhead, Aberdeenshire, Scotland	
1844 39	Birth (Son) Charles [01] Donaldson	13 September 1844 Turniff, Aberdeenshire, Scotland	Forglen
1847 42	Birth (Son) John [02] Donaldson	16 December 1847 Turniff, Aberdeenshire, Scotland	Forglen
1852 47	Marriage (Daughter) Margaret [04] Donaldson	19 July 1852 Aberdeen, Aberdeenshire, Scotland	East Parish
1853 48	Marriage (Son) George [02] Donaldson	12 March 1853 Aberdeen, Aberdeenshire, Scotland	St Nicholas Church
1860 55	Marriage (Daughter) Elsipit Donaldson	06 August 1860 Aberdeen, Aberdeenshire, Scotland	St Nicholas

*People workspace
People view timeline*

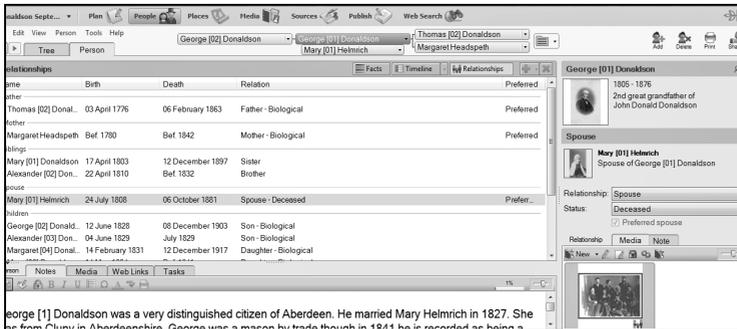
Relationships

This is quite an important and often neglected tab. It is in this tab that you can set relationships like married, partners, etc.

Set marriage ending status. Family Tree Maker uses ‘ongoing’ as a default and it seems silly to me to have a situation where one or both partners has died say in 1898 and the marriage status in the Marriage Report says the marriage is ongoing. You fix it in the Person>Relationship tab.

Also in this area is where you can indicate adoption and in an adoption situation you can have two sets of parents, the natural ones and the adopted ones. You can set which appears on the reports and charts.

So three very important Tabs in the Person view.



People workspace Person view Relationships

Help

Now at about this stage you might be looking for some help. Where is it? Well Family Tree Maker has an abundance of help. First of all there is context sensitive in program help. In any part of Family Tree Maker simply click on the F1 key. This (mostly) will open a help screen related to what you are trying to do.

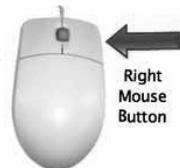
It also includes a help index and a search. Further, in the Help menu you have a built in Companion Guide, a 300+ page book written by Tana Pedersen. This is on the program CD that you purchased. It is in PDF form and is in the Help Menu and will open in Acrobat Reader, or any other program that will open PDF files.

If you are really new to Family Tree Maker, this may be one to read.

Further, in Family Tree Maker 2012/14 (Windows), again in the Help menu, are some excellent training tutorials. These are animated pages with a commentary. Unfortunately they are not in Family Tree Maker for Mac but they are available online at www.familytreemaker.com/Learn/Tutorials.

The right mouse button

This is the ultimate 'Get out of Jail Free' option in Family Tree Maker. No matter where you are in Family Tree Maker, by right clicking, you mostly get a menu of what you can do in any particular view. I encourage you to use this option constantly as it duplicates the menu items and is a great productivity tool.

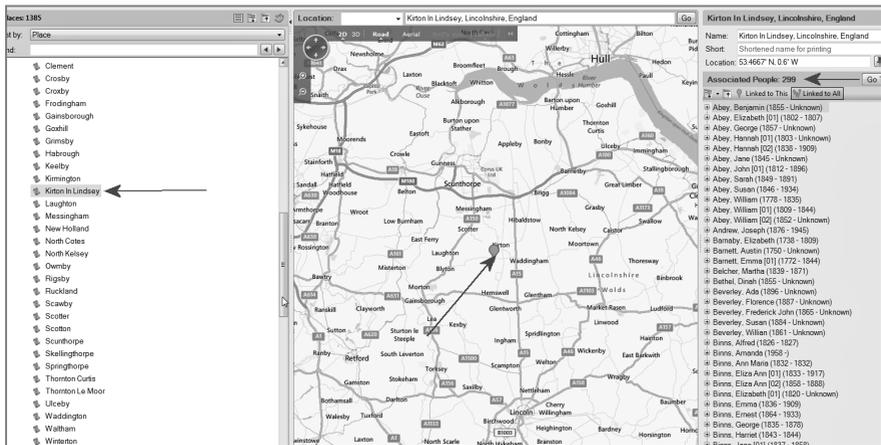


Chapter 5—Places workspace

As you enter places in the People workspace, i.e. where people were born, married, died, etc., you are building up a list of places. So how do you make sense of them? Well click on the Places workspace. No pun intended, but this is a marvellous place to be in Family Tree Maker. On the left hand side of the screen (in the List by Place view) is the index of places that you have entered.

Provided that you are connected to the internet, you will see a *Bing* map of the place selected. The map may be zoomed and in many cases there are ‘bird’s eye’ views of cities as well as 2D and 3D views. I encourage you to explore as you would in any new place.

And finally in the right hand panel, a list of persons associated with a particular place.



Places workspace—Place

Now if you switch the places list to List by Person, you can see migratory information and other interesting detail of your ancestor’s travels. You can plot travel across the world if that is what your ancestors did.

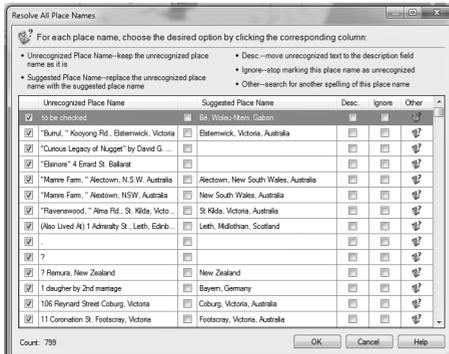


Places workspace—Person migration

Resolving place names

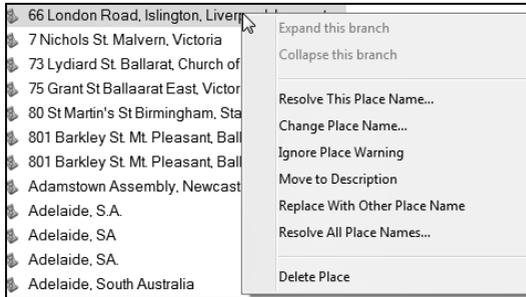
Now one of the very useful things in Family Tree Maker is the Place Name Authority or PNA. This is a built in places database with over three million place names. Now if you right click on a place name in the places list, you get an option to resolve the place name. What Family Tree Maker does is to compare what you have entered to what it has in its PNA and offers to replace your entry with the resolved entry. You may have entered ‘Melb, Aust’ which Family Tree Maker will suggest resolving to Melbourne, Victoria, Australia.

Resolving places does a number of useful things. It makes your places consistent and eliminates various names for the same place. It assists in locating the place more accurately on the map. If you have descriptions mixed up with places, which often occurs if you have imported your file from another program or an earlier version of Family Tree Maker (especially Family Tree Maker 16 or earlier) it can separate places and descriptions.



Resolve all place names

Finally, and this is the most compelling reason to resolve place names, is that the consistency allows you to use the built-in custom report to find (say) all the people born in Melbourne before 1860 who are buried in the Melbourne General Cemetery. I should point out that the Resolve all Place Names screen shot is not from my file. It shows how messy places can be entered and also how Family Tree Maker can help clean them up.

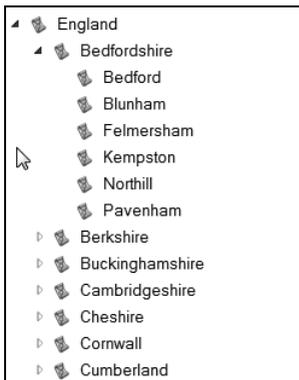


Resolve a single place name

Hierarchical place names

In October 2012, Ancestry.com released a service release for Family Tree Maker 2012, though not for Family Tree Maker for Mac. It was later added as a service release to Mac 2. This service release is detected and installed by Family Tree Maker 2012 and Mac 2 and one of the new features it offered was the ability to expand a places view so you can drill down in terms of Country, State/Province/County/Town/Village/Village feature; such as an address, hospital, library, cemetery, etc. This of course is also in Family Tree Maker 2014 and Family Tree Maker Mac 3.

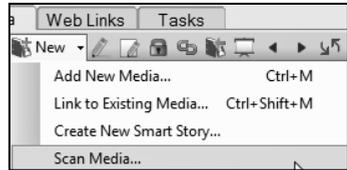
You can then list people associated with a pinpointed location. It took me a good weekend to get all my places in the hierarchised format but once done it is a joy to have them so organised.



Hierarchical place names format

New Media, that is a media item that has never been linked to the file, or **Link to Existing Media** where you have already used the media elsewhere.

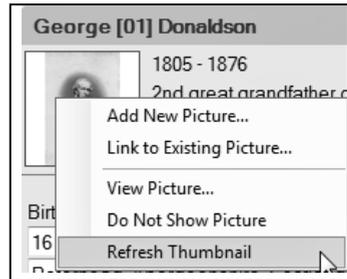
The media item will appear in the space at the bottom of the screen. You can repeat the process as often as you like. As you are only linking media, you are not unduly bloating your files as the links and thumbnails are tiny. Once added, media is then available to include in reports and charts.



Add new media

Changing the silhouette

One common question is how to convert the silhouette in the top right hand corner of the editing panel in the family view to a picture. Simple. Right click on the silhouette and you will get an option to either Add New Picture, or Link to Existing Picture. An existing picture is one already added to Family Tree Maker and a new picture is one on your hard drive.



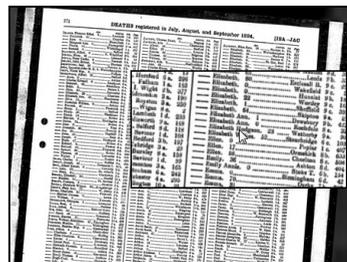
Changing the silhouette

Media categories

One of the very important things to do when you are adding media is to assign a category. Categories are very useful as it is the main way that Family Tree Maker sorts media. There are a number of provided categories like 'Family', 'Document', 'Cemetery', or you can create your own custom categories. You can also go back to your media items at any time and right click on them and categorise or recategorise them. Every time you enter media you will be prompted to add a category. You can have multiple categories for any media item.

New in Family Tree Maker 2014

New features in Family Tree Maker 2014 are a magnifier to look at more detail and a new viewer that lets you look at multi-page PDF files inside Family Tree Maker. Unfortunately they are not yet in Mac 3.

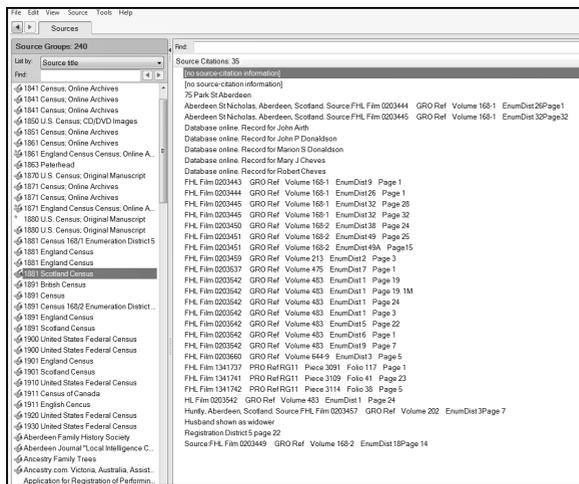


Magnifier tool

Chapter 7—Sources workspace

The subject of sources could take several books on its own and in fact Family Tree Maker follows the work presented in the books by Elizabeth Shown Mills, *Evidence! Citation & analysis for the family historian* and *Evidence explained: citing history sources from artifacts to cyberspace*, an 885 page tome on sourcing! Family Tree Maker includes 170 source templates according to the Shown Mills method. (for a list see www.vicgum.asn.au/downloads/FTMSourcesTemplates2012.pdf)

But I am going to make it simple.



Sources workspace

The two elements of sourcing

When you break it down to the simplest terms the whole reason for sourcing data is to provide an audit trail for you or other researchers, so as you can establish where you obtained the data. Sourcing can distinguish between a fairy story family history and solid research.

The first element used to be called the master source now more commonly the source. The second element is the citation. Let me give you an example. My source is the 'State of Victoria, Birth Certificate' and my citation is the particular number and data associated with a particular birth certificate. These two pieces of information are sufficient to allow the information to be validated.

Another example—the source may be a book title and the citation a particular page. Again, a researcher could verify the source.

Adding sources in Family Tree Maker

In the People view go to say a birth entry. If you mouse just to the right of the birth field, a little icon with a + sign appears. Click on this. This then gives you a dialog to add a new source citation or link to an existing source citation. As we are working with a new file, let's add a new source citation. In the add Source citation type in the name of your source (say) the State of Victoria, Birth Certificate. Family Tree Maker will query if it is new. Say yes. Now you can add the citation detail as well as notes, attaching media and, new in Family Tree Maker 2012/14/Mac 3 a web link. When finished click OK. This source is now linked to this person.

There is also a good tutorial in the Help>Training Tutorials in both Family Tree Maker 2012 and Family Tree Maker 2014. Unfortunately the animated Training tutorials are not in the Mac versions, but you can look at the Windows versions (which are still close enough to the Mac versions) at this online link: www.familytreemaker.com/Learn/Tutorials.

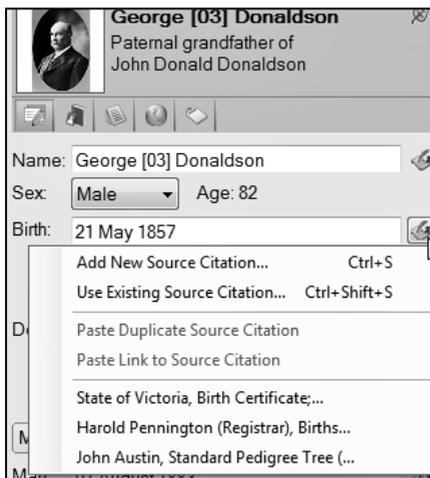


Fig 42 Add a new source

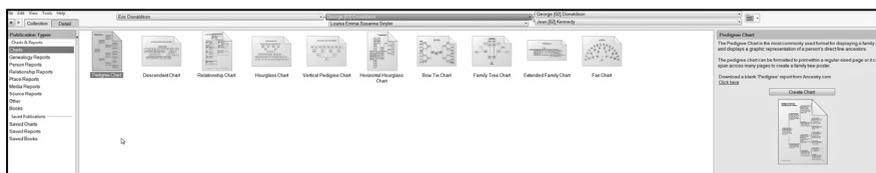
Add a new source

You can source every Fact in Family Tree Maker with as many sources as you like. Once you have added a source it can be used in reports and charts and Family Tree Maker has a number of source reports to help you manage your sources.

You also have the capability in Edit>Manage Sources to add detail about repositories, addresses and other appropriate details. In Family Tree Maker 2012 and 2014, (unfortunately not in the Mac 2, but now in the Mac 3 version), is a report that can show you every fact in your file that does not have a source attached to it. It is called an Undocumented Facts Report. It is salutatory to run this report on a large file and see how much work you still have to do.

Chapter 8—Publish workspace

Up until now all the workspaces have been concerned with data input, names, dates, places, media, facts and sources etc. The Publish workspace though is all about data output. Now the whole point about collecting family history information is to produce output, which may include charts, reports, books, video and online Ancestry Member Trees.



Opening the Publish workspace

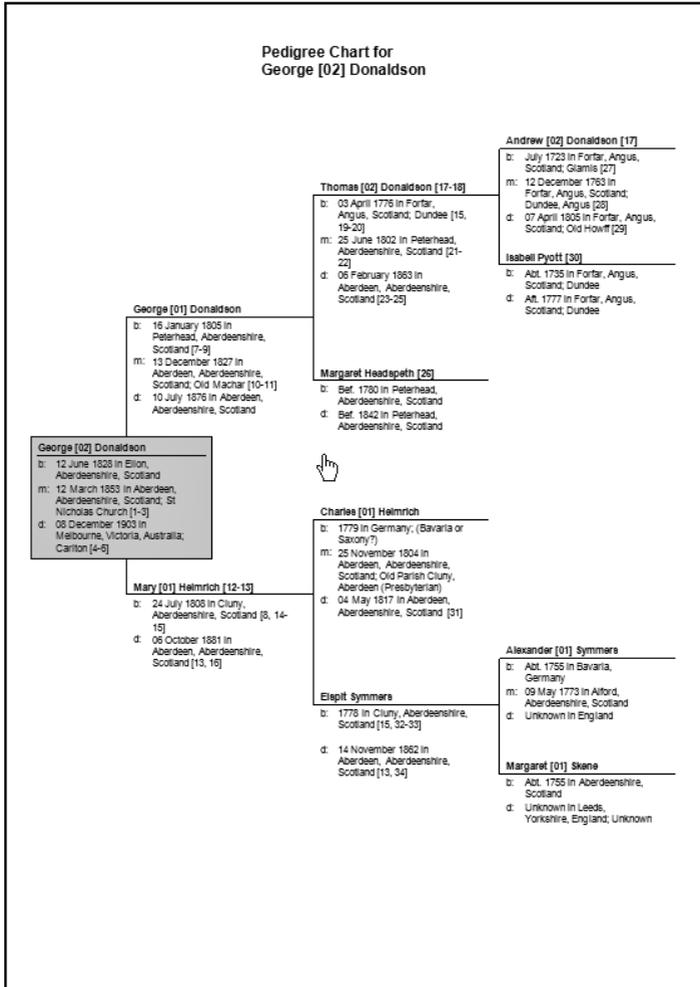
The workspace has two component areas. The first area is the Collection area that contains all the various charts, reports and books as well as an area for saved reports charts and books. The second area is the Detail area where you can edit and modify what are effectively templates in the collection area. Along the top of the view is what is called a ‘mini-pedigree’ chart that allows you to alter the focus person very easily as well as having access to the index without having to go back to the People>Family view.

When you select a chart, a report or book in the collection area, double clicking on it, or selecting it and then clicking on create chart will open it in the detail area and also open the right hand editing panel. As this book is a primer for new users, let me provide a couple of examples.

The Pedigree chart

From the People workspace or the mini-pedigree view, select the person to be the subject of the pedigree view. In the Collection view of the Publish workspace double click on the Pedigree Chart. This will open a pedigree chart for the person selected.

Now in the right hand editing panel (and remember you can make this larger or smaller by dragging the edge) you have a number of pedigree chart options. These include, Items to Include, which can be some of all your facts about the person, then the font which lets you change the fonts used in the chart, then follows the most interesting box and line styles where you can alter the size, colour, fill,



shadow, etc. of your boxes. You can spend ‘hours’ getting it ‘just right’ here. Then there is the ability to insert an image (Media item), a page set up and some saving options so you can reuse the report. If you have set up the chart as you want it, then you can reuse the settings for another person.

Then if all of that is not enough, you can alter the layout to book or poster, nominate the overlaps of the boxes, adjust the spacing, align the nodes, set the number of generations, nominate how many per page and add a background image or effect (Family Tree Maker provides a range of background enhancements and embellishments or you can use your own).

You can add background pictures, set the transparency and finally include empty branches, show generation labels and include duplicate ancestor lines. Finally you can locate people in the chart. Phew!! But there is more. After you create your chart and you right click on it, there are further options including deleting a person from the chart (or even from the file..... be careful of that one!!).

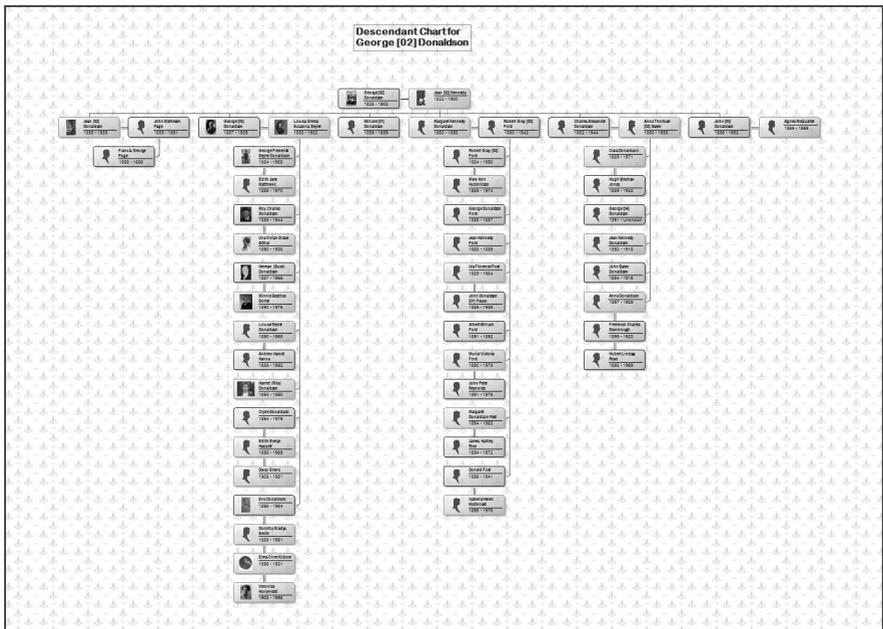
Once you have your chart as you want it, you can print it, save it and through the Share button export it as a PDF file (great for sending via email to someone), export it as an image for further work in your image editing software, or even upload it to Ancestry.com's My Canvas, a paid chart printing service.

The above applies in most cases to all the charts in Family Tree Maker. The nice thing is that the controls are identical so once you get the hang of them you can apply them with confidence.

A descendant report

Note these vary slightly between FTM 2012/14 (Windows) and FTM for Mac2/3. Again select the focus person for the report.

With descendant reports the focus person is often the oldest person in a family line. Double clicking on the report in the Collection view will open the report. Again you have a number of options in the right hand editing panel. These include Items to Include like facts, those sources we discussed plus all those notes that you may have collected like stories etc.



Descendant chart

A Family Group Sheet (FGS)

Again, a very common report. Start with the person that that you want to include in the FGS. This is usually the male head of a family. Double click on the FGS in the collection area and it opens. As you should now expect, the right-hand editing panel has options many of which you have seen before e.g. Items to Include, fonts and header, footer etc.

Family Group Sheet for George [01] Donaldson	
	
Husband:	George [01] Donaldson
Birth:	16 January 1805 in Peterhead, Aberdeenshire, Scotland
Death:	10 July 1876 in Aberdeen, Aberdeenshire, Scotland
Burial:	13 July 1876 in Aberdeen, Aberdeenshire, Scotland
Marriage:	13 December 1827 in Aberdeen, Aberdeenshire, Scotland; Old Machar
Father:	Thomas [02] Donaldson
Mother:	Margaret Headspeth
	
Wife:	Mary [01] Helmrich
Birth:	24 July 1808 in Cluny, Aberdeenshire, Scotland
Death:	06 October 1881 in Aberdeen, Aberdeenshire, Scotland
Burial:	09 October 1881 in Aberdeen, Aberdeenshire, Scotland; Skene Churchyard
Father:	Charles [01] Helmrich
Mother:	Elspt Symmers
	
Children:	
1 M	Name: George [02] Donaldson Birth: 12 June 1828 in Ellon, Aberdeenshire, Scotland Death: 08 December 1903 in Melbourne, Victoria, Australia; Carlton Burial: 10 December 1903 in Melbourne, Victoria, Australia; Melbourne General Cemetery Marriage: 12 March 1853 in Aberdeen, Aberdeenshire, Scotland; St Nicholas Church Spouse: Jean [02] Kennedy
	
2 M	Name: Alexander [03] Donaldson Birth: 04 June 1829 in Aberdeen, Aberdeenshire, Scotland Death: July 1829 in Aberdeen, Aberdeenshire, Scotland
	
3 F	Name: Margaret [04] Donaldson Birth: 14 February 1831 in Aberdeen, Aberdeenshire, Scotland; Old Machar Death: 12 December 1917 in Aberdeen, Aberdeenshire, Scotland Burial: 16 December 1917 in Aberdeen, Aberdeenshire, Scotland
	

Family Group Sheet

Now moving down you have some interesting options. If the person has multiple spouses you can select which spouse to highlight. If you have media entered in the silhouette boxes for the spouse and children, you can display them in the FGS along with a Family Picture if you have entered one in the Shared marriage Facts>Media in the Family>Person view. Also if you have a situation of multiple spouses with issue, turning on the Blended families option lets you see children from all spouses.

Again you have the usual output options.

Family view chart

This is one of the newer charts. It can be most useful in showing ancestors and family of the focus person.

Family View Report for George [03] Donaldson

The chart shows George [03] Donaldson (1857-1939) as the central figure. He is the son of George [02] Donaldson (1826-1903) and Mary [01] Helmrich (1808-1881). George [02] Donaldson is the son of George [01] Donaldson (1805-1876) and Thomas [02] Donaldson. Mary [01] Helmrich is the daughter of Charles [01] Helmrich and Elspit Symmers. George [03] Donaldson is also the son of Jean [02] Kennedy (1822-1900) and George [01] Kennedy (1788-1865). Jean [02] Kennedy is the daughter of George [01] Kennedy and Margaret [01] Milne. George [01] Kennedy is the son of George Murison and Mary Murison (1793-1856). George Murison is the son of George Murison and Christian Keith.

George [03] Donaldson Born: 21 May 1857 Melbourne, Victoria, Australia Died: 23 June 1939 Melbourne, Victoria, Australia	Louisa Emma Susanna Seyler Born: 09 July 1858 St Kilda, Victoria, Australia Died: 07 May 1932 Sale, Victoria, Australia
---	--

Marriage: 01 August 1883 in Melbourne, Victoria, Australia; St Phillips Church, Collingwood

Children:	Sex	Birth	Death
George Frederick Seyler Donaldson	M	17 May 1884 Melbourne, Victoria, Australia	16 July 1965 Melbourne, Victoria, Australia
Roy Charles Donaldson	M	31 March 1886 Melbourne, Victoria, Australia	29 October 1944 Melbourne, Victoria, Australia
Herman (Buck) Donaldson	M	17 December 1887 Melbourne, Victoria, Australia	09 March 1965 Melbourne, Victoria, Australia
Louise Seyler Donaldson	F	23 August 1890 Melbourne, Victoria, Australia	03 March 1965 Melbourne, Victoria, Australia
Harriet (Rita) Donaldson	F	28 February 1893 Melbourne, Victoria, Australia	04 February 1950 Melbourne, Victoria, Australia
Clyde Donaldson	M	09 June 1894 Melbourne, Victoria, Australia	23 June 1979 Melbourne, Victoria, Australia
Eric Donaldson	M	09 January 1898 Melbourne, Victoria, Australia	04 April 1964 Melbourne, Victoria, Australia

Family view chart

Output options

All charts and reports can be printed but also exported in various ways depending on the document through the Share button, which is next to the print button. The options vary, but essentially you have

PDF	Opens in Adobe Reader
One Page PDF	Opens in Adobe Reader
RTF	Opens in Word
CSV	Opens in Excel
HTML	Opens in a web browser
m	Opens in image editing applications

The Send to option creates the report or chart in the nominated way then opens Outlook and attaches the report or chart. All you have to do is to add an email address and some notes as to whom you are sending it to.



Tip. Try sending a report or chart to yourself to see that you understand how it all works.

Reports

There are numerous reports in Family Tree Maker and space and the scope of this book *Totally new* does not allow me to go through all the reports and charts (this may be a subject for a follow-up book?) but I hope that I have given you an insight on how to go about it. The surname report is just one report which can be viewed in various guises and options—it lets you see all the names that you have in your file and you can sort them by surname count.

Additionally, both 2014 and Mac 3 have added extensive new chart capability. These include:

List of Individuals report

The previous Index of Individuals report (from the Person reports group) has been enhanced to include the following options. Each of the options below can now be filtered to display only living individuals if that option is selected.

Birthday list—it's back!!!

This displays the name, birthdate, and coming birthday for each person listed. If deceased people are included, the list also displays the death date and age at death. This was a favourite of mine in Family Tree Maker 16 and earlier and it was a great report to have at a family reunion.

Index of individuals by ID

Displays Person and Relationship ID facts that exist for individuals.

Birthday List		
Name	Birth	Birthday
Anthony, Gwyneth Margaret (Peggy) Donaldson	26 March 1919	95
Fox, Morley Evans	1919	95
Marris, Stella Clara	01 July 1921	93
Donaldson, David Cummings [01]	26 September 1921	93
McIndoe, William Gordon	22 December 1921	93
Austin, William James [02]	02 September 1922	92
Perry, Peter Carl	06 February 1923	91
Marris, Stanley [01]	1923	91
Marris, Living	Aft. 1923	91
Roderick, Female [03]	Abt. 1923	91
Feman, Dorothy Merle	25 January 1924	90
Wood, Ada Elaine	23 March 1924	90
Crute, Beryl Joyce	20 October 1924	90
Binns, Ruth	21 April 1925	89
Link, Anne Luise	22 April 1925	89
Wallis, Jocelyn Myee	28 July 1925	89
Boyd, Frank Burtenshaw	07 August 1925	89
Millar, Pamela	01 September 1925	89
Trail, Keith Charles	26 September 1925	89
Cornell, Elizabeth Flora	1925	89
Marris, Living	Aft. 1925	89
Nielson, Roma	Aft. 1925	89
Shaper, Beverley Jean	Aft. 1925	89
Hayes, Joseph Edmond	Abt. 1925	89
McGillvray, Margaret	Abt. 1925	89
Morrison, Joan Ellen	Abt. 1925	89
Roderick, Female [04]	Abt. 1925	89
Unknown, Joan	Abt. 1925	89
Marris, Lorna Eunice	13 February 1926	88
Littler, Fay Margaret	29 March 1926	88
Falconer, Audrey May	26 May 1926	88
Morton, Annette (Adair)	06 June 1926	88
Davidson, John	27 September 1926	88
Feman, Fay	25 October 1926	88
Boyd, Beryl May	15 January 1927	87
Porter, Joan Shirley	16 March 1927	87
Ireland, Joyce Mary	14 April 1927	87

Birthdays of living individuals

Anniversary list

Displays the marriage date, spouse, and coming anniversary for each person listed.

Index of individuals

This is the same report that was available before but now includes spouses.

Contact list

Displays the name, address, email address, and phone number for each person listed.

New list and individuals to include options

Extended family option in Reports

New 'Extended family' option is available in some reports (Individuals to include section). This new setting filters the report to include the following:

All immediate family

- primary individual
- parents
- siblings
- spouses
- children

Plus extended family

- grandparents
- uncles/aunts
- 1st cousins
- nieces/nephews
- grandchildren
- spouses of all above

This new extended family option joins the existing other options being:

- immediate family
- all individuals
- selected individuals which opens the select individuals filter

List of Individuals Report Options

Report title: Birthday List

List type: Birthday List

Background: None

50 % transparent Center

Individuals to include:

- Immediate family
- Extended family
- All individuals
- Selected individuals: 0

Individuals To Include...

Include only living people

Sort by Year/month/day (oldest first)

Show divider between individuals

Include preparer information

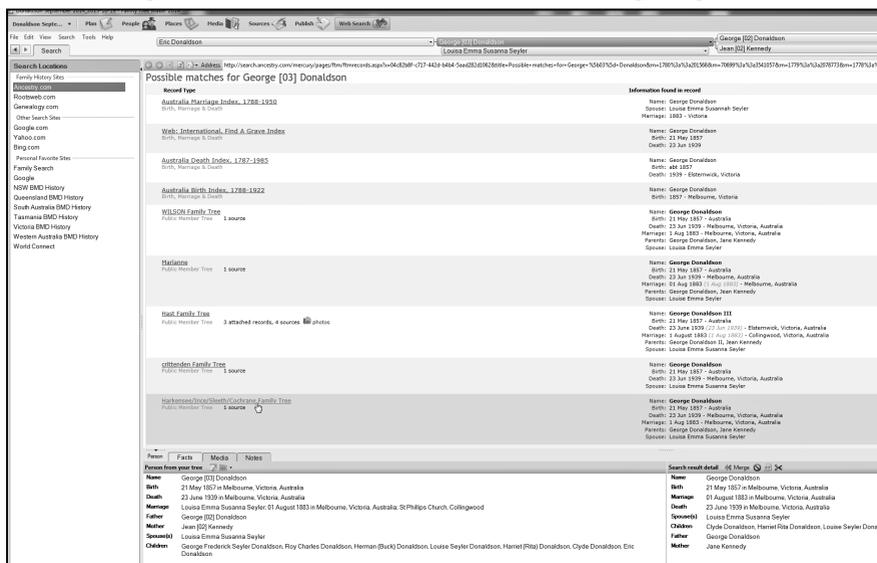
Generate Report

Report options

Chapter 9 – Web Search workspace

In this area a number of things happen involving Family Tree Maker and the internet. Earlier in this book I mentioned the leaf hint facility in Family Tree Maker and how clicking on a leaf hint takes you to the Web Search workspace where you typically see a list of hints.

The centre part of the screen is effectively running a web browser, a cut down version of Internet Explorer in Family Tree Maker 2012/14, and a cut down version of Safari in Family Tree Maker for Mac. At the bottom of the centre part of the screen you see the person from your file that generated the leaf hint, and at the bottom right the data discovered online and a tantalising merge button.

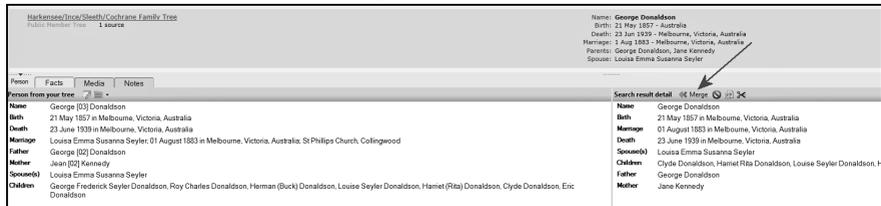


Web Search workspace

Now if you have an Ancestry subscription you see the data but if you don't you see a wonderful message along the lines of telling you how much you are missing and sign up today. Sound familiar? Actually a subscription to Ancestry.com can be a very cost effective way to research, but that is a topic for another day.

Merging from Leaf hints

If you believe the new internet data are what you want press the merge button and the information will be presented in a Merge wizard where you can decide what to keep and what to reject. Pressing the usual OK then merges the data straight into your Family Tree Maker file. Your hand never leaves the mouse. Be aware though that a lot of Ancestry Member Trees that you can merge from may not contain accurate data. 'Let the merger beware'!



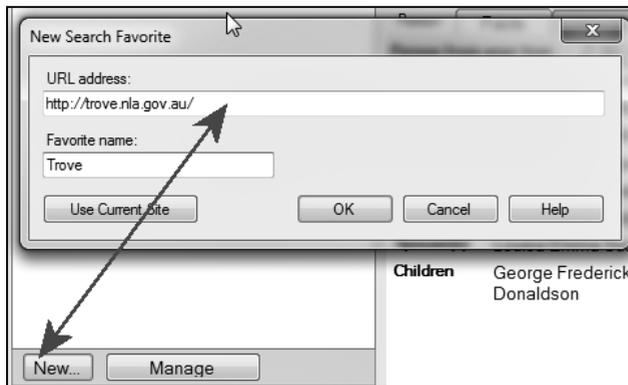
Ancestry merge wizard

Also, you can use your Ancestry.com subscription inside Family Tree Maker by clicking on new search as you would in any browser outside Family Tree Maker.

Using Web Search to search without an Ancestry subscription

But even if you do not have an Ancestry.com subscription you can still search and merge from the Web Search workspace.

Family Tree Maker allows you to create your own favourite sites, (you can copy and paste them from your browser), and use them in Family Tree Maker. One of my favourites is the LDS FamilySearch, another is 'dear old Google'. The illustration below shows a Trove favourite being created.

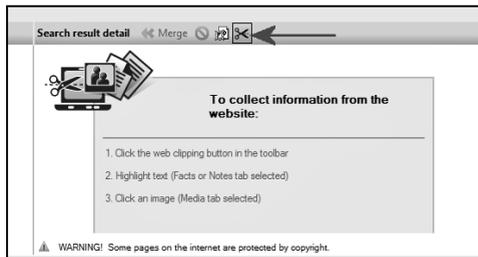


Create new favourite web site

On the left hand editing panel you click on New and add or paste your web site. Then clicking on it opens it in Family Tree Maker.

Web clipping

Do your normal searching. Now if the search returns something useful, turn on the web clipping tool which is a rather indistinct white button on the Search result detail tool line or maybe go to the Search menu and enable web clipping.



Web clipping information

Now have a careful look at the three tabs at the bottom left hand part of the screen associated with the people in your Web Search workspace. They are Facts, Media and Notes.

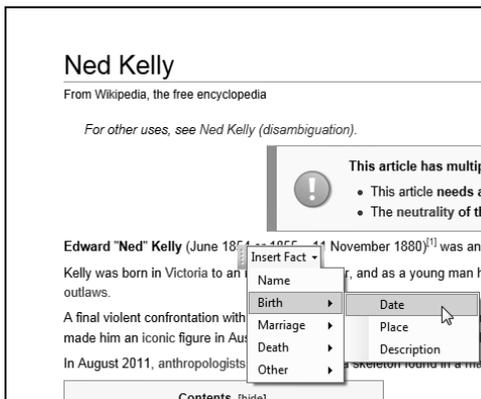
If you, for example, have the media tab clicked and your search returned a media item you want to use, click on it and it will be surrounded by 'Marching Ants'. The web clipping tool will now add it to the bottom right hand Search result detail box. Similarly for the Facts and the web clipping tool, if it sees a date or a place, will give you an option to save it as such. Notes are I think self-explanatory. Turn the Notes tab on then select the Notes in the normal way.

If you are in the facts tab and select a date, Family Tree Maker web clipping tool then provides a way to clip it to the right Family Tree Maker field.

Now pressing the Merge will bring all your clipped data (Facts, Media and Notes) into the appropriate places in your file. Every time I demonstrate this at a workshop or user group, I get amazed gasps about how cool it is and why hasn't the user been aware of it.

It has in fact been in Family Tree Maker since version 2008, about six years ago but often overlooked. This one always causes a 'why didn't I know about this wonderful feature?' comment at workshops.

Clipping a birth fact



Chapter 10—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 *Totally new* book, I have tried to introduce you to a few of the program's many features. My aim has been to get you started in a way that you are not overwhelmed.

Play with the program

As noted above, one of the suggestions that I often make to Family Tree Maker user groups and workshops that I run is to make a playfile file and practice new ideas with it before committing yourself to your main file—a 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.

Join a group

You will also benefit by joining a genealogy group that has expertise in Family Tree Maker. Victorian GUM Inc. is based in Melbourne, www.vicgum.asn.au. GUM was formed by enthusiasts in 1984 just to help folk use and enjoy their computers. You might consider joining fellow users in GUM. It has a very high Family Tree Maker membership and conducts numerous Family Tree Maker workshops, user groups and tutorials to assist Family Tree Maker users.

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.

In the Appendix of this book I have provided a list of what I consider to be good resources for users of Family Tree Maker and I encourage you to use them.

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

Appendix 1: Help resources

Web Links

Family Tree Maker 2012/14 Support: www.familytreemaker.com/Support/Index

FTM-Tech (Where all the high end users hang out, you need to subscribe to this one)
<http://lists.rootsweb.ancestry.com/index/surname/f/ftm-tech.html#FTM-TECH>

Family Tree Maker Answers (Knowledge Base). Type in a few key words and mostly you will be linked to an article on the topic <http://ftm.custhelp.com/app/answers/list>

Ancestry/Family Tree Maker Knowledge Base (similar to Family Tree Maker Answers above)
<http://ancestry.custhelp.com/app/home>

Family Tree Maker software (Win) <http://boards.ancestry.com/topics.software.famtreemaker/mb.ashx>

Family Tree Maker software (Mac) <http://boards.ancestry.com/topics.software.ftmmac/mb.ashx>

Family Tree Maker Blog (is languishing a bit)
<http://blogs.ancestry.com/ancestry/category/products/ftm>

Ancestry.com Blog (active and very interesting) <http://blogs.ancestry.com/ancestry>

Webinars (mouse down until you find the Family Tree Maker ones) www.ancestry.com/cs/us/videos

Family Tree Maker Tutorials (excellent for new users also in FTM for Windows program Help- not Mac) www.familytreemaker.com/Learn/Tutorials

A Private Family Tree Maker Blog spot. Russ Worthington is a power Family Tree Maker user and has a private blog spot with a lot of Family Tree Maker help <http://ftmuser.blogspot.com.au>

Ancestry.com/Family Tree Maker Phone Help, There is also an international toll free phone support for ANZ users—1-800-251-838 (toll free) in Australia or; 0800-442-100 (toll free) in New Zealand.

Books

Beyond the basics: a guide for advanced users of Family Tree Maker 2012 by T. Pedersen

The companion guide to Family Tree Maker 2012 by T. Pedersen

The companion guide to Family Tree Maker for Mac 2 by T. Pedersen

Available in Australia from various genealogy resellers Tana Pedersen is a staff writer with Ancestry.com.

John Donaldson
Updated March 2014
W. www.vicgum.asn.au
E. info@vicgum.asn.au
Victorian GUM®

VicGUM[®] was founded in 1984 by a group of farsighted 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 self-help User Groups. These groups have informal monthly meetings to provide assistance with the more popular genealogy programs. 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.*

John Donaldson, the author of this publication is also the Secretary of VicGUM[®].

Doug Elms

*President of Victorian GUM Inc **president@vicgum.asn.au***

Index

32-bit 10
64-bit 10

A

adding sources 37
Ancestry.com 7, 8, 12, 13, 14, 17, 25, 40, 46, 47, 50
Ancestry Member Tree (AMT) 16, 17, 21, 24, 38
Ancestry subscription 13, 46, 47
Android 17
Apple 17

B

Backup command 20
birth date 22, 27
Blended families 27, 42
Bookmarks 22, 23

C

Categories 35
children 19, 22, 25, 26, 27, 42
Cloud 17, 20, 21
CSV 43

D

dates 21, 27
Deluxe edition 8
descendant chart 40
descendant reports 40
Description field 25

E

Extended family 45

F

Facts 22, 27, 28, 40, 42, 48
Family Group Sheet (FGS) 27, 41, 42
Family Tree Maker 7, 8, 9, 10, 11, 12, 13, 14, 15, 16,
17, 18, 20, 21, 24, 26, 27, 29, 30, 31, 32, 34, 35,
36, 37, 39, 43, 46, 47, 48, 49, 50
Family view chart 42
File migration utility 9
Files workspace 15
FTMM3 9, 15, 16, 26, 27

G

GEDCOM 9, 16, 18

H

Help 13, 30, 50
Hierarchical place names 33
History 23, 49
Home person 24, 25
HTML 40, 43

52

I

Image 43
Index 22, 23, 31, 43, 44, 50

L

Leaf hints 25

M

magnifier 35
Media 14, 27, 34, 35, 39, 42, 48
Media workspace 34
Merge wizard 47
missing media links 34

P

PDF 30, 35, 40, 43
Pedigree chart 38
Pedigree view 24
People workspace 22, 27, 29, 30
Place Name Authority (PNA) 32
Places workspace 31
Plan workspace 16
Platinum edition 8
playfile 21, 49
Publish workspace 38

R

RAM 10, 11
registering 12
relationships 27, 29, 30, 43
Resolving place names 32
RTF 43

S

sandbox file 21
save button 20
silhouette view 25
sorting children 26
sources 18, 36, 37, 38
Sources workspace 36

T

Timeline 29

V

Victorian GUM Inc. 8

W

web clipping 48
web search 14, 26, 46
Web Search workspace 46

Unlock the Past publications

Ron Austin

- AIF unit histories of the Great War 1914-1918

Jennifer Barnes

- Who owns your family history? Australian copyright for genealogists - in preparation

Carol Baxter

- Guide to convict transportation lists: 1788-1800
- Guide to convict transportation lists: 1801-1812
- My ancestor was a convict transportee - in preparation
- Writing INTERESTING family histories - in preparation

Lesle 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

- Family Tree Maker input: people, places, dates, sources, notes and media - in preparation
- Family Tree Maker output: reports, charts, books, and online trees - in preparation
- So you are totally new to Family Tree Maker (2nd edition)

Kerry Farmer

- DNA for genealogists (2nd edition)
- Arrivals in Australia from 1788 - in preparation
- Which genealogy program? (3rd edition) - with Rosemary Kopittke

Jan Gow

- Getting to know Legacy - in preparation

Shauna Hicks

- Family history on the cheap
- Family and local history resource directory for Victoria
- Finding ancestors in church records: a brief guide to resources
- It's not all online: a guide to genealogy sources offline
- My ancestor was in an asylum: brief guide to asylum records in Australia and New Zealand
- Tracing mining ancestors: a brief guide to resources in Australia and New Zealand
- Trove: discover genealogy treasure in the National Library of Australia
- What was the voyage really like?
- Your family history archives: a brief introduction

Graham Jaunay

- Cracking the code of old handwriting
- Family history research in South Australia
- Feeling comfortable with the new FamilySearch
- How to undertake family history research - in preparation
- Pitfalls in family history
- Solving riddles in 19th century photo albums
- Tracing your English ancestors
- Tracing your Scottish ancestors

Eric Kopittke

- Locating your German ancestor's place of origin
- Researching in German civil and church records - in preparation

Rosemary Kopittke

- ScotlandsPeople: the place to launch your Scottish research
- The new findmypast.com.au: gateway to the world collection

Noeline Kyle

- Citing historical sources: a manual for family historians
- Finding Florence, Maude, Matilda, Rose: researching and writing women into family history
- Researching and writing about nurses, midwives, hospitals and health - in preparation
- Write it! How to write and publish a family history the family will love to read - with Lorraine Purcell - in preparation

Thomas MacEntee

- Family history trippin': a guide to planning a genealogy research trip
- Pinning your family history
- Preserving your family's oral history and stories
- Wolfram|Alpha for genealogy and family history research

Paul Milner

- Discover English parish registers

Mike Murray & Lesley Silvester

- Researching in Western Australia - in preparation
- Reunion genealogy program - in preparation

Allan & Joy Murrin

- Insights into New South Wales births, deaths & marriages index

David Parker

- Guide to Baptist history resources in Australia

Chris Paton

- Discover Scottish church records
- Discover Scottish civil registration records
- Discover Scottish land records
- Down and out in Scotland - in preparation
- Irish family history resources online

Alan Phillips

- Basic style guide - with Rosemary Kopittke - in preparation

Geoffrey D. Rasmussen

- Digital imaging essentials

Carole Riley

- Land research for family historians in Australia and New Zealand
- Social media for family historians (2nd edition)

Coral Shearer

- New Zealand's Papers: New Zealand's yesteryear newspapers

Helen V. Smith

- Death certificates and archaic medical terms
- Online genealogical education - in preparation

Lieutenant Colonel Neil C. Smith

- Finding the family Redcoat: tracing your British military ancestors in Australia
- That elusive digger: tracing your Australian military ancestors
- War on the Veldt: tracing your Australian military ancestors in the Boer War 1899-1902

Alan Stewart

- London and Middlesex family history resources online

Unlock the Past

- History and genealogy 2011: Australia and New Zealand
- Australian & New Zealand history & genealogy: volume 2

Jan Worthington

- Professional genealogists can enhance your research - in preparation

Susie Zada

- Sewerage records: an untapped magnificent resource

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.

The program has developed extensively and since purchased by Ancestry.com in 2004 it has become even more tightly integrated with the Ancestry.com database. It has also become very internet aware with its use of Bing Maps and the ability to link to internet sites like Trove from within the program as well using a very convenient web clipping and merging capability.

The program is sold throughout Australia and New Zealand in retail packs that include access to Ancestry.com paid databases.

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.

