

FTM WORKSHOP – 2019

Making Data Entry in FTM Accurate and Easy

Install FTM	Start FTM	Single vs. Merge
Storing Media	Close FTM	Archive Files
Font Size	Menu Choices	Individuals
Facts	Media Sources	Category Tags
Citations	Color Coding	Other Questions

The following questions deserve an appropriate answer for each user of the Family Tree Maker software (or any other genealogy program).

- 1. What should I do to correctly install this program on my computer?**
 - a. Install the application by double-clicking the ftm.exe file (probably located in your Download folder); accept the default installation location (usually the C: drive of a computer)**
 - b. Install the application by double-clicking the ftm.exe file; choose an installation location (perhaps the D: drive of a computer as many devices have the hard-drive partitioned; this places the application outside the drive segment devoted to the OS)**
 - c. Install the application by double-clicking the ftm.exe file; choose an installation location on an external storage device (like a SSD hard-drive); this places the application on a drive that could be used on any other compatible computer system; the downside is that the external drive **MUST** be plugged into your computer for you to use your copy of FTM.**
- 2. How can I quickly and correctly start the FTM program?**
 - a. Open the folder where the program was installed; hover the curser over the file name, right-click and scroll to the drop-down menu choice of “Send to the desktop as a shortcut”**

and left-click this choice; once the shortcut appears on the desktop, that shortcut can be relocated to the spot on the desktop that you prefer.

- b. This same procedure should be followed for your FTM folder for media files.**
- 3. Should I create separate FTM files for each major branch of my ancestral families?**
 - a. Creating separate family files reduces the size of the file where it is stored.**
 - b. Building one family file to include all branches of your file will eventually increase the size of the file in your storage location; the upside is that, from such a file, you can create complex (often confusing) relationship charts between each and every individual that is related to you, especially if that relationship is NOT based upon your blood lines.**
- 4. Where should I store the media files that I collect while researching my related families?**
 - a. Photos, census images, birth certificates, death records, marriage documents, probate documents, etc. should all be saved to the SAME media folder.**
 - b. All documents used as media sources can be saved as images or PDF files (images such as JPEGs lose quality the more often that they are opened for view).**
 - c. Using images and PDF files (or MS Word or Notepad files) will enhance the quality of the research as each one used will be “proof” of a fact (or set of facts).**
- 5. How do I quickly and correctly shut-down the FTM program after I have completed my work session?**
 - a. The safe and quickest method to close the FTM program is to place your curser over the “X” in the upper right hand corner of the program window and then left-click the “X” when it has “turned” red. There are other (a bit more**

convoluted steps) ways to shut down your FTM work session.

- b. The more records you eventually place in your family file, the longer it will take for the file to close (and also automatically create a backup file of your work).**

6. How often (and where) should I archive my FTM files and media sources?

- a. After finishing each and every work session, your FTM file (along with the appropriate backup copy) should be saved to an **EXTERNAL** storage device (some authorities recommend such archiving be done to **THREE** separate external devices with the placement of one of the external devices in a safety deposit box!).**

- b. Any newly collected media sources should also be saved to the same external storage device(s). This means that the media folder you have on your computer should have the same file name on your external device to assist in easily locating it on that device.**

7. Can I change the size of the font used by my computer and/or FTM to make it easier to see the text that I want to enter into my family file?

- a. The font and icon size seen on your desktop can be set at **100% (default setting)**, **125% (medium setting)**, or **150% (larger setting)**; resetting to sizes larger than the default can rearrange your shortcut icons that you had previously placed on the desktop, especially if you have a large number of shortcut icons.**

- b. If you chose to set the font size to **125%** or **150%**, the size of the text seen in the FTM display will increase, making it easier to view and make edits to any text. However, the display segments will appear larger and may create some need to adjust your understanding of the FTM window parts.**

that appear can be **CUSTOMIZED** based upon your preferences.

iv. Each of these areas can be resized or “collapsed” for easier use of the **TREE** view.

e. The **PERSON** view in the **PEOPLE** segment has the following areas for making additions, edits (or even deletions) to your **FTM** information:

i. A small pedigree chart for the current person is centered at the top just below the **MAIN MENU**.

ii. The largest segments are on the left side of the window; at the top is the work area entitled **INDIVIDUAL & SHARED FACTS** and at the bottom is **PERSON** work area divided into **Notes, Media, Web Links and Tasks**; the bottom portion can be resized or even collapsed to increase the viewing area for **INDIVIDUAL & SHARED FACTS**.

iii. On the right side of this window is the name of the person currently chosen, that person’s relationship to the **Home Person**, and entry fields for the fact that is currently highlighted in the area of **INDIVIDUAL & SHARED FACTS**; this area can be resized. The **OPTIONS** button allows you to set the **TABS** you want to use for your facts; **TAB** choices include **SOURCES** (for citations), **MEDIA**, and **NOTES** (best used for additional notes for the specific fact in focus).

9. How do I add, edit or delete an individual for my **FTM** database?

a. The many ways to add a new individual in the **PEOPLE** window include:

i. Use the drop-down menu for the **PERSON** item in the upper sub-menu (there are five different choices for **Add Person** who will likely be related to the individual who is currently your focus).

- ii. **Place focus on an empty box in the PEDIGREE segment and add the name of the new individual**
 - iii. **Add children for the couple currently shown in the PEOPLE window by:**
 1. **Using the submenu path of Person<Add Person<Add Child**
 2. **Add the new child by using the Marriage section below the names of the husband and wife**
 3. **Add the new child by left clicking the “down arrow” found at the left corner of the husband/wife section of the Pedigree segment of the window (this choice allows you to avoid the need to scroll the list of children seen below the names of the husband and wife).**
 - iv. **To add an additional spouse for the person currently in focus, you have the following options:**
 1. **Use the submenu path of Person<Add Person<Add Spouse**
 2. **Left-click the small square (showing a body profile) to see the drop-down menu choice of Add Spouse**
 3. **If you currently have one or more spouses for a person, you can set the spousal order by left-clicking the same small square and then following the prompts.**
- b. To edit the name of a person already in your FTM database, place focus on that person by:**
1. **Using the Find box near the top of the Index on the left side of the TREE window; type in the name of the person whose name you wish to edit (usually by typing the surname, first).**

below the “Personal Information” section of the INDIVIDUAL & SHARED FACTS portion of the PERSON window.

- c. It may be necessary at some point to delete a fact already set up for an individual; simply place that fact in focus (i.e. it is highlighted); once the fact is highlighted, simply click the RED X just below the small pedigree chart at the top of the PERSON window.**
- 11. How do I create images or PDF files of the many documents that I will eventually find when researching my various family lines?**
- a. Camera and/or cell phone photos must be transferred from the device to your FTM Media folder; this is most often completed using the storage chip from your camera or phone.**
 - b. PDF copies of book pages, newspaper articles, obituaries, etc. are easily created by using the photocopier located in the LSCGG office; such PDF files are stored on your own flash/thumb drive and then transferred to your computer where you should store the PDFs in the FTM Media folder; each of these PDF creations will need to be RENAMED as they are all created by the photocopier with the file name of a series of digits.**
 - c. PDF files found on any of the LSCGG databases (birth, marriage, obituary and/or death) have already been given a file name that reflects the contents of that specific PDF file; these PDF files can be saved from any one of the LSCGG workstations to your own flash/thumb drive so the files can then be saved to your FTM media folder.**
 - d. Records found on websites such as Ancestry.com and FamilySearch.org need to be saved to the computer that has access to these websites; once saved to the work computer, the files can then be printed as PDF files and/or**

images. Transfer the saved files to your own computer by using email or your own flash/thumb drive.

- e. Images and/or PDF files that you store in your FTM Media Folder are used to visually document any specific fact(s) for an individual found in your FTM database; Place the image or PDF file for a fact by clicking the NEW (Add Media) submenu button of the MEDIA tab for that specific fact; once placed in this location, you should then create a citation in the SOURCES tab for that specific fact; if you then “copy” that citation by left-clicking the Copy Source Citation button, you can use the same citation for documenting many other related facts for the individual or his/her family. This series of steps should be much easier to understand when a demonstration is shown to you.**
- 12. What are “category” tags for Media Sources (sometimes also called META tags) and how and why should I create such?**
- a. As the number of media sources that you store in your FTM database grows over time, you will eventually want to quickly locate a particular media source for full screen viewing. This can easily be done if each media source was assigned a CATEGORY/META tag; this assigning is best done at the time that you use a particular file as a new media source for an individual fact.**
 - b. After following the steps outlined in “11 e” (see above), left click the PENCIL icon (Media Detail); when that new window appears, click the EDIT button on the right side of that window; a pop-up sub-window (Categorize Media) appears; check-mark one or more of the tags that appear in the list of Categories; then left-click the OK button; to return to the PERSON window, click the red X in the upper right corner of the Media Detail window.**
 - c. A CATEGORY/META tag assigned to a media source will allow you to search and filter your entire set of media**

sources; this step is completed by (1) using the MEDIA button in the upper main menu, (2) when the Collection window appears, change “List By” to “Media Category,” and (3) highlight the media category item of choice to quickly sort through your entire set of media sources.

- 13. Why and how should I create and/or use a fact citation?**
- a. A decently created citation provides solid evidence that a fact (or set of facts) is valid. Such citation adds “meat to the bone” of your on-going research efforts. And when it is time to share part of your research with others by emailing a chart, report, or book (items easily created by the FTM program), such citations can be added to these shared documents.**
 - b. Any and all facts for an individual you record in your FTM database should be cited with at least one source; my preference is to find/create ■ three citations for each fact that I record.**
 - c. A citation is most easily created in the PERSON window; highlight the relevant fact related to a document in your Media Folder; open the tab labeled “Sources”; click the submenu item that reads “New”; when the sub-window named “Add Source Citation For” opens, follow the next steps:**
 - i. Pick a current “Source Title” for your new citation; you can even create a new source title that will be added to the current list of source titles in your file.**
 - ii. Place relevant text in the middle box identified as “Citation detail” (see items d, e and f that follow)**
 - iii. Add any clarifying text to the bottom box identified as “Citation text.”**
 - iv. Be sure that the button that reads “Include in reference note” is check marked.**
 - v. Finish by clicking the OK button.**

- vi. **The new citation can be used to validate more than one fact by highlighting the new citation, clicking the icon with the overlapping sheets of paper (Copy source citation), highlighting a different fact for the same individual (or even other family member), then follow the path of New<Paste Duplicate Source Citation that is located on the right side of the current Person window.**
 - d. **To create a citation from any source found on FamilySearch.org, find a valid family document; (1) click the “View Record Details” icon, (2) click the Document Information selection, (3) double-click the text seen below the “Citing this Record” text (all pertinent parts of the citation should be highlighted), (4) do a Ctrl C keystroke to copy the highlighted words, and (5) do a Ctrl V keystroke to paste the text into a new fact citation (Detail Field) that you are creating for your FTM file.**
 - e. **To create a citation from any source found on Ancestry.com, find a valid family document; (1) click the View Details (usually the title of the new source), (2) scroll down the browser window until you see the section entitled “Source Citation,” (3) highlight the suggested citation text, (4) do a Ctrl C keystroke to copy the highlighted words, (5) do a Ctrl V keystroke to paste the text into a new fact citation (Detail Field) that are you are creating for your FTM file.**
 - f. **Create your own preferred citation for any documentary source and paste the text into a new fact citation (Detail Field) that are you are creating for your FTM file.**
- 14. **How can I quickly identify individuals in my FTM database that have a blood relationship to me?**
 - a. **You can identify all direct ancestors of yourself by using the color coding feature of FTM 2017.**

jfkeating@sbcglobal.net MY VERY BEST WISHES TO YOU IN YOUR
FUTURE RESEARCH EFFORTS IN BUILDING YOUR OWN FTM
DATABASE!!!

Website Resources for Genealogical Research

FREE USE

FEE BASED

Free Use:

<http://www.cyberdriveillinois.com/departments/archives/databases/home.html> - this website has changed URL paths several times in the past - Databases are maintained by the office of the Illinois Secretary of State

<http://wc.rootsweb.ancestry.com/> - this website offers access to family researches done by private citizens; most of these records are not sourced RootsWeb/FamilyConnect is now owned by Ancestry.com but is still free for public use.

<http://www.findagrave.com/> - this website offers access to burial information posted by individuals concerned with preserving and making available to the general public this type of information. Information can be used as "hints" as to what to research about a family member as far as identifying a "paper trail."

<http://www.50states.com/abbreviations.htm#.UToHeleyl6w> - a handy list of abbreviations of the names of states for your making of notes and citations.

<http://chroniclingamerica.loc.gov/newspapers/?state=Illinoisðnicity=&language=eng> - the list of Illinois newspapers currently available in a searchable, digitized format; site is part of the United States Library of Congress.

<http://www.nps.gov/civilwar/soldiers-and-sailors-database.htm> - website maintained by the United States National Park Service; allows access to lists of those who were in the many various military units that served during the American Civil War; also has information regarding the history of each military unit.

<http://genscriber.com/genapps/> - the homepage of this website states "GenScriber is a transcription editor for census records, church records, birth, marriage, baptisms, burials, index records, etc ."

<https://familysearch.org/> - the homepage of the genealogy project supported and organized by the Church of Jesus Christ of Latter-day Saints; free access to transcriptions and/or document images is available with the creation of an account.

<https://archive.org> - Internet Archive is a non-profit library of millions of free books, movies, software, music, websites, and more. A useful site to locate local and county histories that are now in the public domain; most of these histories can be searched; you can also save a PDF copy of a preferred history to your own computer.

<https://books.google.com> - this website provides digital copies of books that are now in the public domain; most of these books can be searched for specific family surnames; to use the homepage, just type into the search field a history that you hope is available.

<http://www.idaillinois.org> - The Illinois Digital Archives (IDA) was created in 2000, as a repository for the digital collections of the Illinois State Library as well as other libraries and cultural institutions in the State of Illinois.

Free Basic Use with Expanded Use with Fee Payment:

<http://www.mocavo.com/> - a fairly recent addition to the world of Internet genealogical research; available in a free, basic package as well as a fee-based "Gold" membership

<http://www.lscgg.org/> - website of the La Salle County Genealogy Guild, a volunteer based organization whose history began in 1979; useful for tracking a paper trail of those ancestors who lived part or all of their lives in La Salle County, Illinois.

http://www.fold3.com/choose-a-plan/?xid=1156&gclid=CKu2p_jz-cACFedzMgodfS4AsA - available options for use of this website that is devoted to allowing access to a collection of original military records.

<http://search.ancestry.com/search/group/usfedcen> - section of the website maintained by Ancestry.com; this service will allow free access to "public trees" as well as the United States Federal Census for 1880 and 1940. "Public Trees" posted to this website are generally not documented.

HOW TO EXTRACT SEVERAL PAGES FROM A MULTI-PAGE PDF FILE

When you want to provide a substantial portion of a hardcopy resource to use as evidence for any individual you have entered into your database, you can either transcribe that large body of text and type it into the NOTES field for a fact or family, or you can create a PDF copy of that large body of text to use as a MEDIA SOURCE.

In creating a media source to use as a basis for a citation to support a fact(s) that you use in your FTM database, you might find that you would like to use a small number of sequential pages from a PDF file that could be over 100 pages in length. Such might very well be the case when you find documentary evidence in a county history book that you have downloaded from either <https://books.google.com/> or <https://archive.org/>

The easy creation of such a source requires that you have one of the following applications installed on your computer: (1) Adobe Acrobat Pro or (2) Adobe Reader DC. The first of these applications is very expensive, though very powerful. **The second can freely be downloaded** from a variety of websites. A copy of the installation file for this second program can be found in the folder named "Free Applications and Histories." Such a folder has been placed on each of the LSCGG workstations.

If you decide you want to have this capability of extracting several pages from a multi-paged PDF file, you would need to do the following:

1. Place a copy of the folder (and its contents) on a flash/thumb drive.
2. Transfer the folder from the flash/thumb drive to your own computer.
3. Open the folder to view its contents.
4. Double-click the file entitled "readerdc_en_ka_crd_install"
5. Follow the prompts to install a copy of Adobe Reader DC to your own computer.
6. After opening a copy of the county history of choice, search the digital history to find the page(s) that provide evidence about one of your FTM individuals.
7. Click the Print command or icon to open the PRINT screen.
8. Identify the page range that you wish to "extract" from the county history.
9. Click the PRINT button (or OK button) to print a PDF copy of the pages that you selected to use as a media source.
10. When the SAVE TO screen opens, navigate to your MEDIA SOURCES folder that you had constructed at an earlier date; create a name for the extracted file that matches the name of the individual to whom this page set refers.
11. This small page set is now ready to be used as a MEDIA SOURCE for your FTM database.