



September 7, 2011

Tonight's Agenda

Genealogy Reports
Person Reports
Relationship Reports
Place Usage Reports
Media Reports
Source Reports
Customizing Reports
Saving, Printing, and Sharing Reports
Creating Family Calendars & Other Custom Reports
Homework Assignment

References to numbered bracket boxes, ie, [1] in each paragraph are shown in each figure located above or below the numbered paragraphs.

Family Tree Maker includes many different reports to help you organize all your genealogy information. Users can select, save, or print different relationship reports, source reports, and media reports, besides a task list before making a research trip. All reports can be customized to include different content and photos. I'm going to recommend the better reports to consider.

Genealogy Reports

Genealogy reports include the older style Ahnentafel report (numbered ancestor table) or the more modern style Register report in both simple and standard formats. The standard format includes more details in a narrative style than the simple format, which has only basic facts.

Tip: I don't recommend the Ahnentafel format as it's rarely used anymore besides being boring to read. I suggest using the other types of genealogy reports such as the Register report or write a customized report using your own family history with photos instead.

The Register report includes all descendants in a timeline format usually by generation plus all the facts and notes you have entered for each individual. Users can enter biography notes, which can be included in the Register report, making the report even more interesting to your family.

Select the [1] Publish workspace at the top to begin your genealogy report as shown in figure one on the next page. Select [2] Genealogy Reports in the left panel and the [3] type of genealogy report that you want to create. Finally, select [4] Create Chart/Report in the right panel.

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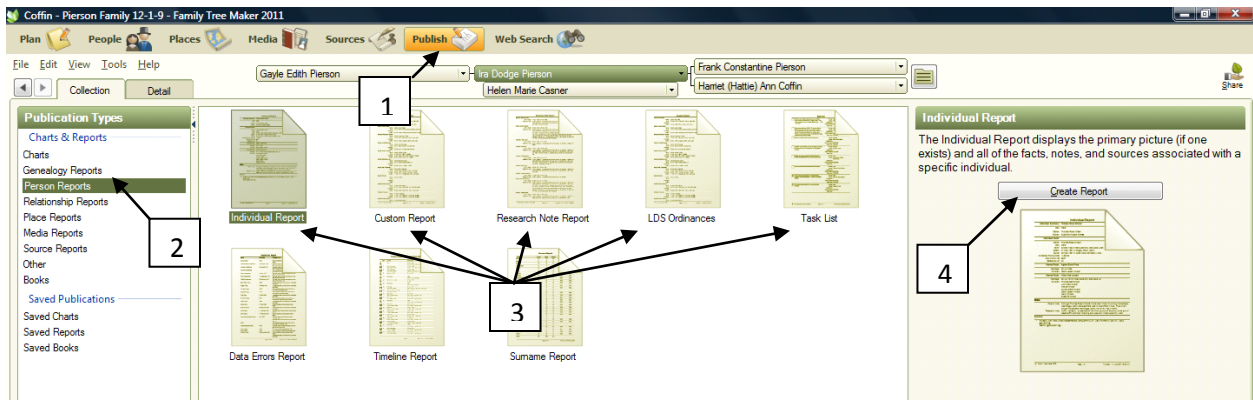


Figure 1. Creating a Genealogy Report

There are nine report categories available in the Publishing left panel to choose from depending on your preference. We're going to focus on several different reports. Besides reports just for individuals, there are many family type reports with many options to customize any of the reports. Several reports allow individual or family photos and the type of facts included, while other reports don't have as many options. The more advanced book publishing option will be discussed at our next meeting in October.

With the selected genealogy report, different options can be included in the preview report screen. In figure two below, I've selected the Descendant (formerly Register) report listing my grandfather. This is a nice narrative report on your ancestor, that is based upon all the facts that you have entered in the People workspace tab.

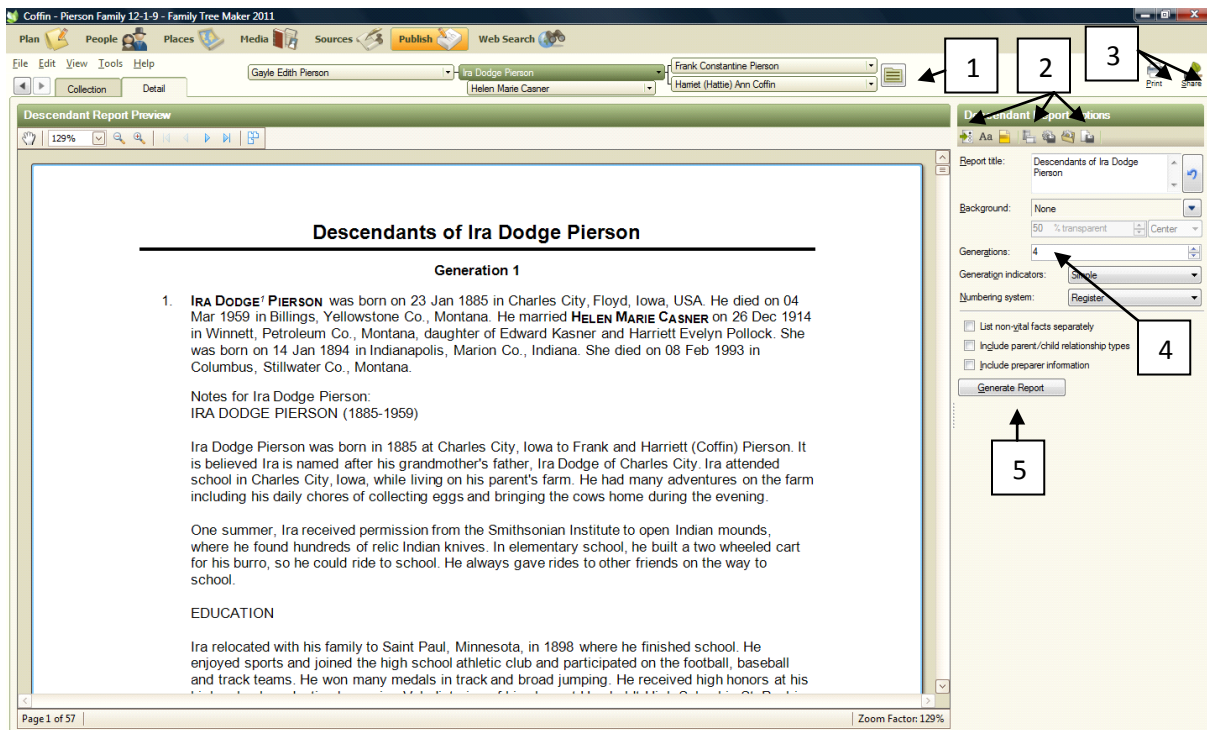


Figure 2. Descendant Report

Users can select any individual by selecting from the [1] Index of Individuals. Users can include [2] different items in the Register report as shown in figure three below, change fonts, or do a page setup, save the report, even reset all modifications back to the original state, and create a title for the report. Users can [3] print or share the report with family members. Sharing options include creating the popular Adobe PDF format for sending the report as an attachment to your relatives. However, be careful to select the correct option on sharing, especially if you don't want your report sent to Ancestry.com for public viewing.

Select the [4] number of generation to be included in your report. Test it so it doesn't look too crowded. Finally, select [5] Generate Report to save a copy into the main FTM folder. Users will likely create multiple reports that can be saved into the main folder for later use. Be aware that users may have over 100 pages of text if all options are selected with four or more generations.

Figure three below indicates the various options to include in your Register report such as listing [1] Facts, [2] Notes, and [3] Sources. The [4] Name Options button allows users to change the format of the individual's name with different title options.

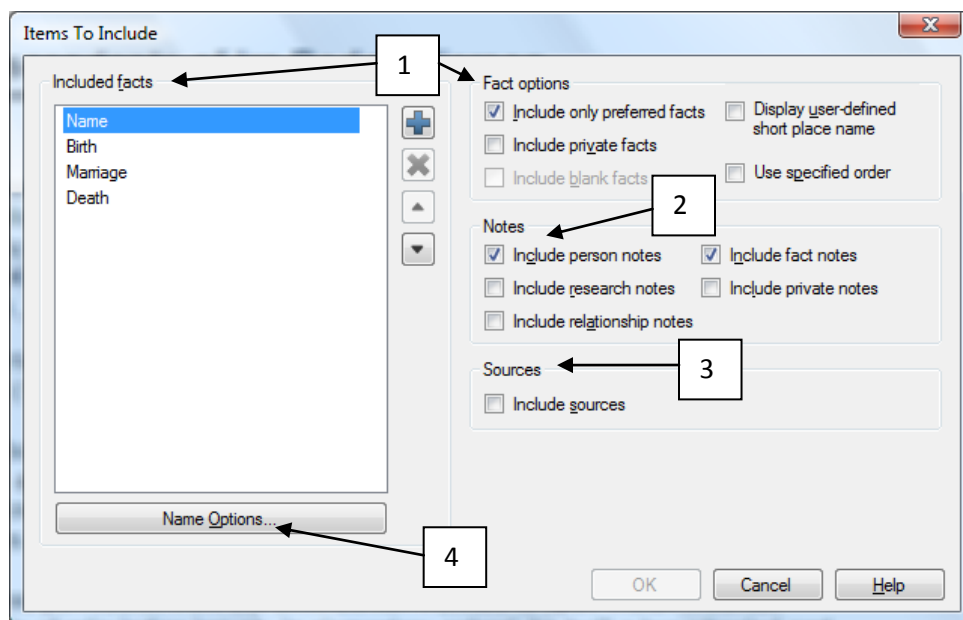


Figure 3. Items to Include

Users cannot edit or modify the text in the actual report. The editing has to be completed in the individual's person notes section in the lower panel of the Person workspace.

TIP: All reports require editing and proofreading to make it a better report that your family can enjoy for many years. Please don't forget this crucial step before sending to your family members.

Person Reports

An Individual report can include a photo of the individual, biography notes, and all the facts created for that individual.

A Research Notes report lists all the research notes that users have created for each individual under the Person tab in the lower panel of the People workspace. Research notes are similar to a tracking journal that the pros use for listing their research activities to prevent duplication of efforts. I recommend you use either a tracking journal or the Research Notes, otherwise you could be duplicating your efforts if you don't keep track of your research activities.

The Task List feature is a great feature to use to help your organization skills for your future research, whether the research is done on the Internet, at the library, or other research facility. By listing the tasks, you'll have a better chance of completing all the required research without making return trips. This report is similar to a tracking journal or log.

TIP: Complete a task list a week or two before visiting a research facility and completing the tasks, otherwise, you'll be rushed and may not obtain all the required research tasks. Carefully review what tasks need to be completed while considering which facilities you want to visit. Simply check off the task list to eliminate any duplication. This is similar to a tracking journal used before computers became available for genealogists.

To enter tasks, select the Plan or People workspace and select the Person tab in the lower panel. Select the Task tab, then select the New icon in the menu items in the same panel. Then complete the Add Task box as shown below in figure four. Users easily [1] add tasks with [2] a due date, [3] select the priority, and [4] whether the task has been completed later on.

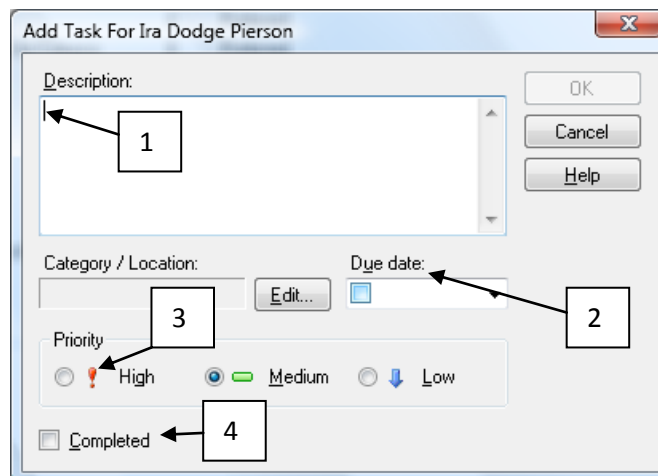


Figure 4. Adding Tasks

After completing the task list, users can review the task list before traveling to the facility for research. See an example of a task list in figure five below. Users can [1] print the task list. Users

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can add various research notes and list the sources as required after [3] completing each task. Users can also [1] share with family members, in case other family members are helping on research by sending them a PDF file attachment via email. Users can also [2] title and save the task list into the FTM folder for later use.

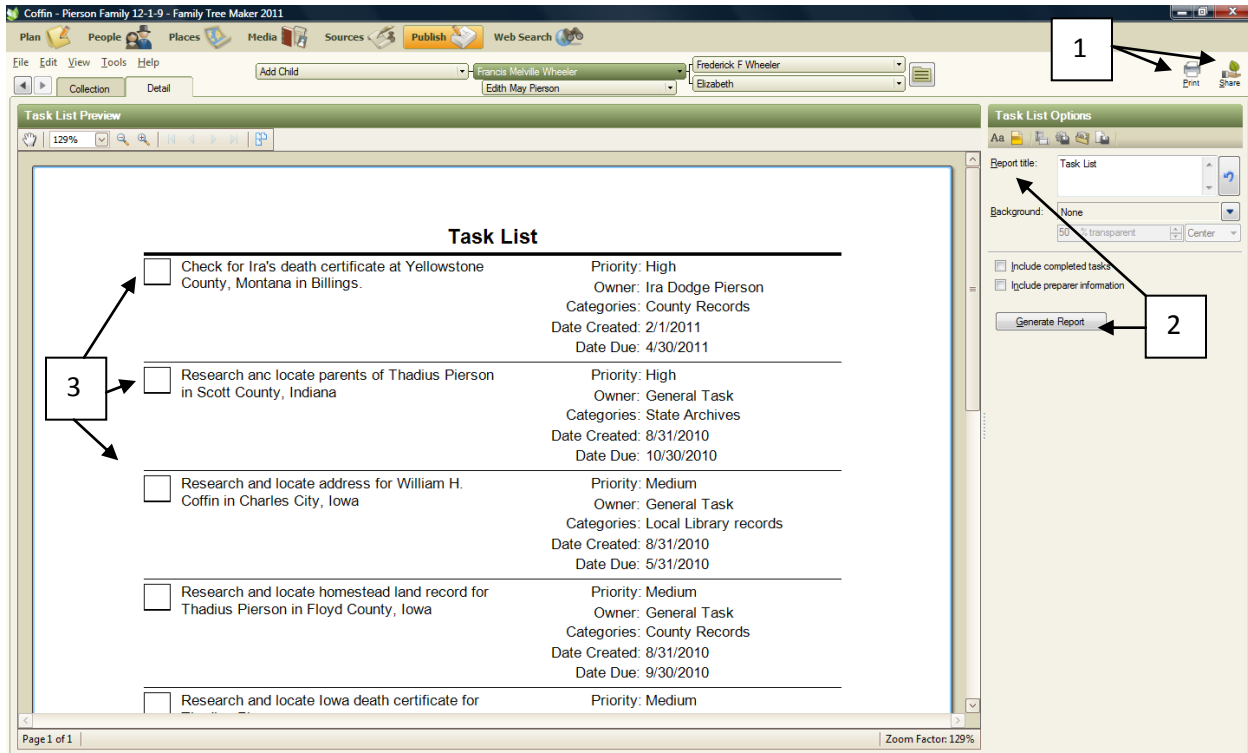


Figure 5. Task List Example

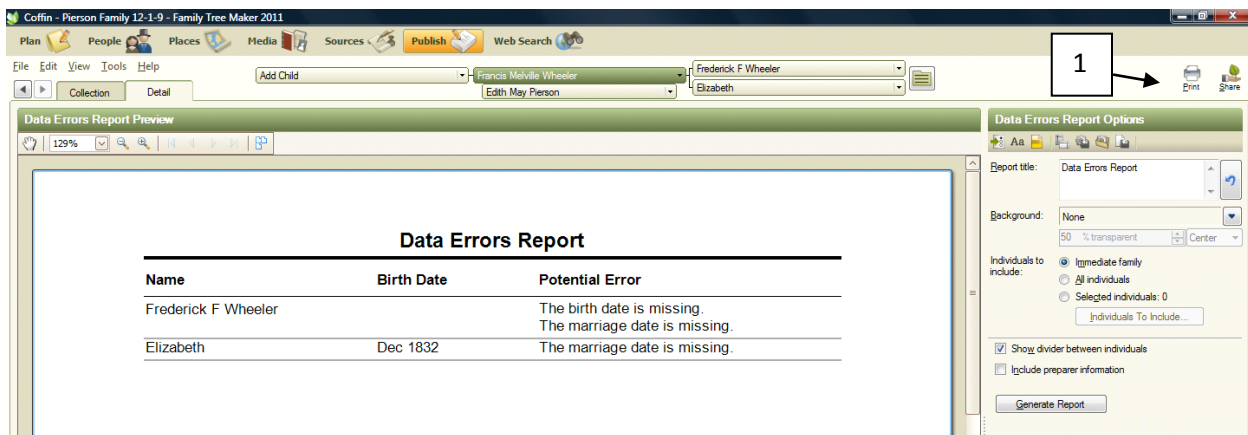


Figure 6. Data Errors Report

The Data Errors report is a nice feature as this report gives you information on missing or incorrect data about your family tree as shown above in figure six. Users can [1] print the Data Errors report by selecting the print icon. Errors are fixed after corrections are made.

Relationship Reports

There are several Relationship reports available from the left panel of the Publish workspace. The Kinship report determines how individuals are related to a specific person. A Marriage report lists all the spouses for any individual with their wedding dates. The Parentage report lists the relationship to the parents such as natural, adopted, or foster child. The popular Family Group Sheet lists all the family members with the required BMD information, locations, and optional photos as shown below in figure seven.

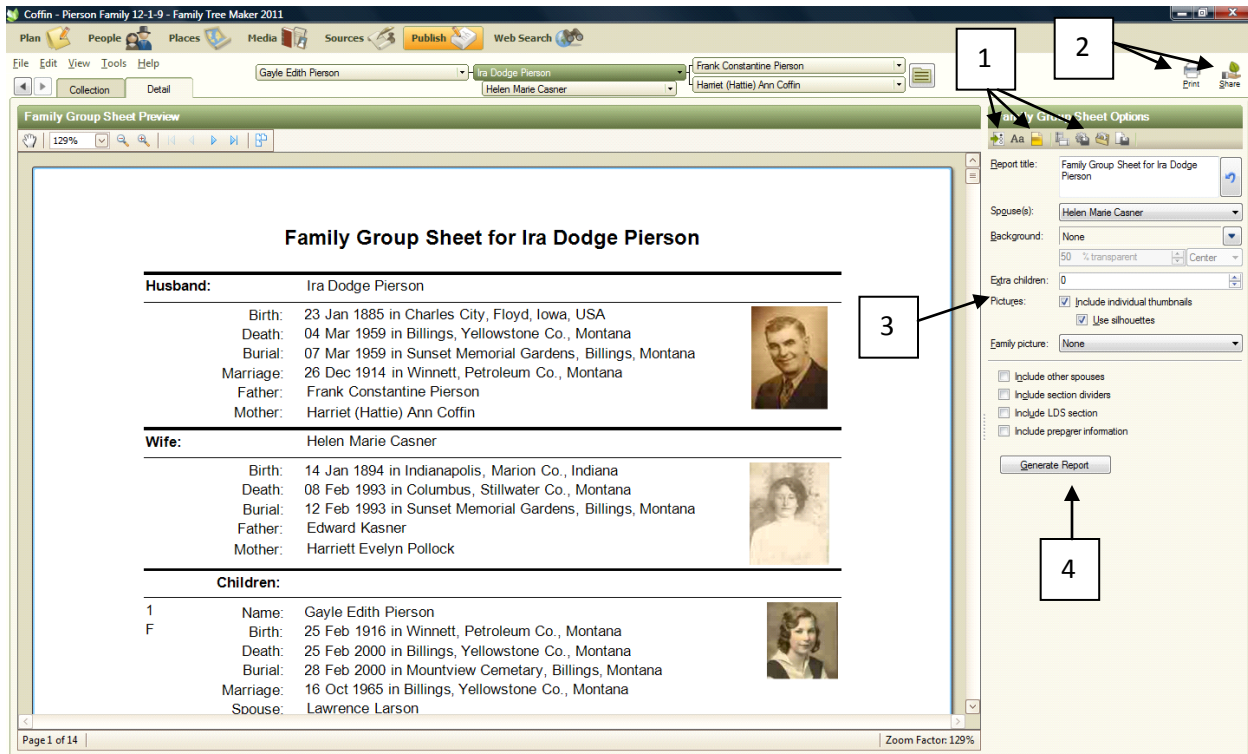


Figure 7. Family Group Sheet

Users can modify what is included in the Family group sheet by selecting [1] Items to include, change the font sizes, do a page setup, or save the report. Additionally, users can [2] print or share the report with family members. If users want to [3] add a photo for each individual by checking Include thumbnail. Users can [4] Generate the Family Group Sheet for saving into the FTM main folder for later use.

TIP: Family Group Sheets are recommended to be included in any family history report or book as it makes a great document for showing family members the important BMD and location information for any ancestor or descendant. Users can include the source and fact information at the bottom by including more items for each individual, but can be a lengthy group sheet with these extra items.

The Descendant report is also popular that lists all descendents of any individual by generation as shown below in figure eight. [1] Users can vary the number of generations and have the same options (except no photos) as the Family Group Sheet.

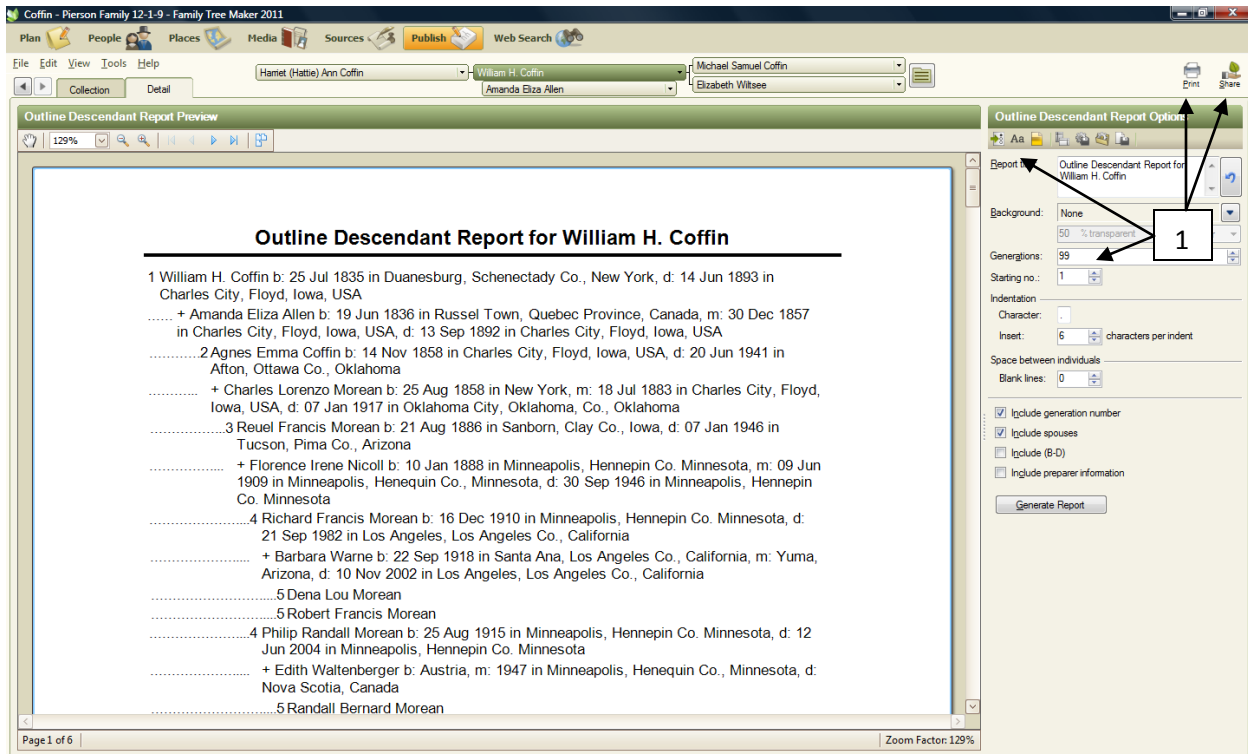


Figure 8. Descendant Outline Report

Genealogists and family historians like the descendant outline as it's easy to view the different relationships by generations in any family. This is an ideal method to include the descendant outline report of several major family lines in a report or book.

Place Usage Report

Although this report lists the different locations users have entered into their family tree of any individual, I'm not sure if it's worth printing or saving, but may have some value as a migration feature for ancestors on the move.

Media Reports

Media reports are ideal when adding photographs to your FTM folder. Users can list each photo individually with a caption, date, and location. Probably the real value of this report is to generate a photo album of any listed family or the entire family tree. Users can also generate a Media Usage report that lists a thumbnail of each photo placed in FTM and associated file information.

Source Reports

Accuracy of your family tree is important. The Source report lists several different reports on your source citations. I'm a big fan of listing sources. These reports will let users know if any sources are missing by carefully reviewing these lists.

There are three source reports. The Bibliography is a summary of all the listed sources for your research. This report can be used for the last section of any report or family history book. The Documented Facts report lists all the events of the source information that you entered for each individual as shown in figure ten below. Users can review this list to find missing sources needed to complete their research.

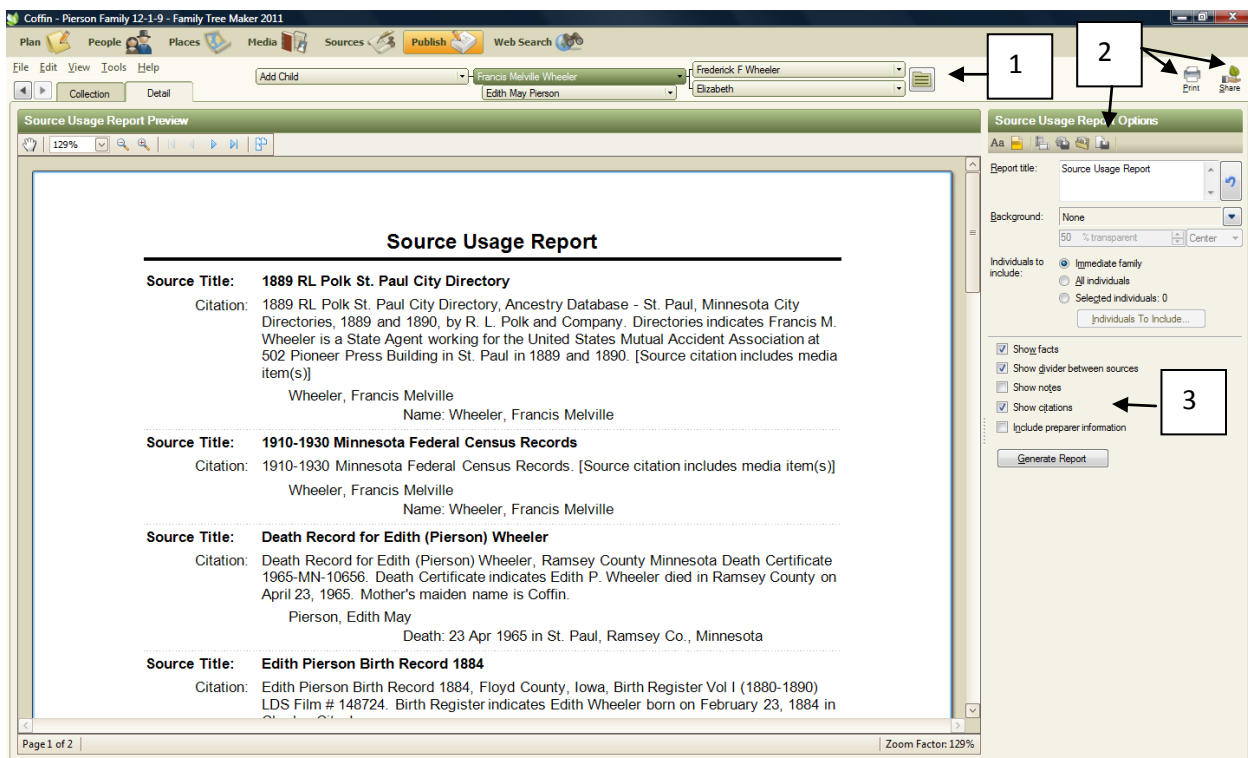


Figure 10. Documented Facts Report

Users can [1] select different individuals to review their listed sources from the Index of Individuals. Users can [2] print, share, or save this source report or [3] show the detailed citations in this report.

The Source Usage report includes all the master sources associated for each individual. Users can track the sources created for all individuals and compare this list with other researchers for accuracy.

TIP: Users should use the source template for adding new sources in the People workspaces by selecting the Person tab and select the Sources tab in the right panel. Select the New icon to add

new sources for any individual. Review the March 2010 handout for instructions on adding detailed sources of your research.

Customizing Charts

Customizing any of these reports is easy to do. Basically select the preferred report, then select the editing tool icons in the upper right panel for changing the title, select various items to include in each individual's report, add divider lines between individuals, choosing which facts to include for any individual, or changing the text or background format of the report.

TIP: If users don't like any of the pre-formatted reports, you can customize any of these reports and add photos and various backgrounds for a more appealing look. If you prefer the more appealing book style for a report, please attend my next class on publishing a report or book.

Saving and Printing Reports

Saving the reports is simple by selecting the save icon in the upper right panel. Users can print the reports by selecting the printing icon in the upper right of each screen.

Creating A Family Calendar or Other Custom Text Report

Family calendars are a nice gift to send to relatives as it is a great reminder of all the relative's birthdays or anniversaries. Calendars can be customized on which family members to include and having most any background photo. Custom text reports are a great tool to customize any report not listed in the publishing section. An internal word processor allows users to write a biography and add photos for a family history book or report. Select Other, then the calendar or text report to begin.

Latest Updates

Don't forget to get the latest FTM 2011 updates. The latest update is 20.0.0.376. To verify, select the Help menu item at top, then select About Family Tree Maker, then look at the version number.

Homework Assignment

Try these new features at home. Generate a genealogy report of your choosing, then list a bibliography to see how many sources you have listed during your research.

This and past handouts are also available in the FTM section on our website at www.lcgsc.org. If you have any problems, email me at FTM@lcgsc.org.

Happy Trails!