

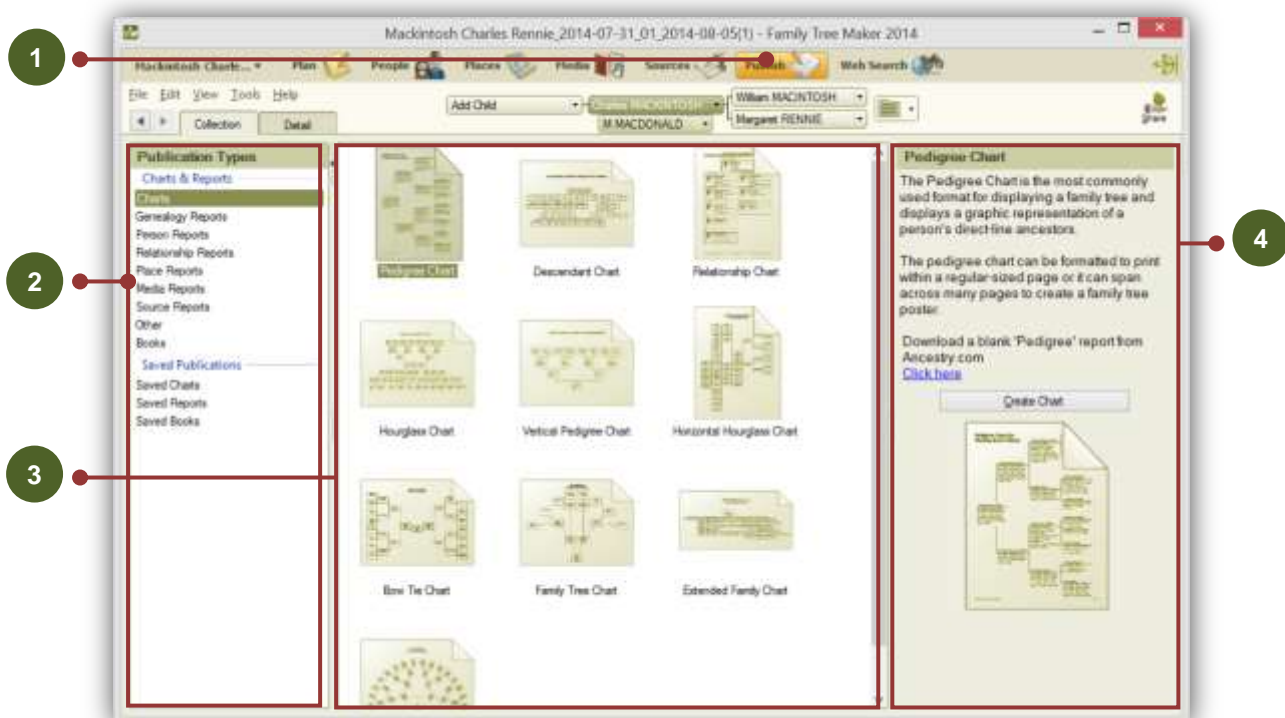
Family Tree Maker 2014

Step by Step Guide: Charts

Introduction

This guide demonstrates how to use FTM to produce charts for coursework. Both the contents and format can be customised to provide an effective way of visualising and communicating the results of your research.

Basics



1

The starting point for producing charts is to select the “Publish” workspace. Note the collection tab is opened by default.

2

“Charts” from the Publication Types panel are also opened by default. The “Other” publication type includes any charts, reports or books you have previously saved.

3

The chart or other selected publication type formats that are available in FTM are shown in the Publication Files panel. The Pedigree Chart is selected by default. Single click on a different chart to highlight it.

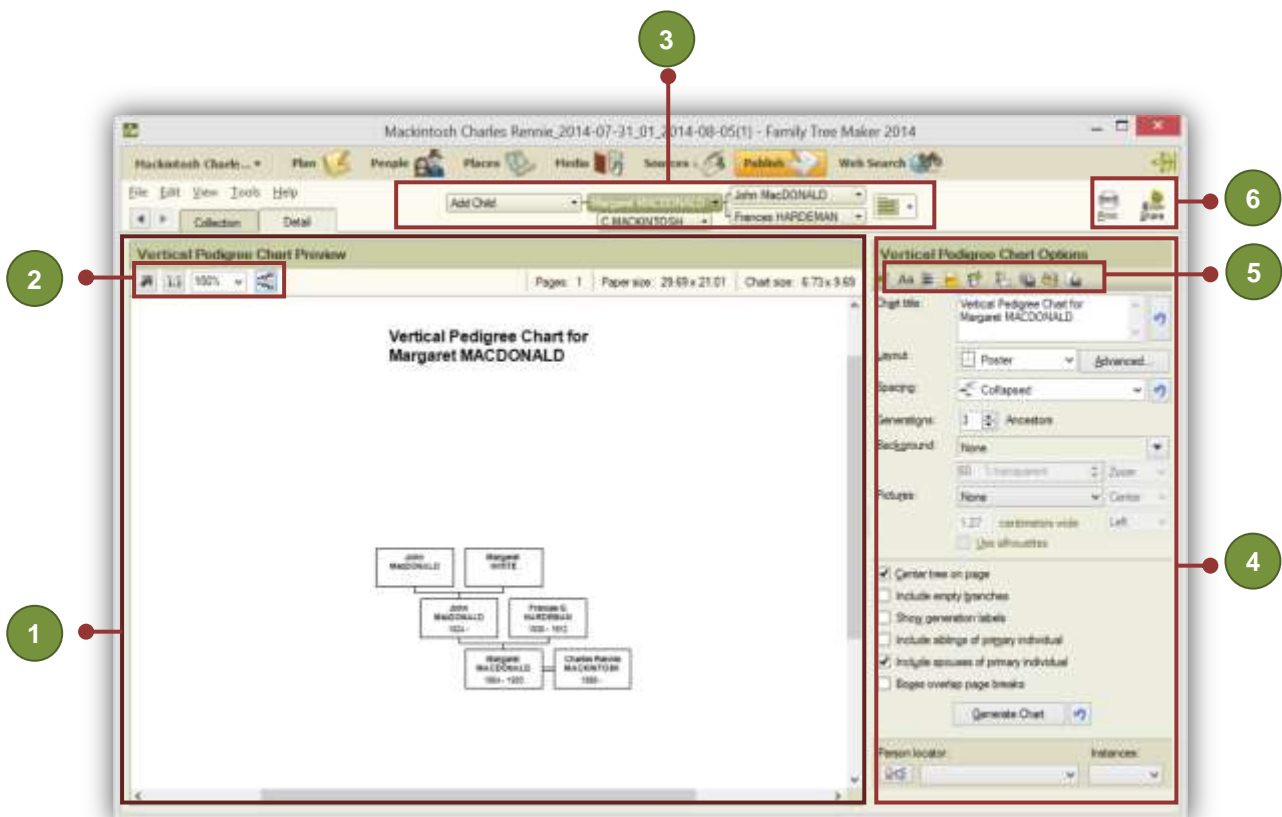
4

Details of the highlighted chart are shown in the Publication Information panel. The highlighted chart can be created by clicking on the “Create Chart” button here, double clicking a chart in the chart panel, or by clicking on the “Detail” tab.

The charts most frequently required for coursework are the Pedigree Chart, Descendant Chart, Vertical Pedigree (a.k.a. ancestor) Chart and the Extended Family Chart.

Creating Charts

We are going to create a Vertical Pedigree (Ancestor) Chart to demonstrate the options available in FTM. So select a Vertical Pedigree Chart as shown in step 4 above. You will get a screen like the one below.



We will look at each of these areas in a bit more detail.

1

Publication Preview panel

This contains a view of the current chart. Note that this can be sized by dragging the right hand margin to the left or right. When in the Poster Layout (see chart options) boxes can be manually rearranged by dragging them to a new position with the mouse or, for more precision, with the movement keys.

Right click on a box to reveal a host of options allowing you to mark or remove individuals or groups. Marking can be useful to highlight individuals or groups in a chart – three separate markings are available and the look of marked boxes is controlled using the Box, Border and Line Options.

Try it!

2 Chart Preview Tools

Zoom to fit – resizes to fit the whole chart within the chart preview panel.

1 to 1-returns the view to 100%.



The show/hide page breaks is useful when viewing a multipage chart to understand how page breaks will impact the chart.

The zoom control provides a variable control of the level of zoom.

The use of these controls only changes what is displayed on the screen, not the final output. We will not dwell on them further here, they are straightforward.

3 Pedigree Navigation Bar



The Pedigree Navigation Bar enables you to quickly find and select a person to be the subject of the chart. Click on persons on the right to go back along an ancestral line (i.e. earlier) or on the left to move down a descendant line. To select a different child in the family, click the down arrow to reveal a menu listing all the children. Click on the folder icon to show an Index of Individuals to select a person from a different branch.

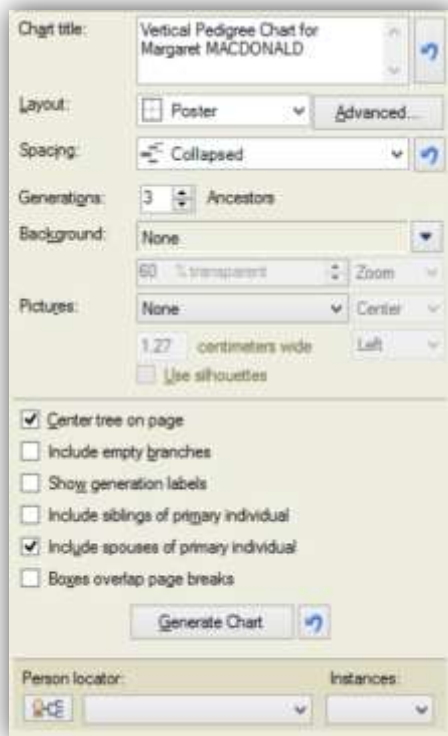
4 Chart Options Panel

The Chart Options panel provides controls affecting the appearance of the chart.

Layout: Most charts can be produced in Book layout (divided by page with references to generations continued on following pages) or in Poster layout (printed as a whole on multiple pages if required with the intent of joining them together as if a poster). The Advanced button, available only for the Poster layout, also lets you manually adjust horizontal and vertical spacing.

Spacing: The space between boxes can be adjusted here. This is useful when trying to fit a chart to a single page.

Generations: This limits the number of generations of ancestors shown on the chart. Beware of leaving this set on a low number and forgetting to include data you have researched!



Background & Pictures: We recommend that you do not add backgrounds or pictures when presenting your coursework.

Center tree on page: Chart display looks best if checked. When left unchecked the chart is aligned to the top left corner.

Include empty branches: Sometimes it can be useful to show empty branches, especially in the early stages of research. However, for presentation of completed work, it is distracting and best avoided. The exception is for pedigree charts which traditionally always include empty branches.

Show generation labels: Checking this will add a label box on the left hand side of the chart labelling each generation. This can be useful when dealing with a great number of generations, but for coursework is unnecessary.

Include siblings of primary individual: This is best left unchecked unless asked for in coursework.

Include spouses of primary individual: Spouses are not usually shown on pedigree or ancestor charts (however, we may ask for them in coursework), but are usually included on descendant and extended family charts.

Boxes overlap page breaks: This is usually best left unchecked.

The generate chart will update the chart for all changes in settings. Some changes are updated automatically, but not all. The adjacent reset button undoes all marking, box position changes and removed/hidden boxes, but not changes to formatting.

The person locator is an aid to finding someone who is included in the current chart.

Note that the content of the chart options panel varies slightly for each chart type.

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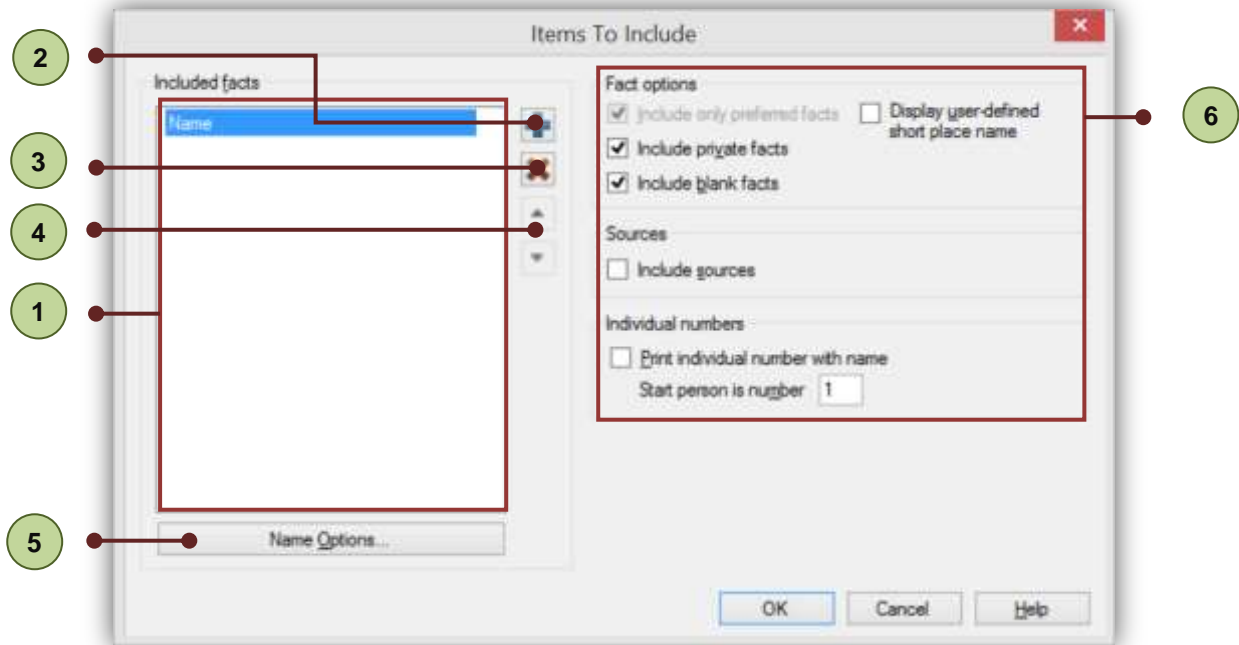
Chart Detail Options



These small boxes provide further powerful options to customise the content and format of charts. They are discussed in some detail below.



Items to include: Click on the icon to display the Items to Include window.



- 1 The Included facts list provides a summary of all facts included in the current chart. By default, the only included fact is Name (other charts have different default facts).
- 2 Additional facts can be added by clicking on the add fact icon. Note that there are a few custom facts: <BLANKLINE> inserts a blank line in a fact list. <DIVIDER> inserts a line – this can look good positioned beneath the name fact. <Lifespan> inserts the birth and death year (e.g. 1776-1831).
- 3 Remove fact – deletes the selected fact or facts from the Included facts list. To select a range of facts, click on the first fact you want to select and hold shift & click on the last fact, or to select several non-adjacent facts hold control & click on the second and subsequent facts.
- 4 The direction arrows change the position of the selected fact in a list and the order in which they appear in charts. However, some charts insist on vital facts preceding non vital facts.
- 5 Name [or other selected fact] Options opens a dialogue box for the selected fact. The precise contents vary for each fact, but in general this allows you to select which fact fields are displayed (e.g. date, place and description), and whether the fact has a label (e.g. Birth, b. etc.). For example, the Birth fact option has the following dialogue box.



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Fact options allow you to control the types of facts included or excluded in the chart.

Include only preferred facts: Sets a default setting for the chart, though this may be over-ridden by settings in the [selected fact] options.

Display user-defined short place name: Not necessary for coursework.

Include private facts: Private facts are unnecessary for coursework. However, if used, this is where they can be included or excluded from a chart.

Include blank facts: If ticked, this prints a heading for a fact that has no data. This can usually be left unchecked.

Include sources: For coursework we usually ask you to provide sources on charts. When doing work for clients, usually charts are accompanied by a report so including sources on both is unnecessary duplication. An exception to this might be when you are asked to produce a chart without an accompanying report.

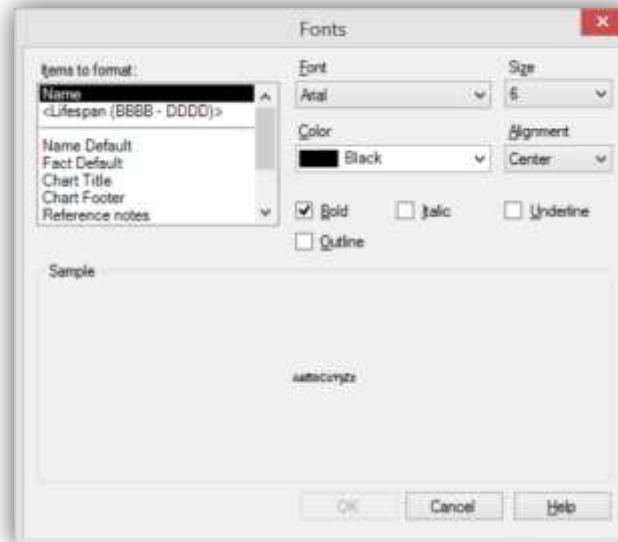
Print individual number with name: This is not usually necessary for coursework. However, this might be considered for complex charts.

Note, generally charts do not work well if overloaded with facts. It can be helpful in the research stage of a project, but a chart with many individuals quickly becomes unmanageable in size if all the boxes are like the example to the right!





Fonts: Clicking on this icon opens the Fonts dialogue box. This can be used to customise any text elements in the chart. Usually the default settings are adequate (Arial is our preference for coursework).



Box, Border and Line options: The box, border and line options dialogue box can be used to customise the appearance of graphic elements in the chart, including the thickness and colour of lines, the shape and fill properties of boxes and of the chart border. Different types of boxes (e.g. for males and females) can be treated differently.



It can be tempting to go wild and express considerable creativity, but the following comments should be noted:

- Tutors may print out coursework in greyscale. Do different colour options work also in greyscale?
- There are no marks allocated for originality of design. Good presentation is expected and poor presentation might lose marks. Content and clarity are far more important than style.
- Simplicity often looks better than complex design.



Header/Footer: Header/Footer: The footer should include your name and course assignment or assessment number (in the “chart note” box). Tick the options to include date of printing and include page/chart numbers in footer.



Insert image or text box: None of the coursework requires the inclusion of graphics in charts. If text boxes are used, their appearance can be controlled using the Box, Border and Line Options dialogue box.



Page setup: This opens a familiar dialogue box to control the paper size, orientation and margins. Coursework should be submitted on A4 size documents.



Save settings: This is a useful and timesaving technique. Once you have changed the various chart options you can save them as a template. If saved as a preferred template, the settings will become the default for new charts, overwriting the previous settings. The create new template option is a safer bet – this saves the settings to a new template file (.fmt) which is saved in the Templates subfolder of the Family Tree Maker 2014 Program Files. If you produce complex templates and work on more than one computer, just copy any template files you create into the same folder on the other computer.

Note: saving settings is different to saving a chart (see option below). This saves just the formatting options, not the data to which they are applied. Name the template sensibly so that it is clear from the name what the template is used for.



Use saved settings: This option allows the use of a template created with previous save settings dialogue. It simply allows you to pick any template saved in the templates folder.



Save chart: Click on this icon to save the current chart (data and formatting). The dialogue box provides a list of previously saved charts, which can be updated (overwritten) by clicking on the name. Alternatively, if a new chart, use or adapt the name suggested by FTM. It is helpful if the name includes the type of chart, name of subject and perhaps the course module it relates to – so for example perhaps “A1 Vertical Pedigree Chart for JP MUDDOCK.”

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Output Options



Print: Clicking on the Print icon will open a print dialogue box, similar to other programs.



Share: Clicking on the share icon will reveal a menu with a number of options allowing you to upload, send or export the current chart. The export options are important and useful, permitting you to save the chart as a pdf file or as an image (bmp, jpg, png or emf).

Pdf files can be produced as multiple pages (if necessary) or as a single page, without restriction of paper size. The latter option is particularly useful for large charts which will be viewed on screen, as the pdf format is easily scaled without loss of clarity and can be moved around on screen. Pdf's can be inserted into other documents (see separate Step by Step Guide). For coursework, we suggest that you choose the 'Export as PDF' option.

Images are best produced as jpg or png documents. Like pdfs these can be inserted into other documents. However, if you change the scale of an image (e.g. reduce it in size) the quality of text can deteriorate substantially. Therefore some care needs to be taken when inserting images into Word documents (again, see the separate Step by Step Guide).

We have focused on the vertical pedigree chart just as an example. The process of using and adapting other charts (and indeed reports) is very similar, although there are a few minor differences in the options available.

Additional hints and tips for coursework

Charts are meant to show an overview, not every piece of information that you have researched. On the other hand, they should show more than just a mere name. Ideally, they should as a minimum show an individual's lifespan, but it is usual to show birth marriage and death facts

separately, with the name of the place where they occurred if there is room on the chart. Pedigree charts should always be shown this way.

Whether additional facts are shown may depend on the precise purpose of the chart. If you are looking at occupations in a family over generations, then of course it would make sense to include occupation. If you are looking at, or even just checking census records, then it would make sense to show census details, etc.

The table on the following page suggests some usual settings for charts created for coursework. This is only a suggestion, and there will be times when it is necessary or sensible to deviate from these suggestions and indeed some assessments and assignments give specific requirements for data to be included.

Removing a person from a chart

Occasionally you may wish to remove a person from a chart without deleting them altogether. This can be achieved by right clicking on their box in the preview panel and selecting the “Remove Person from Chart” option. However, a quirk of FTM is that this option is greyed out if you have selected the book layout. This can be resolved by simply changing to the poster layout, removing the person and changing back to the book layout.

As with other features of FTM, the best way of learning is through practice and experience. It is strongly suggested that you spend some time becoming familiar with creating charts at an early stage of the course.

Recommended chart settings (unless a variation is asked for in coursework):

	Pedigree Chart	Vertical Pedigree Chart	Descendant Chart	Extended Chart
General Settings				
Layout – Book or Poster	Book/Poster	Book/Poster	Book/Poster	Book/Poster
Spacing	As required	As required	As required	As required
Generations	*1	*1	*1	*1
Chart background	✗	✗	✗	✗
Pictures	✗	✗	✗	✗
Centre tree	✓	✓	✓	✓
Empty branches	✓	✗	✗	✗
Generation labels	✗	✗	✗	✗
Siblings of primary individual	✗	✗	✗	✗
Show spouse of primary individual	✗	✗	✓	✓
Boxes overlap page breaks	✗	✗	✗	✗
Items to include				
B,M,D	date, place	date, place	date, place	date, place
Baptism	As required	As required	As required	As required
Other facts	As required	As required	As required	As required
Include private facts	✗	✗	✗	✗
Include sources	✗	✗	✗	✗
Individual numbers	✗	✗	✗	✗
Fonts				
	Default settings	Default settings	Default settings	Default settings
Box, Border & Lines				
	Default settings	Default settings	Default settings	Default settings
Headers & Footers				
	*2	*2	*2	*2
Page Setup				
Paper size	A4	A4	A4	A4
Include blank facts	As desired	As desired	As desired	As desired

Key:

✓ Check

✗ Leave unchecked

*1 Show all required generations (generally everyone you have researched)

*2 The use of Book or Poster will depend on the number of individuals included:

If using Book format, give the date of generation and include page numbers in the footer.

If using Poster format, give the date of generation.