Family Tree Explorer
Premium

Manual

Contents

1. INSTALLATION, ACTIVATION, START, UPDATES, PROGRAM VERSIONS

a) Installation

Before you install **Family Tree Explorer** on your hard drive, make sure your system meets the specified minimum requirements.

1. Insert the DVD-ROM into the DVD-ROM drive of your computer or unpack the installation files from the archive.

2. When launched from DVD, the installation normally starts automatically. Please follow the instructions on the screen.

3. If the installation does not start automatically (e.g. because the auto run function of your DVD drive is deactivated), please click on the "**Start**" button of Windows, after that enter "**D:\setup.exe**" in the input field you see and press the ENTER key. You may need to replace the drive letter with your DVD-ROM drive. After that, please follow the instructions on screen.

Note:

In addition, the product must be **activated**. You will find details on the procedure in the following section **Activation**.

b) Activation

You can only use the program after you have performed the activation.

Activation is an anonymous process, and no personal data is sent over the Internet to anybody.

How to activate the product:

1   After a successfully implemented installation, a dialog box opens before the program start, in which you can perform the activation.

2   In the activation dialog box that opens, you must enter the product key (serial number) into the input field.

Note:

The product key (serial number) can be found on the inside of the DVD box, printed on the DVD, or in case the program was downloaded, in the confirmation message by email where you normally also receive the download link. Depending on the selling company, it is also possible that you receive two separate email messages.

c) Start and updates

Each time **Family Tree Explorer** is started, the splash screen appears with the program name and the details of the version (it can be dimmed with a mouse click), followed by the program's **Start Wizard**. In this separate window, you will find the most often used options for the program start of **Family Tree Explorer**:

Open last selected family - This option is only active if you had already opened a family in **Family Tree Explorer**.

Open saved family - Use this option to open a family saved in **Family Tree Explorer**.

Import a new family from a GeDCom file - You must select this option if you want to use a family created in other family tree programs or if you just have a GeDCom file.

Create a new family - Use this option to create a new family.

Do not choose any of these options - When you click on this button, you open the program window of **Family Tree Explorer** in an "empty" state (without opened family data). You can then select your next tasks using the active buttons in the program window.

By clicking in the empty check box "Do not show this wizard again", you will permanently hide the display of the program's Start Wizard when starting **Family Tree Explorer** in the future. You can also permanently switch off the program Start Wizard at each program start through the program options. To do so, under the **Tools** menu open **Options** and remove the checkmark from the first check box at the top of this options window under "General settings".

When the program starts, **Family Tree Explorer** will automatically search for **Updates** that are placed on a special website for download. From time to time, **Family Tree Explorer** will have these kinds of updates, for example, to optimize details for certain features. Once an update is available, you will see a message on the screen when you start the program. Confirm it to start the update process automatically.

You can choose to permanently disable the update message, but you will no longer receive automatic updates. You can undo this decision using the program options. To do so, under the **Tools** menu open **Options** and under "Display and updates" click in front of the box "Always show notification for new updates".

Please also note that your PC must have a functioning Internet connection to run updates.

d) Further information on Family Tree Explorer

You may possibly find a file named like *FTE_Important Information.doc* on the DVD-ROM or in the downloaded archive. This file includes potentially available changes of this program guide and other recent notes on **Family Tree Explorer**.

e) Program versions

Family Tree Explorer is available in three versions: *Premium*, *Standard* and *Viewer*. The main differences of the three versions are listed in the **table on the following page**.

Premium offers the most comprehensive set of features, while *Standard* is a version with reduced functionality.

Viewer is a freeware edition based on Premium. It does not have any features to create a family, to enter, edit and save personal data or to use GedCom files to import and to export family data. Neither does it have a Start Wizard. The core scope of the Viewer is described in chapter 8.

Comparison of **Family Tree Explorer** versions (main differences)

FEATURE	Premium	Standard	Viewer
General			
Create a family, enter, edit, save personal data, add media and other files	+	+	-
Use GedCom files to import and to export family data	+	+	-
Show anniversaries	+	-	+
Archiving family data	+	-	-
Send email with family data (attachment)	+	-	-
Create/Edit (special features)			
OpenStreetMap connection	+	-	+ (*)
Family Crest	+	-	+ (*)
Display			
Change background in program window	+	-	+
Diagrams			
Fan	+	-	+
Relations	+	-	+
Time Line	+	-	+
Illustrated Designs (number)	19	11	19

FEATURE	Premium	Standard	Viewer
Save diagram as PDF or image	+	-	+
Reports			
Family	+	-	+
Biography	+	-	+
Family Statistics	+	-	+
List of Addresses	+	-	+
Short List (by location)	+	-	+
Save report as PDF or RTF	+	-	+
Tools			
Search (parameters per data field)	2	6 - 8	6 - 8
Album	+	-	+
Coherence Check	+	+	-
Annotations for family	+	-	-
Lock/Unlock mode	+	-	-
Extras			
Viewer application	+	-	+ (only)
Sample Family	+	+	-
(*) Display only (if respective data or image is present in loaded family)			

2. THE MENU LISTS OF THE PROGRAM WINDOW
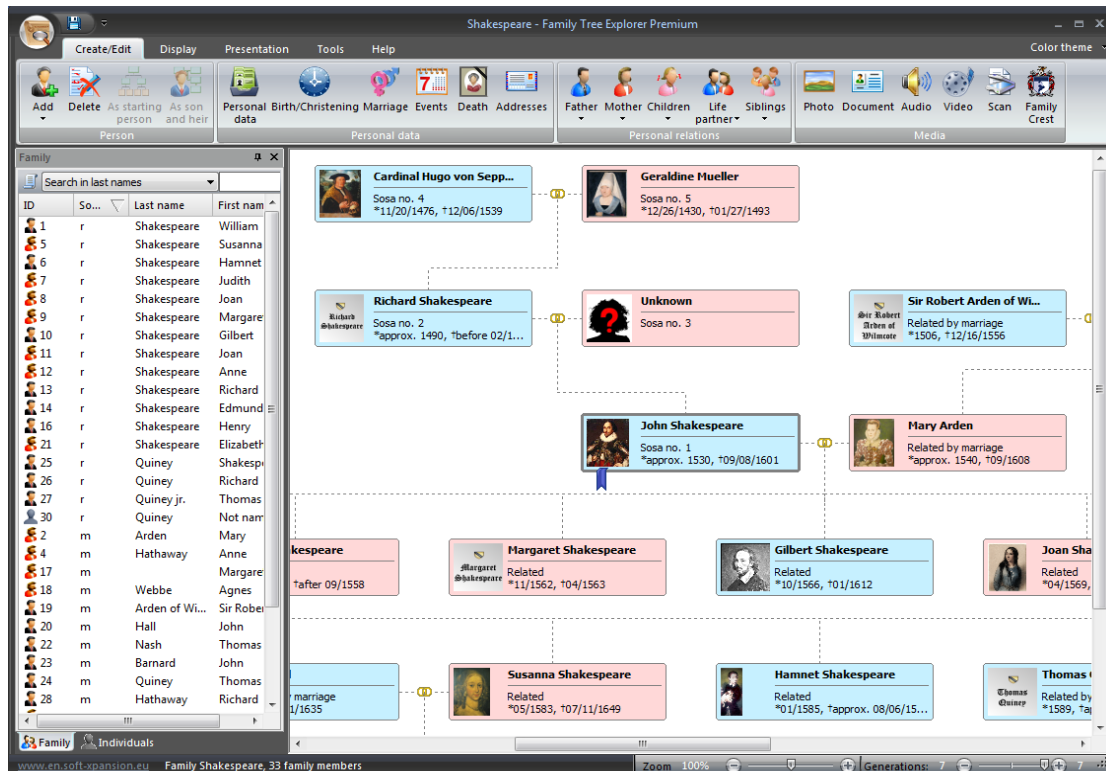
*The program window of **Family Tree Explorer***

There are three different menu lists at the top of the program window of **Family Tree Explorer**. The top bar consists of several small icon buttons; this is the **Quick Access Toolbar** for important functions of the program **Family Tree Explorer**.

*The menu lists in the program window of **Family Tree Explorer***

Directly below you will find the **Main Menu Bar** with a total of six labeled buttons, through which you can open the individual functional areas (or tabs) of **Family Tree Explorer**: **Create/Edit**, **Display**, **Presentation**, **Tools** and the "?" **Menu**; the sixth button is used to select a **color style** for the entire program window of **Family Tree Explorer**.

The third menu bar is the **Ribbon** and its content changes depending on your current selection in the main menu bar. Here you will always see the buttons for the most important functions and options that belong to the currently selected function area.

The Family Tree Explorer Center and the Quick access toolbar

Seen behind the small icon button with the program icon as well as a small arrow to the left of the button **Create/Edit** in the main menu is the so-called Family Tree Explorer Center, where you can at any time find the most important functions for your work with **Family Tree Explorer**. It contains the options to **Open an already existing family** as well as to **Create new family**. You can also find the buttons to **Rename a family**, for the **import** and **export** function as well as to **save**, to **archive**, to **print** and to **send** family data (as an attachment to an email). Another button opens the **Options** of **Family Tree Explorer**. Finally, you can also **close Family Tree Explorer** through the corresponding button.

You can also alternatively activate some of the mentioned options in the Family Tree Explorer Center quickly through the small icon buttons, which can be seen in the **Quick access toolbar** directly above the toolbar for the center. You can customize this toolbar individually: click on the small arrow button at the far right of the bar and select the program commands and functions that you want to include in the quick access toolbar from the menu that opens. The toolbar can optionally be **above or below the ribbon** (the main menu and symbol buttons). You can also **minimize** the ribbon so that it is no longer visible in the program window.

3. IMPORT OF FAMILY DATA FROM OTHER FAMILY TREE PROGRAMS

You can add and edit family data in **Family Tree Explorer** that you created in other family tree (genealogy) programs as you please. This is performed by using the GeDCom file format.

The transfer of already created family data from another family tree program has to be started with the GeDCom export function in other programs (if available) and subsequently with the import function of **Family Tree Explorer**. In other words, it is obligatory that the other program has an "Export to GeDCom" functionality to be able to import family data in **Family Tree Explorer**.

a) Export from another family tree program

When preparing the data export, follow the instructions in the program guide or in the manual of the other genealogy program. In particular, make sure that you activate options for the export of media files (if available). Also make sure that you do not have activated any settings in the Options dialog that prevent the export of certain personal data (e.g. of people still alive). After all of the relevant preferences are taken into account, you can start exporting the family data via GeDCom export.

b) Import of an exported file in Family Tree Explorer

As soon as the other genealogy program has correctly generated the export file with your family data (file with file extension *.GED*), and potentially the family's album, you can import this data in **Family Tree Explorer**. Proceed as follows:

1) Open the **Family Tree Explorer Center** and select the **Import** option.

2) In the "Import GeDCom file" dialog box that opens, click on the small symbol button with the floppy disk to the right of the empty input line. In the Explorer window that opens, select the GeDCom file (file format *.GED*) that you would like to import.

3) If the file to be imported has a format type that **Family Tree Explorer** does not support, a corresponding message appears on the screen. Change the default selection of the format type in the list box "Encoding".

4) Under "Status report", select whether the program reports the results of the import in **short form** or in **advanced form** on the screen. The short status report contains a detailed **list of statistical data** for the imported family. The advanced status report also contains detailed **warnings** for individual data fields of the imported family. It is recommended to use the **advanced** option because it may occur that values entered in certain data fields cannot be imported in **Family Tree Explorer**. This is usually due to a special assignment of the data field with a deviating GeDCom tag in other family tree programs. In such cases, the extended status report provides detailed information about the non-imported value of the data field so that you can quickly and easily reconstruct the data in question (by manually copying it from the other genealogy program).

The following important GeDCom tags containing values that you enter may be listed in the **advanced** status report:

UGNM - given name or nickname

SRCH - research location for sources

FILE - files (mostly media files from the album of the family)

A comprehensive list of explanations for additional tags, according to GeDCom specification 5.5, that maybe are used by other family tree programs can be found on the Internet at the following address:

http://wiki-en.genealogy.net/GEDCOM-Tags

If the warnings contain entries for missing files, you will find them separately under "Missing Files". If you have a list of media files that you have assigned to the family, then you must provide all of these files in exactly the same directory structure that is displayed in the warning. If necessary, copy the listed files to the directory required by the program.

5) If you have started the import process while currently having a family opened in **Family Tree Explorer**, you can set the data of the (new) family to be imported **in the current family** or **as a separate, new family**. In case there is no family currently open, these two options are not available. The family to be imported is then always created as a new family.

By importing data into a currently open family, you can, for example, add a new branch to the open family. After the import, you must then carefully check whether the imported family data is set in the correct familial relationship with the people in the existing family. You may have to make manual adjustments here.

6) Start the import process by clicking on the **Import** button.

7) During the import process you will see the progress in a small window.

Please note: The import of very extensive family data in **Family Tree Explorer** can take a long time (several minutes). It may appear that the program is "frozen"; this however is not the case, just wait a while; the import process is taking place in the background.

8) After successful completion of the import process, you will see a "GeDCom information" window. This window displays all the abnormalities that were recognized during the import process in **Family Tree Explorer**. In the upper part of the window ("GeDCom file header"), there is information about the imported GeDCom file itself. However, the information in the lower part of the window ("Status report") is more important. Here you can see messages about problems affecting data import, such as, "** Import finished. Some data could not be imported**." If this is the case, check the statistics for the imported family in the status report: click on "Statistics" in the lower part of the report window; it opens a detailed list of statistical data about the imported family. Check the specified number of imported data, in particular of people and media. If the figures here do not correspond to the data in the initial family, there have been irregularities or even data losses during the import.

Click the **OK** button to close the information window.

9) In the last step of the import process, the imported data is then prepared for display in **Family Tree Explorer**. This step can also take some time. During the process, you will see a small window that lists the tasks that are currently running. The family data is also reviewed immediately after the import by the **Coherence Check** (detailed description in section 6. d) for possible inconsistencies.

Please note: The import of very extensive family data in **Family Tree Explorer** can take a long time (several minutes). It may appear that the program is "frozen; this however is not the case, just wait a while; the import process is taking place in the background.

10) At the end of the import process, the import report is displayed in a small window with **Error details.** After confirmation of this report a coherence check is performed. Its result can be saved by clicking **Save protocol** as a text file (file format *.TXT*), e.g. on your hard drive. This is important because you should review all the conflicts contained in the report for the imported data. The report contains all data problems that are not consistent with the limits (criteria) on which the coherence control for certain data is based. Use the saved protocol to correct all data that was actually entered incorrectly in the imported family. However, not every data problem contained in the protocol is necessarily a "true" (data entry) error; often soft events (such as late maternity or death at old age) actually differ from the limits laid down in the coherence check.

11) Then the data of the imported family is displayed in the **Family Tree Explorer** program window. The person selected by default, whose data box is now visible, is the root of the imported family (with the Sosa number 1).

Anniversaries are displayed when family data is opened. By default, each time a family is opened in **Family Tree Explorer**, a small separated window displays an **Overview of events in the concerned family** which lists anniversaries on the current calendar day (according to the system time on your computer). These anniversaries refer exclusively to birthdays, dates of death and wedding days, which are documented in the concerned family. You can permanently disable the standard display of this year's anniversaries for each family by clicking on **Options** (program area **Tools**) to disable the corresponding check box.

Even if for the current calendar day there is *no* anniversary with respect to the events in the open family, you will receive an appropriate message when opening the family by default. You can, however, permanently deactivate this message by clicking the check box at the bottom of the message window "Show message even if there are no anniversaries today".

For the further processing of the imported family data in **Family Tree Explorer**, please read the notes on the individual program functions in the following chapters, which describe them for a newly created family.

4. CREATE A NEW FAMILY IN FAMILY TREE EXPLORER

You can find all buttons and input forms for a new family to be created on the **Create/Edit** tab. Open this program area by clicking the **Add** button in the main menu bar. Alternatively, you can also use the button **Create a new family** in the program start wizard or **New Family** in the Family Tree Explorer Center.

a) Entering data

Name and location of the family data

Firstly, you must have a unique **name** for the new family that has not yet been used for an existing family file. If you enter an already assigned name here, you will be automatically asked if you want to overwrite the already existing family files of the same name with the new family data. In order to avoid data loss from already existing family files, you should give the new family a different name. In the small dialog box that opens, enter the name in "Name of the family".

Afterwards, you also have to create the **data directory** in **Family Tree Explorer**, and from then onwards, all the data and files that you enter and create for the new family will be saved. Click in the second line on "Name of the directory"; **Family Tree Explorer** will then automatically suggest a directory name that is identical to the family name. You can keep the name or change it.

In the third line of the dialog box, you will see the **directory pathway**, where in which **Family Tree Explorer** would like to save the named family directory with the new family data. This default pathway always leads to a directory in your individual Windows folder automatically created on the hard disk. In this directory, the **Family Tree Explorer** installation creates a subfolder that has the same name as the program name. You can change the directory pathway. Click the small icon button with the folder icon at the right edge of the pathway row. In the directory window that opens, select the desired directory on the PC hard disk or on an external storage medium.

Click the button **Create new** to confirm all settings for the new family.

Entering the data for the first person of the family (son and heir, Sosa code number 1)

It opens the input form for entering the data of the first person of the new family. This first

person will be provisionally considered **son and heir** of the family and has the Sosa code number 1. In addition, likewise for all other people you enter into this family, this son and heir receives an individual person number (ID) assigned only once in the family that **Family Tree Explorer** assigns automatically and that cannot be changed by the user. The current family structure is always calculated for the son and heir, i.e. all other members of the family have an identifier (Sosa number or tag) that indicates the relationship between the current son and heir and the person.

Sosa code numbering and other related identifiers

Family Tree Explorer uses different identifiers to characterize the kinship relationships between all individuals within a family.

All people who are **direct ancestors** (parents, grandparents, great-grandparents, etc.) of the son and heir and the son and heir himself or herself automatically receive a number according to the so-called **Sosa Code**. This ancestry forms the so-called *agnatic line* of the family (relative to the parent). The family's son and heir always has Sosa number 1, his father always has number 2 and his mother always has number 3. In other generations, the male ancestors are given the following even Sosa numbers (4, 6, 8, etc.), and the female ancestors have the following corresponding odd Sosa numbers (5, 7, 9, etc.).

All other members of the family, who are not part of the family's agnatic line (relative to the parent), are registered one of the following identifiers in **Family Tree Explorer**:

Relative, related my marriage (M) - All life partners of the son and heir, of the ancestors and of the relatives are among the married relatives. All the relatives of these married relatives are themselves also married relatives of the parent. Married relatives, therefore, are not related to the son and heir, and instead belong to the family through a familial relationship. They can be a brother-in-law, mother-in-law, son-in-law, second spouse of an ancestor, etc.

Relative (R) - The person is related to the son and heir through a common relative, without themselves being the son and heir's ancestor - there is a blood relationship between related persons and the persons of the agnatic line.

For example, children of the parent and their descendants, the brothers and sisters of the parent, their offspring, the uncles, aunts, cousins and the descendants. There is a blood relationship between these family members.

Individual (I) - The person is not related to any person of the family. An individual can provide you with their data in **Family Tree Explorer** if the person has any connection with

people or events of the family, without being a member of the family. As long as this person is not placed in a familial relationship with a person of the family, they are always treated as an individual.

Witness (W) - The person is a witness at an event within the family. As long as this person is not placed in a familial relationship with a person of the family, a witness is always treated as an individual.

The input form for the personal data

In order to provide the clear and comprehensive entry of data available for a person, **Family Tree Explorer** has a multi-part input form arranged according to data sources, with a large number of input fields, selection menus and option buttons. The data rubrics are distributed into tabs, which can always be activated using the appropriate buttons to the left of the form.

The input form for the personal data

General Tab

The form opens by default to the first of a total of eight tabs: enter the basic personal data - name, gender, basic data on birth and death in **General**.

The form is divided into several areas:

At the top, you can see the (initially still empty) **image field** in which you can display a picture of the person. To the right you will see the **names** and the **identifier** of the person (Sosa number or familial specification as well as an individual, automatically assigned person ID). Using the three buttons to the right of it, you can compose **annotations** for the person and assign **sources** and **media**.

The second area of the form is used to record and display the **name specification** for the person. The (initially empty) **table** serves primarily only for the data display; it is filled (automatically) as soon as you have entered values in the input fields.

Therefore, always start the data input on this tab in the input fields below the table:

Select "Name type" from the selection menu (recognizable by the small arrow symbol in the data field) and the **type of name** it involves (e.g. birth name, married name in case of marriages, and options for changed names, for example after adoption, are available).

In the first two lines under the Name type menu, type the **full name** of the person under whom the family is to be stored. You can also specify existing **name affixes** if necessary. For "prefixes" in the first-name line, there is a small list of additions that usually appear before first names (e.g. "Lord" or "Lady"). For "prefixes" in the surname line, there are corresponding additions that can be in front of the family name (and can also be a part of it, such as "of" and "de"). Finally, the selection list for "affixes" contains a small selection of additions that are usually after the last name (e.g. "Jr." and "Sr.") after the surname field. Select all necessary additions from the lists or simply type an addition not included in the list into the "prefix" or "addition" field.

In the following three input lines, you can enter information on the person's **patronymic name** (for example in Russian names), on the **given name**, on the **nickname** and on the **alias** (e.g. artist name, pseudonym).

Once you have entered this first data about the person names, you can click on the **Add** button below the table. The person's name information is then automatically transferred to the table. You can from then on edit this person via the entry in the table. As long as the entry in the table is selected, you can **Delete**, **Add again (as a double)** or **Refresh** this entry by clicking on one of the three buttons below the table. Attention: when deleting, all data in the input fields belonging to the corresponding entry are always deleted. Adding another entry (duplicate) is used to record all other names and associated data for people who may have more than one name. The data recorded for the individual entries in the table is displayed in the data fields of the form as soon as you have selected the relevant

entry in the table by clicking. By clicking on **Refresh,** you confirm later changes to the data for the relevant tab entry that you make again in the data fields below the table.

In the "Entries data from" field, you can enter the date on which you **last updated** this general data about the person. Click in the blank input line (or alternatively on the small icon button at its right edge); it opens the **Calendar Tool** automatically (detailed description in chapter 6. c). By default, this always shows the current date (according to your computer's system time). To apply this date to the data field in the form, simply click the **OK** button at the bottom of the Calendar tool.

Note on date fields

All date fields within the input form for the personal data are programmed in such a way that always automatically opens the calendar tool. You cannot type the date directly into the date field. To the contrary, **time of day** fields, which are located to the right of each date field, can be entered directly from the keyboard.

If you also want to specify that entered data on the **General** tab are **current** and (for the time being) do not require any further processing, click on the empty check box "Current data".

In the area of the form below, enter the **gender** of the person. Click on the appropriate information or keep the "unknown" specification.

In the other two areas at the bottom of the form, enter the date and location of the **birth** and **death** for the person.

If the person has died, you must first activate the "Deceased" check box in the "Death" section by clicking on it. Only then are data inputs possible in this area's data fields.

Please pay attention to the special procedure when **editing the date field** within the entire input form; read the detailed description of the **Calendar tool** in chapter 6. c).

Location data fields: connection to the online map service OpenStreetMap

Any location data field in **Family Tree Explorer Premium** is connected to the accessible, free internet map service **OpenStreetMap**. Thanks to this connection, you can quickly and simply integrate all location data that **OpenStreetMap** offers into these data fields. Once you have entered a place name in the location data field and then click on the small globe button to the right of the data field, the system opens **OpenStreetMap** in a separate window. Please note that your computer must be connected to the Internet to use this feature.
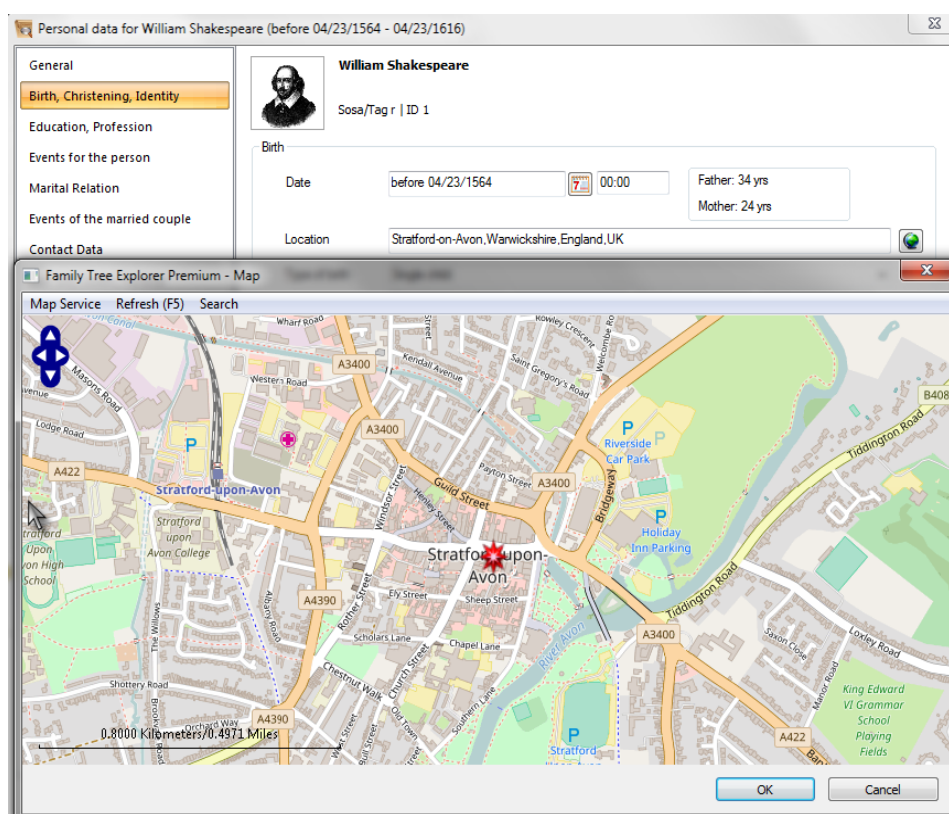
*The online map of **OpenStreetMap***

When opening the **OpenStreetMap** service from a completed location data field, a results list with several entries will be displayed on the screen. Please note that all results from **OpenStreetMap** are self-generated. It is therefore possible that some results lists do not exclusively contain entries with pure place names. In this case, select the desired entry from the results list. Only then does the **OpenStreetMap** window open, and the previously selected location is marked with a red star symbol on the map service's standard world map. Alternatively, you can open other world maps; select one of the options in the **Map service** menu in the map window. The **Refresh** option in the main menu of the map window updates the view of the selected world map section; the shape of the world map can change constantly since the **OpenStreetMap** online service is constantly being developed and expanded by new data.

Within the opened world map, you can search further for any other places. Use the options in the **Search** menu: find a location either by specifying the common place name ("Search" option) or by its geographic coordinates ("Go to global coordinates").

In the left-hand side of the map, you will find a navigation system that allows you to comfortably control the world map. The four small arrow buttons at the top left serve to "move" the visible map; the arrow always points in the direction opposite from where the map is being "slid"; the direction of the arrow thus practically always indicates the direction in which one moves as a viewer over the world map. Alternatively, you can move the map

section by holding down the left mouse button to "drag" the map section.

Use the light gray slider below the arrow keys to zoom in or out of the world map. The further you move the marker upwards on the slider, the closer you zoom in on the map, and the more detailed the map is. A benchmark scale always shows you the size ratios at the bottom of the map window.

You close the OpenStreetMap service window by clicking the **OK** button.

Create personal annotations

Click the **Annotation** button at the top of the **General** tab to make annotations about the concerned person. In the opening window, you can enter the name of the author of the annotations at the top right in "Noted by:". The annotations themselves are entered into the large field under "Text:". Confirm and save the entries in the Annotations window by clicking the **OK** button.

Document sources for personal data

Click the **Source** button at the top of the **General** tab to document information on the sources from which the personal data entered in the form are derived. The procedure for entering sources in the opening window is analogous to recording name details described above. Begin in the input line at "Designation:" and enter a name for the source; alternatively, you can click on the small arrow on the far right of the line to open a list of preset source names. If necessary, select the appropriate name from the list. After that, you can then click the **Add** button to place the source as an entry in the table directly above the input fields. If necessary, fill in the additional data fields in the lower window area. Fields for inputting an abbreviation of the source name, for the author and the publisher of the source, the author of the source note and for the corresponding authority / office are available. In the large field at "Text:" you can enter an explanatory text for the source. With the help of the two **Annotations** and **Media** buttons, you can assign additional annotations and media files for the source. This works as described for the annotations and media for the person.

Confirm and save the entries in the "Source" window by clicking the **OK** button.

Assigning media to a person

Click the **Media** button at the top of the **General** tab to assign media to the person. Media can be *image* files, *audio* files, *video* files and text *documents*. **Family Tree Explorer** can manage all common file formats of the named media types. To assign a media file, select one of the four media types from the small selection menu under "File:". Then, click the

small icon button with the disk icon at the right edge of the "File:" line. In the directory window that opens, select the file that you want to assign to the person. Confirm your selection by clicking on the **Open** button and then click **Add** in the media window. If you have selected an *image file*, the preview image will then appear in the large preview window above the buttons and input fields. Image files can be portraits of the person in question, but can also show the family Crest, which can then be assigned to more than one person in the same family.

For all other media types, a symbol image appears in the preview window. To be able to identify the individual symbol images, move the cursor over the symbol image; the complete directory pathway to the file appears (also for image files) in a tooltip (text overlay).
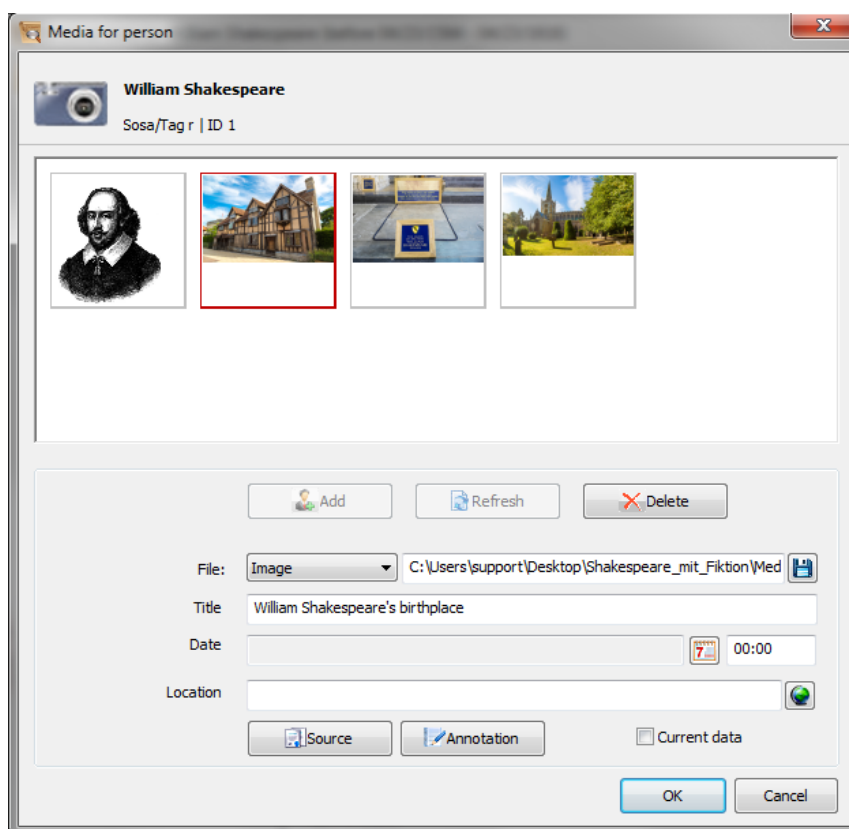
The dialog box for assigning media

If necessary, fill in the additional data fields in the lower window area. You can enter a **title** and one **date and time** as well as a **location** for all media. You can also provide separate information for the **sources** of the media file and document other **annotations**; click the appropriate buttons at the bottom of the window. The data entry here works as described for the annotations and sources for the person.

You can also enter all other media in the media window as described for entering the name data in the form for the personal data. Alternatively, after completing all the entries for the first media, you can click the diskette button again and select the next media file.

You can activate the empty check box for "Current data" by clicking on it if you are keeping the media data in this window current (for the time being).

Confirm and save the entries in the "Media" window by clicking the **OK** button.

Once you have entered all of the desired information on the **General** tab, click the **Apply** button at the bottom of the tab. **Family Tree Explorer** in this way saves the changes on this tab, but leaves the input form open so that you can activate another tab. On the other hand, you can click the **OK** button at the bottom of the form after entering data so that the form is completely closed (with the similarly stored data).

Entering data on the other tabs

In principle, the detailed description of the data input in the previous chapter that applies to the **General** tab also applies for all other tabs of the input form. On all tabs, you will find input fields, selection menus, and buttons with similar functions as those already described. However, there are some peculiarities:

Birth, Christening, Identity tab

In all three areas of the tab, you not only can record media, sources and annotations for each data entry, but **witnesses** as well. Enter the **Witnesses** button in the *christening* area and potentially the person's godfather as well.

Data input for witnesses

Click the button with the same name; a separate window will open. Here you can now link either an entirely **new** person or one already **existing** in the family as witnesses to the event. Select the desired option from the small selection menu at the top of the ("[Please select an action]") window.

Create a new person: after selecting this option, you can enter the most important personal data for this new person in the other input fields in the "Witnesses" window. The input fields correspond to *a selection* of those fields that you find in the input form for the personal data, and the function of the data input is practically identical to the input in the form. However, *not all fields* in this form are available. As long as this person is only a witness, not a family member, only this reduced personal information is available. Only when you accept the witness *into the family* (description in chapter 4b)**, Display of the data on the screen**) can you add additional person data in the form that is then completely visible.

Link with a person: In the window that opens, select the desired person from the family;

open the selection menu for the search criteria, which by default has the option "Search in last names" and if necessary, change the name range within which you want to search. Then click on the small icon button to the right and enter the name of the person you are looking for in the "Search for:" field. Using the four check boxes below the input field, you can further refine your search (entire word instead of sub word, case sensitive, search direction within the family's list of people). As soon as you see the desired person in the family's list of people (if necessary, after clicking the **Continue searching** button many times), exit the "Search" dialog by clicking **Cancel** and then confirm the selection by clicking on **OK**. The person is then named as a witness to the event on the **Birth**, **Christening**, and **Identity** tab.

Note that the program automatically enters the age information for the father and mother in the field to the right of the birth date once you have entered a date of birth for the person's father and mother.

Identity: Select the desired option at "Type" in the drop-down menu, where the default option **Nationality** is shown. In addition to information on the N**ationality** and the possibly deviating **Citizenship**, enter the data for the person's **religious affiliation** (**Confession**). All tabular entries can be sorted in ascending or descending order by clicking on the respective column headers. They are then displayed in the respective "Identity" table. Again, the **Witnesses** button is available here.

Events for the person tab

Family Tree Explorer treats practically all the data inputs you make on the various tabs of the input form as events in the life of the person concerned. Therefore, the information for *Identity* and for *Birth* is automatically entered in the table of events on this tab. You can also enter any number of additional events on this tab that cannot be documented using the data fields on the other tabs. A selection list of frequently used event types can be found directly below the table by clicking on the arrow symbol in the "Event Type" data field. Select a type of event, or type any other desired type into this field. Witnesses can also be named for each event. You can enter a short description of the event in the "Description" field. The description (short form) can be entered directly into the line. Alternatively, double-clicking on the line opens a pop-up window in which a longer description text can be entered. All tabular entries can be sorted in ascending or descending order by clicking on the respective column headers. They are then displayed in the respective "Identity" table.

Marriage tab

Enter data here about the spouse or life partner of the person as well as the connection between these two people. You can enter the name of the partner in the two input fields for "First name(s)" and "Last name" if the partner does not already exist in the family. If, on the other hand, you want to assign a partner that already exists in the family, click on the button with the three points (**...**) to the right of the first name field. The current family's list of people opens, and you can - as with the linking of witnesses (see above; **Data input for witnesses**) - select the desired person and link them as a partner.

In the "Type of relationship" field, specify the type of relationship between the partners. The most common types of relationships are offered in the selection menu (click on the arrow symbol on the right in the field). You can also enter same-sex relationships.

Once you have entered a partner and click on the **Add** button in the table at the top of the tab (and therefore applied it in the family), you can also assign the **Children** relationship. In order to do this, click on the button at the bottom right of the "Married couple" section.

Adding children for a married couple

A separate window will pop up, similar to the "Witness" window (see above; **Data input for witnesses**) you will find a reduced input form for the personal data. You can create new children for a couple if these children are not already present in the family; alternatively, you can assign already existing family members to the parents as children. Type either the name of the new child to be entered into the name field, or click the button with the three points (**...**) to look for people in the family and to assign them as children.

In the "**Parent/Children relationship**" selection menu, you will find options that allow you to specify an adoptive relationship between parent and child.

Events of the married couple tab

Each marital relationship is itself treated as an event and applied accordingly from the **Marriage** tab in the table at the top of the **Events of the married couple** tab. In addition, you can include any number of additional events related to the marital relationship in this tab. You enter these events at the bottom of the tab, where they are then stored in a separate event table. This event table always refers only to the marital relationship currently marked in the upper table. As soon as you have entered a number of marital relationship for a person in the upper area, you must ensure that you assign additional events to the correct marital relationship.

Specify what type of event it is in the **Type of event** box. The most common types of

events are offered in the selection menu (click on the arrow symbol on the right in the field); you can also enter any names here. The use of these event data fields is especially recommended for the documentation of events such as **engagements**, **marriage settlements**, **divorces** and **annulments**.

The program fills in the fields for the ages of the two partners automatically as soon as you enter the date of birth of the respective partners and the date for the event. You cannot enter or change the age details yourself. If the age calculation is not possible, you can use the two selection menus to the right of the age specification to determine whether the person was **underage** or **of age** at the date of the event and which **marital status** they had. Choose one of the available options.

In the "Contract type" selection menu, you have a few options to define the **Type of marriage settlement** between the partners. To the right is an entry field for the name of the **notary** who drafted the marriage settlement. All tabular entries can be sorted in ascending or descending order by clicking on the respective column headers. They are then displayed in the tables in the respective order.

Contact data tab

Here you enter all the **addresses** of residence a person had throughout their life. Additional contact data, which can be documented here, includes **email address**, **phone number**, **fax number**, and **homepage on the Internet** (**WWW**). The addresses, as well as other data in the input form, are stored in a table, which is shown at the top of the tab. In the "Date" field, you can enter the time period for which the person's address was valid; compare this to the annotations on values/periods in the description of the **Calendar tool**. For information in the "City" field, you can access a list of all locations that you have previously entered in the local data fields of the current family. Open this list of already saved location details by clicking on the small arrow and select the desired location. Alternatively, enter the location data via the keyboard into the data field.

Last will, Death, Funeral tab

This tab also consists of three areas and its functionality follows the patterns already described. In the "Death" section, you will find an input field for the **Cause of death**. Either enter the documented cause of death of the person, or select one of the options in the selection menu (click on the arrow symbol on the right in the data field). The field for the age is provided by **Family Tree Explorer. It is** automatically filled in as soon as it is calculated from the date of birth and death; you cannot enter your own data here.

A table is available for the last will so that you can enter several details here. In this way,

you can, for example, document several versions of a person's last will. To do this, select **Type of will** with the help of the options in the selection menu with the data field of the same name (alternatively: any text input). All tabular entries can be sorted in ascending or descending order by clicking on the respective column headers. They are then displayed in the respective "Identity" table.

Please note that the individual tabs and data field functions of the personal data input form can also be accessed quickly via the various **icon buttons in the ribbon**. They are arranged in four buttons in the **Create/Edit** area of the toolbar: **Person**, **Personal data**, **Personal relationships** and **Media.**

Determine family crest

In **Family Tree Explorer,** you have the option to define an individual family crest for each family. This object then appears on some of the **illustrated designs** (see section **Presentation**) in a separate field and gives the presentation of your family data a very special tone.
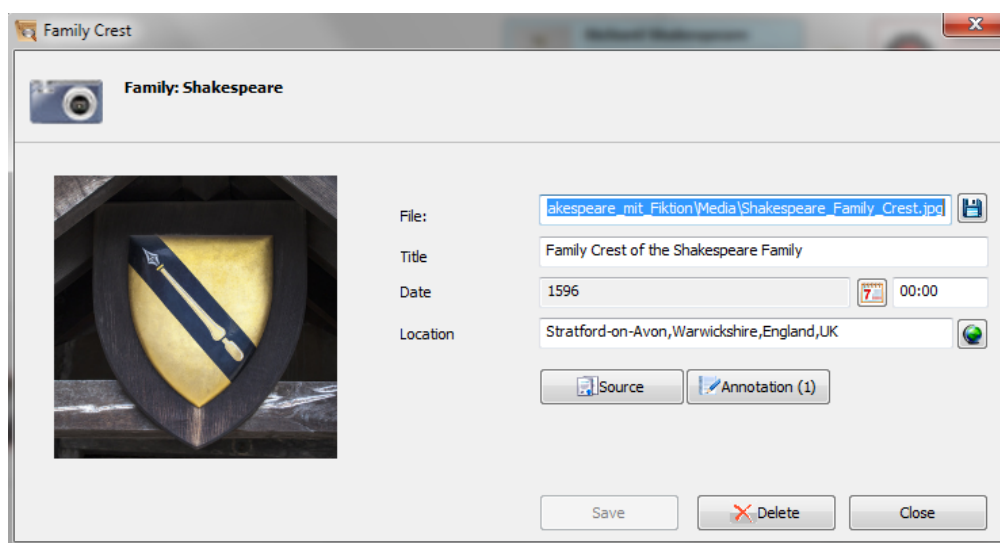

The dialog box for setting a family crest

Click the **Family Crest** button at the far right of the **ribbon**. A separate window will open where you can select the image file that shows the desired family crest and provide it with some information. Click the small icon button with the *diskette* to select the desired image file; after your selection, you will immediately see a preview of the crest on the left in the "Family Crest" window. In the empty input fields *Title*, *Date* and *Place*, enter a title for the crest, and potentially the time and place of its creation. Also, provide the family crest file with details of its **sources** as well as any other **annotations** by clicking the corresponding buttons.

Attention: the date is entered via the **Calendar Tool**; when entering the town name, you can revert to the online map service *OpenStreetMap* (further explanations in the respective sections of this program help).

When you have entered all the family crests, click the **Save** button; the arms file is then permanently stored as the family crest of the current family and the "Family Crest" dialog is closed. You can delete an assigned family crest later by clicking on **Delete** in the Family Crest window.

b) Display of the data on the screen

Color theme button
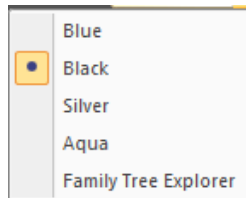
On the far right of the main menu bar, you will find the **Color theme** button. With its help, you can change the overall color theme of the program window in **Family Tree Explorer**. Five different color themes are available, which each display the program window and its elements in a particular color. Choose the most appropriate color theme; the standard theme is "Family Tree".

Once you have the first data of a newly created family in **Family Tree Explorer** or have imported a complete family, **Family Tree Explorer** displays this family data on the screen in various forms.

The list window

All people recorded in the family are automatically included in the "Family" list of people, which is always displayed in the list window in the left part of the program window. As soon as you create individuals who are not linked to family members, they are saved in the separate "Individuals" list.

List window display options

By default, the "Family" list is displayed in the list window with the four data columns **ID** (the individual number of the person assigned automatically when a person is created), **Sosa/Tag** (Sosa number or relationship code letter), **Last name** and **First name(s)**. You can sort the content of the list according to a particular column **in ascending or descending order**. To do this, click the header of the desired column; the small arrow symbol on the right of the column header indicates the current sorting direction.

You can change the **width of the list window** freely by holding down the left mouse button and dragging the separating frame between the list and the display area for the personal data to the left or right. The width of the list window that you set is always saved when the program is closed.

All other buttons and options for individual control of the data display on the screen can

be found at the top of the list window as well as on the **Display** tab (in the **Ribbon**).

If you right click on the **header area of the list window**, a small context menu opens with the following options:

Undock/dock: you can detach (undock) the list window from the left side of the screen and move it freely on the screen. By default, the list window is docked to the left edge of the screen.

Automatically in the background: folds the list window permanently to the left edge of the screen (in contrast to **pin icon** in the following section).

Hide: permanently hides the list window from the program window. You can later use the corresponding icon button in the program area **Display** again.

Pin icon ("automatically in the background") in the list box of the list window: click on this icon to permanently delete the list window **to the left edge of the screen**; then the window for the display of the personal data is set for the complete screen area; the list windows are minimized to two icons (family, individuals) at the edge of the screen. This is recommended, for example, when looking at more extensive family tree graphics. Clicking on the icon for one of the two lists will open the respective list again as a list window.

You can also completely hide the two lists of people **from the screen**. To do this, click the checkmark in the "List of people" checkbox at in the **Ribbon**. Alternatively, you can also click on the small close button in the upper right corner of both lists of people.

Switching between the "Family" display list and the "Individuals" display list: either click the appropriate button at the bottom of the list window or one of the two icon buttons on the far left of the **Ribbon**.

Search for people in the two lists: open the selection menu above the list window, which by default shows the option *Search by last name*. Select one of the available options for the search in the lists of people. You can search in one or both of the name columns or in all columns in the respective list of people; it is also possible to search for a specific person ID. Enter the name or value in the blank input field to the right, and press the Enter key. In the window that opens, you can search for more information about the search term (whole word or sub-word, upper or lower case, search direction within the list of people). Click the **Continue searching** button to start the search and continue doing this until the person you are looking for is marked in the list of people.

Advanced Search: you can also access the advanced search from the Options window; click on the button with the same name. In the advanced search, you can search more

specific search terms for the family members than the data fields listed in the list of people. The advanced search is described in detail in a separate chapter (6. a).

Context menu by right clicking: if you right-click on a person's entry in one of the two lists, a small context menu opens with options for editing the personal data.
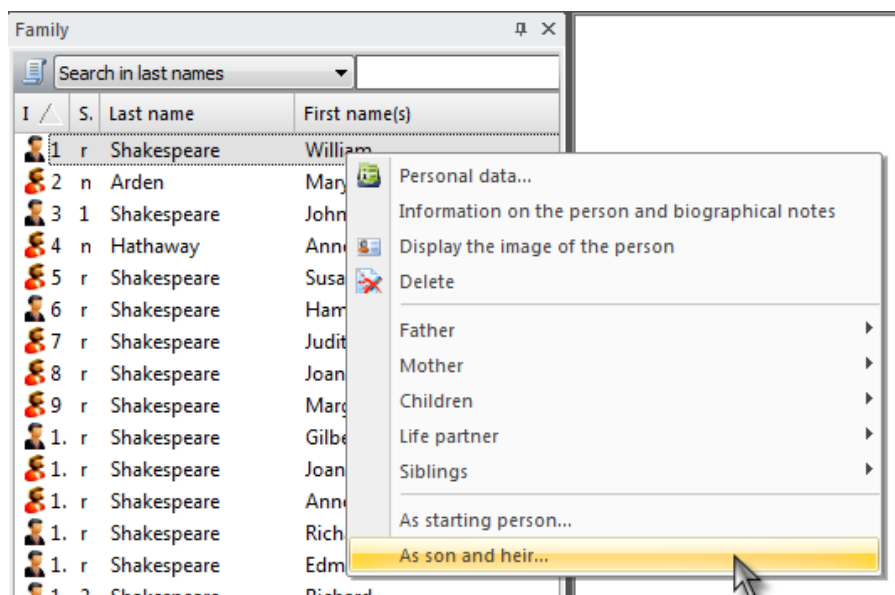
The family list of people with the context menu after right clicking

Family context menu

Here you will find the options for activating the personal data input form of the person themselves, as well as their parents, siblings, life partners and children, to display a brief overview of the most important biographical details of the person, the display of the image assigned to the person, and to **immediately remove** the person from the family. Furthermore, you can determine here whether the person should be the current **son and heir** of the family or only just the current **starting person**.

Son and heir: the person named the new son and heir is given the Sosa number 1, and the entire family structure is re-calculated for this person.

Starting person: the person becomes the "starting person" (at the "head position") in certain representations in the **Presentation** area (as well as in the display area of the personal data on the right in the program window); the family structure is not recalculated.

Individuals context menu

Here you will also find the options for activating the personal data entry form of the individuals and to **immediately remove** the individual. You can also use another menu option to **Add an individual to the family**. The individual is automatically moved from

the "Individuals" list to the "Family" list and marked there. You can then click the person in the "Family" list; it opens the input form for the personal data in which you can enter all other personal data for the person and can also establish relationships with other family members.

Activating personal data: click the **personal data** icon button ("described sheet of paper") in the upper left-hand side of the list window, activate the input form for the personal data of the person currently selected in the list of people and then edit the data.

Show/hide status bar: deactivate the "Status bar" by clicking on the check box in the **Display** area on the **Ribbon**. In this way, you can hide and display the status bar at the bottom of the program window. In the status bar you always find the following information (from left to right): **Internet link** to the homepage of the developer company *soft Xpansion*; **last name** of the currently open family and **number** of current family members; slider for the **current zoom** (magnification) for the view in the display area of the personal data; slider for the **amount of generations**, which are displayed in the display area of the personal data (more detailed description below).

c) The display area for the personal data (family tree graphic)

The larger, right part of the program window occupies the display area for the personal data in the form of **Family Tree Graphics**. Here you see the data box of the currently selected person as well as the other people according to the amount of generations that is currently set in the "**Generations" slider** at the bottom of the program window.
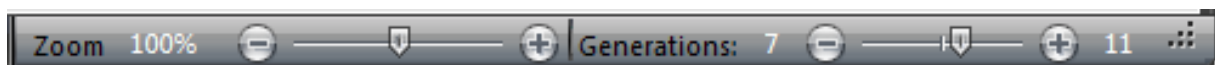
Sliders in the status bar: on the left is the zoom slider; on the right is the generations slider

Use the left mouse button to drag the marker on this slider (or click the small "+" and "-" buttons) to show more or less generations in the family tree graphic. The minimum number of generations is always 1; the maximum number depends on the size of the family concerned. The number of generations is always increased or decreased by 2; in the 5 generations setting, you will always see the generation of the currently selected person as well as the two next ancestor and descendant generations.

You can display the family tree graphic enlarged at any time; "drag" with the left mouse button on the **zoom slider** (also at the bottom of the program window) to the desired magnification factor (value scale: 0 to 200%). Alternatively, you can change the zoom

factor by clicking the buttons in the "Zoom" area of the **Ribbon** ("Display" menu). Click on the **zoom out** or **zoom in** buttons or enter a zoom factor (in percentage, value scale: 0-200) in the empty field mentioned above below the buttons and confirm with the Enter key. The family tree graphic is then displayed according to the selected zoom factor.

The family tree graphic is by default displayed in **vertical** orientation, i.e. the generations are displayed in the vertical direction (one below the other). However, you can also set this to a **horizontal** alignment; the generations are then presented side by side. To switch between the two alignment options, click on the respective symbol button (**vertical** or **horizontal**) in the "Family Tree Orientation" area on the **Display** tab.

The individual elements in the family tree graphic can be clicked and offer various editing options:

Moving the cursor over a data box: the basic data for the relevant person are displayed in a tooltip.

Moving the cursor over the symbol for a marriage (two rings): the basic data for the marital relationship is displayed in a tooltip.

Right clicking on the data box: opens a small **context menu** with the same options as the context menu when right clicking on people on the **Family List**.

The **blue flags** at the bottom of the person's card indicate that this person is the currently selected person in the family.

Left mouse clicking on the data box: the relevant person becomes the new currently selected person of the family; their little card receives the blue flag.

Left mouse clicking on the symbol for marriage (two rings): a brief overview of the events of the marital relationship is displayed.
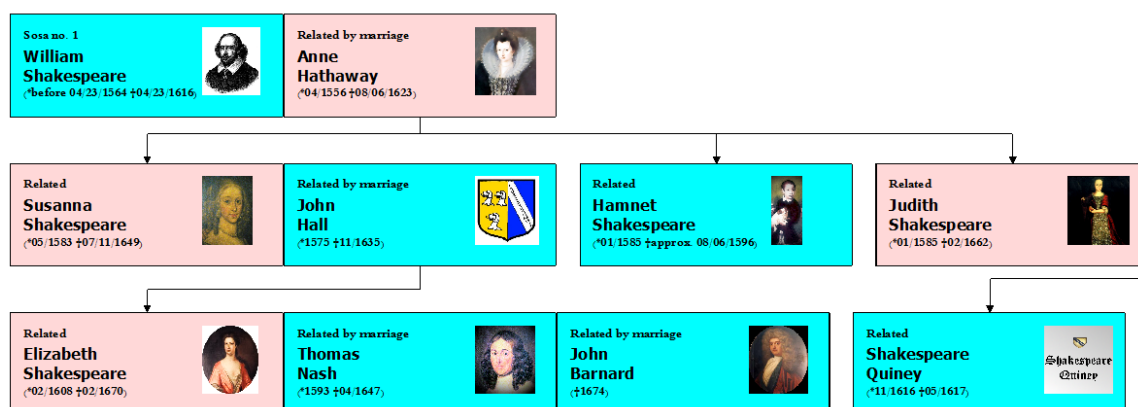
5. PRESENTATION

Family Tree Explorer allows you to create sophisticated and large-scale diagrams and graphics that present your family data in the highest quality. Please note that you must have the corresponding hardware configuration (current operating system, high-performance graphics card, fast processor and sufficient memory) to create and print these presentations on your PC.

All buttons and options for the individual presentation of the family data (for printing) can be found on the **Presentation** tab in the form of symbol buttons on the **Ribbon**.

a) Diagrams

You can view the graphic that is currently displayed in the display area as a family tree presentation, which can be exported as an **ancestors diagram**, as a **descendants diagram**, as a mixed presentation of **ancestors and descendants** or as a **fan diagram**. Click the icon button for the desired diagram. In addition, it is possible to integrate the content of the current family tree graphic into one of a total of 19 **illustrated designs**. The designs give the presentations of your family data a particularly representative and original character.

All the diagram presentations always take the person currently selected in the person list as the starting point. Before setting up a diagram or an illustrated graphic, make sure that you set the **Generations slider** at the bottom of the program window to the correct value (always > 1); otherwise, it may occur that you do not see all the desired personal data in the diagram. Note these two basic rules before selecting the diagram type.

Example of a diagram presentation

Ancestors Diagram

In the "Settings" dialog box, first set the required settings for the type of diagram. You can adjust the suggested **Title** of the diagram. Under "Display", select the **extent** of personal data to be shown:

Short - only the most important personal data appears in the person's card.

Advanced - additional personal data (including full life data) appears in the person's card.

Select whether you want to include all generations of the family in the diagram. Attention: the diagram may be very extensive in this case. Alternatively, you can include only the first three ancestor generations of the currently selected person in the diagram.

Also, select whether the data box is to display the image assigned to the person.

You can also specify whether you want the diagram to be automatically created with a **frame**. The frame is then set around the *entire* diagram. The corresponding option in the general **Family Tree Options** is found at the check box "Draw a frame around the whole diagram". Since this is a general family tree option, what you decide here applies to all diagram presentations.

Finally, you can also determine whether the diagram should be placed vertically or horizontally on the sheet of paper. If you print the chart with the option "First three generations", the selection for the diagram's orientation does not apply; in this case, the diagram is always aligned vertically.

If there is a large number of data boxes in the diagram, it is also recommended to select *Yes* for "Rearrange fields densely". The data boxes on the sheet are then placed together to save as much space as possible.

The "Adapt the diagram to the paper size (display on one page)" option can also save space. Activate this option if you see that there is only very little data on other document sheets in the print preview (see next section). In this case, depending on the amount of data on the sheets, the customization option can slightly shrink the entire diagram so that it fits on a single document sheet while still being legible.

More Options

With the **Options** button in the "Settings" dialog window, you can activate setting options that customize the appearance of the diagram. Open the four sections under "Diagrams" in the window on the left, **General**, **Fonts types**, **Data boxes**, and **Relations and**

background and make the desired changes for each of the available options to customize the appearance of the diagram and the fonts used in it. You can set the appearance of individual elements of the diagram (data boxes, connecting lines between the boxes, background colors of the boxes and the entire diagram) in detail. Confirm your entries by clicking on **OK**.

Then, also click on **OK** in the "Options for the presentation" window. The ancestor diagram is then displayed in the **Print preview**. Check the appearance of the diagram again; use the **zoom** function in the print preview (**Ribbon**, right block). If, on the other hand, you want to fit the diagram in this view even more accurately into the first print page (to avoid a page break), use the **zoom slider** at the lower right edge of the program window. This is available in the print preview for this purpose, as long as the "Adapt the diagram to the paper size (display on one page)" option was <u>not</u> activated before. The generation slider, however, is inactive here. In this zooming process, in many cases printing a second page (which only contains a few residuals of the diagram) can be avoided by making the entire diagram slightly smaller on a single print page while still being legible. You can also use the **Print settings** (also in the toolbar). If the diagram contains several print pages, you can use the small icon buttons in the middle at the bottom of the preview window or, alternatively, the buttons in the block **pages** on the top of the ribbon. Click the **Print** icon button to print on the left of the **Ribbon**.

You can also save any presentation document as a **PDF document**. To do this, click the appropriate icon button to the right of the **Print** button. It will open a small window where you will see some **Settings** for generating the PDF document. You can also permanently turn off this window by unchecking the "Ask before saving to settings" check box at the bottom of the window. In this case, the program will use the most recent settings for all other PDF documents until you change them again. To remove the check mark before "Ask for the options before saving ", undo it by clicking on the **Family Tree Options**, clicking on "Display and updates" under "Family Tree Explorer options" and then checking "Display the settings dialog at saving ". The **Family tree options** are accessible by clicking the "Options" button in the "Tools" group on the ribbon.

Assign a suitable **title** for the presentation in the settings window and include an **author** and **subject** for the document. The check box for "Embed all fonts" should be activated if you have used several different fonts for the texts (names and data, etc.) in the presentation. This ensures that these fonts appear correctly in the PDF document.

In the presentation document, you can create the PDF document with the used images **compressed** and set the degree of compression. Select an option from the "Image Compression" drop-down menu. If *No* is selected, the images will not be compressed and

stored as pure bitmaps in the document, and the generated PDF file will be large. The *ZIP* selection offers good picture quality without losing information with a good compression ratio. For large images, especially in illustrated graphics, the *JPEG* option is recommended. The **picture quality** of the PDF file can then be exactly defined using an additional setting (percentage input); *100%* offers the best possible picture quality.

The "Paper size" options menu offers the usual DIN A4 format as well as **larger DIN A formats** up to and including DIN A0. This ensures that the PDF document - especially if it contains a very comprehensive diagram - is prepared for the desired paper format. Unwanted page breaks within the diagram are avoided in most cases. The larger paper formats are also available for printing the static illustrated graphics (each based on a DIN A4 format template, see chapter 5.b).

After setting all the desired options, click **OK** at the bottom of the settings window. Before the PDF document is created, you will be asked for the location of the file. Select the desired directory pathway.

Alternatively, you can also save all created presentation types as **image file(s)** in the **Diagrams** area. The most common image file formats are available: PNG, BMP, JPEG / JPG, GIF, TIFF. In this process, the same number of image files is created for each diagram as the diagram has pages according to the print view. Therefore: one page = one file.

Then close the print view by clicking the **Close** button.

Descendants diagram

You can also set settings for this diagram presentation in the "Settings" dialog box that is also available for the ancestor diagram. In addition, you can determine whether you want to display descendants' spouses as well. For the sake of clarity, it is recommended that you do not use this option in a large descendants diagram. Select *do not display spouses* at the "Spouse" option.

The additional options described in the ancestor diagram (**Options** button) are available.

Diagram of ancestors and descendants

In this diagram type, in which the currently selected person is shown in the central position of the diagram and is "framed" by their ancestors and descendants, all the setting options described for the ancestor diagram are available.

Diagram of ancestors and descendants (only 3 generations)

This diagram type also shows the currently selected person (possibly with their life partner) in the central position of the diagram. The family panel, however, shows only three generations: the person's and their life partner's parents can be seen above the person and the person's children, who they had with the specified life partner, can be seen below. The diagram settings window provides you with many of the setting options described for the ancestor diagram.

Family pedigree

The pedigree is not a classical diagram and instead is a table presentation; all the applicable people have one space each on this table. The currently selected person (with the most important personal data (but like all other people on the chart *without* their portrait picture!) is always shown in the lower "base" of the pedigree. The first three generations - the parents (two fields), the grandparents (four fields) and the great-grandparents (eight fields) are always presented. In the window for the settings for the pedigree, you can activate some settings with the **Options** button, where the **Reports** presentation type is also available (see detailed description).

Fan diagram

The fan diagrams in **Family Tree Explorer** present the generations of the family (including the currently selected person), which are currently set in the generations controller, in the form of a fan. The spaces of the fan contain the names and life data of the people. You can see the fan diagram immediately in the print preview and can then print it out or save it as a PDF document or as an image file.

Relatives
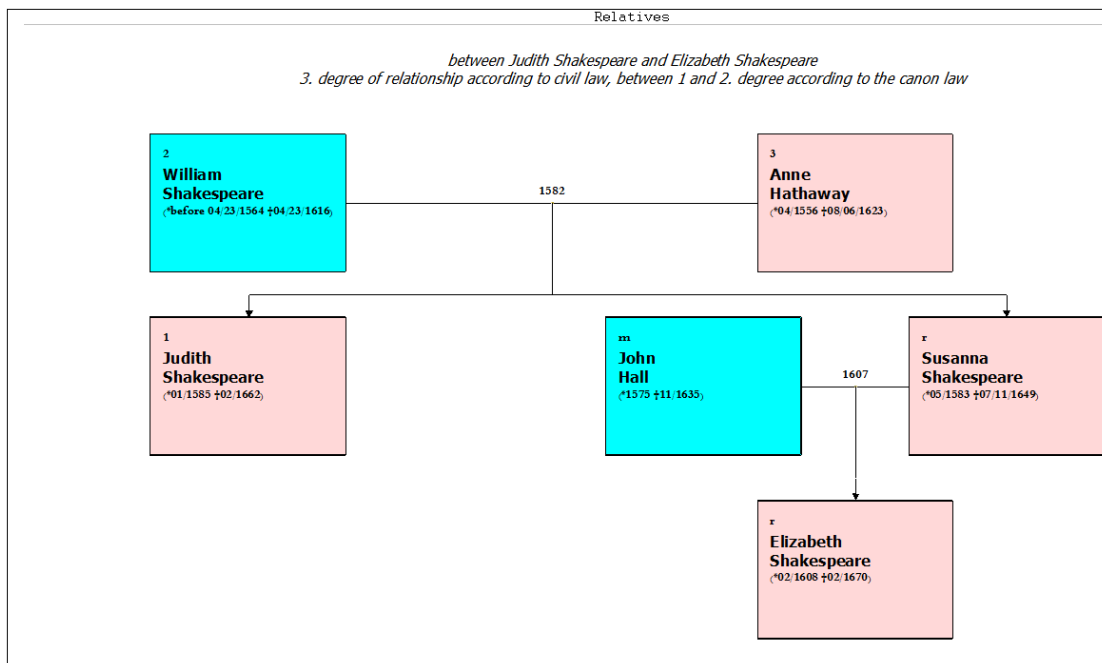
For each currently selected person in the family, you can at any time generate an overview of the kinship relationship to another person within that family. Only conditions: the second person may *not have a blood relationship* to the currently selected person, i.e. may not be a direct ancestor or descendant of the current person. Both people, however, must have a common ancestor.

After clicking the **Relatives** icon button, the window for the settings for this report type will open. Here, you select the desired second person from the displayed list of people, whose relationship to the current person you want to export. If you select a person who does not meet the above conditions, you will receive a message on the screen. Please select another person.

Using the **Options** button open the other setting options for reports.

The kinship relationship between the two people will be displayed in the print preview in the form of a "relatives" family tree graphic after clicking on **OK**. In the subtitle of the document produced, the extent of the familial relationship is indicated between the two people (the way of measuring this is different according to civil law and according to the law of the church). The further procedure for printing and creating a PDF or an image file has already been described above.

Time Line
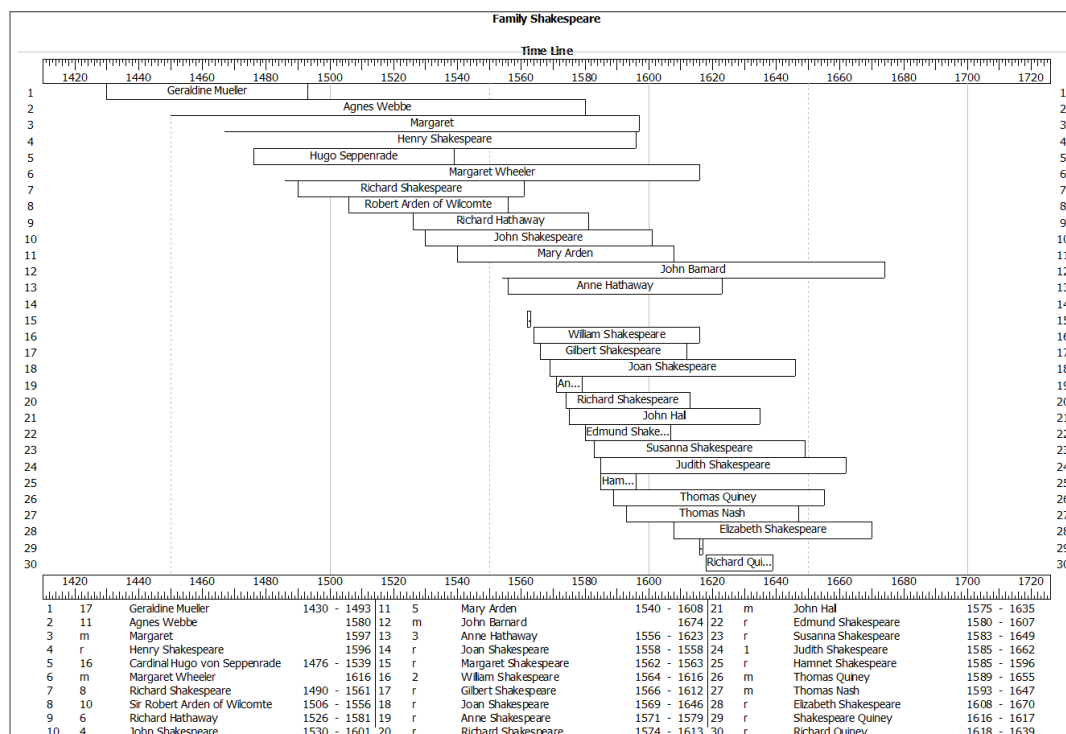
Example for displaying the family on a time line

You can display all members of the currently open family by their respective lifespan on a time line. After clicking the **Time line** button, the window for setting this presentation type opens.

You can change the **Title** and **Subtitle** for the time line as desired; enter the desired text into the input fields.

You can also only select certain members of the family to display on the time line, either through a filter or by including or excluding individual people by clicking on the check box in front of their name in the displayed list. A combination of both approaches is also possible.

Use this **filter** to select a criterion from the options offered in the menu. Depending on your selection, you may have to make further settings:

Ancestors / Descendants of the current person: If necessary, determine whether you would like to consider all **generations** of the ancestors or the offspring (this is the default setting) or only a certain number of generations; enter the desired number of generations in the "amount of generations" field.

Only people **born/ who died in a given period of time**: to set the start date and end date of the period, click in the empty field at "Date"; it will open the **Calendar Tool** of

Family Tree Explorer. Set the desired dates as described in the calendar tool.

Only selected people: here you can compile an arbitrary selection of people. Select a desired person, who is listed in the list under "People" in the settings window by clicking on the empty check box. You can also use the two buttons just below the list to **select** or **deselect all** people **at once**.

Determine which **time period** the timeline should include for each sheet of the subsequent document; click here in the blank date field and set the desired time using the calendar tool.

Using the Options button to open the other setting options for reports

The time line presentation is displayed after clicking **OK** in the print preview. It shows the **lifespans** of individual people as horizontal beams. Above and below the timeline you will find the **timescale** orientation with years. The vertical **numbers** of the people shown are left and right of the time line. You can use this numbering in the **Legend** below the time line, the life data (year of birth and death) of the people concerned; for reasons of space, this data is not contained in the bars in the time line.

The further procedure for printing and creating a PDF or an image file has already been described above.

b) Illustrated designs

In **Family Tree Explorer** a total of 19 illustrated graphics are available, which offer quite different background motifs for the presentation of personal data. Through their artful, representative design, they stand out clearly from the diagrams where personal data is presented, which have a more "neutral" design.

The **Illustrated Designs** icon button provides access to all 19 templates of this presentation type; they are based on 14 different motifs. These can be differentiated between **static** and **dynamic** illustrated graphics. The *static* graphics (including most of the templates) are determined with respect to the number of people present. They always represent a total of four generations (including the currently selected person). On the other hand, the *dynamic* templates first used in **Family Tree Explorer** are not bound to four generations. Here you can select as many generations as you wish (for example through the generations slider at the bottom of the program window); the illustrated graphic is then generated individually according to the number of people and has a corresponding size.

After selecting the desired template type (static or dynamic) from the **Illustrated Designs**

button on the menu in the **Ribbon**, a dialog box "Options for the presentation" will open again. Select one of the available designs from the "Background image" menu; they are all marked with a unique title and a small thumbnail is displayed for each selected background graphic on the right side of the settings window, so that you can get an impression of the graphic's appearance in advance. In the static illustrated designs, some of the creative options are offered multiple times in the menu; the options that additionally state "Premium" offer a separate display field for a **Family Crest** in addition to the "Standard graphic" with the same name. You can use this symbol for a separate function (**Family Crest** icon button all the way on the right in the Ribbon).

Then determine whether in the data boxes you would like to display the **photo** assigned to each person that is included in the selected design. If you have not assigned a photo to all the people who will be included in the illustrated design, you can also enable the check box for "Missing photos"; then in the data boxes for which no photo of the person is present, the **oval, gray portrait symbols**, which you also see in the personal data form before you assign a photo to a person, will be displayed.

Finally, select a **font** as well as a **font size** and **font color** for the labels displayed on the illustrated graphic using the **Options** button. Please note that some templates are uniformly preset due to the background color used; this means font colors of the personal data that are not specific to the template cannot be used; you must select a different color to ensure the data is readable.

You can set the font, font color, and other properties separately for a variety of presentation elements. Click on the small downward arrow to the right of the selection list for the presentation elements to see which elements can be formatted.

For the *dynamic* templates, you can also use two other settings:

 - Show all generations of the family tree (or only the number of generations set by the generation slider)

- Vertical or horizontal arrangement of the graphics (generations under one another or side by side)

By clicking on the **OK** button, confirm the selected options for the graphic, which will then be opened in the **print preview**.

Example of an illustrated design (static, with family crest)

Check the appearance of the illustrated graphic again, as described for the diagrams. Click the **Print** icon button to print on the left of the **Ribbon**. If you want to save the illustrated design as a PDF document, click the appropriate button to the right of the Print button. If necessary, make settings for the PDF document as described at the end of the section on ancestor diagrams.

To exit the print preview, select the **Close** button.

Please note: the display of the static templates "Picture Frame" and "Twilight Hour" (with the personal data) in the preview window of the settings dialog box as well as in the print preview takes longer than with the other static templates because the resolution of the used image files is higher (600 dpi).

Special features of dynamic illustrated designs:

The dynamic illustrated design feature does not have the option to set the paper size for the PDF document. Instead, the program calculates the required page size for all dynamic designs itself, based on the number of people to display.

Please note:

- In the case of very complex pedigrees with many people and/or generations, a presentation or a document is produced with **very large dimensions** in terms of **paper size**. **Family Tree Explorer** calculates these dimensions automatically based on the

number of people / generations to be displayed and based on the requirement that all elements of the graphic have to be readable on the paper. The following applies to creating the PDF: if you have an appropriate PDF editing program, you can change the page size of the PDF created by **Family Tree Explorer** to suit your needs and quality requirements. Alternatively, ask your print service provider (e.g. digital printing studio) to set the desired page size.

 - To successfully **create PDF files** for complex, dynamic, illustrated designs, the system configuration of the PC used (current operating system, processor and memory / RAM) is always relevant. If the system configuration is too small (measured by the amount of data to be generated), errors can appear and the desired PDF document will not be created. You can avoid this, for example, by not displaying all the generations in the graphic (as perhaps was initially preset). To do this, uncheck the "Display All Generations" check box.

- Click **Print** if you are in the print preview and the document will be sent to the printer connected to the PC on paper. In some cases this may not be sensible, for example if you only have a DIN A4 or A3 printer, but you want to display many generations on the printed document at the same time. Then the elements of the graphic may be reduced to such an extent that the print result is not readable.

Alternatively, you can also save the illustrated graphic as an **image file**. The most common image file formats are available: PNG, BMP, JPEG / JPG, GIF, TIFF. Please note: for the creation of image files, especially from dynamic illustrated designs, the warnings and suggested solutions regarding the system configuration of the used PC (processor and RAM) similarly apply with respect to creating PDFs (see above). If you see the message that the memory is not sufficient when creating image files with illustrated designs (static or dynamic), then it can be useful to use JPG or GIF, for example, instead of the standard file format PNG.

c) Reports

You can also display the family's personal data, which is displayed in the display area for family tree graphics, as reports: as a **List of People** or as a **Hierarchical List**, as **a Group sheet**, as a **Biography**, as **Family Statistics**, as a **List of Addresses** as well as a **Short List (by location)** in the family's personal data sheets. Click the icon button for the desired diagram. Most of the report presentations always take the person currently selected in the person list as the starting point.

Family Shakespeare

Ancestor for: Elizabeth Shakespeare

Generation 3

(13) **Mary Arden,** born approx. 1540 in Stratford-on-Avon,Warwickshire,England,UK, died on 09/1608 in Stratford-on-Avon,Warwickshire,England,UK

Father: (26) Sir **Robert Arden of Wilcomte** *1506, †12/16/1556
Mother:(27) **Agnes Webbe** †before 12/28/1580

(14) **Richard Hathaway,** born approx. 1526, died on 09/1581

Parents unknown

(12) **John Shakespeare,** born approx. 1530 in Snitterfield,Stratford-on-Avon,Warwickshire,England,UK, died on 09/08/1601 in Stratford-on-Avon,Warwickshire,England,UK

Father: (24) **Richard Shakespeare** *approx. 1490, †before 02/10/1561
Mother:(25) **Unknown**

Generation 2

(7) **Anne Hathaway,** born on 04/1556 in Stratford-on-Avon,Warwickshire,England,UK, died on 08/06/1623 in Stratford-on-Avon,Warwickshire,England,UK

Father: (14) **Richard Hathaway** *approx. 1526, †09/1581

(6) **William Shakespeare,** born before 04/23/1564 in Stratford-on-Avon,Warwickshire,England,UK, died on 04/23/1616 in Stratford-on-Avon,Warwickshire,England,UK

Father: (12) **John Shakespeare** *approx. 1530, †09/08/1601
Mother:(13) **Mary Arden** *approx. 1540, †09/1608

Generation 1

(2) **John Hall,** born on 1575 in Chellington,Bedford,England,UK, died on 11/1635

Parents unknown

(3) **Susanna Shakespeare,** born on 05/1583 in Stratford-on-Avon,Warwickshire,England,UK, died on 07/11/1649 in Stratford-on-Avon,Warwickshire,England,UK

Father: (6) **William Shakespeare** *before 04/23/1564, †04/23/1616
Mother:(7) **Anne Hathaway** *04/1556, †08/06/1623

Example of a report (list of people)

List of People

If you select this list option by clicking on the small arrow symbol at the bottom of the button, an option menu opens; here you can choose whether the list of people should contain only the **ancestors** or only the **descendants** of the current person - or whether you would like to export the current family's **list of people**.

Ancestors

First, the window with the **Settings** for the ancestral report will open. At the bottom of the ("People") window, you immediately see the list of all the ancestors that will be included in the report.

Before printing the report, you can still determine how the personal data will be presented. Each report can be divided into three types - each with a different **amount of data** generated. Select one of the options from the "Display" menu: *short list*, *advanced list*, *complete list*.

You can change the **title** and **subtitle** of the report as you would like; enter the desired text into the input fields.

The people can be **grouped** in the report according to the criteria **generation** and **family name** (as well as in combination). Select the desired method under "Grouping".

In addition, you can have the people presented **sorted** (also within the grouping); select one of the three check boxes for the sorting criteria and specify the **direction** they shall be sorted.

If you do not want to include all the ancestors of the current person in the report (because it might be too large), using the **filters** you can even further restrict the number of ancestors. Select one of the options from the selection menu; you can specify the number of ancestors in the report, such as those born or deceased in a given period; enter the dates for these periods in the "Date" field as described for the **Calendar Tool**.

If you select the *Only selected people* option in the list of ancestors (at the bottom of the Preferences window), you can select the people to be included in the report by placing a check mark in front of their names.

By clicking on the **Options** button at the bottom of the settings window, you can access the options available for the presentation of reports. In the window that opens, you can access two tabs (**General** and **Fonts types**) to determine whether the report should contain **page numbers**, the **photos** and **all forms of names** of the people; you can also

select the desired **font** and **font size** as well as the **formatting** of the individual elements of the report text. Confirm all settings in the options by clicking on **OK**. Then, start by clicking on the **OK** in the settings window to create the report. This is done in the **print preview** on the screen. Then if necessary set the **print settings** and review the data again in the report; "leaf" through multi-page reports with the help of the **arrow buttons** at the bottom of the screen (status bar). Click the **Print** icon button in the **Ribbon** to print the report.

If you want to save the illustrated graphic as a PDF document, click the appropriate button to the right of the Print button. If necessary, make settings for the PDF document as described at the end of the section on ancestor diagrams.

Alternatively, you can save the report as an RTF file (running RTF); click on the corresponding symbol button in the ribbon of the print preview.

You can exit the print preview with the **Close** button (also in the toolbar).

Descendants

First, the window with the **Settings** for the descendants report will open. These are identical to those for the ancestor report. So when creating descendants reports, follow the steps outlined for the ancestor reports.

Cousins

With this option, you create a report in which all blood-related first cousins of the currently selected person are listed. First, the window with the **Settings** for this report type will open. These are identical to those for the ancestor report. So when creating reports about cousins, follow the steps described for the ancestor reports.

List of all people

First, the window with the **settings** for this option will open. These settings are identical to those for the ancestor and descendants reports. So when creating a list of all people, follow the steps outlined for the ancestor reports.

Hierarchical List

As an alternative to the lists of people described above, which are initially rather unstructured and are only given a structure through various additional settings, you can also immediately display the people of the family in a hierarchical list, in which you will find the hierarchical structure and its presentation in print format without having to go through

any further settings. In the hierarchical lists, the people of the different generations are indicated by indentations.

Please note: the hierarchical list is *always* a **list of the descendants** from the current person selected in the family. Consider this principle when you first select the source person for the list.

There are also various **setting options** available for hierarchical lists in the opening window.

You can display the hierarchical lists in three ways - with each producing different **amounts of data**. Select one of the options from the "Display" menu: *short list*, *advanced list*, *complete list*.

You can change the **title** and **subtitle** of the list as you would like; enter the desired text into the input fields.

The **filter**, with its functionality described for the other lists of people, is also available.

Family sheet

For the current person, their spouse and children you can create a family sheet. To do this, click on the **Family** symbol button. The window for the settings of the family sheet will open.

You can generate the family sheet in two ways - with each producing different **amounts of data**. Select one of the two options from the "Presentation" menu: *short list* or *advanced list*.

You can change the **title** and **subtitle** for the family sheet as you would like; enter the desired text into the input fields.

One **filter** is also available for the family sheets. Determine if you want to see all the partnerships of the person listed in the family sheet, or only one partnership, which you must then select in the window below the field "Filter".

With the **Options** button, activate the other setting options for reports that have been described above as well as the further procedure for printing and creating a PDF document.

Biography

You can create a biography for the current person, which in addition to the basic personal data, contains a complete overview of the events that are documented for the person

concerned. Click the **Biography** icon button. The window for the settings for this report type will open.

You can create a biography in two ways - with each producing different **amounts of data**. Select one of the two options from the "Presentation" menu: *short list* or *complete list*.

You can change the **title** and **subtitle** for the biography as you would like; enter the desired text into the input fields.

With the **Options** button, activate the other setting options for reports that have been described above as well as the further procedure for printing and creating a PDF document.

Family Statistics

Generation	A	Men			Women		
		B	C	%	B	C	%
5	32	16	1	6,25	16	1	6,25
4	16	8	2	25,00	8	2	25,00
3	8	4	2	50,00	4	1	25,00
2	4	2	1	50,00	2	1	50,00
1	2	1	1	100,00	1	1	100,00
0	1	-	-	-	1		

For the currently open family, you can always create a comprehensive statistical overview that expresses the status of this family in figures. For example, it gives information about the current number of people and about the partnerships in the family, breaks down people according to their relationship, sex, age and much more. Click on the **Family statistics** icon button. The window for the settings for these statistics will open.

You can change the **title** of the statistics as you would like; enter the desired text into the input fields.

Through the **Options** button, activate the other options for reports that have been described above as well as the further procedure for printing and creating a PDF document.

List of Addresses

You can have the addresses documented for all members of the currently open family in a common list. After clicking the **List of Addresses** button, the window for the settings of this list type opens.

For the output of the address list, you can select from the four display options in the "Display" menu: pure list of people with only the **postal address**, pure list of people with all of the **contact details** documented in the tab of the input (telephone numbers, email addresses, etc. in addition to the postal address), or **Labels** with people's names and

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addresses, optionally two-column or three-column in A4 format. You can use the label options, for example, if you want to send mail to family members.

You can change the **Title** and **Subtitle** of the list of addresses as you would like; enter the desired text into the input fields.

In addition, you can have the people presented **sorted** alphabetically (according to last name); select one of the two check boxes to specify the **direction** they shall be sorted.

You can also include only certain family members and their address data in this list. Use this **filter**; select a criterion from the options offered in the menu. If you select the "Only selected people" option, you must first select the persons. Select a desired person listed under "People" in the settings window by clicking on the empty check box. You can also use the two buttons just below the list to **select** or **deselect all people at once**.

Using the **Options** button open the other setting options for reports.

The list of addresses display is then opened in the print preview. The further procedure for printing and creating a PDF document has already been described above.

Short List (by location)

You can display all the location data documented in the various location data fields for the members and events of the currently open family in a common list.

After clicking the **Short List** icon button the window for the settings of this list type opens.

You can set the following display options for the output of the list:

- Read out the local data fields for all members of the family

- Only consider certain members of the family; make the selection of people in the list that is displayed in the lower part of the settings window

- Location data fields that contain no entry can be ignored for the list; they will not appear in the list. Otherwise, these "empty entries" are displayed at the beginning of the short list as places with the " " value.

Once you have made the settings for the location list and click on **OK** the short list is created by location. It contains, in alphabetical order, all location data from the desired personal data pages. For each location, the four-column list indicates the date of the earliest and the latest identification of the location and specifies the number of entries for the respective period in the personal data.

6. TOOLS

On the **Tools** tab, important additional functions are available, with which you can further process the family data beyond purely creating and displaying it.

a) Search

In **Family Tree Explorer** you can, as described in <u>chapter 4. b</u>), carry out a search within the "Family" and "Individuals" lists of people to find certain people by their names.

In addition, **Family Tree Explorer** offers an advanced search, which you can open by clicking **Search** on the left in the **Ribbon** of the **Tools** tab.

Input form of the advanced person search

In the advanced search, you can search through numerous data fields that you know from the input form for personal data **values** according to specific values. You can **combine** any number of data fields for the same search; you can also combine **multiple combinations of data field inputs** together, in order to limit the possible list of people that meet the search criteria in the search results as much as possible.

In the "Advanced Person Search" window (before performing a search) on the left you will see the field in which the **List of people** will be displayed that meet all of the search criteria. The larger right pane ("Values") contains all the data fields that you can search. For example, you can search for a person with a particular **Sosa number**; according to

name and **gender**; according to certain data in the **birth and death information** or in the information for people's **identity**, **education** and **job**; the **contact details** (addresses, etc.) assigned to people can also be searched. You can also specify the **events** inputs as a search criterion. If you are looking for information that is *not* available for a person in one of the explicitly listed data fields, then you can also carry out a **Full text search** of all texts within the current family.

Enter the search term or value you are looking for in any of the fields. Use the provided **selection menus** for some data fields to select specific options, and type the desired values via the keyboard in the blank **fields**. Set **date information** (as described) using the **Calendar tool**.

On the right-hand side of each data block, in which you can enter values into empty input fields, you will find a further selection menu where you can select the option *Contains* or *Is equal*. This option can be changed for all data fields; in the small selection menu, you will find either six (date fields and full text search) or eight (text fields) options, depending on the data field, which you can set for searching in the data field. If you use the criterion selected from the menu in combination with the text or date entered in the corresponding field, the data field in the family is always checked to determine whether the entered combination is true. Most of the options in the menus are self-explanatory; reference is made here only to the following peculiarities:

- *Contains / Does not contain / Begins with / Ends with* (for text fields): If you use one of these options, you can either enter a single letter in the associated text data field or enter parts of words or whole words.

- *Ignore*: you should always select this option if you had previously selected another option for the data field, but you are not satisfied with the current search result. By ignoring the search value, the people who did not match the ignored search value are added to the search result again.

If you have entered the desired values for all data fields, you can search by clicking the **Search** button at the bottom of the advanced search window.

You can also add as many **additional data field combinations** as you like before you generate other search values. To do this, click the **Or** button. The search mask entered for the first data field combination is then deleted in the input mask of the extended search, and you can again select all required data fields and fill them with values. The first data field combination is always saved in the background; you can retrieve these combinations by clicking on the small **double arrow button** to the left of the **Or** button at any time in the search mask.

Since the individual data field combinations with the so-called "or" operator are linked to one another, the subsequent search is used to search for all personal data if they contain *either* the search values of the one data field combination *or* if they contain one of the others. In the search results list, therefore, (normally) no people will be included that meet *all* the data field combinations.

To delete all the selected and entered data values in the search mask at once, click on the **Clear** button below the search mask.

The **list of people** output as a search result on the left in the window includes, by default, the Sosa number (or the identifier of the other familial relationships), the last names and the first names of the people who meet the search criteria. Double-clicking on an entry in this list of people opens the input form for the personal data of the respective person.

b) Album

Through the **Album** icon button, you can at any time view the album of the currently open family, view the media stored in it, and manage it easily using a variety of options.
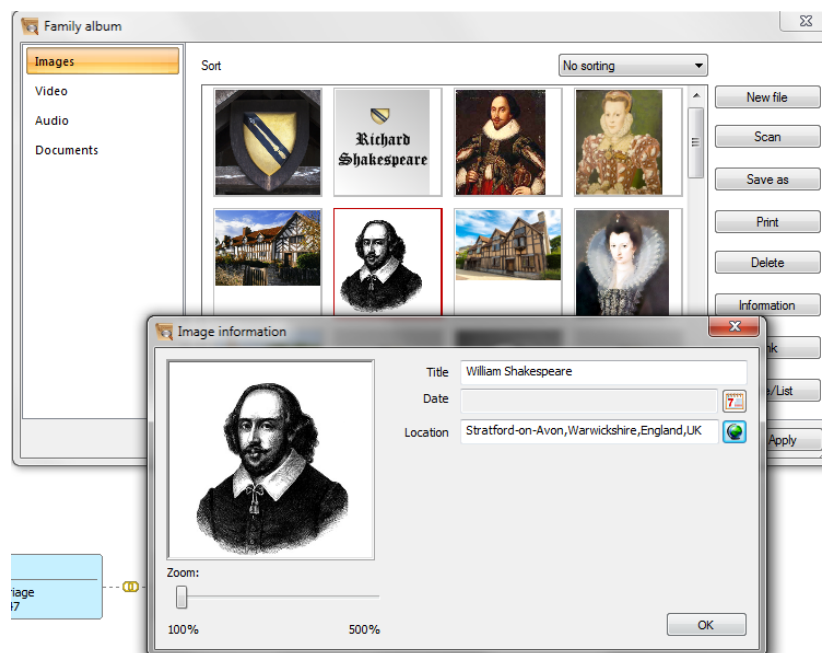
The "Images" tab of the family album with detailed display of an image

In the window of the family album, you initially see the pictures saved for the family (and assigned to specific people) in the form of small **preview images**. To view the media of the three other types (videos, audio, documents), simply click on the corresponding label in the list of buttons at the far left of the window; in the central display area, the preview image or symbols of the corresponding media appear.

All media are by default **sorted** according to file name; you can also sort them by title, by date, or by file size. To do so, select one of the options in the Sort menu at the top of the display area.

Move the cursor over a preview or symbol image; in one **tooltip** you can see the current location of the media in question, as well as the title and date of the media (if this information about was documented; see more below).

By **right clicking** on a preview or symbol image, you open a small context menu with two options. Here you have access to the documented **information** for the respective media (such as title, date and place of origin) and can **link** the media with another person in the family.

The currently selected medium is marked with a narrow **red frame**. You can edit the current media using the **buttons on the right edge** of the Family Album window. Please note that not all of the buttons shown here are not always available for every type of media and each individual media file. Unavailable buttons are "grayed out" and cannot be clicked.

New file: click this button if you want to add new media to the family album. The media file, however, will not automatically linked to a person in the family.

Scan: this button is only active when your computer is connected to a scanner. You can use it with a scanner to scan media and then easily create the file in the family album in **Family Tree Explorer**.

Save as: saves a copy of the current media to a location that you specify. In this way, you can secure the respective media, e.g. on an external data carrier.

Print: the currently selected media is printed on your standard printer. The print function is not available for the media types *audio* and d*ocuments*; a still image is printed from *videos*. Please print *documents* from the original file (i.e. outside of **Family Tree Explorer**) from your standard printer.

Delete: the currently selected media is irrevocably deleted from the family album. You will see a security check on the screen before the final deletion, which you can affirm or negate. Before deleting media, always ensure that the media in question is no longer linked to the family.

Information: you will see a separate **preview** window of the media that you can enlarge up to a maximum of five times from the original size with a **zoom** slider; set the value to 500% using the slider at "Zoom". In the initially empty **data fields** at *Title*, *Date* and *Place* enter the appropriate information; the title and origin of the media can be entered via the

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keyboard; to specify the date of origin, please use the calendar tool (description in the following chapter), which automatically opens when you click on the date field. The *OpenStreetMap* online map service is available for the location data field.

Link: a window opens with the list of all people in the current family; it corresponds to the list of people you see on the left side of the main window of the program. Select the person with whom you want to link the media. To find the person, use the options in the small selection menu on the right above the list of people (search in individual columns or in all of the list's columns). Clicking on the small icon button to the right of the selection menu opens another search function; here you can enter any text (even single letters) for which you can specify additional criteria: Case sensitive, whole word or part of a word, search direction in the list of people. In this way, you can search for a particular name in the list of people and quickly find the person to whom you would like to link.

Table/List: use this button to switch between the two possible **display modes** of the media in the central `display area of the` album window. By default, you see the preview and symbol images as a *table*; by switching to the *list* view, you will see the list of media in the form of file names including directory pathway, title, date, location and file size.

Any changes you make to the individual media files are always confirmed by clicking on the **Apply** button at the bottom of the album window. Then click on the **OK** button to close the album window.

c) Calendar
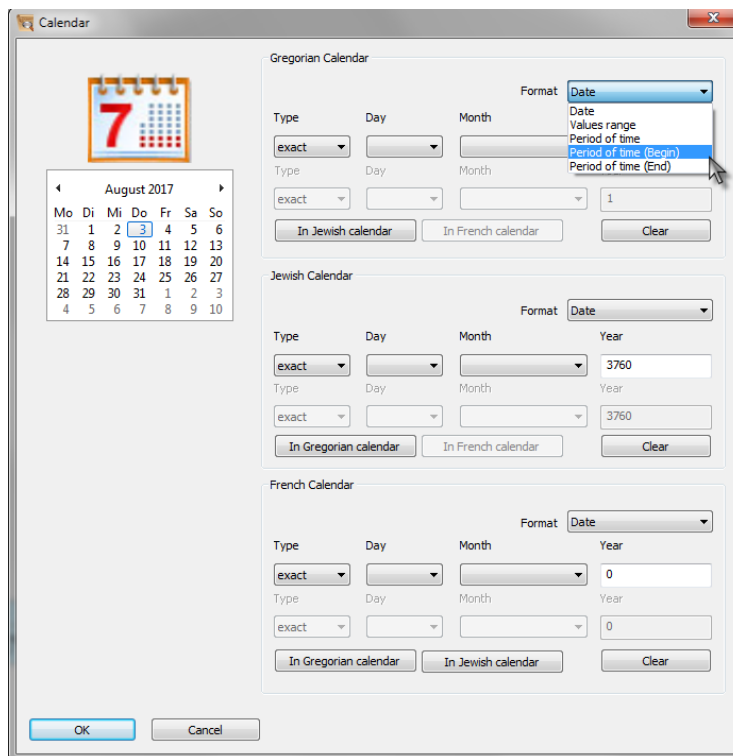
The calendar tool opens by clicking on the **Calendar** icon button in the **Ribbon** in a separate window. It also always opens when you click on an input field for a date specification on the various tabs of the personal data form. In **Family Tree Explorer,** it is not possible to type dates directly into a date field using the keyboard. The calendar tool offers convenient setting options that allow you to quickly and precisely set the desired date.

Setting the date in the calendar tool

You can set all dates for the date fields in the calendar tool with a few mouse clicks. The calendar tool always displays the current date by default (according to the system time of your PC). You can set the date using either the calendar (left) or the various buttons, selection menus and input fields on the right.

Calendar: click on one of the day buttons to select another day in the current month. Click to change the current month using the small arrow symbols to the left and right of the display step-by-step to the previous or following month.

Setting the date in the right part of the calendar tool: there are three areas available for setting the date exactly; you may set the date according to the Gregorian calendar (the most common calendar today); in the middle you can enter a date according to the Jewish

calendar (the year of the current year is already set here); below, the French (Revolution) calendar is available, which however only displays date data for the dates 1793-1805 (according to the Gregorian Calendar).

All three calendars are linked; as soon as you have set a date in one of them and click on one of the two buttons for the other (**in Calendar**), the equivalent of the date in the other calendar is displayed.

Before setting the specific date, first determine whether you want to enter a single date (*Date*), a time range between two dates (*value range*; <u>including</u> start date and end date) or a *Period* (<u>excluding</u> start date and end date); for periods you can choose whether you want to consider only the start date or only the end date or to consider both date inputs. Select the desired date format option from the "Format" selection menu in the upper-right corner of each calendar area. The *date* format is set here by default.

Select the desired date or period from the four available selection menus in one of the three calendar areas.

Type: if you want to set an exact date, apply the default selection *Exact*. For dates that are not exact, the options *Approximate*, *Estimated* and *Calculated* are still available. If necessary, select the appropriate option.

Day: Click the day of the month you want the date to display in the list of days.

Month: In the list of month names - which contains the correct names for each of the three calendar types - click the desired name.

Year: You can always enter the year using the keyboard; there is no selection menu available.

By clicking the **Clear** button at the bottom of each of the three calendar areas, you can delete the previously set date and set a different date.

Once you have set the desired date in the calendar tool, click on the **OK** button below; the set date is then transferred to the date field in the person's input form.

d) Coherence Check

The coherence check checks all the family data that you enter or import in **Family Tree Explorer**, according to certain criteria, their accuracy, i.e. the compliance with prescribed limits (= coherence) for this criteria. The data that is examined exclusively involves date data.

This data is subject to a reference date specification (e.g. date of birth) and then compared with the limit value for the corresponding date specification. All family data that is outside the specified threshold is reported as incoherent by the coherence check.

When importing family data, the coherence check is carried out automatically at the end of the import process. During the data input for the current family, the coherence check also runs automatically in the background; as soon as you enter data that is inconsistent with respect to the applicable limit values, you will see a corresponding message on the screen. In addition, you can always click the **Coherence check** icon button in the **Ribbon** to start the check of the current family data *in its entirety*.

If no discrepancies have been found in the data checked, you will see a small window with the corresponding confirmation on the screen. Click on **OK** in this window to close the window.

If, on the other hand, the coherence check has detected conflicts in the family data, a window is also displayed on the screen that lists all of the incoherent data in detail. It is recommended to use the coherence check **protocol**; by clicking on the **Save protocol** a text file (file name: .txt) is created that you can store in any location. Then you can open this protocol repeatedly and check the incoherent data reported in the family and correct it.

The coherence checks are preset as standard **limits for data fields**, from which the program orients itself towards incoherencies. You will see these default values when you use **Options** through the icon button with the same name in the **Ribbon** (also see section g) below). On the "General Settings" tab, you will find all the check boxes and input fields of the **date and coherence check**. Here, the following criteria are defined for the coherence check: **events and dates before the person's date of birth and after the date of death** (exception: the date of the funeral is not reported as inconsistent, since it is always after the date of death); **minimum and maximum age** for the events **marriage, birth of the first child and death**. These age indications are different for men and women.

You can change the presets as desired, but the default selection usually corresponds to the usual habits and also includes extreme cases that always occur (e.g. very old age at death). You should only adjust the presets if you are expecting many cases in your family in which the deviation from the current limit values is clear. If this is the case, deactivate the check boxes for events before and after the lifespan if you want to enter such events with many people in the family, or lower the minimum age for marriage for women if many women in the family married before the age of 15.

At the bottom of the tab, you find another check box. If you activate this box by clicking, when entering personal data in the future **all data will be automatically deleted** that is not within the limits defined by the coherence check. You will then see a message on the screen informing you about the invalid date and you can subsequently enter the correct date.

e) Annotations (worksheet) for the family

Enter an annotation for the current family in this annotations field. You can edit this annotation later. There is a variety of format options available for inputting annotation text, which you should know from common word processing programs (e.g. MS Word). They are on the one hand in the two menus **Edit** and **Format** in the main menu bar; on the other hand, you can get more options on the **toolbar buttons** in the menu bar below. All tool buttons are provided with tooltips that explain the button's functionality. Use the buttons and menu items to set all the settings regarding font, font color, font type, text alignment, etc. You can also paste image files into the comment text. You can also change the text blocks already set in the comment field (header, current date according to PC system time). When finished, click the **Save** button to save the comment. Any comment on a family in **Family Tree Explorer** is saved as a file in RTF format; you can define the location freely. By clicking the **Open** button, you can retrieve any previously saved comment and view and edit it in the comment box.

f) Lock (Reader Mode)

To protect your family data from unwanted changes, click the **Lock (Reader mode)** icon button in the **Ribbon**. The data of your family can then only be read in reader mode. In all data and text input fields, input or modification is still possible; the changes, however, cannot be saved, as you will see from the fact that despite the changes made in the input fields, the "Save Family" command is inactive. It is also not possible to save with the CTRL+S shortcut in reader mode. As long as this mode is active, a security note informs you when the program is finished that any changes in reader mode cannot be saved. You have the option to leave reader mode before closing the program to save changes.

In reader mode, the following commands are not accessible (inactive buttons and menu items): Rename Family, Save Family, Save Family as, Export (Save Family Data to GeDCom File), Archive, Send email and Save reports and diagrams as a PDF file.

To exit reader mode, click the icon button again, and the label to activate reader mode will change to **Unlock**.

g) Options

There are various options to customize the program to meet your needs in the individual program areas of **Family Tree Explorer**.

After clicking on the **Options** icon button in the **Ribbon**, the "Family Tree Options" window will open. It is also retrievable from other program areas of **Family Tree Explorer** (data input form, settings for reports and diagrams) via the **Options** button. In this window, you will see the areas for which options are available as subject trees. The Options panel is open and contains two sub-entries, each of which opens a tab:
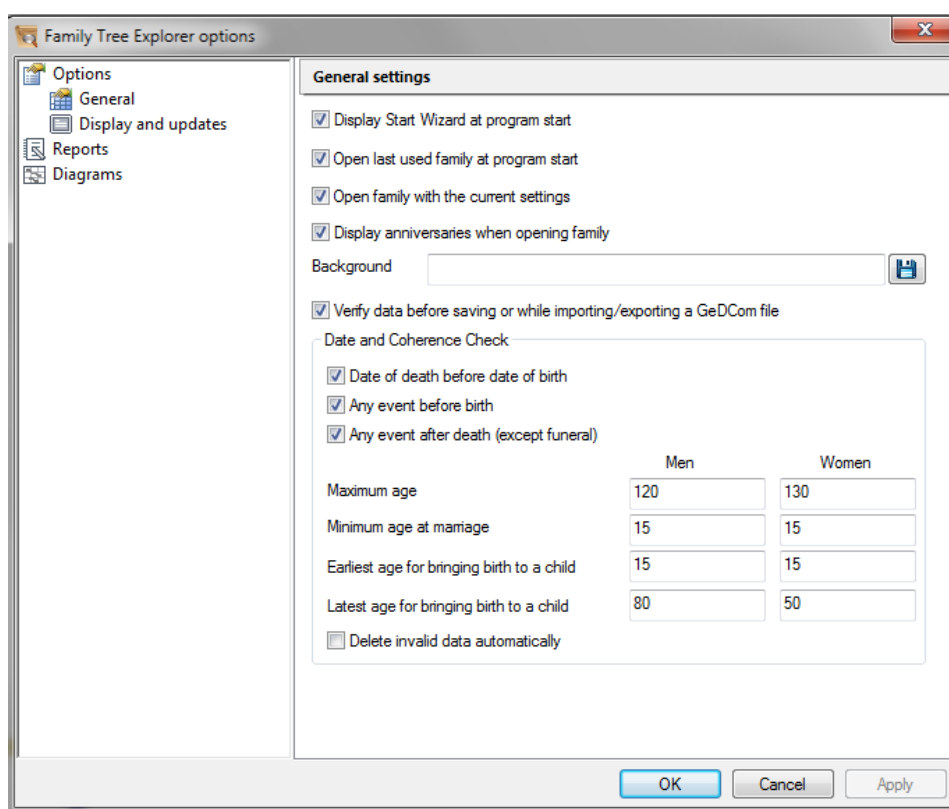
General - Make settings for the operation of Family Tree Explorer in general: disable or enable the Display Start Wizard at program start, the activation of the Open last used family at program start and Open family with the current settings the next time you open it. Determine whether each time a family is opened for the current calendar day the anniversary of events of the respective family should be displayed (birth, death and wedding days) in a small separate window (this is the default setting). Choose one background image, with which the display area for the family tree graphic (main tree) on the right in the program window is permanently stored. To remove the graphic, simply delete the pathway details displayed in the "Background" field. You can also set whether the family data should be checked for coherence before saving or before exporting and importing (verified). In the lower part of the tab ("Date and Coherence Check"), you will find the

options for the coherence check (description in chapter 6.d).

Display and updates - Here you determine whether the personal data that is displayed in the family tree graphics in the right area of the program window should always have the maximum **extent of information** or only the minimal extent. Select the required option from the selection menu in the upper right corner.

The table under "Column management" shows which data columns are currently being displayed in the column **Lists of people in the list window** (on the left in "Family" or "Individuals" program window. You can add up to three additional columns to the three standard list columns (alias name, date of birth and death). You can also remove the three default columns, but in most cases, the contents of the lists of people in the list window will become almost useless, since the individual persons are no longer identifiable at first sight.

Click the check boxes before the column names to select or deselect the columns individually.

Use the two check boxes below the column overview to determine whether you would like to have the **Properties dialog box** displayed when **saving PDF documents** (in the presentation area and whether you would like to see a message on the screen when you open a family that has no **anniversaries** for the current calendar day.

Select the check box at the bottom if you would like to be notified of new available **updates** from **Family Tree Explorer** when you open the program.

The options for the two other areas "Reports" and "Diagrams" are described in chapter 5 for the corresponding presentation types.

7. THE "HELP" MENU

In this menu you have access to the **User guide** (the text you are currently reading, **Help** button), copyright and version information about the **Family Tree Explorer** program (**About Family Tree Explorer** button), as well as to the **website** of Soft Xpansion GmbH & Co. KG with contact details for your **support requests** (**Website/Support** button). In the title bar of the **About Family Tree Explorer** window, you can also see the license key / serial number with which you have activated the program.

The digital program help is a file (PDF document) that is automatically opened in the add-on program **Perfect DocuReader**. This program is included with **Family Tree Explorer**. You can open the contents of the program help through the **Table of Contents** that you see in the left part of the reader window. Clicking on one of the chapter names in this table of contents scrolls the program help (on the right of the reader window) to the beginning of the chapter. You can also search the entire text of the program help for a specific term (**Full text search**). To do this, click on the **Search** button above the table of contents; enter the search term in the upper empty input line and activate the "Case-sensitive" check box if necessary. By clicking on **Search,** you start the full-text search in the program help.

Close the reader window by clicking the close button in the upper right corner of the window.

8. THE "FAMILY TREE EXPLORER VIEWER"

The separately installed "Family Tree Explorer Viewer" is also included with the program **Family Tree Explorer Premium**. This is a functionally reduced version of **Family Tree Explorer Premium**. It serves to open and display family data that has been created in **Family Tree Explorer** on a PC without requiring that **Family Tree Explorer** is installed on the computer. In this way, you can pass on your personal family data to friends and relatives, so that they can view the data, check for correctness and, if necessary, print it out without even being users of **Family Tree Explorer**. Please note: familial data opened in the "Family Tree Explorer Viewer" cann*ot* be modified, supplemented or stored.

The files that install "Family Tree Explorer Viewer" are located on the **Family Tree Explorer** DVD-ROM or in the program archive file in the *Viewer* directory. You can send this directory to desired recipients along with the family data on a sufficiently large data carrier (e.g. DVD-ROM, USB-Stick). Sending a CD-ROM is not recommended because the viewer's installation files will require almost 700 MB of disk space due to the provided graphics. If you and the recipient have a fast Internet connection and a powerful FTP server is available, you should consider utilizing an FTP server for the same reason.

The recipient must then simply double-click on the *setup.exe* file (in the *Viewer* folder) to install the "Family Tree Explorer Viewer". The family data can then be opened in the same way as in **Family Tree Explorer** with the "Open Family" option opened in the **Family Tree Explorer Center**.

If the system requirements of the recipient PC are not sufficient, you can also send the reports and diagrams created by **Family Tree Explorer** as PDF or image files.

From time to time, updates are created for "Family Tree Explorer". These updates will - analogous to the functionality of **Family Tree Explorer** - run automatically the next time the viewer is started if you allow the update message in the dialog box.

9. IMPRINT

Family Tree Explorer

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