

Guide to FTM 2019

DESCRIPTOR	Guide to FTM 2019 Contact: Andy Douglas or Tahitia McCabe
KEY LEARNING POINTS (Knowledge; skills; methodologies)	Knowledge On completion of this guide students should : <ul style="list-style-type: none">• Understand how to use FTM in the course environment. Skills: On completion of this guide students should : <ul style="list-style-type: none">• Be competent in the basics of how to use FTM 2019.
NOTE	Students are expected to: <ul style="list-style-type: none">• Follow these course and online materials
PREPARATION	Install FTM 2019 on your computer.

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Introduction

The use of genealogical software is required for this course. Family Tree Maker 2019 (FTM), which is normally provided to PG Cert and full time MSc students, is strongly encouraged and recommended. Some students will have used different software and may wish to continue doing so and you can do so as long as it can output references in the course style and it can attach reference to charts. However, this is discouraged as:

- The tutor team can only provide advice and support for the use of FTM for this course.
- The course notes follow the report and chart names used by FTM, which may lead to confusion or misunderstanding by non-FTM users. Other packages may not be capable of as easily producing the output required for certain assignments and assessments.
- Advanced features that other packages may offer (for example advanced query writing or database manipulation) are not required for this course.

Older and Mac versions of FTM are also discouraged. For the Mac version, some workarounds are necessary to get it to show information as needed on the course. A 'Mac users and FTM issues' document is available and it's based on ways that former students found to solve some of these problems. Most of what is in the regular step by step documents will apply to the Mac version though.

Whilst FTM is not necessarily "the best" genealogy software program it is an excellent all-round package and more than capable of producing everything required for this course.

Students are strongly advised to familiarise themselves with FTM before the course commences.

Using FTM

This section provides an overview of using FTM in the course environment using images from the example family tree we created using FTM. It may help to read through the guide with this tree open in FTM. The tree focuses on the families of Margaret Macdonald and Charles Rennie Mackintosh and was sent out in an email at the start of the course and can also be downloaded from the All Levels site.

The guide is not meant to replace or duplicate the FTM Companion Guide (the digitized book provided with the software package, look in the help tab in the program) nor the extensive FTM help features. We start with understanding some of the software's terminology and outline a strategy for learning FTM. Help resources are discussed and some course "best practice" is suggested. Finally, some "tips and tricks" are provided.

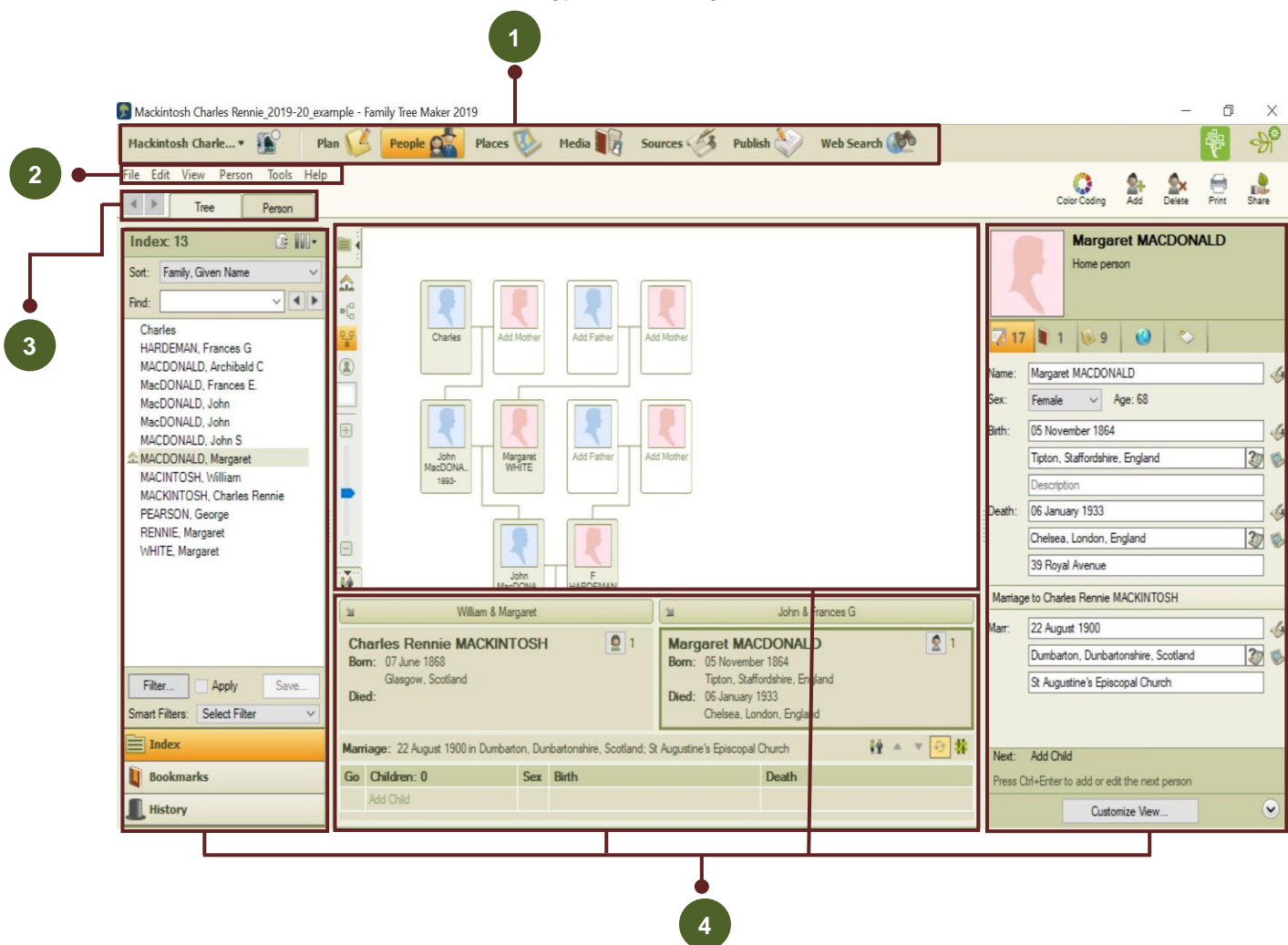
It is assumed that you have installed the software and, if desired, linked it with an Ancestry subscription and/or FamilySearch account (you **do not** need to link your software to these

websites though). The best way of learning any software package is to start using it, rather than reading about it.

We do not suggest creating a tree on Ancestry (or other online tree) and then downloading that to FamilyTreeMaker for the research you do for the course. We have found that students who do this end up spending more time changing the Ancestry provided references to course standard references, and changing other details on the tree than it would take by just beginning the tree in FamilyTreeMaker.

Basic Terminology

Let's start with some basic terminology to aid navigation and discussion.



- 1 The *toolbar* located at the top of every FTM window organises FTM's main features into seven different *workspaces*: Plan, People, Places, Media, Sources, Publish and WebSearch. Each *workspace* provides a different view (basically everything beneath the toolbar and dropdown menu).
- 2 The *dropdown menu* located immediately beneath the toolbar is similar to ones found in all Windows programs. Some of the options included differ in each workspace.

3

Tabs are used to view different *panels* within all or part of each *workspace*.

4

Panels are component parts of a *workspace* view. Each panel has a name. Here, in the People workspace Tree tab, we see the Index panel (left), the Generations panel (middle top), the Family Group panel (Middle bottom) and the Individual Information panel (right).

Facts abound in FTM. Files may be full of facts in the sense of assertions of truth backed by evidence, but here we refer to a technical term for characterising events, personal data or descriptors about an individual or couples. FTM has some 78 standard Facts. As well as birth, marriage, death and sex, some of the most frequently used on the course are baptism, census, occupation, cause of death, probate and burial/cremation. We offer some advice on each of these commonly used fact types below. New Facts can be created for specific needs. There are a number of *elements* to each Fact, usually Date, Place and Description. See the example reports and charts and .gedcom file provided for Charles Rennie Mackintosh and his wife Margaret Macdonald which show how we would like you to approach filling in these elements.

Strategy for learning FTM

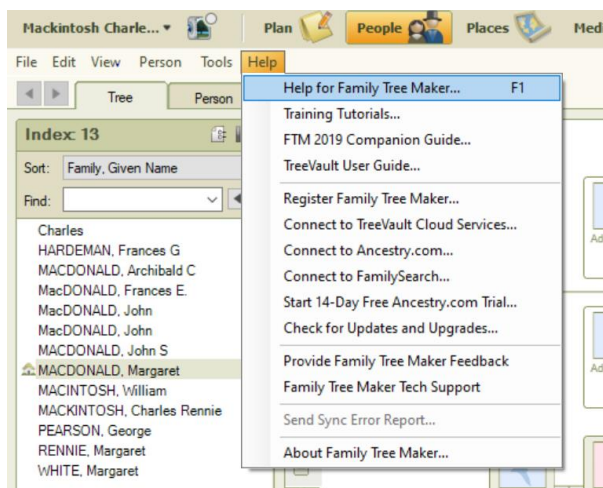
The best way of learning *any* software product is to just get stuck in and start using it. FTM does take a while to get used to, but time invested in learning the product at the start of the course will pay dividends later on.

There are a variety of short instructional movies on using FTM available on the Ancestry Academy. These provide an excellent and quick overview of the product and you are strongly advised to view them. These can also be seen online, without having to have FTM loaded - <https://www.ancestryacademy.com/getting-the-most-out-of-family-tree-maker>. Scroll down the webpage to see a list of the available videos. Click on the title and watch the video. Watch all of the movies – each is only a few minutes long. Although these movies have not been updated for the latest MacKiev version of FTM (2019) they are still very relevant and informative. **View them now!**

We have also created a number of short videos on using FTM on the course, these can be found on the All Levels MyPlace site which you have access to once the course begins.

OK, having seen the tutorial movies you now have a little understanding of what the software can do. You can return to these movies at any time. Each of the workspaces was described. It might be helpful to know that the Media workspace is not really necessary at all for this course, and the Places workspace might only be used occasionally. Using the Web Search workspace has some issues and students are advised to use it with care (see more on this in the best practice section).

Now spend an hour setting up a sandpit! This doesn't require you to go out into the garden – a sandpit is just a practice database in which you can play around. Create a new family tree (see the FTM building a family tree movie), add some people, add some facts about them and produce some reports. Make it all up, let your imagination run riot, use silly names – this is just for you. You can always come back to it in the future to check something specific out (for example, adding a second wife). We will build on this, but for now, just get the feel of the product.



Getting help!

Hopefully, playing in the sandpit has resulted in you having some questions. FTM provides several levels of support. Some can be accessed from “Help” on the dropdown menu.

These options offer different levels of support. The first option “Help for Family Tree Maker...” (which can also be accessed by hitting the F1 function key from anywhere in the software) opens a new window with an on line help tool. This can be searched for specific words, or browsed at will.

“Family Tree Maker Tech Support” takes you to the Technical Support page on the FTM website. You can log an issue with FTM here.

“FTM 2019 Companion Guide” opens a .pdf copy of a 364-page instruction guide.

There is other help and advice available (see the end of this guide for this link):

- *Family Tree Maker User Blog by Russ Worthington* - A blog dedicated to use of FTM which is well worth an occasional browse.

Course Best Practice

The following notes are intended to help students avoid several potential pitfalls.

Backup: Disasters (whether fire, theft or mechanical breakdown) only happen to other people. Wrong! One student had her laptop stolen over Christmas. She lost all her coursework including a completed but not submitted assessment which put her under massive pressure for the rest of the academic year. Cloud based storage solutions such as Dropbox or OneDrive offer a technically savvy approach, but a regularly updated memory stick kept in your pocket/purse/workplace can work just as well. It cannot be stressed enough - **BACKUP YOUR COURSEWORK!**

Customising Charts and Reports: It is important to be aware that most charts and reports in FTM can be customised to include or exclude information and to change the appearance. For example, we expect to see sources included with reports in the form of references, and for the purposes of the course, mainly to help the tutors with marking, with charts as well. However, it is **not customary in genealogical practice to include sources with charts**. The default FTM settings do not include sources in reports or charts so you will need to tick the ‘include sources’ box when you set up your reports and charts.

However, it is possible for too much information to be included, especially on charts where space is at a premium and clarity of presentation essential. The two Step by Step Guides to Charts and Reports provide details on what might be included successfully.

Chart Design: Although it is possible to be quite creative with the presentation of charts it is, for the purposes of the course, better to invest your time in researching for the assessments and assignments. Background pictures, portrait photos, silhouettes or multiple fonts are simply not necessary if not explicitly asked for. If you do use colour, remember that the chart may get printed in greyscale and different colours may print as similar shades of grey. The following miniature charts demonstrate some variations possible for the same basic chart:



FTM's standard chart. Insufficient facts included, image needs cropping.



Too colourful! Multiple fonts and colours, unnecessary silhouettes, intrusive background.





Cropped, consistent and easy to read (at full size).

By all means experiment, but poor chart presentation will lose marks in assessments. See the Step by Step Guide to Charts for more information on the process.

Displaying Facts: FTM offers a large number of pre-defined Facts. When you are working through the Tree tab of the People workspace key facts can be displayed in the right-hand Information Pane. These are selected from the Customise View dialogue box (click on the Customize View button at the bottom of the pane) and will then appear in the Information Pane and can then be used for data entry. Typical Facts you may want to add, beyond the default set, are birth and baptism (separately), death, burial and probate, censuses and occupation.

In the Person tab of the People workspace, you can add additional Facts by clicking on the blue plus sign button.



FTM Hints: Once you have linked FTM with Ancestry and/or FamilySearch you may start to notice little green leaves  or little blue squares  appearing in the pedigree chart in the family view of the People workspace. These indicate that Ancestry (in the first instance) or FamilySearch (in the second instance) has identified possible matching records – as either source records or in other member trees. This can be helpful, but in reality they only target “low hanging fruit” that you would find quickly anyway. There is a real danger in over reliance on hints (laziness) and the absence of a hint doesn't mean Ancestry or FamilySearch don't hold relevant information. As for other member trees, **ignore them for the most part** – they are probably either wrong or without sources (and thereby irrelevant), however they can at times provide useful hints. If you do refer to them and use the results, remember to include them as a source.

ICT (or IT) Forum: The ICT (Information and Communications Technology) forum on your course's MyPlace site is a useful place to discuss general issues and solutions to problems with

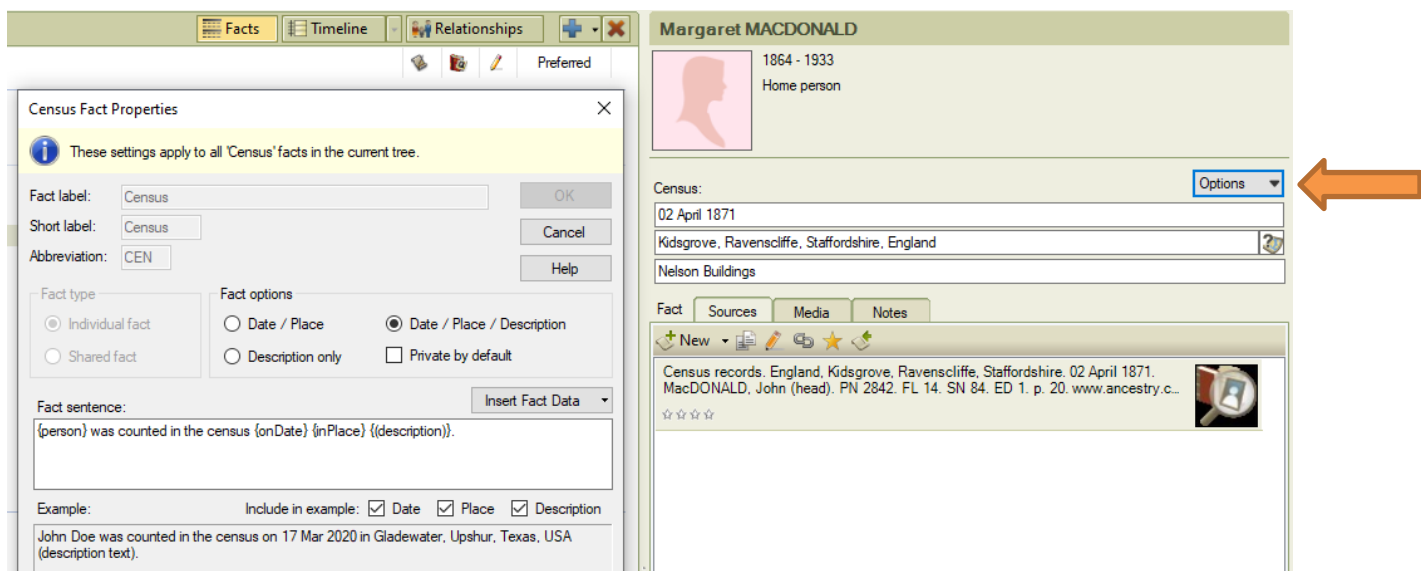
FTM (along with other system issues such as using MyPlace or email). These open discussions can be followed by all the students and tutors on the course and everyone can learn from them. As a basic courtesy to fellow students and tutors you should try to resolve any issues before posting to the forum – don't just panic and ask for help instead of pressing the F1 help button or looking at the companion guide. Please include "FTM" in the title of any new discussion topic specifically about FTM.

Preferred Facts: There will be occasions where an individual has multiple instances of the same fact. For example, where there is additional information (such as multiple residences, jobs, censuses, etc.). However, FTM requires one of each fact to be marked as the "preferred" fact. FTM nominates the first instance entered to be the preferred, although this may be changed. This matters because some charts and reports default to only showing preferred facts, whereas we normally want to see all information that has been discovered. Where there is the option to "show only preferred facts" this should be **deselected**.

To set a fact as the preferred fact go to the Person panel of the People workplace, right click on the fact you want and choose "Set As Preferred." The Step by Step Guides indicate how to show facts in reports and charts.

Enabling the 'Description' Field within a Fact: As a default the description field isn't shown for all facts. You will use the description field for address or place information within Census and BMD Facts as well as other Facts such as showing the name of the occupation in an Occupation Fact.

To enable it, go to the person view in the People workspace. Highlight the desired fact in the top left hand pane (Person Facts View) and then click on the options button in the right hand Person Information pane. Choose "Fact Properties" from the menu and select the Date/Place/Description option.



See the example below where Margaret MacDonald's birth Fact has no additional information entered into the description field (because there was no additional address or place data available) but she does in the death and marriage Facts. These description fields have been indicated with an arrow.

Name: Margaret MACDONALD

Sex: Female Age: 68

Birth: 05 November 1864
Tipton, Staffordshire, England
Description

Death: 07 January 1933
Chelsea, London, England
39 Royal Avenue

Marriage to Charles Rennie MACKINTOSH

Marr: 22 August 1900
Dumbarton, Dunbartonshire, Scotland
St Augustine's Episcopal Church

Recording Addresses: there are a couple of issues here. The first is which fact to use to record where someone lived. There are three similar facts: Address, Property and Residence. Each is defined in the GEDCOM standard as follows:

Address: The contemporary place, usually required for postal purposes, of an individual, a submitter of information, a repository, a business, a school, or a company.

Property: Pertaining to possessions such as real estate or other property of interest.

Residence: The act of dwelling at an address for a period of time.

Address and residence are very similar, but residence might be preferred in most circumstances. Whichever you use, be consistent! Property is clearly a different fact – it might refer to a place, but not the necessarily primary place of residence. Equally, it might relate to a piece of art or other high value item.

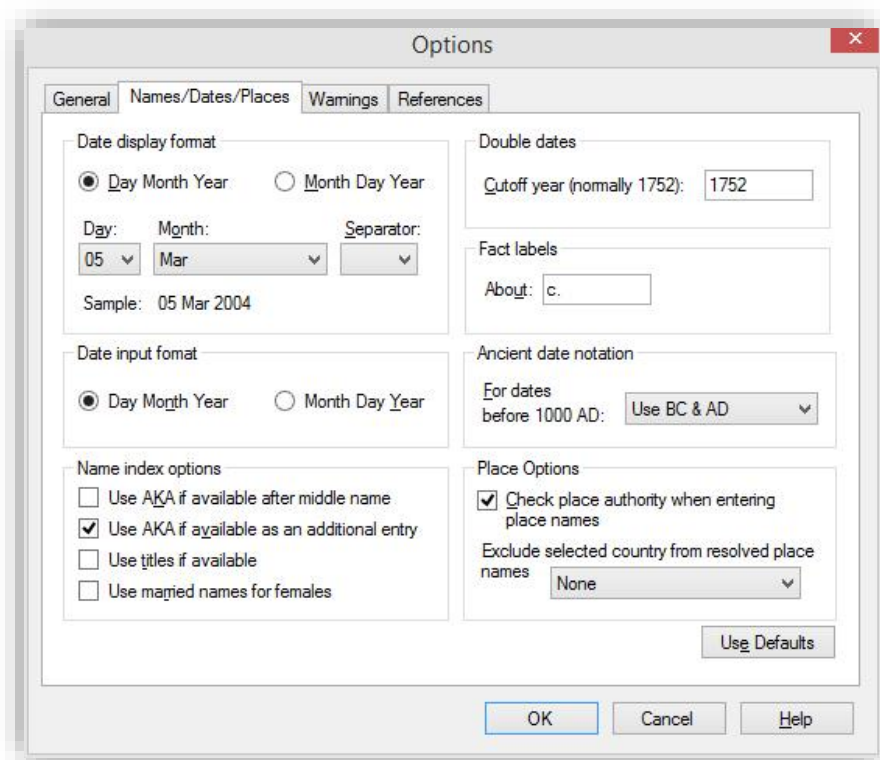
The second issue is with recording places in other facts (such as where someone was born). As standard, FTM displays Place with many facts such as birth, marriage, death, census. This should be recorded in the format suggested the lecture *Gathering family information, producing reports and charts* and in the Referencing Guide. Note that in the latter, it is stated that, if you choose to do so, you can leave off the county/shire name for the following cities within FTM Facts and notes: England – London; Scotland – Aberdeen, Edinburgh, Dundee and Glasgow. However, be consistent.

Enter the place name as it appears in a record, which is not necessarily the place name that FTM suggests to you! Place names change over time and you want to capture the place name as

shown on the record. You can provide a note for the Fact if the place name has changed and giving information on the current place name is necessary (as it more than likely will be).

However, what if you have a full address? There are two options. The first, and what we prefer to see you use, is to record the part of the address not recorded in the Place field (i.e. the house name/number and street) in the Description field (see the note about this above). The other option (which we do not prefer unless you have also included it in the Description field) is to record the address details in the note for that fact, by clicking on the note tab in the same panel. This is where any other additional information would normally be recorded.

Recording Dates: Firstly, ensure that FTM is set up to recognise UK format dates. Select “Tools” from the dropdown menu and choose “Options.” This will bring up the Options window. Select the Names/Dates/Places tab. Select Day Month Year for both “Date display format” and “Date input format.” Non UK students are strongly advised to follow this for coursework to avoid any confusion. You can also change the prefix for About to either Abt. or c. This is a personal choice.



FTM is quite flexible with entering dates and will automatically change the formatting, where applicable utilising the settings chosen in the Options window:

If you type:	FTM displays:
1800	1800
1/1800 or Jan 1800 or January 1800	Jan 1800
1/1/1800 or 1 Jan 1800 or 1 January 1800	01 Jan 1800
est (or abt., about, c., ca., circa) 1800 (or any other date format)	c. 1800

?	Unknown
Bef or Before 1800 (or any other date format)	Bef. 1800
Aft or After 1800 (or any other date format)	Aft. 1800
Bet 1/1/1800 – 1/3/1800 or 1/1/1800-1/3/1800 or 1800-1900	Bet. 01 Jan-01 Mar 1800 Bet. 1800-1900

Recording Notes: Often just recording the date and place of a fact is not enough. FTM allows notes to be attached to individuals, relationships, facts, sources, and media. Individuals can have both person notes and research notes. However, you must ensure that if you have used notes that they are included in reports – tutors will not normally mark from your FTM files, just the output from them as this is what a client would see. The default settings for reports do not include all note types (see the Step by Step Guide to Reports to see how to include them).

The screenshot shows the Family Tree Maker 2019 interface for Margaret MACDONALD. It includes a 'Fact' table with columns for Fact, Date, Place / Description, and Preferred status. A 'Notes' section is visible at the bottom right, containing text about her art work and marriage details. Two red arrows point to specific note areas: arrow 1 points to a note about her art work, and arrow 2 points to a note about her marriage ceremony.

We recommend that you use notes as follows:

1

Person notes: best used to discuss general themes, information that does not fit into a standard Fact, general conflicting information or reasoning for conclusions reached, etc. Notes in FTM don't have a way of linking sources to them, so if you introduce new information here you will need to also include a reference manually directly after the information. Do not paste chapters from books, or complete entries from the Oxford Dictionary of National Biography in here!

2

Fact notes: These are good for recording additional details about a specific fact, conflicting information, reasoning for conclusions reached, etc. For example, for a marriage you might note the names of witnesses, the minister/vicar/priest, marriage according to the rites of whichever church, the names of the parents of bride and

groom, etc. For some facts, it might be appropriate to discuss any concerns about the quality of the source, especially for facts based on secondary evidence.

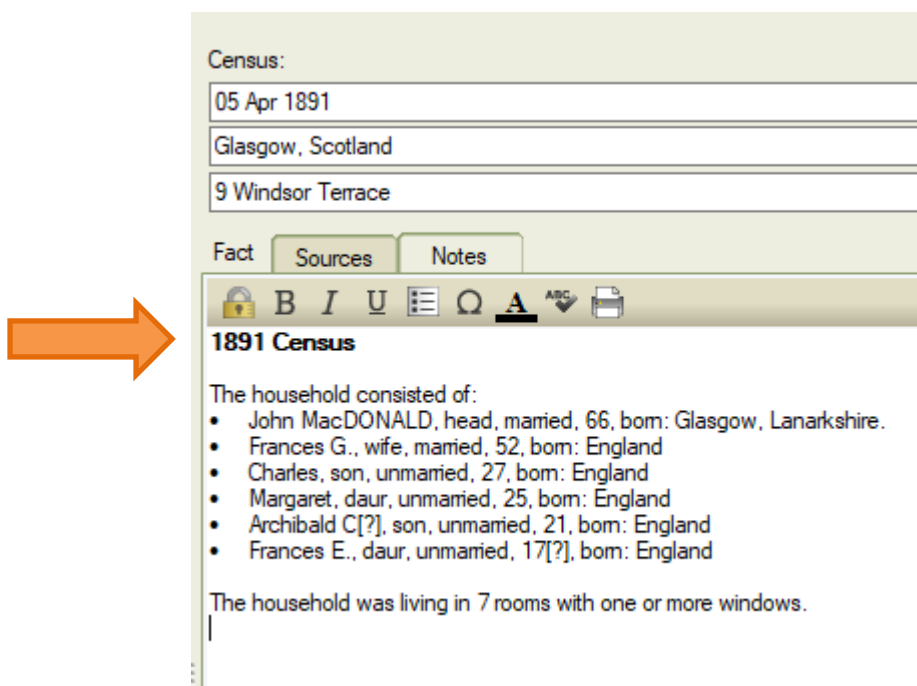
Research notes: these are good to record research strategy and especially to record negative searches (where you have researched something, but not found any results). For purposes of the course, please do not use research notes, rather put this type of information in the person or Fact notes sections.

Relationship notes: can be avoided by using a person note for one of the individuals. If used, beware of recording hearsay (e.g. “the marriage was tempestuous”) unless you can provide a source. For purposes of the course, please do not use relationship notes.

Source notes: Don't use them – the information is better recorded as a fact note.

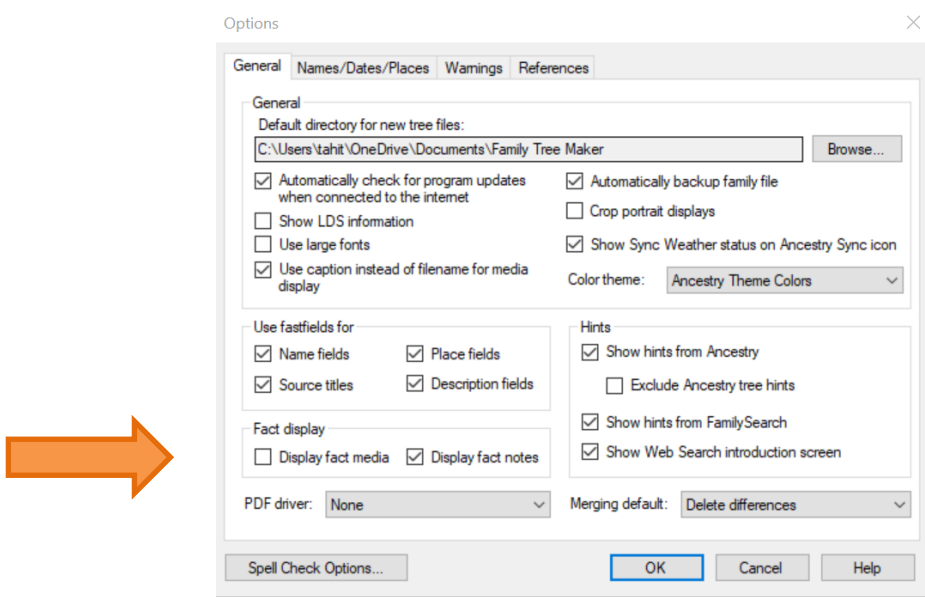
Media notes: We do not use attached media in the course so media notes are not applicable.

Census Fact notes: FTM does not arrange census fact notes in any reasonable order in reports. We suggest typing in at the beginning of a census fact note, the year of the particular census. This makes it clear which census year the note is referring to when a report is created.



Fact notes tab not appearing?

For some unknown reason, sometimes the notes tab does not appear in a Fact's entry space and you have to turn this on manually. To do this, go to the Tools drop down menu and choose Options. From within this pop up box, tick on the box by 'Display fact notes' and click on OK.



Recording Person Names: Follow the name conventions specified in the lecture *Gathering family information, producing reports and charts*, namely use () for an unknown name and capitalise surnames. The “also known as” fact can be used to record alternative names or name variants.

Sources: There are just two things to remember: every fact needs a source, and every source needs to be recorded (cited) in compliance with the course Referencing Guide. Recording sources has been a constant area of difficulty for students during the early stages of the course. However, once mastered, it becomes second nature and is a skill every genealogist needs. Familiarity with the Referencing Guide is assumed at this point. That document explains the required layouts to use when quoting sources. Here we are discussing recording sources in FTM.

FTM provides a number of templates for citing sources. These are based on the practice promoted by the veteran US genealogist Elizabeth Shown Mills and for the most part assume US records. They are not easily adapted to our purposes, so our advice is to ignore them! **Instead, we recommend a different approach - recording the generic first part of a particular reference as the source title (e.g. Baptisms (OPR) Scotland) and the rest in the source citation field.** This approach is demonstrated in detail in the Step by Step Guide to Source Citations. There are other ways of achieving a similar result, but we suggest you use this method.

For coursework there is no need to record a source for Name Facts (unless this is asked for in the assessment instructions), and certainly recording multiple sources should be avoided, unless there are perhaps significant variants of the name in use. For client work you might attach a source to a name to show the record where you first encountered it, or in medieval genealogy where a name may be the only fact available for an individual.

It is possible to add notes to source citations. Don't do this – they are too easily missed. Any notes required are better presented as a fact note (see “Recording Notes”).

FamilySync: This is the process by which a tree on your computer is synchronised with a tree created on the Ancestry website. This can be helpful in a hobby environment, but **we do not recommend using this** for coursework (or professional work). Mainly, if you put your coursework on the Internet, there is a risk of it being used by other students and you are required to make any online trees created as part of course work non-searchable and private.

Uploading Trees: Did you realise that when you create an Ancestry family tree, even if it's a private tree, you "*grant Ancestry a perpetual, sublicensable, worldwide, non-revocable, royalty-free license to host, store, copy, publish, distribute, provide access to, create derivative works of, and otherwise use such User Provided Content to the extent and in the form or context we deem appropriate on or through any media or medium and with any technology or devices now known or hereafter developed or discovered. This includes the right for Ancestry to copy, display, and index your User Provided Content.*"? See

<https://www.ancestry.co.uk/cs/legal/termsandconditions?hideHeader=1> . Most hosted sites, and things like Facebook, operate in similar ways so your data can be sold on.

If you create an online tree while doing your course work, you must make it private and non-indexed (if that is possible on the site you are using)! That way other students cannot see your work...also do not add content to online collaborative trees such as FamilySearch or WikiTree for families researched as part of the course assignments or assessments.

Web Search Workspace: There are some concerns with the use of the Web Search workspace on FTM. It is certainly convenient. However, there are also problems. It is much more flexible, and you can be more creative, if you search Ancestry and/or FamilySearch manually. If you only use the Web Search workspace on FTM for searching you may not develop advanced skills in using Ancestry or FamilySearch. Imported data brings its own source reference, which is fine, but it is in the wrong format for this course and you will need to change these. Use this if you want, but you are strongly advised not to rely on it. What may appear to save time may, in the end, be more time consuming and less beneficial.


Commonly Used Facts

Recording Birth Facts:

- Fact date field: The date of the birth should be recorded. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty.
- Fact place field: use the place as shown on the birth record – you may need to view the search results to find out place details as everything you need might not be on the actual record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: If available, provide the house name/number and street here. Or name of institution, hospital, etc.

Example for someone for whom the full date of birth was known:

Charles Rennie MACKINTOSH

 1868 - 1919
Husband of
Margaret MACDONALD


Birth: ✓ Options ▾

07 June 1868

Central District, Glasgow, Scotland ?

70 Parson Street,

Fact Sources 1 Notes 1

 1%

The birth record shows parents as:

Father: William McIntosh, police clerk
Mother: Margaret McIntosh, m.s.: Rennie

Marriage information: 4th August 1862 in Glasgow.

The birth was registered on 25 June by the father.

Example for someone for whom the full date of birth is not known:

Frances G HARDEMAN

 1839 - 1912
Mother of
Margaret MACDONALD


Birth: ✓ Options ▾

Bef. 17 February 1839

Cradley, Worcestershire, England ?

Description

Fact Sources 2 Notes 1

 1%

Her baptism record of 17 February 1839 gives no date of birth. The 1871 census record where she is shown as 33 years old gives a possible birth year of 1838.

We have decided to show the date of birth as before her baptism date.

Recording Baptism Facts:

- Fact date field: The date of the baptism should be recorded. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty.
- Fact place field: use the place as shown on the baptism record – you may need to view the search results to find out place details as everything you need might not be on the actual record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: If available, provide the church name here. Or name/address of house, etc.

The screenshot shows a software interface for recording a baptism fact. At the top, the name "Frances G HARDEMAN" is displayed in a green header. Below this is a profile picture placeholder (a pink silhouette) and the dates "1839 - 1912". To the right of the dates, it says "Mother of Margaret MACDONALD".

The main section is titled "Baptism:" and contains several input fields:

- A date field containing "17 February 1839".
- A location field containing "Halesowen, Worcestershire, England".
- A "Description" field which is currently empty.


 To the right of the "Baptism:" label is a green checkmark and an "Options" dropdown menu.

Below the input fields are tabs for "Fact", "Sources 1", and "Notes 1". At the bottom of the interface is a rich text editor with a toolbar containing icons for bold, italic, underline, list, link, unlink, and print. The text in the editor reads: "The transcription of the baptism register entry gives her father as Joseph Tilley Hardeman and her mother as Harriet [no surname is given]."

Recording Burial/Cremation Facts:

- Fact date field: The date of the burial/cremation should be recorded. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty.
- Fact place field: use the place as shown on the burial/cremation record – you may need to view the search results to find out place details as everything you need might not be on the actual record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: If available, provide the church, civic cemetery, crematorium's name here. Or 'at sea', etc.

Margaret MACDONALD

 1864 - 1933
Home person







Cremation: ✓ Options ▾

10 January 1933

London, England ?

Golders Green Crematorium

Fact Sources **1** Notes

Helland, Janice. (2006). 'Mackintosh, Margaret Macdonald (1864-1933).' In: Oxford Dictionary of National Biography. Oxford: Oxford University Press. <http://...>
☆☆☆☆

Recording Cause of Death Facts: Cause of death can often be found on a death record. Use the FTM 'Cause of Death' Fact to provide this information when we ask for it. This Fact does not allow you to give a date or place, all you can enter is text describing the cause of death.







Frances G HARDEMAN

 1839 - 1912
Mother of
Margaret MACDONALD

Cause of Death: ✓ Options ▾

Pernicious anaemia, 1 year 6 months

Fact Sources **1** Notes

Deaths (CR) Scotland, Old Kirkpatrick, Dunbartonshire. 16 June 1912.
MACDONALD, Frances Grove. 501/00 0267. <http://www.scotlandspeople.gov.uk...>
☆☆☆☆

Recording Census Facts: The easiest way (and what we ask for on the course) to record whether someone appeared on the census is to use the standard Census Fact. Do not use the Residence Fact for this information.

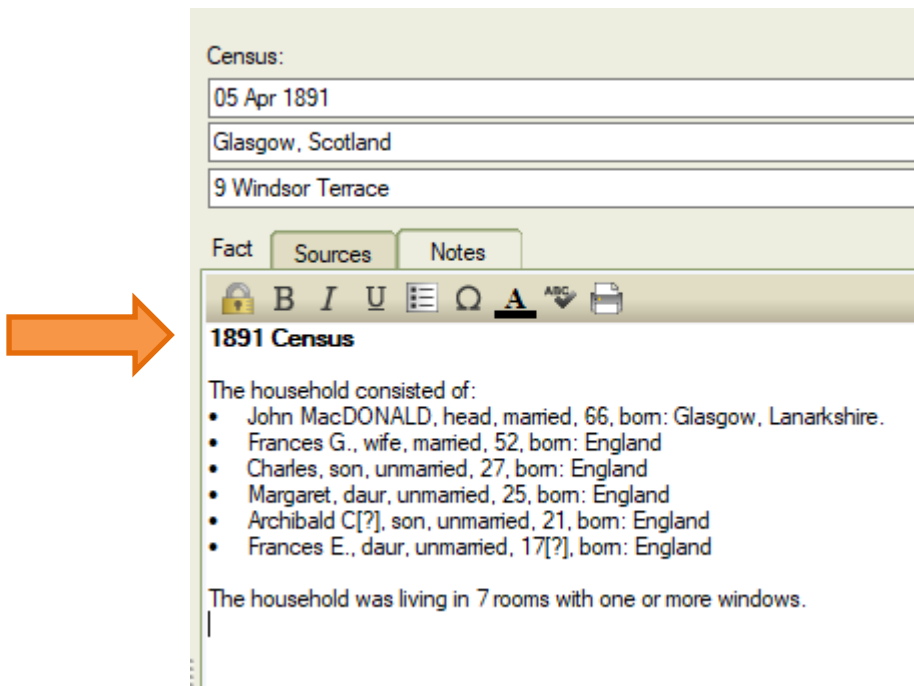
- Fact date field: The date of the census should be recorded as the full date (based on the Sunday as per the list below for the UK)
- Fact place field: use the place as shown on the census record – you may need to view the search results to find out place details as everything you need might not be on the actual census record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: Provide the house name/number and street here. Or name of institution, etc.

Separate facts can be set up to record education (if a person is shown as a ‘Scholar’ or being at school) and/or occupation details provided on the census return. Other information found in censuses such as the number of rooms with windows, number of servants and/or lodgers can be included in the note area for each Census Fact.

You will need to add a new Census Fact (and associated facts such as occupation if required) for each census year to capture the data from each census you’ve found. Here are the census dates for the UK:

Census Year	Census Date
1841	06 Jun 1841
1851	30 Mar 1851
1861	07 Apr 1861
1871	02 Apr 1871
1881	03 Apr 1881
1891	05 Apr 1891
1901	31 Mar 1901
1911	02 Apr 1911
1921	19 June 1921

Census Fact notes: FTM does not arrange census fact notes in any reasonable order in reports. We suggest typing in at the beginning of a census fact note, the year of the particular census. This makes it clear which census year the note is referring to when a report is created.



Census:

05 Apr 1891

Glasgow, Scotland

9 Windsor Terrace

Fact Sources Notes

1891 Census

The household consisted of:

- John MacDONALD, head, married, 66, bom: Glasgow, Lanarkshire.
- Frances G., wife, married, 52, bom: England
- Charles, son, unmarried, 27, bom: England
- Margaret, daur, unmarried, 25, bom: England
- Archibald C[?], son, unmarried, 21, bom: England
- Frances E., daur, unmarried, 17[?], bom: England


The household was living in 7 rooms with one or more windows.

Recording Death Facts:

- Fact date field: The date of the death should be recorded. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty.
- Fact place field: use the place as shown on the death record – you may need to view the search results to find out place details as everything you need might not be on the actual record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: Provide the house name/number and street here. Or name of institution, 'at sea' etc.

Example for someone for whom the full date of death is known:

Frances G HARDEMAN

 1839 - 1912
 Mother of
 Margaret MACDONALD


Death: ✓ Options ▾

16 June 1912

Bowling, Dunbartonshire, Scotland ?

Dunglass Castle

Fact Sources 1 Notes 1

 1%

Frances is shown as the widow of John MacDonald, consulting engineer.


Her age is: 73 years old.

Her parents were:
 Joseph Tillis Hardeman, land agent. Deceased
 Harriet Hardeman, m.s. Moore, Deceased

Informant was: Charles MacDonald, son who was present.

Example for someone for whom the full date of death is not known:

Frances E. MacDONALD

 1874 - 1891
 Sister of
 Margaret MACDONALD

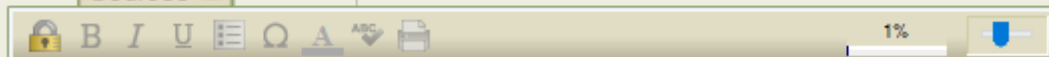
Death: ✓ Options ▾

Aft. 05 April 1891

Place

Description

Fact Sources 1 Notes 1

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As Frances appears on the 1891 census, we assume she died after this date. More research is required to find her death information.

Recording Occupation Facts:

- Fact date field: In most cases, the date of the event on the record should be recorded. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty. However, you might need to enter an occupation fact for someone who is dead and, in this case,, do not enter the date of the record or the place in which the record was taken as this will be misleading. Or you might have occupation information given for someone who does not live in the place where the event took place and in that case, you can provide a date but not a place.
- Fact place field: in most cases, use the place as shown on the record being used– you may need to view the search results to find out place details as everything you need might not be on the actual record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: Give the name of the occupation, person's status (such as from a census record where someone's occupation might be noted as 'annuitant'), etc.


Example for someone where date and place can be provided:

John MacDONALD

 1824 - 1900
Father of
Margaret MACDONALD







Occupation: ✓ Options ▾


02 April 1871

Kidsgrove, Staffordshire, England 

Manager, colliery

Fact Sources 1 Notes

 New     

Census records. England, Kidsgrove, Ravenscliffe, Staffordshire. 02 April 1871. MacDONALD, John (head). PN 2842. FL 14. SN 84. ED 1... 

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Example for someone where date but not the place can be provided:

William MacINTOSH

1838 - 1900
Father-in-law of
Margaret MACDONALD

Occupation: ✓ Options ▾

22 August 1900

Place

Police Clerk

Fact Sources 1 Notes 1


William's occupation on his son's marriage register entry is 'police clerk'. As this record does not provide information on where William is living or being a police clerk, the place field has been left blank.

Recording Marriage Facts:

- Fact date field: The date of the marriage should be recorded. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty.
- Fact place field: use the place as shown on the marriage record – you may need to view the search results to find out place details as everything you need might not be on the actual record itself. What can be provided here will vary depending on the place but typically we want to see the name of a parish/neighbourhood, town/city, county, country.
- Fact description field: Provide the house name/number and street here. Or name of church, synagogue, etc. Or the name of the registration district.

Example for a marriage where the full date and place can be provided:


Charles Rennie MACKINTOSH

 1868 - 1919
Husband of
Margaret MACDONALD



Marriage: ✓ Options ▾

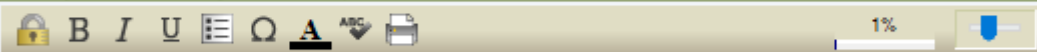
Margaret MACDONALD ▾

22 August 1900

Dumbarton, Dunbartonshire, Scotland 

St Augustine's Episcopal Church

Fact Sources  Notes 

 1%

Groom's parents: William MacKintosh, police clerk and Margaret MacKintosh (m.s. Rennie) (deceased).

Bride's parents: John MacDonald, colliery manager (deceased) and Frances Grove MacDonald (m.s. Hardiman).


Officiating was W. Stephen, DD. Rector of St. Augustine's Episcopal Church.

Witnesses were: E.E. MacKintosh [?] [The surname is difficult to read] and Charles MacDonald.

The ceremony was performed 'after banns according to the forms of the Scottish Episcopal Church'.

Example for a marriage where the full date and place cannot be provided:


Frances G HARDEMAN

 1839 - 1912
Mother of
Margaret MACDONALD



Marriage: ✓ Options ▾

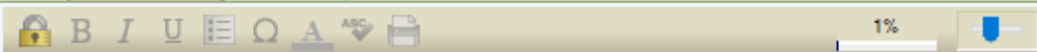
John MacDONALD ▾

Bet. July-September 1862

Worcestershire, England 

Kings Norton registration district

Fact Sources  Notes 

 1%

Need to order certificate for exact date of marriage and for fathers' names. For now, it is assumed given the place of marriage registration and names of parties, that this is the correct index entry.

Recording Probate and Will Facts: FTM has two standard Facts that deal with the issue of inheritance; for the purposes of the course assignments and assessments, we would like you to use these two Facts in this manner:

Probate Fact: To be used in most cases.

- Fact date field: The date to be shown is that of the confirmation (or sealing) in court instead of the date of death or the date the will (or document) was written. If you do not know the full date, then enter what you do know and add 'about' or 'between' to indicate uncertainty.
- Fact place field: The place is that again of the court and not the place of death or usual residence of the person. You will need to include the name of the country and depending on the court, may need to include name of town/city, province/county or state, etc.
- Fact description field: Use to record the type of document or action; for example, 'Testament testamentar' or 'Administration' or 'Probate'.

Will Fact: To only be used if a will and/or testament (or other inheritance document such a deed or inventory) has **not** passed through probate or confirmation or been registered with a court. In most cases, you will be using a Probate Fact.

Margaret MACDONALD

1864 - 1933

Home person

Probate: ✓ Options ▾

04 March 1933

Edinburgh, Midlothian, Scotland ?

Confirmation of probate

Fact Sources Notes

Addresses: sometime of 78 Ann Street, Hillhead Glasgow, latterly of 10 Chelsea Manor Studios, Flood Street, Chelsea, London.

Widow, died 06 January 1933 at Chelsea, forsaied, testate.

Confirmation in Edinburgh to Archibald Campbell Macdonald, Graham's Temperance Hotel, Jamaica Street, Glasgow, her brother and executor.

Will dated 02 December 1932, recorded Edinburgh 03 March 1933. Value of estate: £1132: -: 7.

Other Step by Step Guides to FTM

A number of guides have been written to help with specific areas of using FTM:

- Using FTM output in coursework
- Charts.
- Reports.
- Source Citations.
- Importing and Exporting GEDCOM files.
- Mac users and FTM issues

These can be found in the IT support section of the Course information, administration and IT page on your course's MyPlace site.

Tips and Tricks

Here are a just a few tips and tricks that may help using FTM a little easier.

Adding spouses

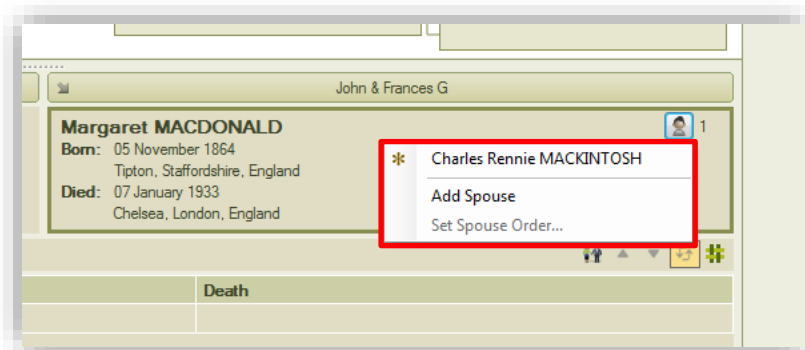
First spouse

- Adding a spouse is easily done from the People workspace, Family tab by clicking on one of the Add Spouse buttons.

The screenshot shows the Family Tree Maker 2019 software interface. The main window displays a family tree with several individuals. A person named George PEARSON is highlighted in the tree. The right-hand panel shows the details for George PEARSON, including his name, sex (Male), birth date (07 July 1893), and birth place (Bothwell, Lanarkshire, Scotland). Below the details panel, there is a section for adding a spouse, with an 'Add Spouse' button highlighted by a red box. The bottom of the interface shows a table with columns for 'Go', 'Children: 0', 'Sex', 'Birth', and 'Death'.

Additional spouses

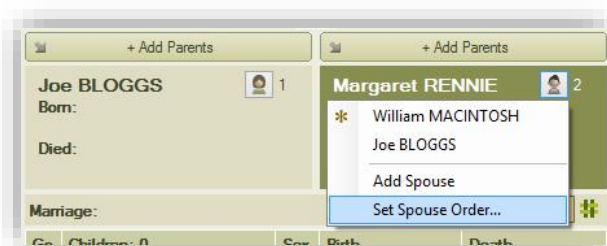
- To add an additional spouse, go to the People workspace, Family tab as above, but this time click on the **Spouse icon** next to the individual's name. Select Add Spouse from the drop-down list.



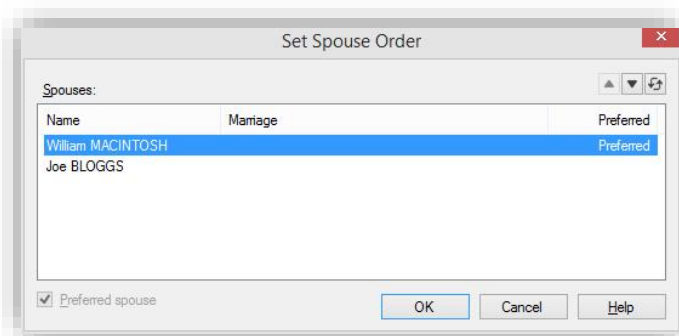
- Now enter the name of the new spouse and click OK. FTM will then display a new family group view.
- You can view the other spouse(s) again by selecting them using the same Spouse icon.
- Note the number to the right of the Spouse icon – this shows the number of spouses of an individual.

Reordering spouses

- Again using the Spouse icon, select Set Spouse Order.



- In the Set Spouse Order dialog box use the move up or move down icons to change the order as required. Note the third icon sorts all spouses by order of marriage date.

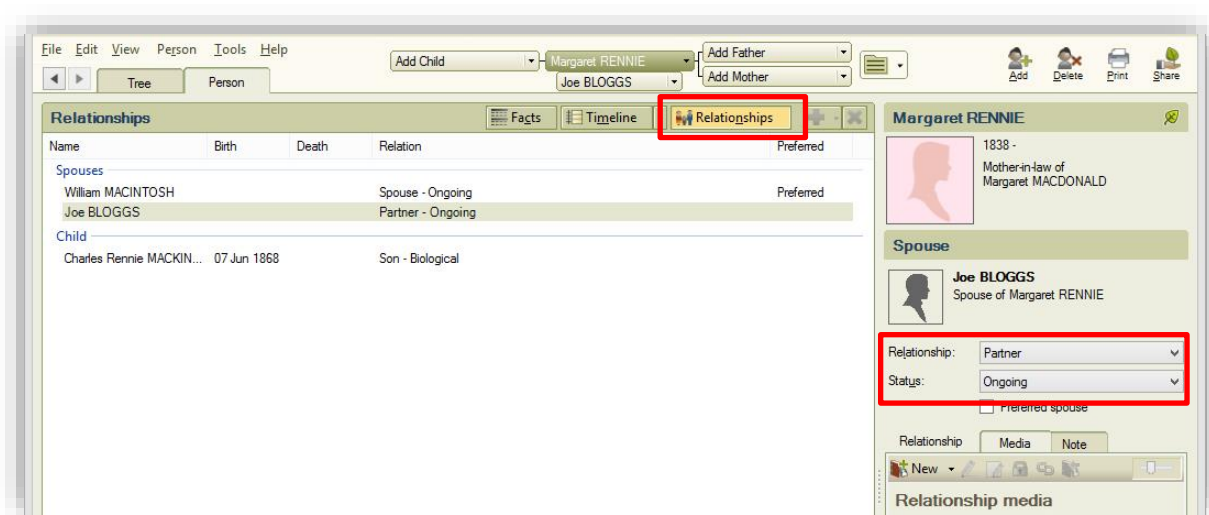


Unmarried spouses

FTM like most genealogical software defaults to recording marriages. However, there will be certainly be occasions where you will need to record unmarried couples.

FTM can record a different relationship type for “spouses” e.g. partner, friend etc. and a status e.g. on-going (the default), divorced, annulled, deceased, etc.

- Select one of the partners and in the People workspace, person tab select the Relationships button.
- Click on the dropdown boxes in the spouse information tab to change the relationship and/or status.



You can also record the partner as a spouse (or other relationship type) and record the date of the marriage as “Not married”.

These changes have an interesting effect in narrative reports where the usual description of a spouse where no marriage fact is recorded is “Person 1 married person 2.” This becomes “Person 1 met Person 2” if the relationship is changed from spouse to partner/friend/etc. Alternatively, if a marriage fact is recorded, but with the date “not married” then reports will show “Person 1 never married Person 2.” For the latter, on charts, the date is also shown as “Not married” – a useful reminder that they were not married, rather than the details of any marriage being unknown.

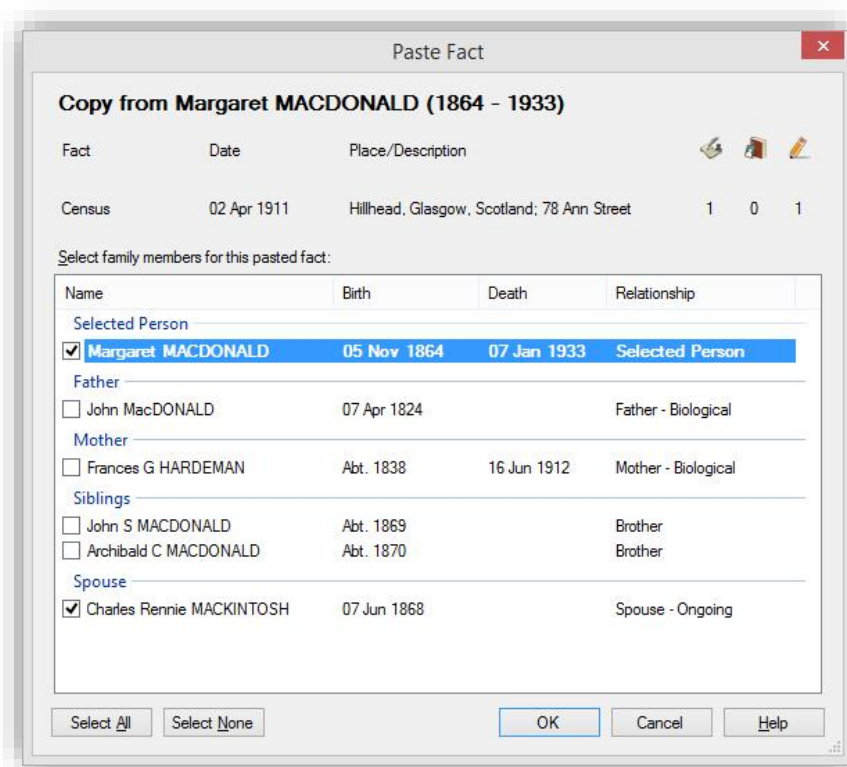
Relationships can also be changed for parents and children, etc. to show the relationship as adoptive, step, foster, guardian and more. The default relationship is ‘biological’.

Copying facts

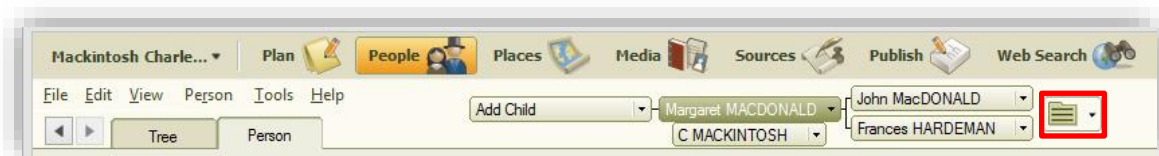
One criticism levelled against FTM is that it can be laborious to enter facts that can apply to several individuals (e.g. census details). However, this can be easily overcome using its ability to copy a fact from one individual and paste it to another.

- Select the individual from whom you want to copy a fact from the Person tab in the People workspace.
- Click on the Facts button.
- Right click on the fact you want to copy and select copy.
- To paste the fact to an immediate family member, right click on the fact for the individual again, and this time click on paste.
- A dialogue box will pop up showing the immediate family of the individual. Select the additional family members by checking the box to the left of their name. Note: you must deselect the checkbox for the individual from whom the fact is being copied (who will be highlighted in bold) to avoid creating a duplicate fact. Click on OK and the Fact (and its source and notes) will be automatically copied into the selected family members' Individual and Shared Facts spaces.

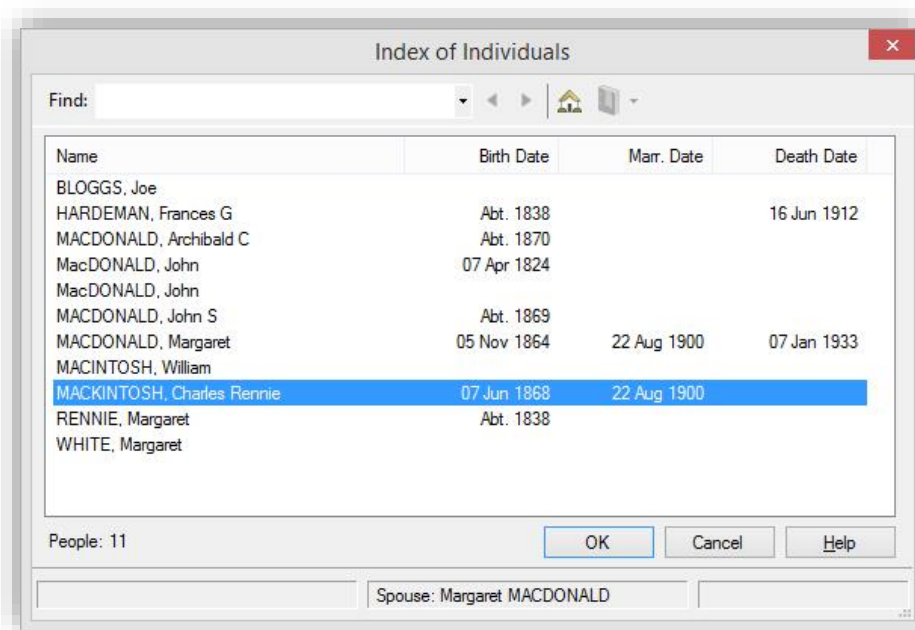
Fact	Date	Place / Description
Personal Information		
Name		Margaret MACDONALD
Sex		Female
Individual Facts		
Birth	05 November 1864	Tipton, Staffordshire, England
Census	02 April 1871	Kidsgrove, Ravenscliffe, Staffordshire, England; Nelson Buildings
Education	02 April 1871	Kidsgrove, Staffordshire, England; Scholar
Education	Bet. 1890-1894	Glasgow, Scotland; Glasgow School of Art
Census	05 April 1891	Glasgow, Scotland; 9 Windsor Terrace
Residence	22 August 1900	Bowling, Dunbartonshire, Scotland; Dunglass Castle
Census	31 March 1901	Blythswood, Glasgow, Scotland; 120 Mains Street
Occupation	31 March 1901	Glasgow, Scotland; Artist, working on own account, at home.
Census	02 April 1911	Hillhead, Glasgow, Scotland; 78 Ann Street
Occupation	02 April 1911	Glasgow, Scotland; Painter (artist), working on own account, at home.
Residence	1919	Chelsea and Deptford, London, England; 2 Cedar Studios
Death	06 January 1933	Chelsea, London, England; 39 Royal Avenue
Probate	04 March 1933	Edinburgh, Midlothian, Scotland; Confirmation of probate
Shared Facts with Charles Rennie MACKINTOSH		
Marriage	22 August 1900	Dumbarton, Dunbartonshire, Scotland; St Augustine's Episcopal Church



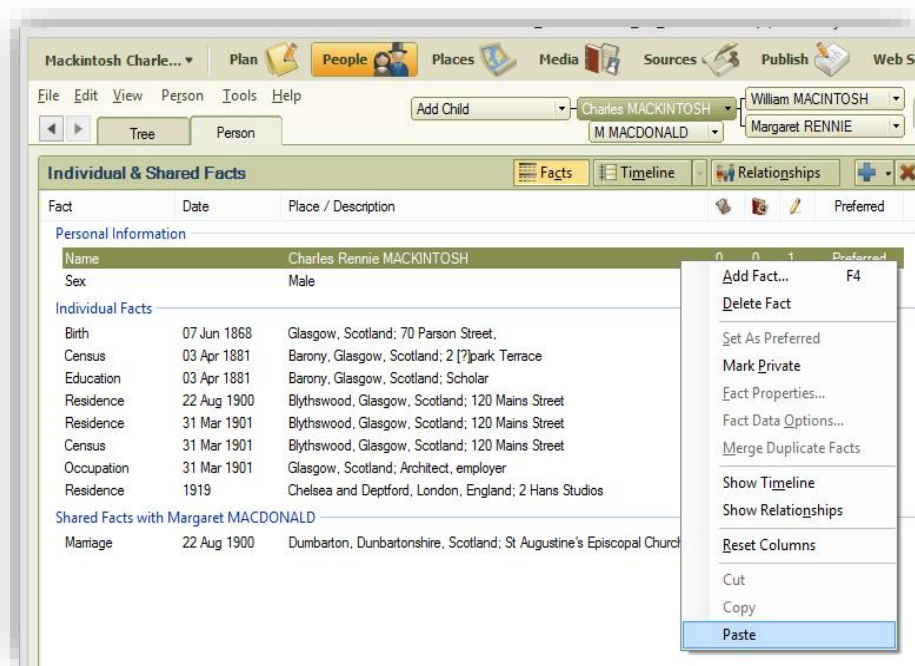
- Alternatively, to paste the fact to another person, press F2 or click on the index of individuals button (to the right of the pedigree navigation bar).



- Select the individual you want to copy the fact to and click the OK button.



- Right-click on their name fact and select paste.

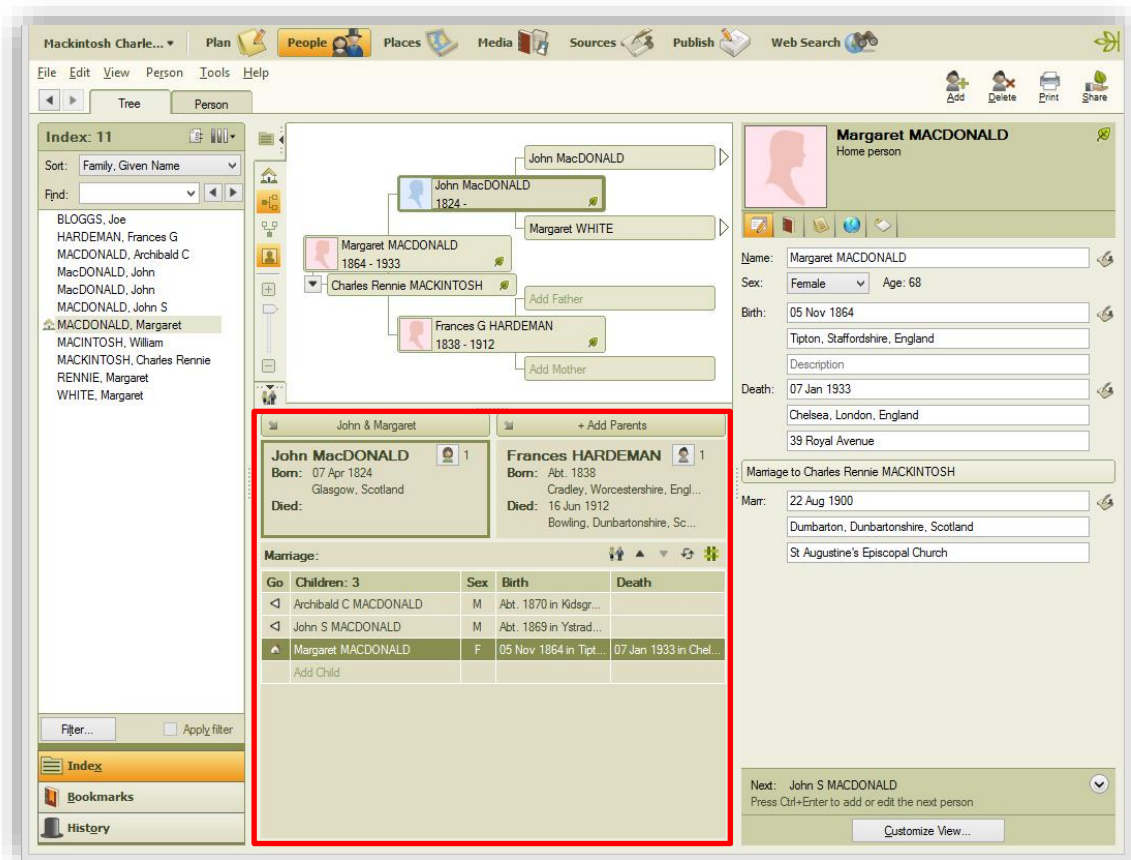


- If this individual has any immediate family, a dialogue box will pop up as above.

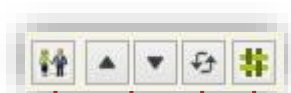
Ordering children

Reports and charts for coursework should always show children in the order of their birth, the eldest first. FTM will order children in the order in which they are input, but this is easy to change. Note: if some dates are unknown, list these after the known dates, unless there is other information that provides a birth order.

- Select a parent of the family whose children are out of order in the People workspace Family tab. This will show the individual's children in the order into which FTM has sorted them in the Family group view.



- Note the icons within the family group view.



- Blended families button.
- Sort all children by birth order
- Move selected child up or down
- Marriage facts, notes and media (not relevant here)

- To re-order a single child, select the child and then click on the move child up or move child down icons as many times as necessary to move the child into the correct position.
- To re-order all the children, click on the sort all children button.
- If the middle three reorder buttons are greyed out it probably means you have “blended families” enabled. If this option is enabled all the children of all partners of an individual will be shown in the family group. This is toggled on and off by clicking on the final button in the toolbar.

Unfortunately, there is no global option to sort siblings into the right order (and in any event this can be problematical where dates are not known). However, there is a way to quickly identify families which may have the order incorrect. This is particularly useful in a large database!

- Run the Data Errors Report (found in the Person Reports collection in the Publish workspace). Run this for all individual. Ensure the All individuals radar button is selected in the Options pane.
- Look for “This individual’s children sort order may be incorrect.” This should identify both parents. Use the process described above to correct the order.

If during the year you find any tips or tricks for using FTM, please share these with everyone by posting a comment on the IT Forum.

Resources

Mackiev.com. *Family Tree Maker Support Center*. <https://support.mackiev.com/> : accessed 07 September 2023. [This includes many articles on using FTM.]

Worthington, Russ. *Family Tree Maker User* [FTM2017 & 2019] [Blog]. <https://ftmuser.blogspot.com/> : accessed 07 September 2023.