

A stylized tree logo with a grey trunk and several green leaves. The trunk is a simple vertical line that branches out at the top. The leaves are simple, rounded shapes in a light green color.

Family Tree Maker

A Functional Overview

Presented by Michael Smith

Session Outline

Family Tree Maker is a very powerful database that is able to store, organise and report on the family history data you input.

This session will provides an understanding of navigating around the functions within Family Tree Maker and what you can do within them. The session covers very little operationally.

Like most software packages there are many complex functions within the application, they will be the subject of future sessions.

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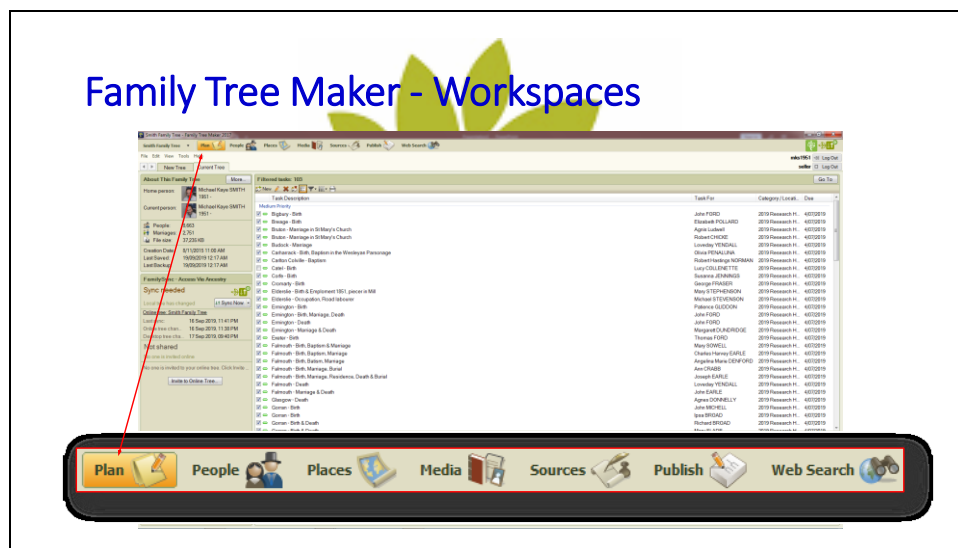
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What Can You Do with Family Tree Maker?

- Build your family tree by entering known family information including stories and media
- Record and schedule tasks for your research
- Search for new information about your family members
- Create and personalize your research with charts and reports
- Share your findings with others through charts and reports and by linking to Ancestry
- Record and catalogue, events, media, sources, in fact all data related to your family's history

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- AND much more



The Seven Workspaces in Family Tree Maker

PLAN: Is the initial workspace each time you start up Family Tree Maker. It allows you to organize, create, and import projects into Family Tree Maker. Within a project, Plan shows you the status of your projects, the status of the tasks, and the last person you were working on.

PEOPLE: Is where names and facts associated with the people and families in your tree will be entered and managed. Most of your time will be spent in “People”. Family view and Pedigree view are displayed via two tabs and they are conveniently combined with the Index, Notes, Sources, Edit Individual, and more functions.

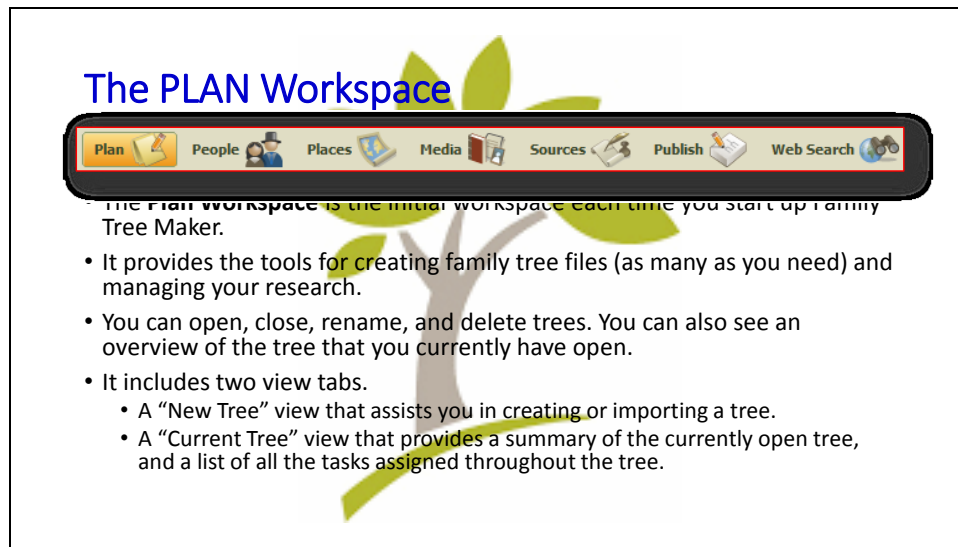
PLACES: Locates the places associated with a person. Seeing the locations and viewing who spent their lives there can help lead you to breakthroughs.

MEDIA: Images, documents, audio recordings, movies, and more are managed here. Media can be viewed by category, person, source, and other groupings. You can see what a media file is linked to and link it to other people or sources.

SOURCES: Helps you manage the sources associated with facts. You can quickly locate sources, view what they are connected to, remove connections, and edit citations, sources, and repositories quickly.

PUBLISH: Lets you print or share charts and reports from a variety of templates. You can customize a chart or report according to your needs, including background images, colours, and fonts.

WEB SEARCH: With an Internet connection and Ancestry.com and Family Search accounts, the vast store of databases of both can be searched to find more information about the people in your tree. With Web Search you can find and include facts on any genealogy site. Family Tree Maker includes the Google, Yahoo, and Live search engines. You can also add websites that you use often to the Search .



The PLAN Workspace

The PLAN workspace is the initial workspace each time you start up Family Tree Maker.

- It provides the tools for creating family tree files (as many as you need) and managing your research.
- You can open, close, rename, and delete trees. You can also see an overview of the tree that you currently have open.
- It includes two view tabs.
 - A “New Tree” view that assists you in creating or importing a tree.
 - A “Current Tree” view that provides a summary of the currently open tree, and a list of all the tasks assigned throughout the tree.

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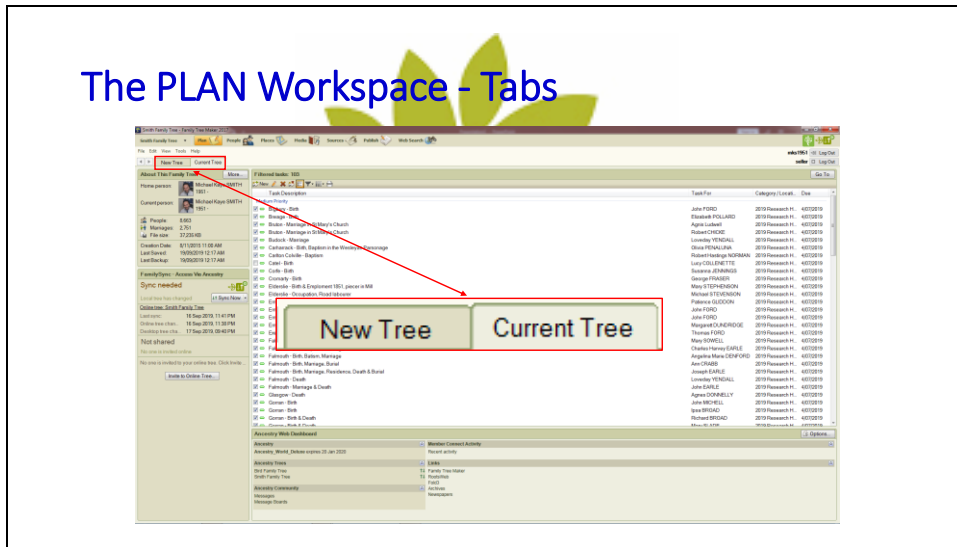
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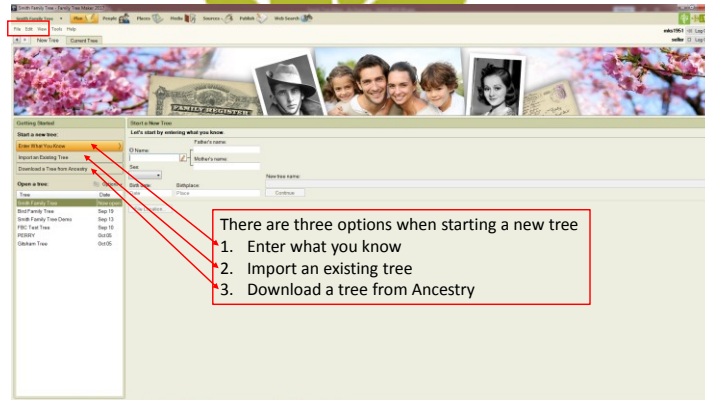
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The PLAN Workspace - Tabs



The PLAN Workspace – New Tree Tab



The PLAN Workspace – New Tree Tab

How the three options are used to create a new tree in Family Tree Maker

1. Enter What You Know

- The most basic way to start your tree is to enter the information about yourself and your parents. This is enough to start a family tree.

2. Import an Existing Tree

- If you have already created a family tree in a different genealogy program, you can import that file directly into Family Tree Maker. Files that can be imported are but not limited to, Family Tree Maker (Ver 5 or greater), GEDCOM, Personal Ancestral File (PAF), Legacy Family Tree, The Master Genealogist

3. Download a Tree from Ancestry

- If you have been creating your tree in Ancestry.com, you can easily download it to Family Tree Maker and work on it with Family Tree Maker's powerful set of tools.

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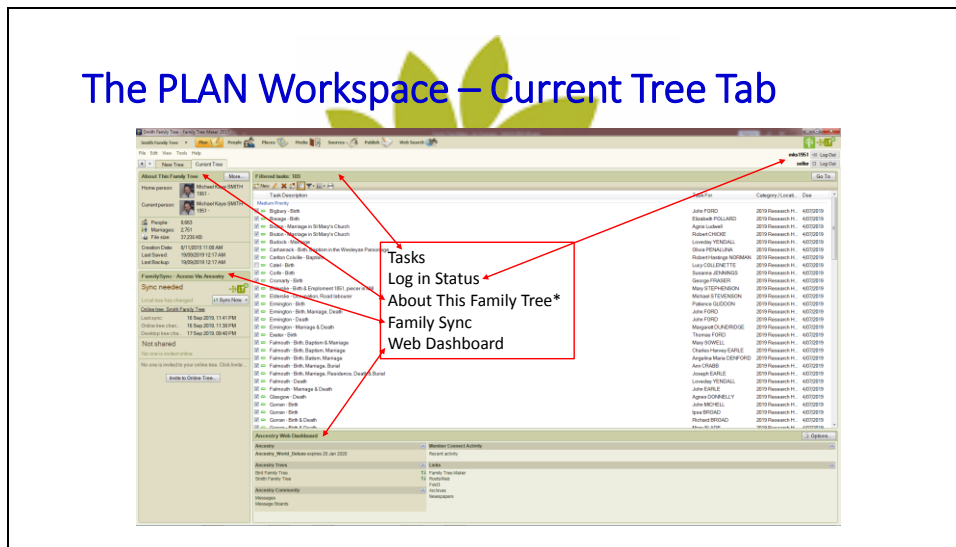
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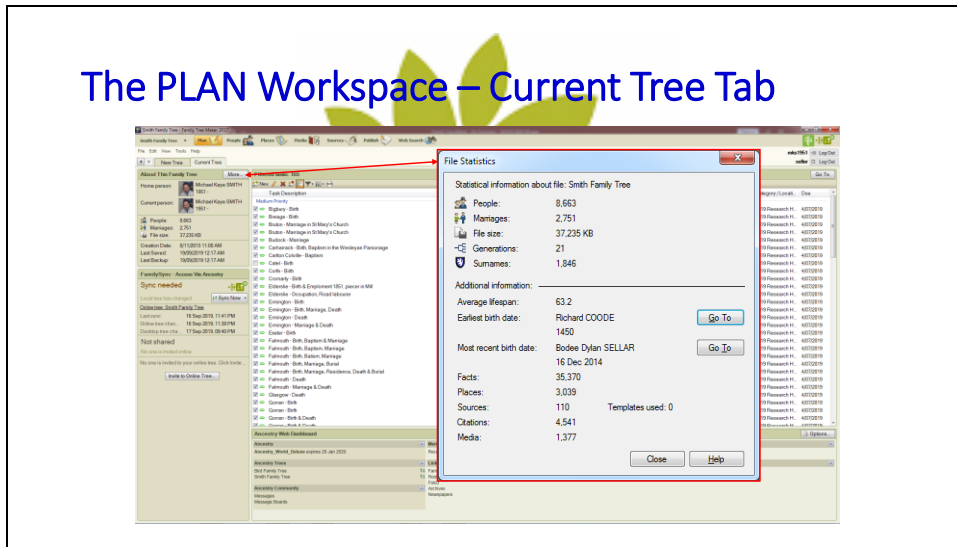


The Plan Workspace – Current Tree Tab

The Current Tree Tab makes provision for the following:

- Creation and management of Tasks associated with your research
- Logging into Ancestry and Family Search and displays login status
- Statistics about your Family Tree(s)
- Uploading and Syncing a tree to Ancestry.com and indicates current Sync. status
- Web functionality such as
 - Shows the status of your Ancestry.com subscription
 - The tree(s) you have uploaded to Ancestry
 - Exploring other search family history and general web sites
 - Links to your messages and Message Boards

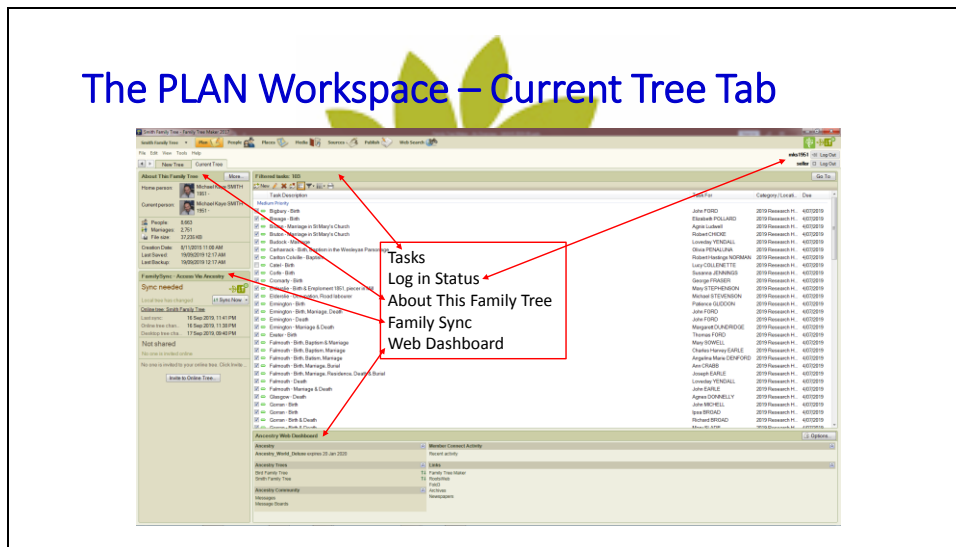
The PLAN Workspace – Current Tree Tab



File Statistics

The more button provides additional statistics about the tree.

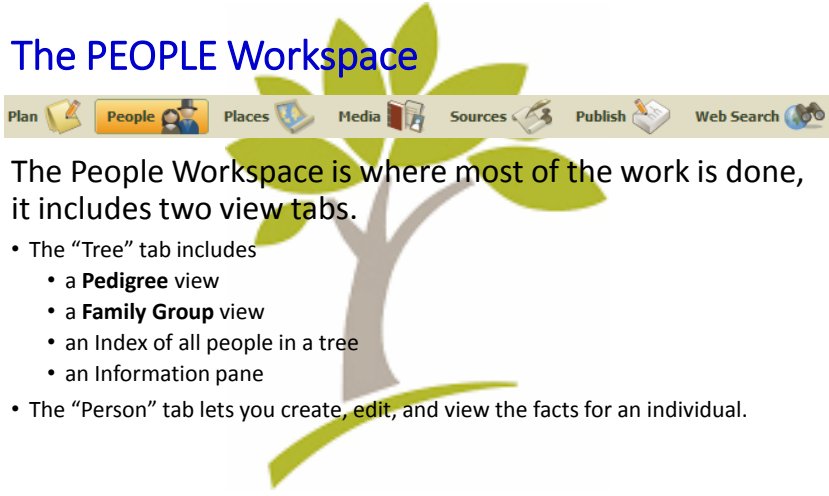
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The PEOPLE Workspace

Plan People Places Media Sources Publish Web Search

The People Workspace is where most of the work is done, it includes two view tabs.

- The “Tree” tab includes
 - a **Pedigree** view
 - a **Family Group** view
 - an Index of all people in a tree
 - an Information pane
- The “Person” tab lets you create, edit, and view the facts for an individual.

The PEOPLE Workspace

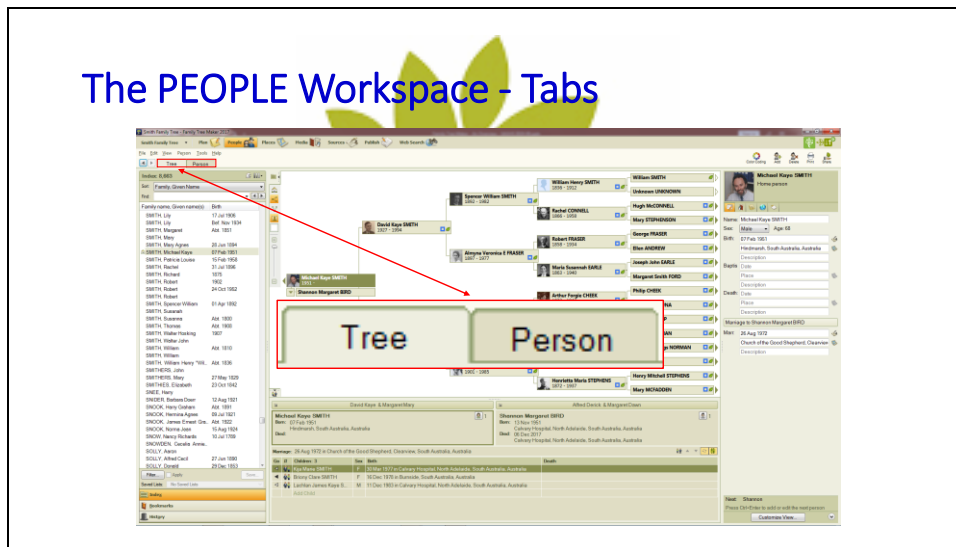
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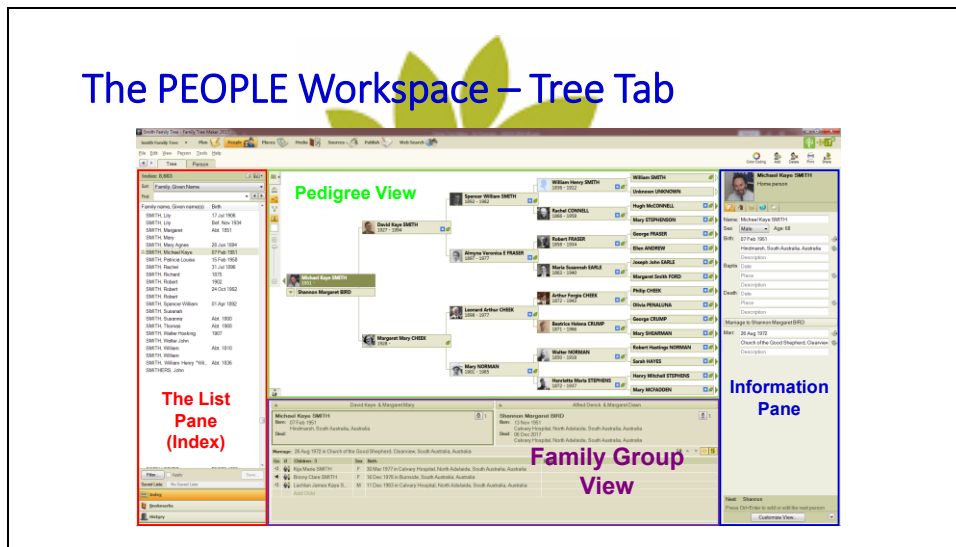
The PEOPLE Workspace - Tabs



The People Workspace - Tabs

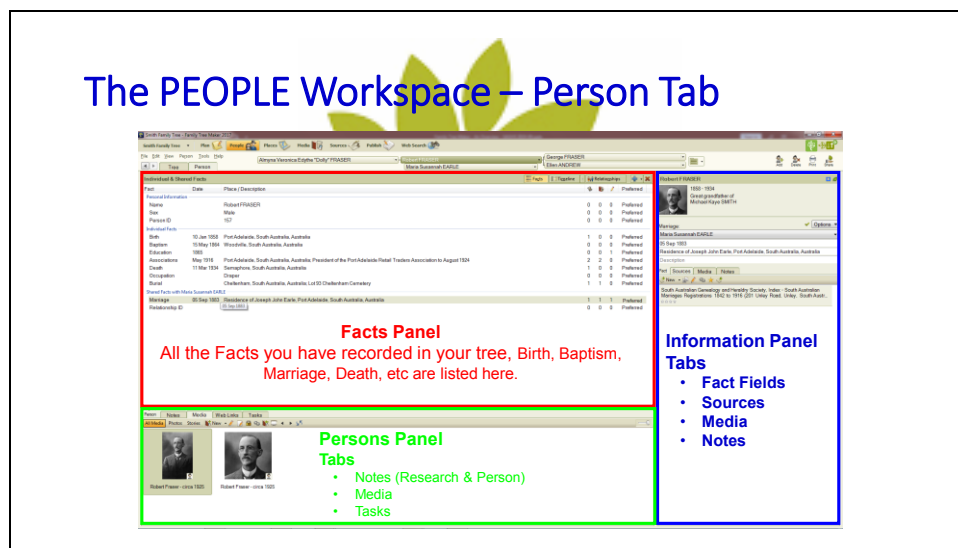
The People Workspace is where you will do most of your work. It includes two tabs: Tree and Person.

- The Tree tab includes the Pedigree and Family views, the Family Group panel, Index panel, and Information panel. From this tab you can create and edit records and navigate around in your family tree. It is here that you get the big picture of your family.
- The Person tab lets you create, edit, and view the facts for an individual. It allows relationships to be set, e.g. a child's status with mother and father, the partner relationship, etc. It also includes a timeline that shows the events recorded in a person's life and optionally, world events can be included in the timeline.



The PEOPLE Workspace – Tree Tab

- The List pane includes the Index, Bookmarks, and History lists in the People Workspace. Index displays all of the people in your tree. Bookmarks displays the people you have attached a bookmark to. History is a list of the last 200 individuals you have added or modified. The buttons at the bottom of the List pane let you display the different lists.
- The **Pedigree view** works as a way to navigate through the family tree as well as enter new people into the tree.
- The **Family Group** view lets you enter the spouse and children for the currently selected person in the Pedigree view.
- The **Information pane** provides fields for entering or editing facts for the selected object (person, media, source, etc.). The Information pane is present in all of the workspaces except for the Plan Workspace and Web Search Workspace. Its purpose changes according to the focus of the workspace.
- The **Information Pane** lets you enter and edit facts for the currently selected person. The icons indicate whether there is anything already entered in a tab. The tabs in the image to the left indicate that content is entered. If there is no information present in a tab, the icon for that tab appears empty.



The PEOPLE Workspace – Person Tab

The **Facts** view lists all of the facts recorded for the currently selected person. You can view, add, edit, and remove facts. You can also include alternate facts that might conflict with other facts you have found.

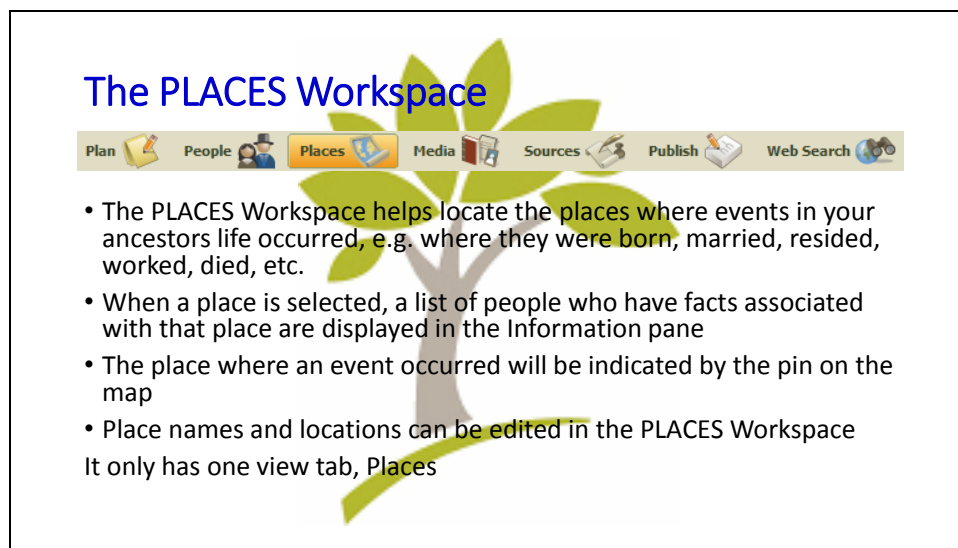
The **Timeline** view displays a persons life events in chronological order, it also has an option for including world events in the timeline.

The **Relationship** view displays the parents, siblings, spouse and children of the selected person. Facts for individuals can be edited according to what your ongoing research finds.

If you have imported all or portions of your tree, you may need to edit facts to correct information.

The **Person tabs** let you associate notes, media, and tasks to the currently selected person. Each tab includes specialized buttons for adding, editing, viewing, and deleting objects. Unlike the Fact tabs, the Person tabs apply to the person generally. These would be notes about the person, general media (such as pictures of the person throughout his/her life), and tasks for research concerning the person.

The **Information** pane in the Person tab lets you edit and view the fields, sources, media, and notes for the selected fact for the person.



The PLACES Workspace

- The PLACES Workspace helps locate the places where events in your ancestors life occurred, e.g. where they were born, married, resided, worked, died, etc.
- When a place is selected, a list of people who have facts associated with that place are displayed in the Information pane
- The place where an event occurred will be indicated by the pin on the map
- Place names and locations can be edited in the PLACES Workspace

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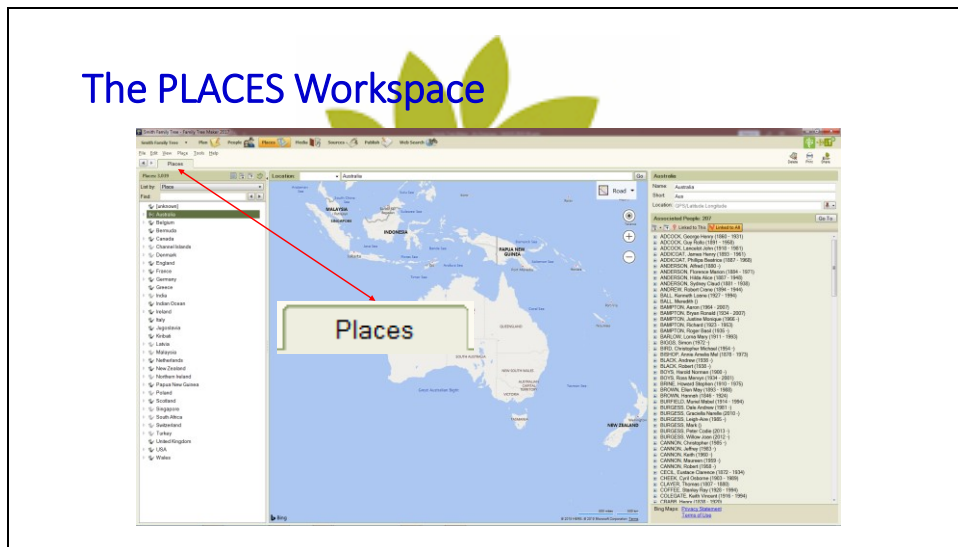
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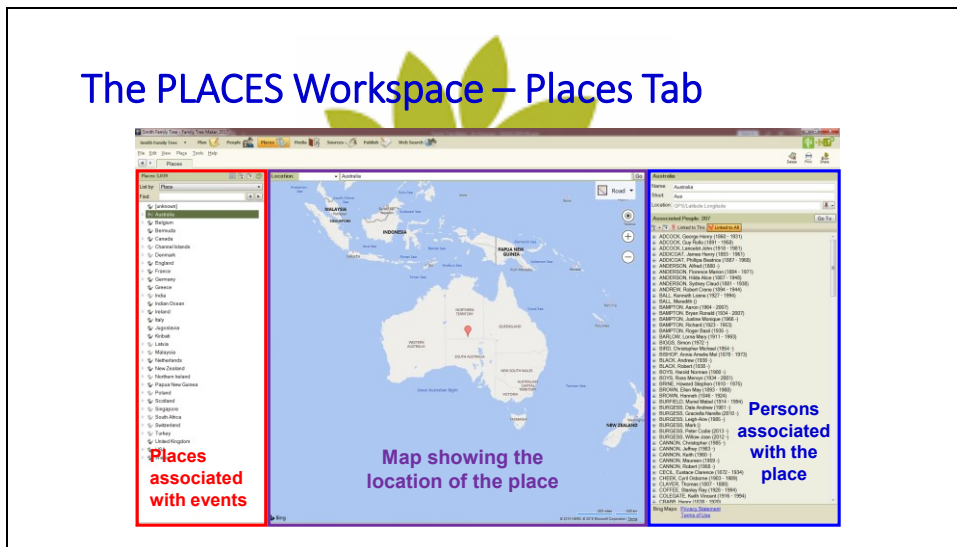
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It only has one view tab, **Places**

The PLACES Workspace



The PLACES Workspace – Places Tab





The MEDIA Workspace

The Media Workspace facilitates the management of media files attached to people, facts, sources and notes in your tree, you can:

- Link and unlinked Media files from people, facts, sources and notes in a tree
- Assign a category or multiple categories to each Media item
- Add and edit the information attributes for Media files
- Adjust, apply corrections and crop media items

There are two view tabs, Collection and Detail

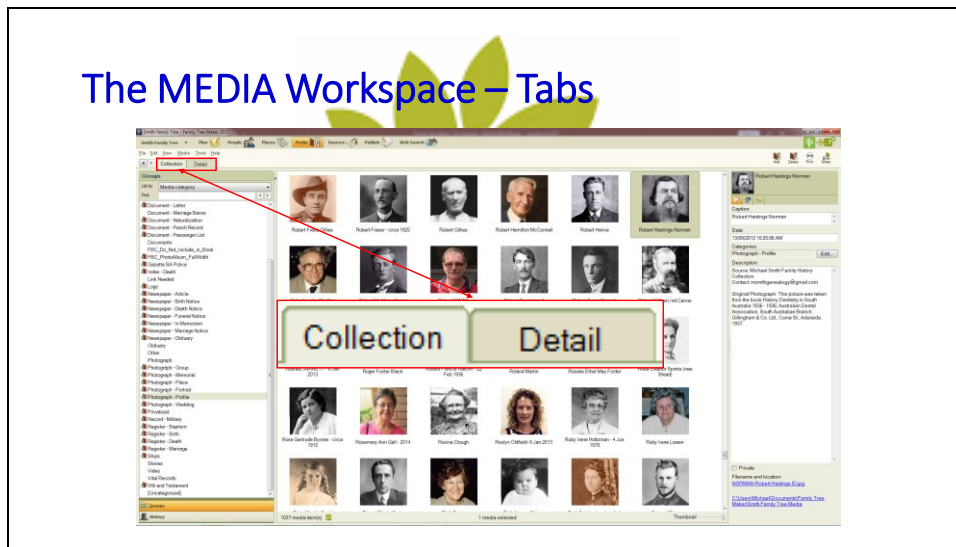
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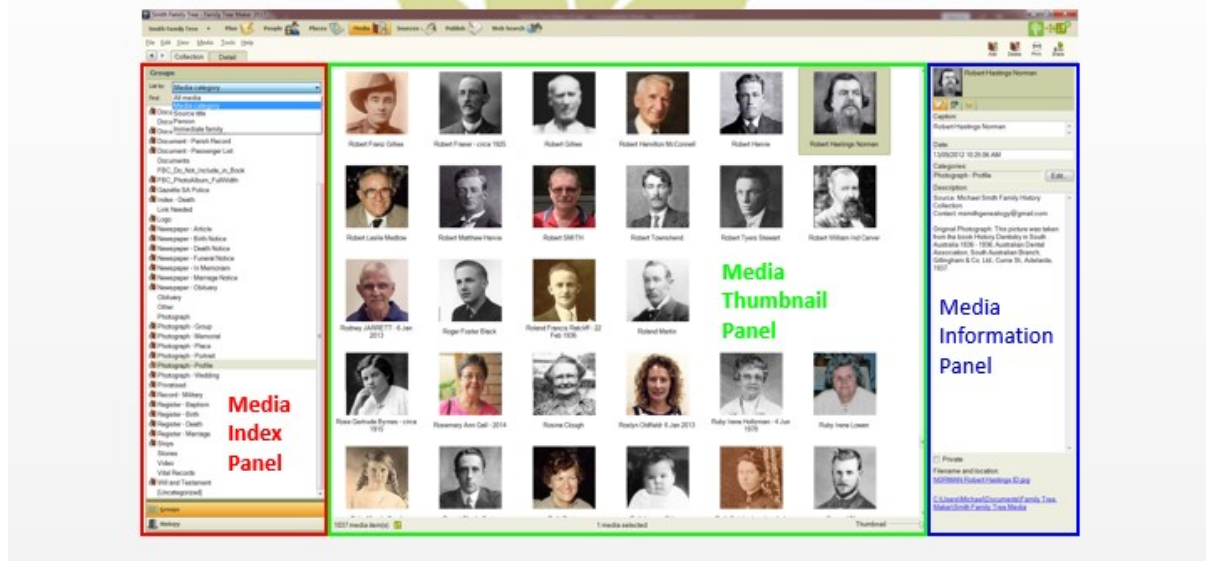
The MEDIA Workspace – Tabs



The MEDIA Workspace

The media workspace provides the functionality to add, remove, manipulate, select media from the collection. It also provides for printing and sharing of media and generating reports on the media collection.

The MEDIA Workspace – Collection Tab



The Media Workspace – Collection Tab

The **Media Index** panel lets you search for media in your tree by a number of different groupings.

- List by

Displays ways of grouping the media in your tree. The Media List panel includes lists by, all media, media category, source title, person and an individual's immediate family

- Find

Lets you search for a group in the list. Type the group name you want to locate. The arrow buttons move you to the next or previous match in the list.

- Groups

Opens the Media Groups list so you can locate a media file.

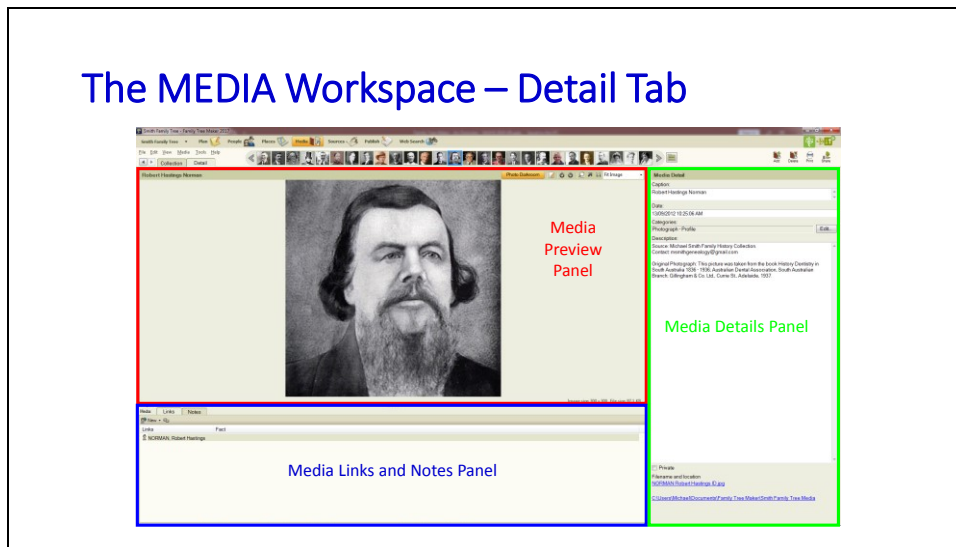
- History

Opens the History list that displays all of the most recently modified media files with the most recently opened media file at the bottom of the list.

The **Media Thumbnail** panel shows all media as thumbnails.

The **Media Information** panel lets you add and edit details about the media file.

The MEDIA Workspace – Detail Tab



Media Preview Panel

The **Media Preview** panel displays a the currently selected media file. The preview panel displays image files along with tools for moving, rotating, and zooming in and out.

Media Links and Notes Panel

The Media Links and Notes panel lets you manage the links between the media file and the people, fact or source citation in the tree. It also provides the functionality to include notes about the media.

Media Details Panel

The **Media Details** panel enables the entering and editing data related to a media file such as the description, caption, date taken, categories and description. It also provides the functionality for privatising media, displaying the media file name and file location, i.e. where the media is stored.

The Media detail tab also provides the facility to scroll through the media collection or find media linked to an individual in a tree.

The SOURCES Workspace



Family Tree Maker uses four levels of source management to help make the job of documenting your research easier:

- Source Title
- Citation Detail
- Citation Text
- Repository

The Sources Workspace has only one view tab, Sources

The SOURCES Workspace

The Sources Workspace has only one view tab, Sources

The Sources Workspace provides the functionality to record the source citation detail, source detail and repository.

Source Title

The publication where the citation is found. This may be a book, volume, record, etc. e.g., *Newspaper Article/Notice – National Library of Australia, Trove.*

Citation detail

The title of the article, page number, Internet address, etc. where the source citation text can be found in the source, e.g. *Adelaide Observer (SA : 1843 - 1904), Saturday 23 August 1845, page 4.*

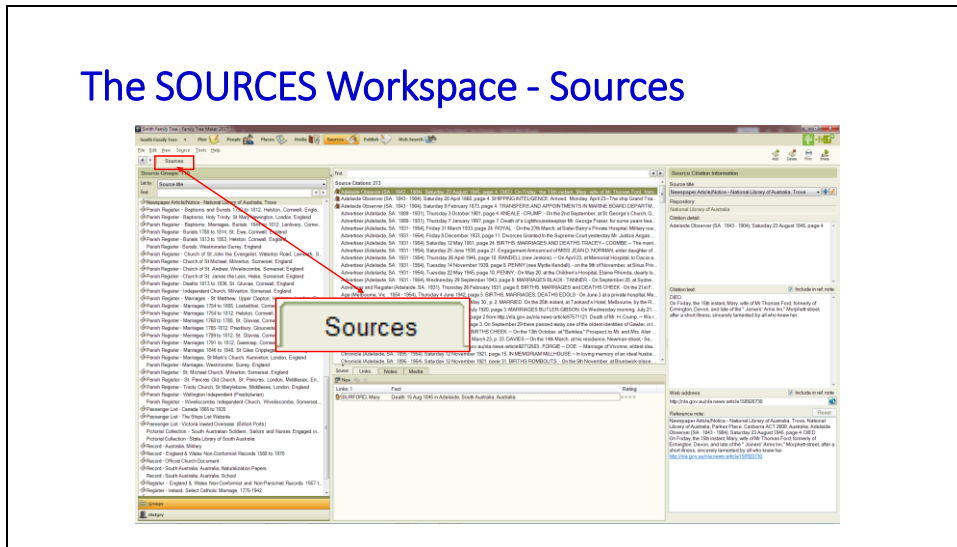
Citation text

The actual text from the source that pertains to the fact, e.g. *DIED - On Friday, the 15th instant, Mary, wife of Mr Thomas Ford, formerly of Ermington, Devon, and late of the "Joiners' Arms Inn," Morphet-street, after a short illness, sincerely lamented by all who knew her.*

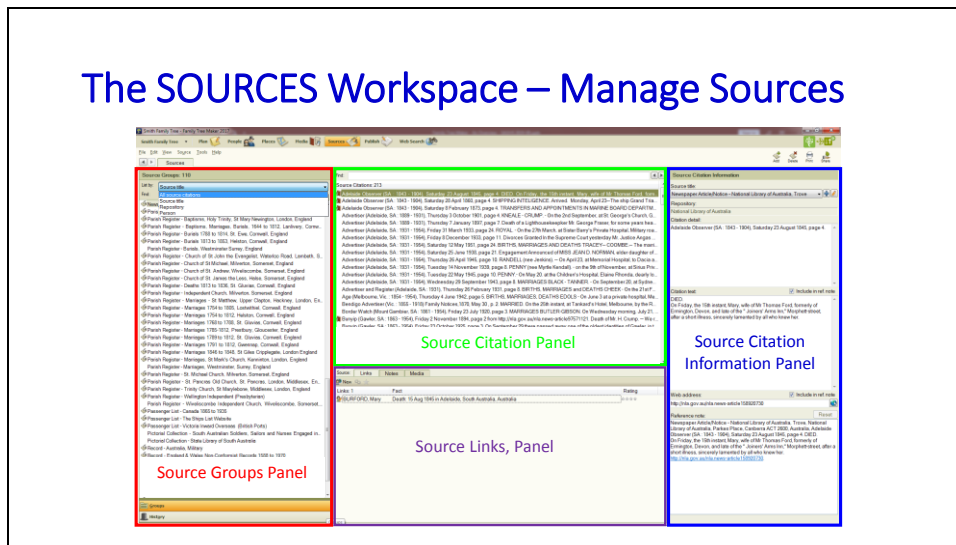
Repository

Lists the repository where the source is housed, e.g. *National Library of Australia, Parkes Place, Canberra ACT 2600*

The SOURCES Workspace - Sources



The SOURCES Workspace – Manage Sources



The Sources Workspace

Manage Sources

Source Groups Panel

- View the link to the person fact.
- View the list of sources that are not linked to a person fact.
- Attach notes and media files to sources.
- Display sources by title, repository and person.
- Search for a source.
- Add new source titles and repositories.
- Edit existing source titles

Source Citation Panel

- View all citations for the selected source title.
- Select a source citation to display the source title, Citation detail, Citation text, Web address and reference note in the Source Citation panel.

Source Links Panel

Displays the person and fact(s) that a citation is linked to.


Add a note to a citation.

Add media (e.g. birth, death or marriage certificate) to a source.

Source Citation Information Panel

- Change the source title from a dropdown list
- Change the source repository from a dropdown list.
- Add or edit the Citation detail
- Add or edit the Citation text
- Add or edit the Web address
- Reset the Citation note.

The PUBLISH Workspace



Family Tree Maker offers a variety of charts and reports that you can print out.

- Genealogy Charts
- Genealogy Reports
- Person Reports
- Relationship Reports
- Place Reports
- Media Reports
- Source Reports
- Other
- Books

In the Publish Workspace you can modify the look of charts and reports, including the facts that are included.

Reports and the report settings can be saved for later use.

The PUBLISH Workspace has two tab views, Collection and Detail

The PUBLISH Workspace

The PUBLISH Workspace has two tab views, **Collection** and **Detail**

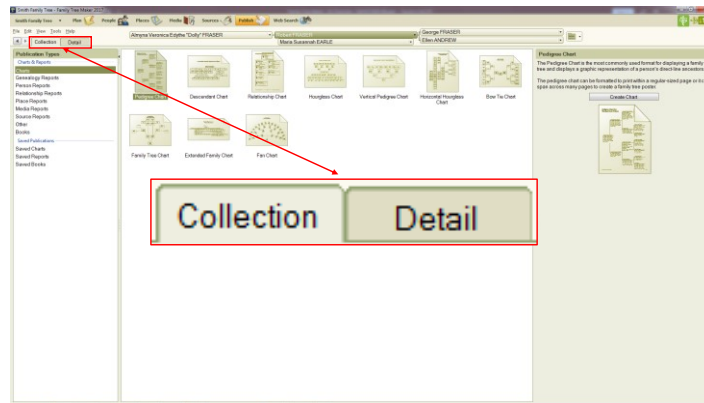
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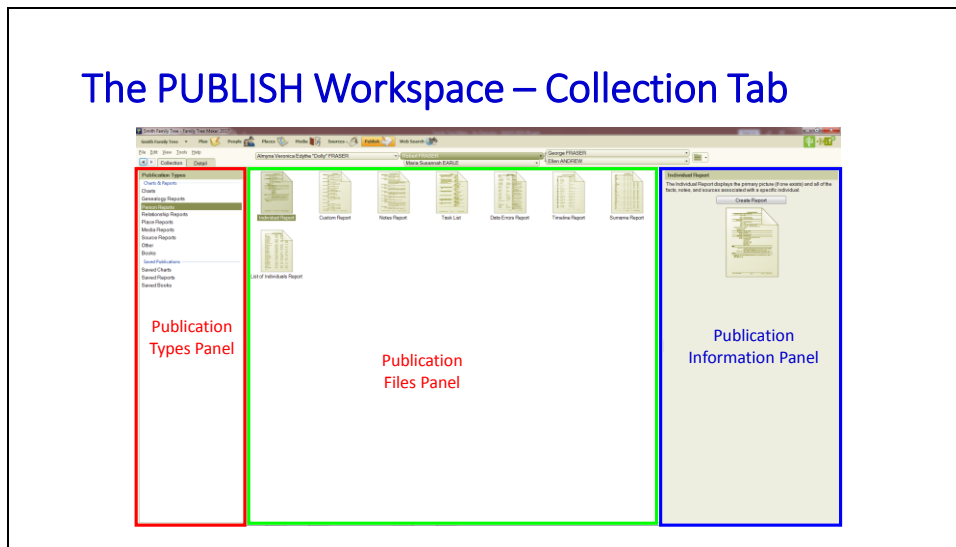
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The PUBLISH Workspace - Tabs



The PUBLISH Workspace – Collection Tab



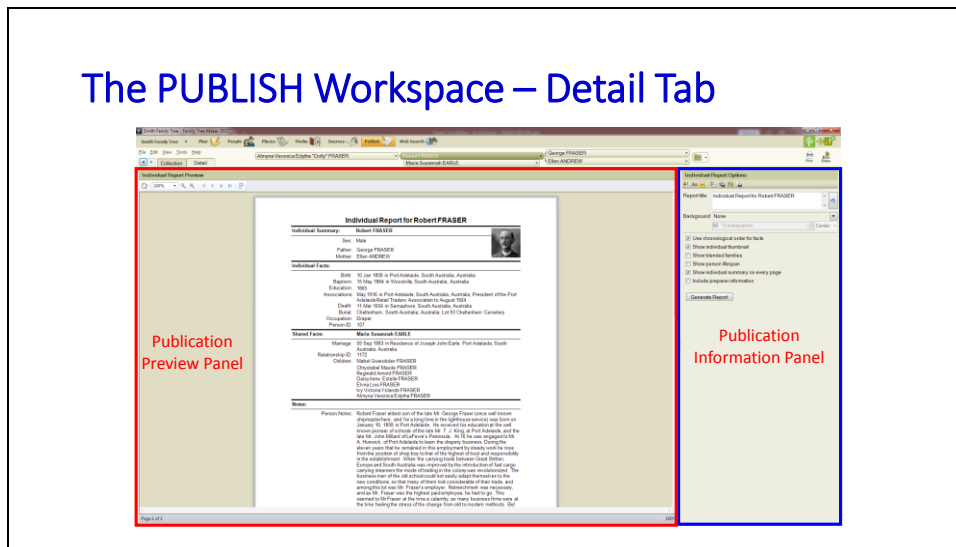
The Publish Workspace – Collection Tab

The **Publications Types** panel lists the following categories Genealogy Charts, Genealogy Reports, Person Reports, Relationship Reports, Place Reports, Media Reports, Source Reports, Other, Books for reports that Family Tree Maker can produce. When you click a category under “Saved Publications”, the charts, reports, and books that you have created and saved are displayed so you then can be quickly modified, printed, or shared with your family.

The **Publication Files** panel displays the templates to create new charts, reports, and books for the category selected in the **Publication Types** panel.

The **Publication Information** panel displays information about the publication (chart, report, or book) that you have selected in the Publication Files panel. It describes the purpose of the publication, including a thumbnail of how it might look. Click the **Create** button open the publication type and begin customizing it.

The PUBLISH Workspace – Detail Tab



The PUBLISH Workspace – Detail Tab

The **Publication Preview** panel displays how the publication will look with the options and customizations that you have selected in the **Publication Information** panel. The **Publication Preview** panel includes options that let you view and navigate through the publication.

The **Publication Information** panel includes the tools and options specific to the chart, report, or book that you have chosen to customize. The options available depend on the specific publication selected and generated.

The **Publish Workspace Detail** Tab provides the tools to customize the selected chart or report. Each chart and report has a different set of tools to customize the output. When you are finished, you can print, send, or save the report to share with others.

Depending on the report, you can modify lines and boxes, select the people and facts to include, specify a background image, and so forth.

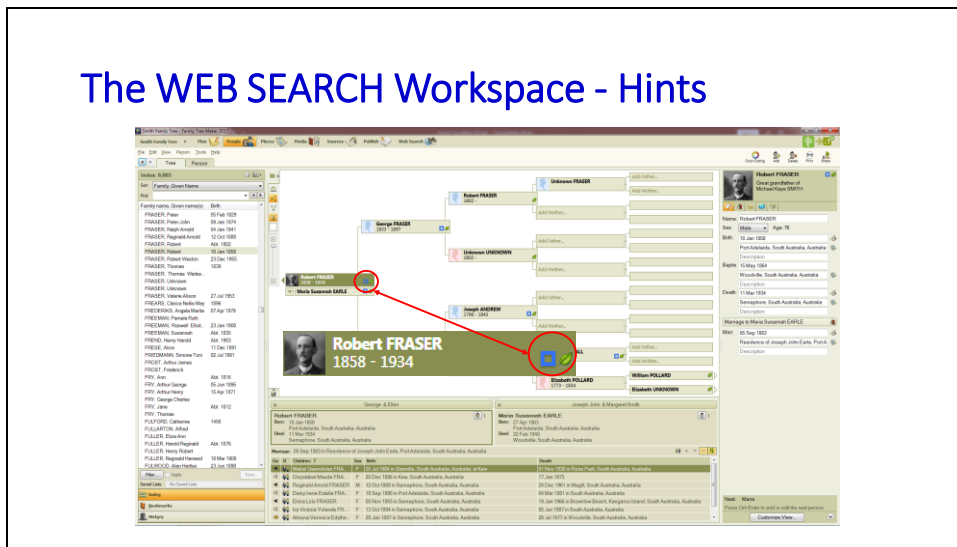
Share lets you prepare the report to send electronically or save as a file on your computer.

The WEB SEARCH Workspace



- The Web Search Workspace allows you search Ancestry.com, Family Search and other websites for information about people in your tree.
- You must have Internet access to use Web Search and be registered with Ancestry.com and Family Search to search their databases.
- In addition to searching for information, the Web Search Workspace lets you easily merge (*not recommended*) information from Ancestry, Family Search and other websites into your tree.
- You can accept or reject any fact, note, or media file that the search finds without leaving the workspace.

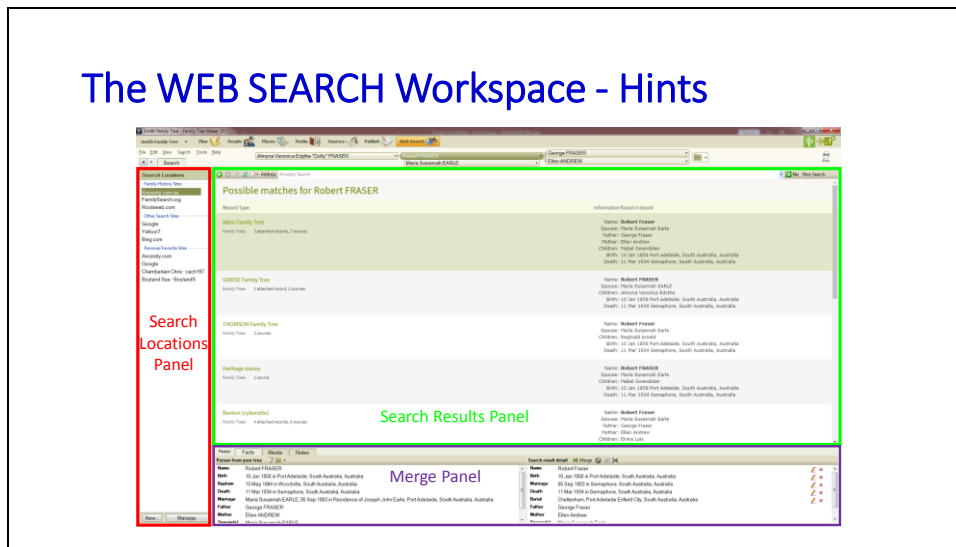
The WEB SEARCH Workspace - Hints



The WEB SEARCH Workspace – Hints

Hints from Ancestry are displayed as a leaf and from Family Search as a blue square in the name box of the Pedigree and Family view. Click on a leaf or box and the associated hints open in the **Search Input and Results Panel**.

The WEB SEARCH Workspace - Hints

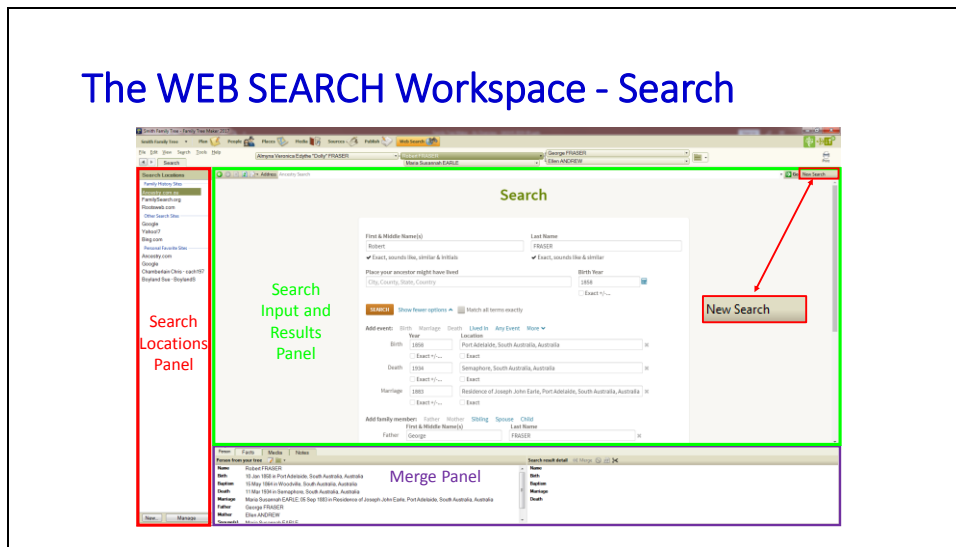


The WEB SEARCH Workspace - Hints

The results can be expanded and examined to see if they can assist you filling in blanks or adding to your tree.

Where there is a match the search result may be merged into your tree through the **Merge** panel.

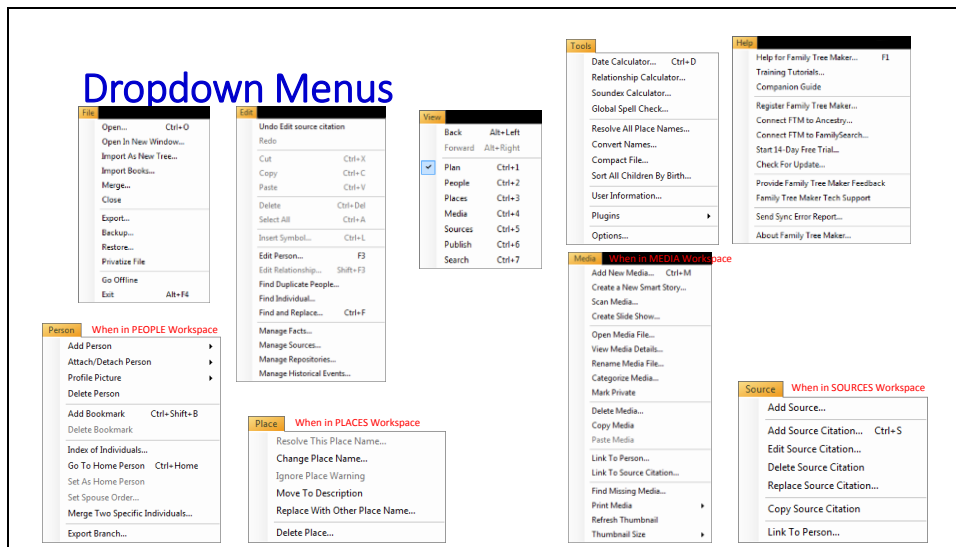
The WEB SEARCH Workspace - Search



The WEB SEARCH Workspace – Search

A search can either be made via the Family Tree Maker search form by clicking on **New Search** or from search location in the **Search Locations** panel. In both instances search parameter must be input. The results of the search will be displayed in the **Search Input and Results Panel**.

Where there is a match the search result may be merged into your tree.



Dropdown Menus

The **File**, **Edit**, **View**, **Tools** and **Help** and the five standard dropdown menus, but when the:

- **PEOPLE Workplace** is selected the **Person** dropdown menu is inserted between the **View** and **Help** dropdown menus.
- **PLACES Workplace** is selected the **Place** dropdown menu is inserted between the **View** and **Help** dropdown menus.
- **Media Workplace** is selected the **Media** dropdown menu is inserted between the **View** and **Help** dropdown menus.
- **SOURCES Workplace** is selected the **Source** dropdown menu is inserted between the **View** and **Help** dropdown menus.

All of the additional menus provide additional functions within the ?? They are associated with.

Questions & My Next Session

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My next session on Wednesday 16th of October and will cover Family Book Creator.

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