MyHeritage

Family Tree Builder

Version 8.0



USER'S GUIDE

Important Notice

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About This Guide

This user guide is intended for first-time and experienced users of MyHeritage Family Tree Builder. It will familiarize you with its interface, describe its workflow and can serve as a reference for all the options that appear in its windows, menu bar and toolbar.

This guide contains the following chapters:

- **Chapter 1, Introduction**, introduces the features and benefits of using Family Tree Builder to build your family tree, describes genealogy in general and provides a guideline for doing your research.
- **Chapter 2, Quick Tour**, provides a quick tour through the various options in the Family Tree Builder interface.
- **Chapter 3, Getting Started**, suggests a workflow for getting started with Family Tree Builder and describes how to start adding people to your family tree.
- **Chapter 4, Premium Membership**, introduces Family Tree Builder's Premium Membership features, and describes their benefits and how to obtain membership.
- **Chapter 5, Handling Photos and Other Media**, describes how to add, view, annotate and automatically mark faces in photos and how to use documents and video/audio files to enrich your family tree.
- **Chapter 6, Smart Matches**, describes the option for finding out if any of the people in your family tree appear in family trees that have been synced by other people anywhere in the world using MyHeritage.com.
- **Chapter 7, Maps**, describes how to manage place-related information for your project, as well as how to view this information on an interactive map.
- **Chapter 8, Research Tools**, describes how to add and search for genealogical information for the people in your family tree, based on information found in MyHeritage's powerful SuperSearch engine.
- **Chapter 9, Charts**, describes the types of charts that Family Tree Builder provides and how to create and customize them.

- **Chapter 10, Reports,** describes the variety of reports that Family Tree Builder provides.
- **Chapter 11**, **Syncing Your Family Tree,** describes how to synchronize (sync) your family tree using Family Tree Builder to MyHeritage.com, so that it is available for viewing on the Web to anyone that you invite.
- **Chapter 12**, **Languages and Translation,** describes the various language and translation features that are provided by Family Tree Builder.
- **Chapter 13, Advanced Tools,** describes additional options for configuring the behavior of your family tree.

Glossary

The following describes some of the terms used in Family Tree Builder.

Term	Description
GEDCOM	An acronym for GEnealogical Data COMmunication, GEDCOM is a specification for exchanging genealogical data between different genealogy software. More information is provided in **GEDCOM and Family Tree Builder**.
Genealogy	The tracing of one's roots. More information is provided in **What is Genealogy?**
Media or Photo	The term photo and media may be used interchangeably in this guide. Media may refer to a photo, document file or video/audio file.
Personal Photo	Family Tree Builder enables you to assign a single picture to each person in order to represent them wherever possible, such as in a report or thumbnail that is displayed when you hover over a person in a list, or when they are shown in Tree View. Typically, this photo should be a portrait of their face. You can mark the face of a person in a photo and use that marked area as the personal photo.
Home Person	Each family tree has one person, called the Home Person, to whom quick access is provided. This person is located in the center of the Tree View. A variety of options are provided to see the relationship of people in the family tree to this Home Person.

Contacting Us

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Business Development	bd@myheritage.com
Public Relations	pr@myheritage.com
Affiliate Program	affiliate@myheritage.com

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CHAPTER 1

Introduction



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Introduction

About This Chapter:

This chapter introduces the features and benefits of using Family Tree Builder to build your family tree, describes genealogy in general and provides a guideline for doing your research. It contains the following sections:

- **Introducing Family Tree Builder** introduces the benefits of using Family Tree Builder to build and synchronize (sync) your family tree to your online family site.
- **What is Genealogy?** describes the definitions and origins of genealogy.
- **Distributing Your Family Tree** describes how to use Family Tree Builder and MyHeritage.com to build and sync your family tree to your online family site.
- **Doing Your Research** provides a guideline for the process to gather information to fill your family tree.

Introducing Family Tree Builder

Creating a family tree was once only possible using a pen and paper and was very difficult to maintain. Family Tree Builder enables you to create family trees easily and beautifully. In handwritten family trees, it was a major task to add a newly discovered family branch. Using Family Tree Builder, your computer helps you do the research and immediately produces a variety of printouts, charts and reports. These can be easily distributed to anyone and can be viewed on the Internet in a simple and intuitive interface.

Documenting your history for future generations is like writing a detective story, where you are both the author and the hero. You are trying to unravel mysteries of the past, sometimes starting with very little information. You put together a puzzle and unravel the previously undiscovered history of your family.

Gathering, designing and building your family tree is not just about collecting names and dry facts. We recommend that you try to bring the family tree to life by interviewing as many family members as possible and gathering all the photos, documents and video/audio files that you can. Compiling and saving all your information opens up more questions and typically encourages relatives to share previously unknown facts. This is why genealogy is appealing to tens of millions of people.

In addition, Family Tree Builder enables you to sync your family tree to an online family site on MyHeritage.com.

A MyHeritage family site provides an ideal location for showcasing your family tree. Here are some of the benefits of owning a family site:

- **Free:** Family sites are free using MyHeritage. There are Premium subscription plans for huge family trees or photo collections, but these are optional.
- **Sharing:** Sharing your family tree with family members and friends in a beautiful, interactive display will extend your personal connections and bring you closer to all involved.
- **Functionality:** Family Tree Builder provides your family site with a rich variety of features and functions that were previously unavailable or that had only been available using expensive genealogy applications.

- **Privacy:** Your data is only visible to you and to the people that you invite to view it. Information regarding deceased ancestors can be made available to guests so that relatives can find you on the Internet, but this is optional.
- **Backup:** Your data is automatically backed up online each time you synchronize it, and it can be restored to an earlier version at any time. This protects your family tree and photos from any catastrophe or computer failure.

What is Genealogy?

Definition of Genealogy

ge·ne·al·o·gy (jē-nē-ŏl'ə-jē)
noun. pl. **ge·ne·al·o·gies**

1 Lineage or pedigree.

2 The study or investigation of ancestry and family histories.

3 A record or table of the descent of a person, family or group from an ancestor or ancestors; a family tree.

The Rise of Genealogy

Genealogy, or the tracing of one's roots, has enjoyed a massive worldwide surge in popularity over the past few years. In recognition of this, the United States Congress has officially designated October as National Family History Month by unanimously passing a Senate resolution in 2001.

"*Experts say that in the United States, genealogy is now the second most popular hobby next to gardening,*"[1] said US Senator Orrin Hatch, who co-sponsored the resolution, along with 83 others.

"*It is only natural that we want to find out more about our ancestors, and what better way to bring families closer together than by discovering more about the story of your own family?*"

This resolution celebrates the fact that millions of people are actively searching for information about their ancestors and also encourages others to begin their search.

[1] Source: United States Senate Committee on the Judiciary, June 26, 2003.
http://judiciary.senate.gov/member_statement.cfm?id=834&wit_id=51

In the eyes of many, genealogy is educational and deeply personal. It brings people closer to their roots and closer to each other; it strengthens bonds inside the family as well as between families, and it bridges gaps between generations, cultures and traditions.

Why has genealogy boomed in recent years? This is to a great extent due to the proliferation of the Internet, which has proven to be an invaluable aid in genealogy. The Internet allows you to search archives, libraries and databases from your home, to communicate easily with people across the globe and to share information. As more and more people go online, and an increasing number of databases become accessible online, genealogy is dramatically gaining popularity. It is no wonder, therefore, that the Internet is home to hundreds of thousands of personal genealogy websites, and searching for **genealogy** in Google yields over 33 Million hits[2].

[2] Source: Google, June 18, 2007. There are also several million additional hits for translations of genealogy into other languages, such as 'genealogie' (11,900,000 hits)

Distributing Your Family Tree

Any member of MyHeritage can build a family tree. This family tree is built and stored on your computer until you decide to synchronize (sync) it to your online family site. After syncing, this site is available to all your family, friends and anyone else you invite. Synchronizing your family tree was called *publishing* in Family Tree Builder prior to version 7. As of version 7, any changes made in the online site are synchronized back to your computer. Hence, the term *synchronize*.

You have the option of defining multiple projects. Each project contains one family tree, and each family tree describes numerous people. You can sync the entire family tree to only one family site,

You can create a family site that is private and secure, or make it public and share it with the rest of the world. You are in complete control. Photos uploaded to your family site can utilize our face recognition technology and allows you and your family to quickly identify people in your photos.

NOTE



A site can contain multiple family trees.

The following shows the flow for building and syncing your family site in order to make it available for viewing by whomever you choose to invite:



4 Build your family tree on your computer using Family Tree Builder. This process includes a variety of tasks described in this guide, such as: entering information about people, defining relationships, adding photos, marking faces, designing the look and feel of reports and charts and so on.

5 Synchronize the family tree to your family site on MyHeritage.com.

6 Invite family members to view the family site.

You and invited family members can now visit the family site on the web, as well as using tablets and smartphones. Note that invited family members can modify information only if you allow it.

Doing Your Research

The following advice may help you through the process of tracing your ancestry and family history.

Choosing Your Goal

Before you begin your family history research, it is a good idea to focus on what you want to achieve. Do you wish to pursue the paternal (male) line with its continuity of surname, or the maternal (female) line, or perhaps even verify a family legend? You may find that the decision is made for you, if the research proves difficult. If, however, you decide to pursue more than one line, be sure to keep your research organized and file the results separately to avoid confusion.

Family History Begins at Home

The golden rule in family history research is to try to work backwards from what you already know. As such, family history truly does begin at home and you may be surprised at how much you already know or have access to within your own extended family. It is not necessary to have a lot of detail to start, but it makes sense to log whatever information is readily available and to seek out further details from relatives.

Best Starting Point: You

Begin by recording your own details, such as: date and place of birth, marriage, spouse, children, and then the details of your parents, grandparents and so on, as you recall them.

Next Step: Your Relatives

Information from relatives can increase your knowledge of the family, but a patient and tactful approach is required. Family anecdotes can become distorted with the passage of time, but should still be noted for later verification. Be sure to interview your relatives, especially the older ones, as they may have information about your ancestors that you will not find in any database. Write everything down for future reference. Getting in touch with your relatives may often prove to be a rewarding and enriching experience.

Achieving Success

How successful you are in researching your family history is determined by a number of factors, many of which are beyond your control. Your success can depend on the survival of records, how common your surname was, your family's social status and level of literacy and the possibility of transcription errors. However, success can also depend on your own tenacity, keeping an open mind and not taking anything for granted, being methodical, approaching a problem from more than one angle and corroborating any evidence you may find. In spite of the occasional **brick wall**, you may find that the genealogy hunt itself is almost as exciting as the thrill of discovery.

Documents and Photographs

Most families possess old documents or photographs, which can be of use to the family historian. Examples of documents you might find, which can significantly aid your research, are: birth, marriage and death certificates; obituaries; family Bibles; school and university graduation certificates and awards; military service records; business papers; immigration and travel documents; diaries; address books; birthday books; letters; postcards; newspaper cuttings and memoirs – in short, anything!

Go through old family photographs and see how many people you recognize. Show the photos to older relatives to help jog their memory. Try to ask them to identify as many faces as possible, so that this information is preserved.

Any information that can be gathered from within the family can help establish a foundation on which to build your family history.

Read Up on Family History: Join a Society

Libraries and bookshops stock a range of material on family history. You may want to consider joining a family history society in your area. For a small annual fee you will receive all the benefits of membership (magazine, research facilities, well-stocked libraries, research services and ready advice) and meet like-minded individuals. Consider also joining a society in the area in which you are conducting research. You can also turn to the Internet for an active genealogy community. You can find forums in which to post questions, read answers, hear about others' successes and failures and find additional resources.

Pick the Right Tools

The family tree is the nucleus of any family history research and putting it together is often an exciting journey that can play out like a detective story. Maintaining the family tree information that you store using paper records may quickly get out of hand, so use genealogy software to help you keep track of the various individuals in your family tree and the relationships between them. Family Tree Builder is a good choice for this. It is free, supports multiple languages, offers a very easy interface to enter and review data, and allows you to organize your entire photo collection according to the relatives pictured.

SuperSearch is MyHeritage's dedicated genealogy search engine, which provides the best place to start your research. It is also well integrated into Family Tree Builder, making it easy to find search results about your family.

Share and Enjoy

Once you have put together your family tree, collected some interesting old photos of your family and gathered family legends, stories and anecdotes, do not keep this treasure to yourself! Synchronize it to your online family site on MyHeritage.com for your family and friends to enjoy. They will be able to contribute more to your research and perhaps help you fill in missing information. Distant relatives can also find you this way so that long-lost cousins can reunite as a result of your efforts. Use MyHeritage.com to create a family site and share your family tree and family history gems, including photos, documents, stories, historical records and more. Invite your relatives to become members in your site and open some areas of your site to guests. Share and enjoy!

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CHAPTER 2

Quick Tour



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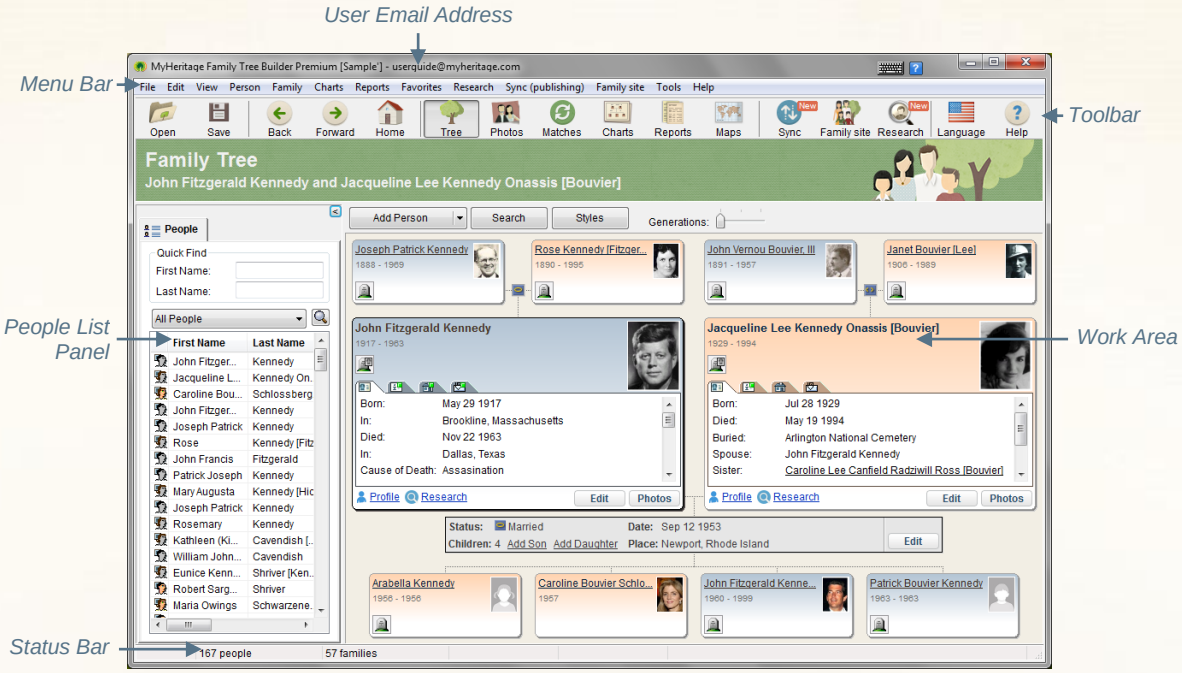
Quick Tour

About This Chapter:

This chapter provides a quick tour through the various tools in the Family Tree Builder interface. It contains the following sections:

- **Family Tree Builder Main Window** describes the areas of the main window and what they do.
- **People List Panel** describes how Family Tree Builder displays the people in the family tree and the tools associated with that display.
- **Tree View** describes how to view and manage people in your family tree. This is the main view of Family Tree Builder.
- **Photos View** describes how to view, search for and add photos to people in your family tree.
- **Smart Matches View** describes how to match people in your family tree to people in other trees in MyHeritage.com using Smart Matches.
- **Charts View** describes how you can display the members of your family tree in various charts.
- **Reports View** describes how you can create various reports for the members of your family tree.
- **Maps View** describes how to map your entire family tree, any portion of it or just one individual on an interactive world map.
- **Menu Bar** describes the functions in the menu bar.
- **Toolbar** describes the functions in the toolbar.

Family Tree Builder Main Window



The Family Tree Builder main window is composed of the following:

- **Menu Bar:** Provides access to a variety of Family Tree Builder functions (see Menu Bar).
- **Toolbar:** Provides quick access to the most frequently used Family Tree Builder functions (see Toolbar).
- **People List Panel:** Lists all the people that you have already defined in your tree in Family Tree Builder and enables easy access to them. The panel can also be displayed or hidden.

- **Work Area:** The information and functionality of the Work Area changes according to the selected view, as follows:
  -  Tree View (see Tree View)
  -  Photos View (see Photos View)
  -  Smart Matches View (see Smart Matches View)
  -  Charts View (see Charts View)
  -  Reports View (see Reports View)
  -  Maps View (see Maps View)
- **Status Bar:** indicates how many people, families and photos have been added to this family tree, plus various other status messages.

The Family Tree Builder main window shows the user's email address in the window title bar. This email address is the one used to register with MyHeritage.

People List Panel

The People List Panel displays all the people that you have defined in your project, enables quick access to any person and performs almost all the essential Family Tree Builder functions on that person.

You can choose to minimize the People List Panel. To minimize the panel, click the icon in the upper-right corner.



NOTE

In Matches View and Maps View, the Family Tree Panel is minimized by default.

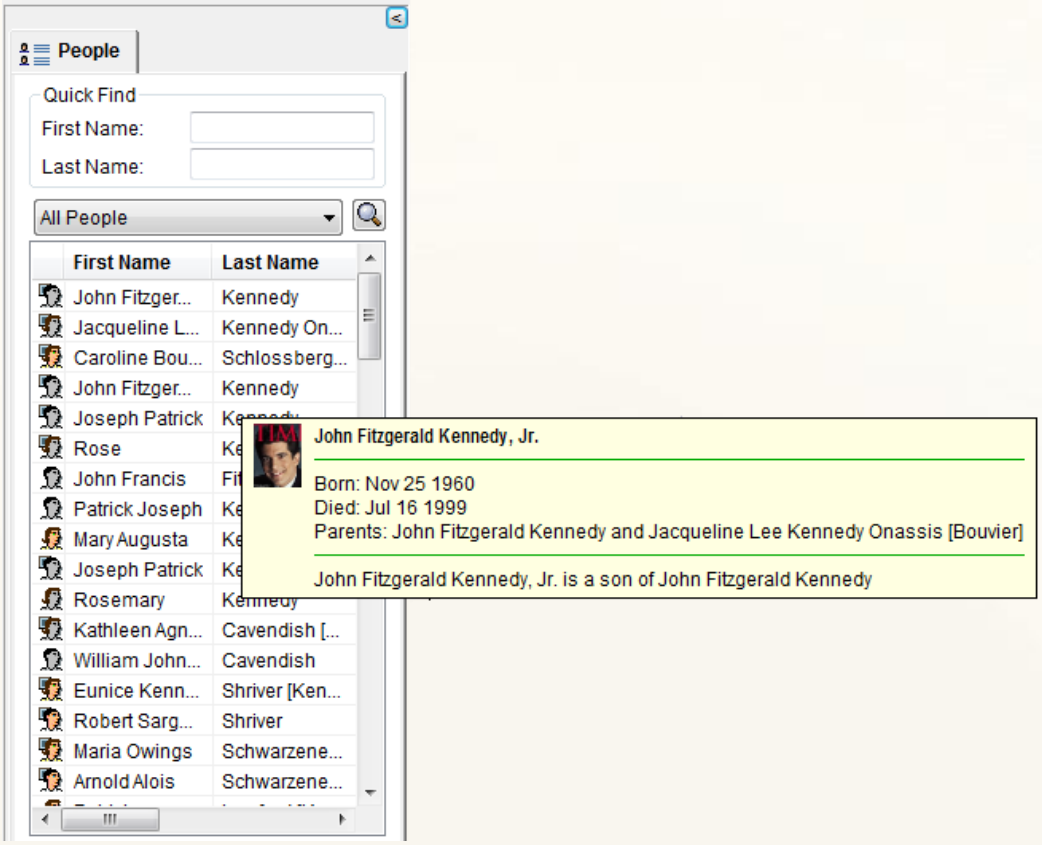
To display a minimized panel click the icon.

You can double-click any person in the People List Panel to display that person's information, or right-click any person to display a menu of options (see Right-click Menu in the People List).

Quick Find

The **Quick Find** area appears at the top of the panel and enables you to quickly find a person by entering his/her first or last name. As you type letters into the **First Name** or the **Last Name** field, the people whose name starts with the same letters will appear at the top of the list.

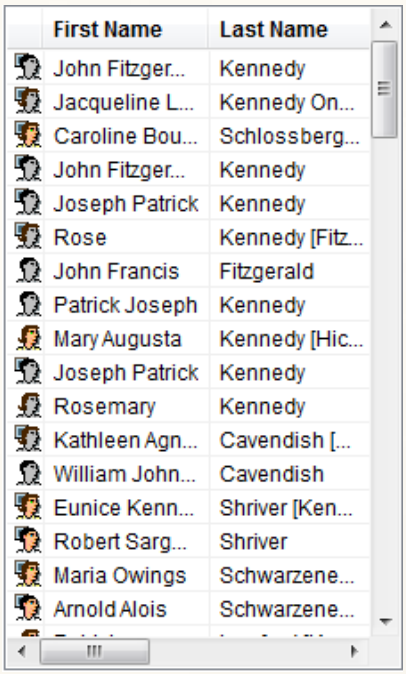
Hovering with the mouse over the name of a person in this list displays the person's information and photo, if added. An example is shown below:



People List

In the People List display, each row describes a single person.

Double-click a person in the list to display the relevant information of this person according to the selected view. For example, while in Tree View, you will see their Tree View card on the right (see Tree View).



First Name	Last Name
John Fitzger...	Kennedy
Jacqueline L...	Kennedy On...
Caroline Bou...	Schlossberg...
John Fitzger...	Kennedy
Joseph Patrick	Kennedy
Rose	Kennedy [Fitz...
John Francis	Fitzgerald
Patrick Joseph	Kennedy
Mary Augusta	Kennedy [Hic...
Joseph Patrick	Kennedy
Rosemary	Kennedy
Kathleen Agn...	Cavendish [...
William John...	Cavendish
Eunice Kenn...	Shriver [Ken...
Robert Sarg...	Shriver
Maria Owings	Schwarzene...
Arnold Alois	Schwarzene...

The following describes the columns in this list, which provide a different type of information about each person.

NOTE

Use the horizontal scroll bar to scroll through the columns.

Use the vertical scroll bar to scroll through the list.

- **Icon:** The icon in each row indicates whether the person is male or female, living or deceased (deceased individuals are grayed out) and whether there are photos for that person or not.



Male



Female



Living People (colored icon)



Deceased People (gray icon)



With Photos (with a picture frame behind their head)



Without Photos (no picture frame)

- **ID:** A unique ID is automatically assigned to each person that you add to Family Tree Builder in the order that you added them. You can choose to display or hide this ID using the Options window.
- **First Name/Last Name:** When searching for a person, it is easiest to find them by typing in all or part of their name in the **Quick Find** area at the top of the People List.
- **Birth Date/Death Date:** These dates only appear for the people for whom you have entered birth and/or death dates.
- **Relation:** Specifies the distance of the relationship between this person and the Home Person. The number 1 specifies that this person is immediate family, such as father, mother, spouse, son or daughter. The number 2 specifies a more distant relationship, with two steps between this person and the Home Person, such as grandmother or grandchild. This number will go as high as your family tree is large.
- **Last modified:** Specifies the most recent date where information was added or modified for this person.

Finding People in the People List

A number of options are provided for finding people in the people list, as follows:

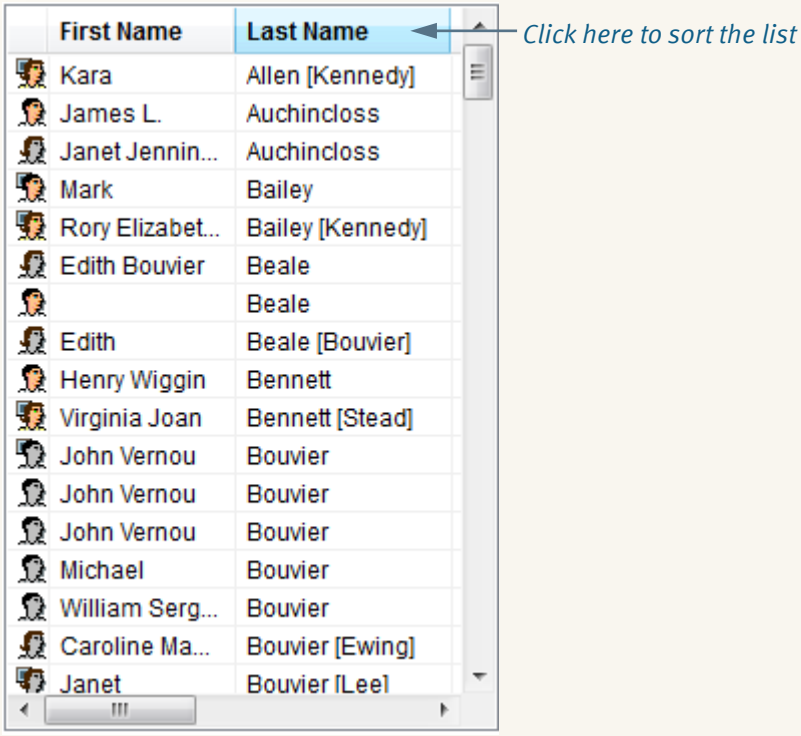
- **Quick Find**
- **Sorting the List**
- **Searching for People**
- **Filtering the List**
- **Using the Find and Replace Function**

Quick Find

For details about how to use the Quick Find area, see Quick Find.

Sorting the List

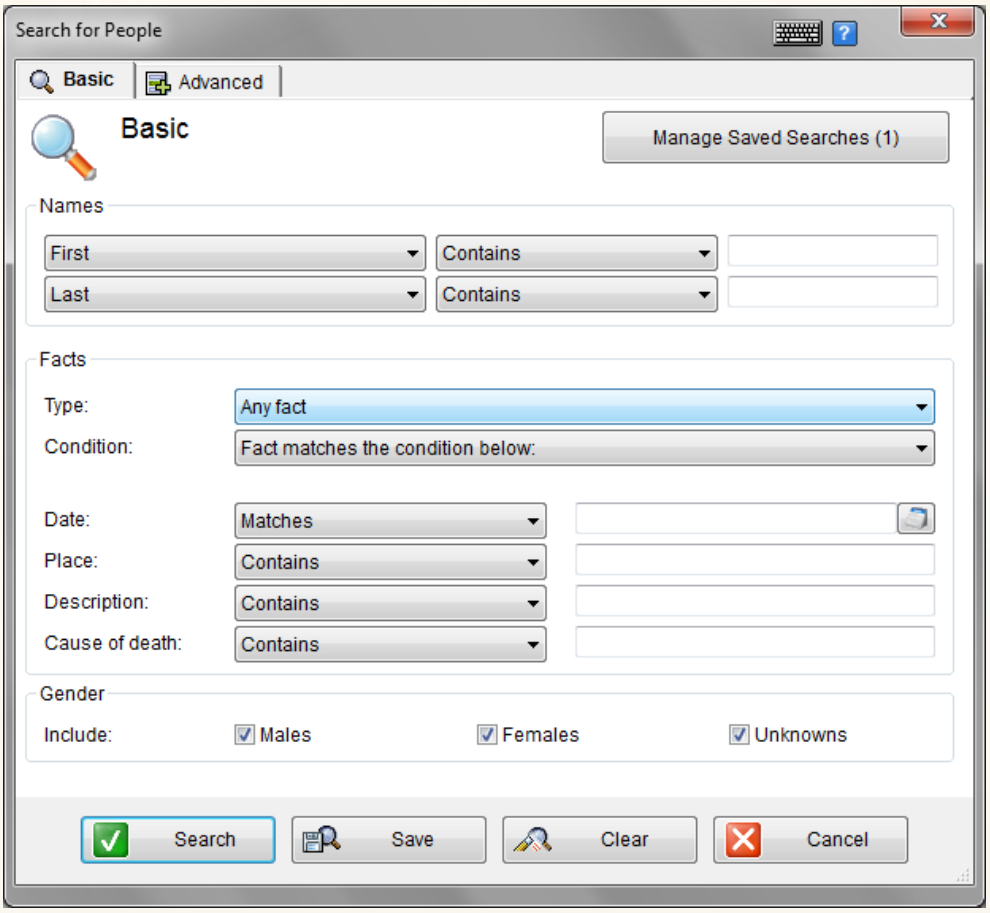
By default, the list is in the order that people were entered into Family Tree Builder. To resort the list, simply click the title of the column by which the list should be sorted. For example, the following shows that clicking the **Last Name** column title sorts the People List by their last name:



Searching for People

To search for people in the People List:

1 Click the **Search** icon to display the following window:



2 You can enter all or part of the **First** and/or **Last Name** of the people to be included in the search results. You can select which option to use for the **First** and **Last** name, including the two options that look for names that sound like the name you enter.

3 If you want to search for all people based on a specific fact, enter the type of the fact and then select the condition and the parameters of the condition, including the date, place description and cause of death.

4 You can choose the gender of the people to be included in the search result.

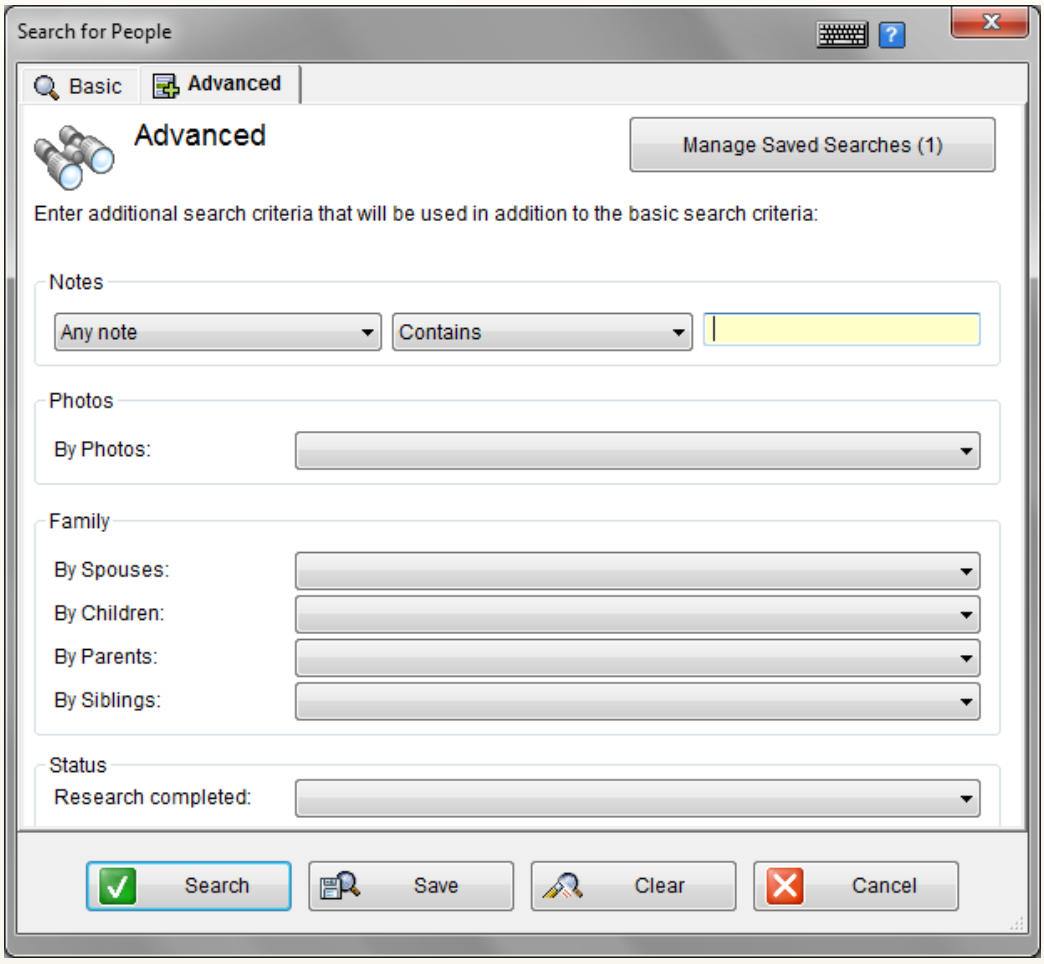
5 To save this search for future use, click the **Save** button.

6 Click the **Search** button to filter the People List.

> **NOTE**
>
> You can save this search condition by clicking the **Save** button and providing a name for the search. Later, you can click the **Manage Saved Searches** button in the window shown above to display another window in which you can rename, delete or select a Saved Search.

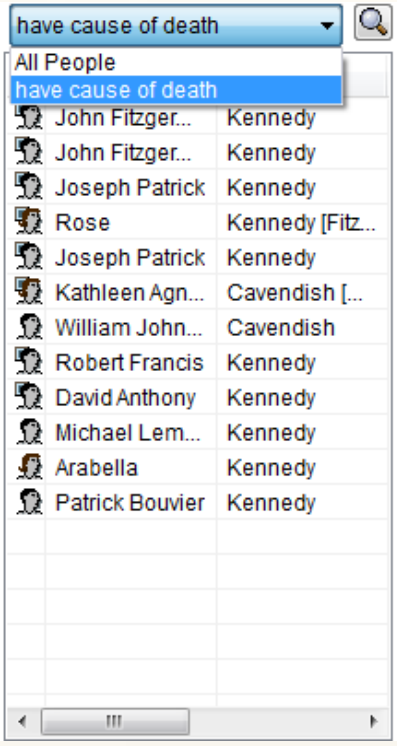
Advanced Search

If you would like to add more specific details to a search, click the **Advanced** tab, as shown below, and fill out the information in the same manner:



Filtering the List

A dropdown menu appears above the People List. It enables you to specify whether you would like to view all the people in the list by selecting **All People**, or a list of certain people by implementing a **Saved Search**, which filters lists according to your definitions. The following shows a Saved Search that was defined to show all people for whom a cause of death was entered:



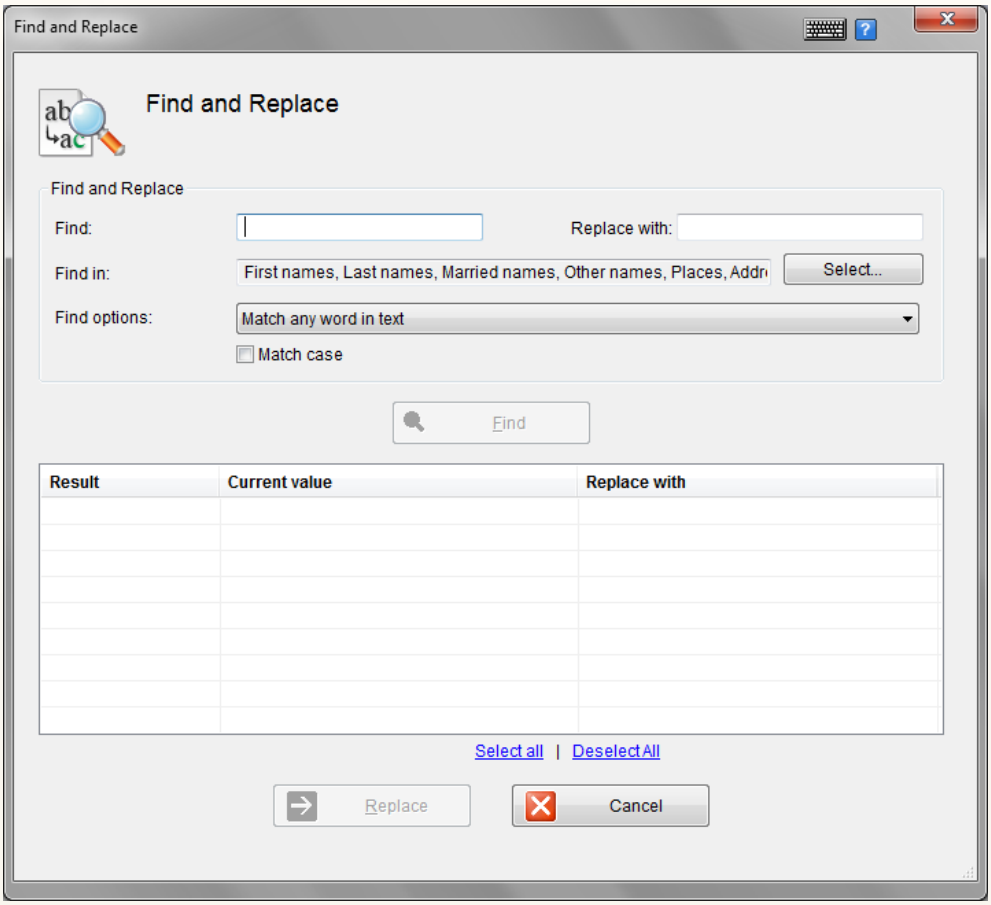
Using the Find and Replace Function

The **Find and Replace** function enables you to search for a text string in your data and replace it with other text. This feature is useful when you determine that a name is misspelled that affects several individuals. Using this feature, you can search for incorrect name and then change all the people with that incorrectly spelled name to the correct spelling.

You can use this function to affect text, such as names of people and places.

To find and replace text:

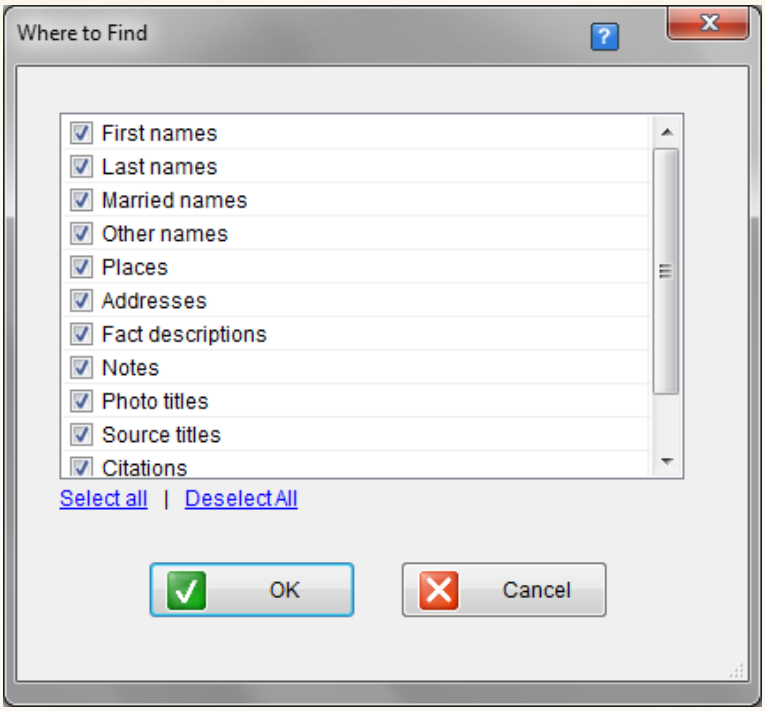
1 In the **Edit** menu, select the **Find and Replace** option. The following window is displayed:



2 In the **Find** field, enter the text you want to find.

3 In the **Replace with** field, enter the replacement text.

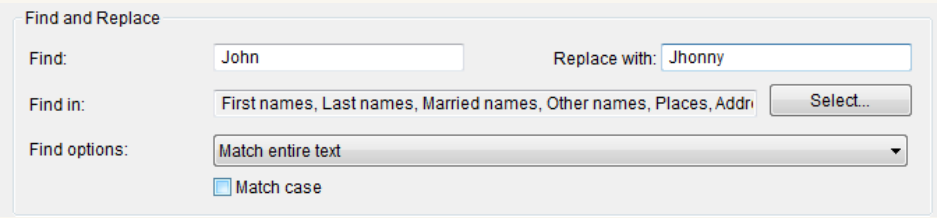
4 In the **Find in** field, click the **Select** button to open the following window in which you specify the scope for the search operation:



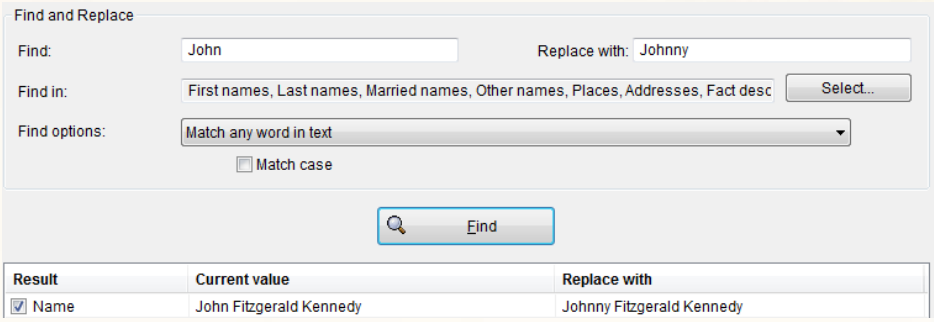
This window lists the types of information that will be searched. For example, you can select first names, last names, places, notes, citations and so on. All information types are selected by default. Simply check the checkbox(es) to be included in the search operation and then click **OK**.

5 In the **Find options** dropdown list, select one of the following options:

- **Match entire text:** When you select this option, all text in the text strings being searched must match that specified in the **Find** field.



- **Match any word in text:** When you select this option, the text in the **Find** field must match any word of the text strings being searched. Use this option the text to be search contains multiple words, as shown in the example below:



- **Match any part of text:** When you select this option, the text in the **Find** field must match any part of the text strings being searched.

6 [Optional] Check the **Match case** checkbox for the search operation to be case sensitive.

7 Click the Find button. The results of the search are presented in a table at the bottom of the window.

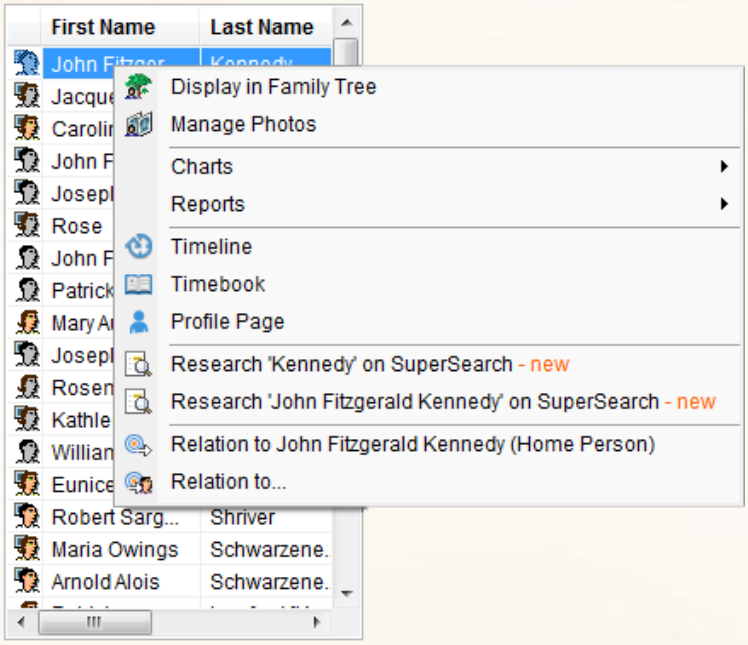
Result	Current value	Replace with
Name	John Fitzgerald Kennedy	Johnny Fitzgerald Kennedy
Name	John Fitzgerald Kennedy	Johnny Fitzgerald Kennedy
Nickname	John-John	Johnny-Johnny
Name	John Francis Fitzgerald	Johnny Francis Fitzgerald
Name	William John Robert Cavendish	William Johnny Robert Cavendish
Name	John Bouvier Kennedy Schlossberg	Johnny Bouvier Kennedy Schlossberg
Photo	JFK looks at the space craft Friendship 7, the spac...	JFK looks at the space craft Friendship 7, the spac...
Photo	JFK looks at the space craft Friendship 7, the spac...	JFK looks at the space craft Friendship 7, the spac...

The results list shows the type of result, such as Name, Nickname and so on, the current value and the replacement value. Check the checkbox for each row whose value you want replaced. All result rows are checked by default.

8 Click the **Replace** button. A confirmation message is displayed after completing the replace operation, which indicates the number of items replaced.

Right-click Menu in the People List

When you right-click a person in the People List, a menu of options is displayed as shown below:



- **Display in Family Tree:** Displays the selected family in Tree View. Selecting this option is the same as double-clicking the person in the list.
- **Manage Photos:** Displays the Photo View, showing all the photos defined for the selected person.
- **Charts:** Enables you to generate a variety of graphical charts about the selected person. See Charts.
- **Reports:** Enables you to generate a variety of reports. See Reports.
- **Profile Page:** Displays the full profile page from the family site for the selected person.
- **Research on SuperSearch:** Provides you with full access to SuperSearch genealogy research, which can use to research families and/or specific people in your family tree. See SuperSearch.
- **Relation to Home Person:** Displays a window that describes the relationship between the selected person and the Home Person in the tree.

- **Relation To:** Displays a window in which you can select a person, in order to see the relationship between this person and the person selected in the People List.

Tree View

In Tree View, you can view and manage people in your family tree.

NOTE Display this view whenever you want to see your family tree.

The Tree View is displayed by default when you launch Family Tree Builder. You can also display the Tree View by clicking the button in the toolbar, as shown below:



In Tree View the work area contains the following:

- **Person Card:** Provides a graphical representation showing a person's photo and vital information in the family tree and enables access to all the information and functions provided by Family Tree Builder for this person.

  NOTE Information about a marriage is shown immediately under the husband and wife cards.

- **Generations View:** Enables you to control how many generations are displayed in a Tree View. Slide the bar to select the number of generations you want to see. The default is three, and you have the option to select five or seven.

- **Add Person Button:** Enables you to add a new person to the family tree.
- **Search Button:** Enables you to search for a person and displays that person in the Work Area.
- **Styles Button:** Displays the Options window, where you can configure various aspects of the appearance and behavior of Family Tree Builder.

Person Card

Family trees are created and edited in Family Tree Builder using an intuitive user interface that is simple to use. Our philosophy is to keep things highly visual and effortless, enabling you to create and branch-out a family tree just as one would do using a pen and paper.

A person's card allows you quick, intuitive access to a person's genealogy information. All the functions related to adding or changing information for a person can be accessed from here. You can also see an individual's information at a quick glance, such as birth date, place of birth, spouses, siblings, and so on.

In Tree View, each person in the tree is represented by a card.



You can navigate to any person and make that person the focus by clicking their name on their card, or by double-clicking their name in the list of people on the left.

Family Tree Builder enables you to assign a single picture or Personal Photo to each person in order to represent them wherever possible, such as in a report or in a thumbnail that is displayed when that person is shown in Tree View. Typically, this photo should be a portrait of their face.

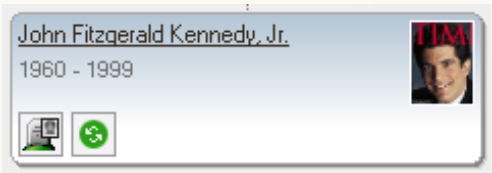
NOTE

The husband and wife displayed in the center of Tree View have larger cards that display additional information, with tabs that may be clicked to view this additional information.

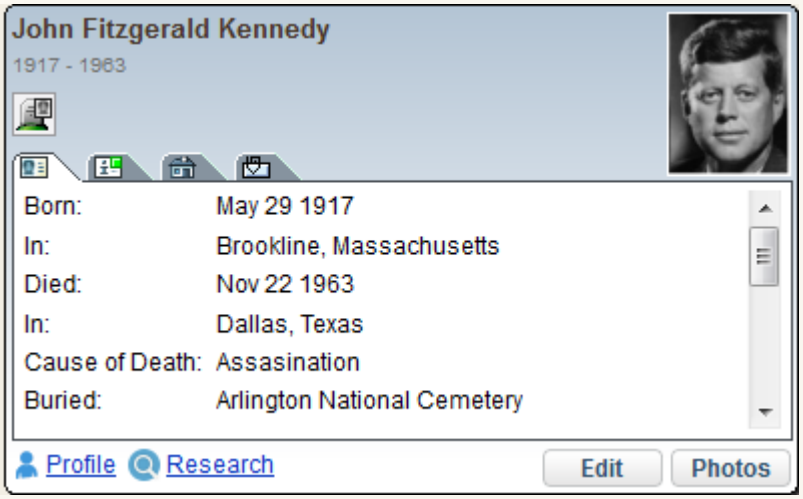
Tabs that have information in them are denoted using a small green indicator, for example:



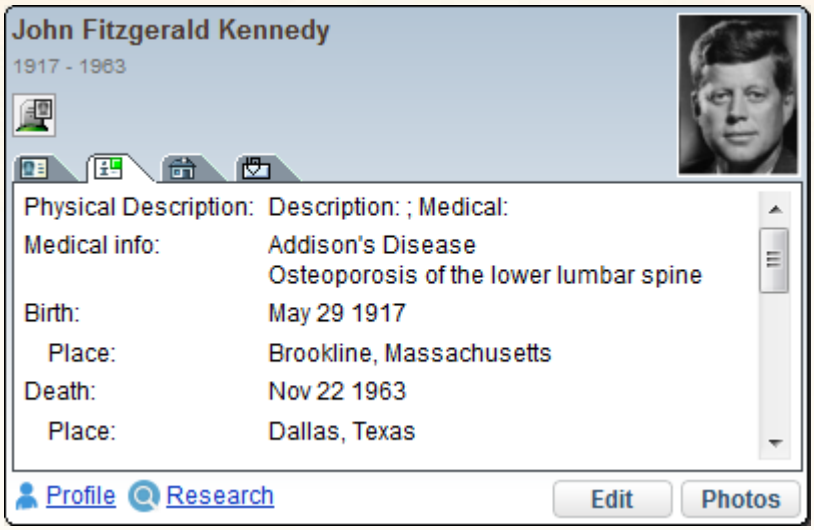
The descendants and ancestors in this view have smaller cards showing less information.



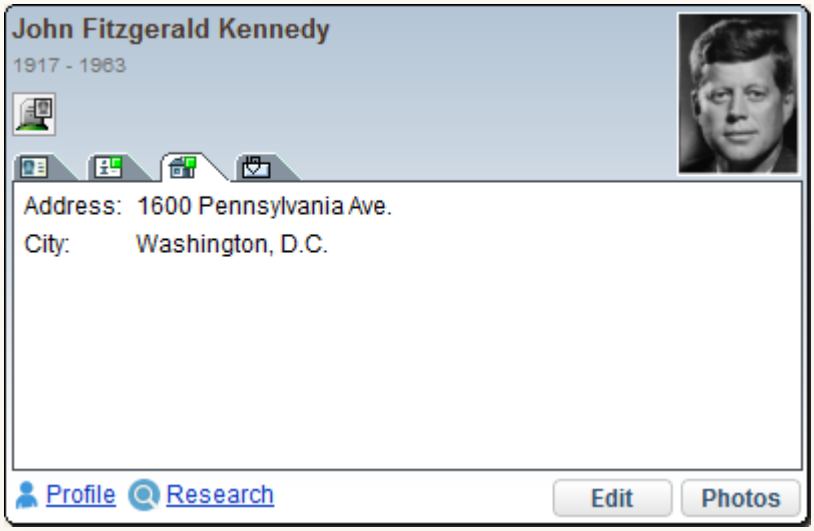
The **Main** tab  , shown below, shows genealogical information.



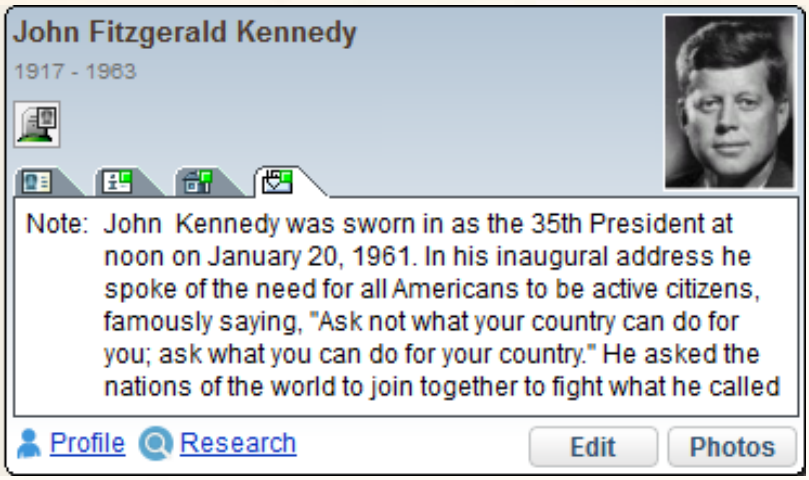
Clicking the **Info** tab shows additional information:



Clicking the **Contact** tab shows contact information:



Clicking the **Notes** tab shows notes added to the person card:



To edit information about this person, double-click the card or click the **Edit** button in their card and then select the **Edit Details** option from the menu. Both actions open the Edit window showing their current information, which enables you to modify their details.

To update the photos, documents or video/audio files about this person, click the **Photos** button in their card to open the view showing the photos that are currently associated with them. This enables you to add photos and edit information about existing photos.

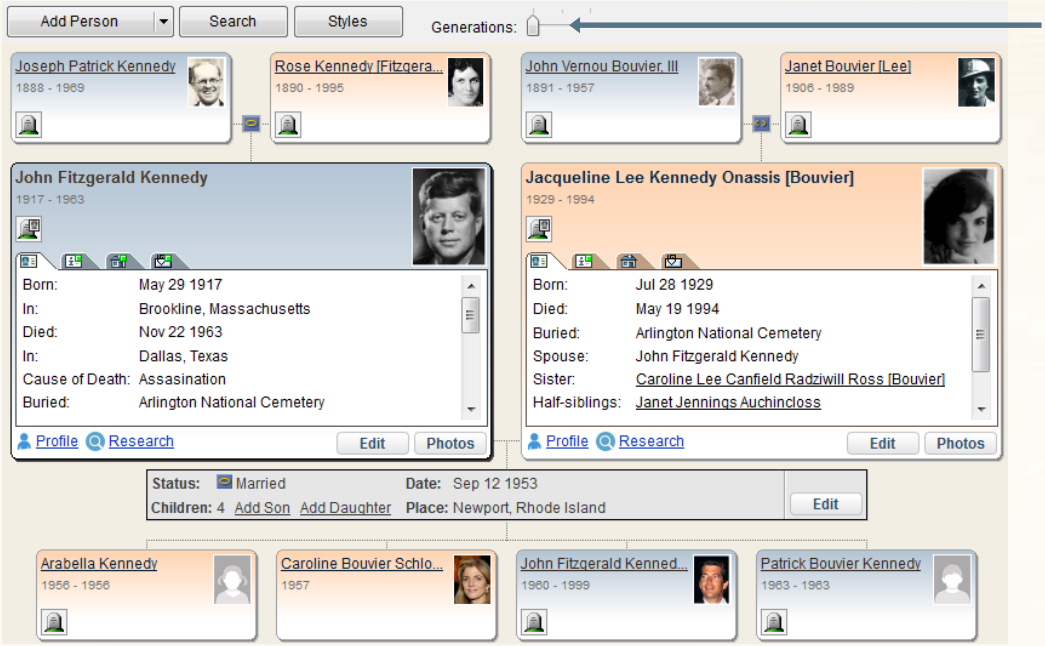
Each person card contains two links: a **Profile** link and a **Research** link. Click the **Profile** link to display the full profile page from the family site for that person, as shown below:



Click the **Research** link to open **SuperSearch**, in order to research the selected person.

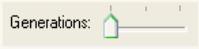
Generations Control

By default, three generations are shown in Tree View, as shown below:



In the window above, John and Jacqueline are the husband and wife, their parents are shown above them and their children are shown below them.

The option to view three generations (the default and the most clutter-free mode), five generations or seven generations is enabled by the **Generations** slider

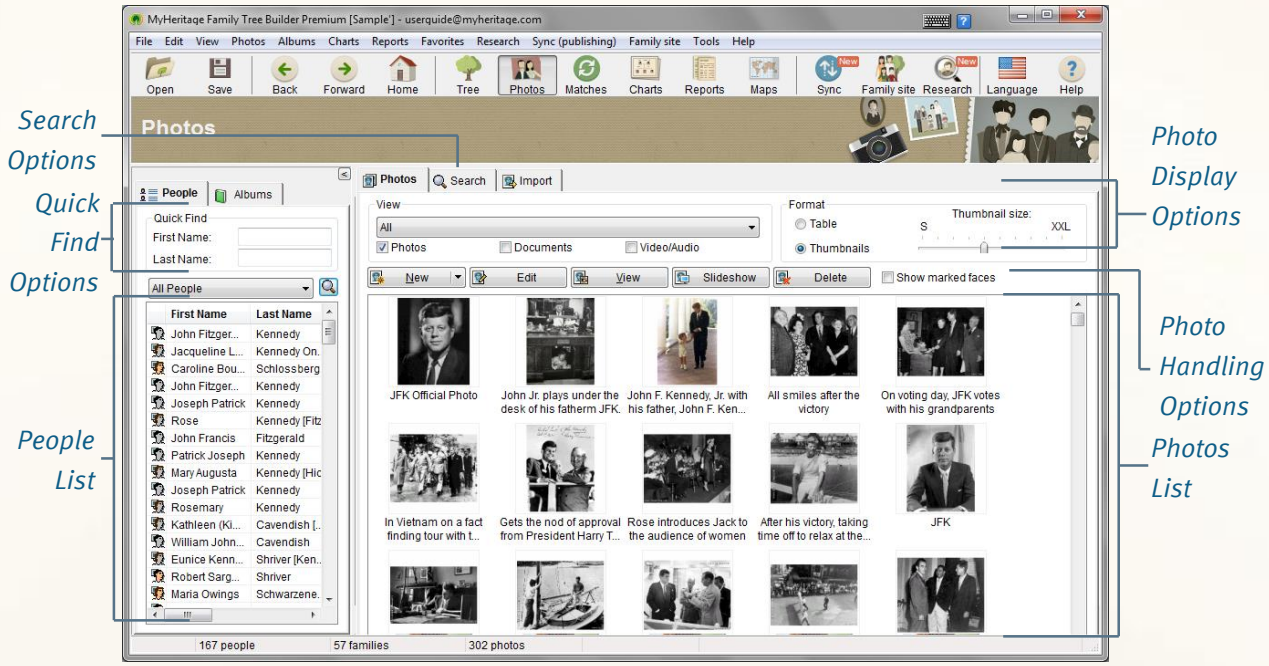


that appears at the top of the Tree View.

Photos View

Photos View provides a variety of options for viewing photos, adding information about photos and associating photos with people and facts. For detailed information of the Photos View tools see Viewing and Managing Photos.

You can click the  button in the toolbar to display the Photos View:



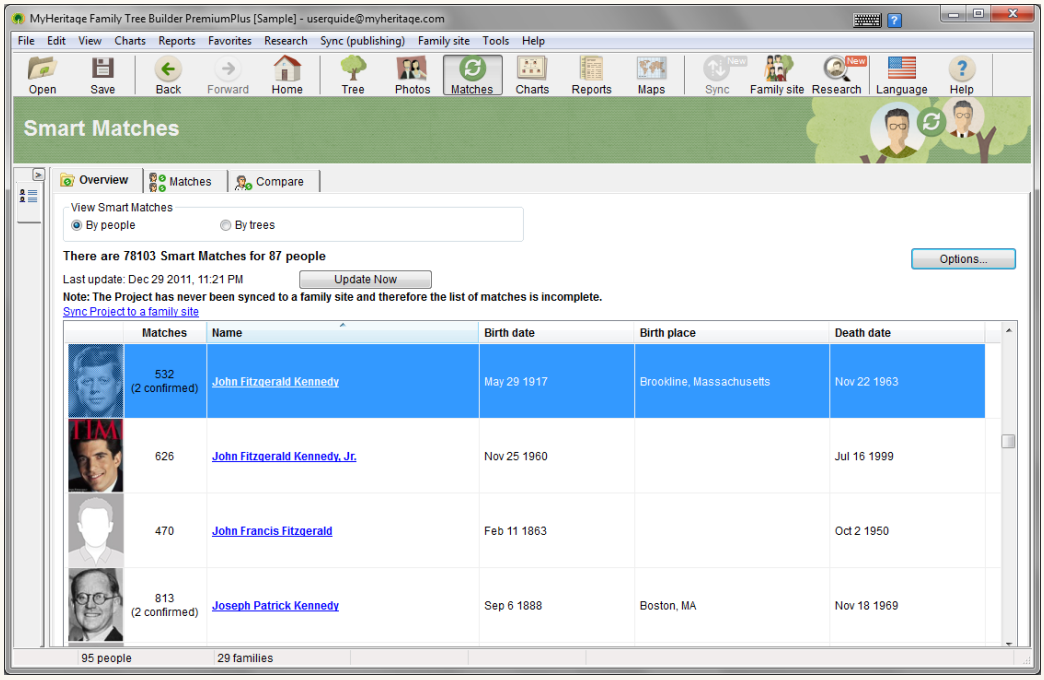
In Photos View, the Work Area contains the following:

- **People List:** Lists all the people in your project and enables easy access to their photos.
- **Photos tab:** Lists photos according to your request. It may show all the photos defined in your project, all the photos that are associated with a particular person or any other filtered list of photos that you specify by indicating in what or in whom you are interested. You can control how photos are displayed in this panel. You can also add photos, edit information, mark faces and view and delete photos.

Smart Matches View

In Smart Matches View, you can match people in your family tree to people in other family trees. For detailed information of the Matches View tools, see Smart Matches Window.

You can click the  button in the toolbar to display the Smart Matches View.



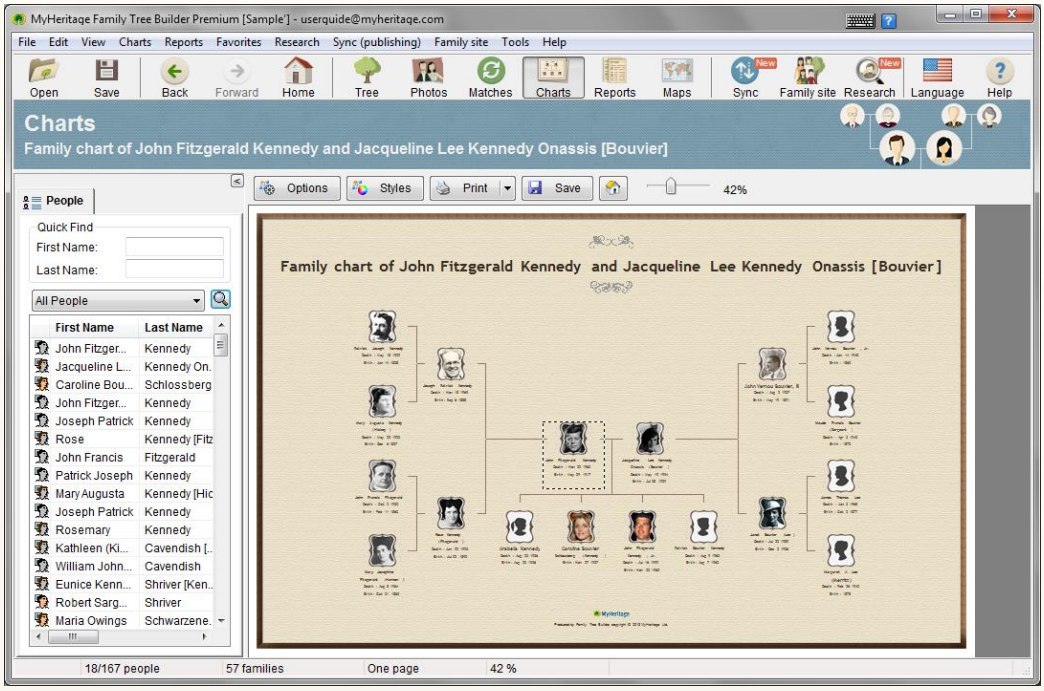
In Smart Matches View, the Work Area contains three tabs, as follows:

- **Overview Tab:** Shows either a list of people in your family tree that have matches or a list of family trees in which those matches where found.
- **Matches Tab:** Shows the matches for a specific person in your family tree.
- **Compare Tab:** Graphically shows a person in your family tree compared side-by-side with that person in someone else's family tree.

Charts View

In Charts View, you can display people in your family tree in various chart formats. For detailed information on displaying charts, see Displaying a Chart.

After you click the  button in the toolbar, you need to select the specific chart you want to display (ancestor, descendant and so on) and its orientation (horizontal or vertical). You can also choose the **Chart Wizard** option to help guide you through the process of creating a chart.

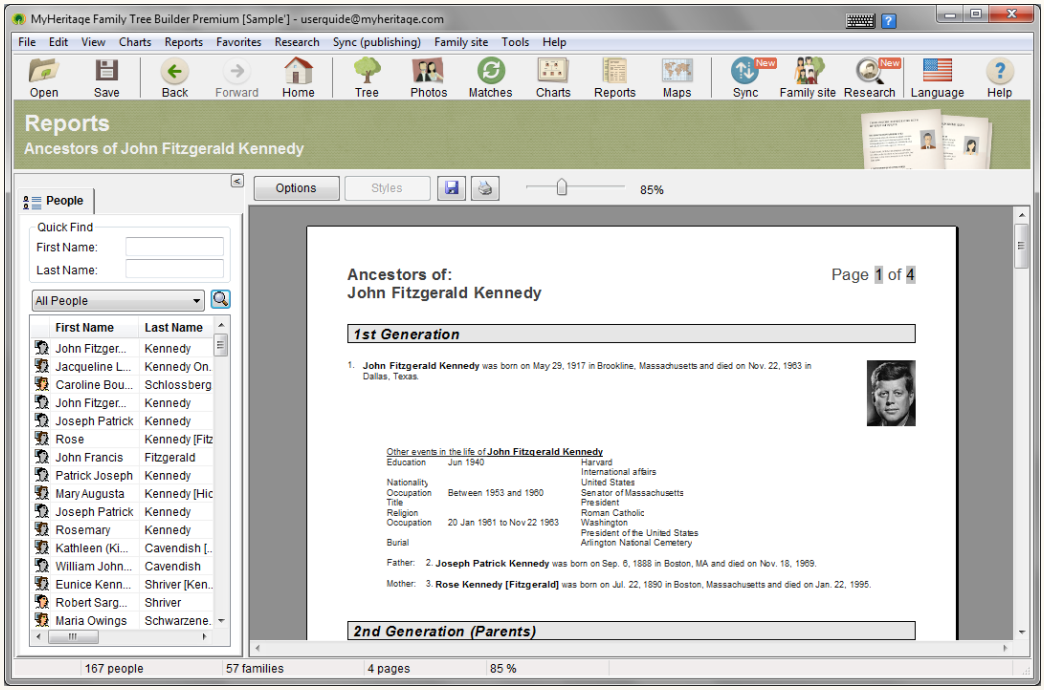


In Charts View, the Work Area enables you to change the style and configuration of the chart, zoom in and out and save or print the chart.

Reports View

In Reports View, you can create various reports for the members of your family tree. For detailed information on generating reports, see Generating a Report.

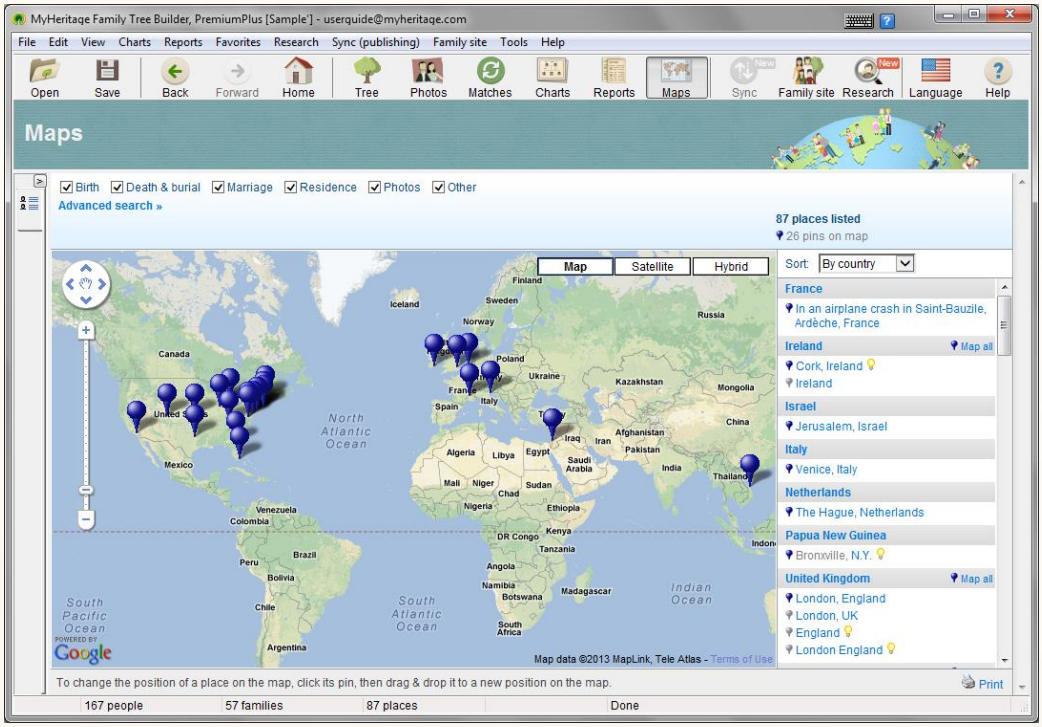
After you click the  button in the toolbar, you need to select the specific report you want to display:



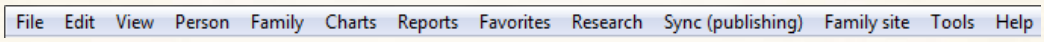
In Reports View, the Work Area enables you to edit specific report options, zoom in and out of a report and save or print the report.

Maps View

In Maps View, you can map your entire family tree, any portion of it or just one individual on an interactive world map. The Maps feature uses Google maps, in which you can pan, zoom in/out and so on for easy maneuverability. For detailed information about using the Maps feature, see Using Maps.



Menu Bar



The following describes the options in the menu bar:

NOTE

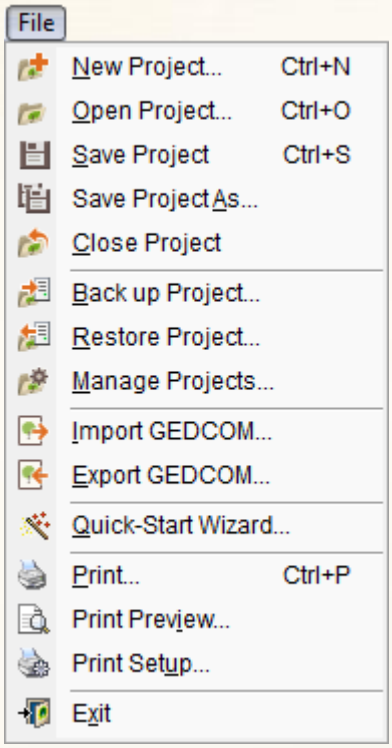
The menus that are shown and the options that are available in each menu may change according to the view that you are in, such as: Tree View, Photos View, Smart Matches View or Smart Research View. Unavailable options appear grayed-out.

The following is a comprehensive list.

- **File Menu**
- **Edit Menu**
- **View Menu**
- **Person Menu**
- **Family Menu**
- **Charts Menu**
- **Reports Menu**
- **Favorites Menu**
- **Research Menu**
- **Sync (publishing) Menu**
- **Family site Menu**
- **Tools Menu**
- **Help Menu**

File Menu

The following describes each of the options in the **File** menu:

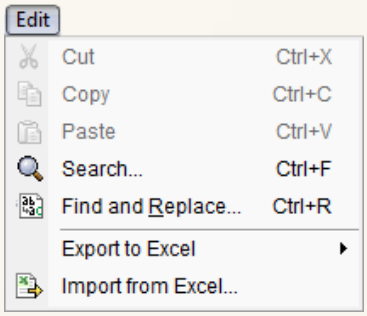


- **New Project:** Enables you to create a new project.
- **Open Project:** Displays a window from which you can select a project to open. Only one project can be opened at a time. You are offered to save your current project, if one is already open. Click the **Finish** button to load the new project. A statistics window is then displayed, summarizing how many people, families, photos and so on are defined in the project that is currently open.
- **Save Project As:** Saves the current project with the name that you specify in the window that is displayed. Use this option when you want to save a copy of the current project.
- **Close Project:** Closes the current project.
- **Back up Project:** Opens a wizard that walks you through the process of creating a backup of your entire project locally on your disk (see Backing Up a Project).

- **Restore Project:** Restores a project that was previously backed up on your computer (as described above) or that resides on your online family site at MyHeritage.com, and opens it in Family Tree Builder (see Restoring a Project).
- **Manage Projects:** Opens a window in which you can rename, describe, delete and modify projects and import or export a Family Tree Builder project.
- **Import/Export GEDCOM:** Opens a wizard that walks you through the process of importing from or exporting to GEDCOM (see GEDCOM and Family Tree Builder).
- **Quick-Start Wizard:** Opens a wizard that walks you through the process of creating a new genealogy project, importing an existing project or opening an existing project.
- **Print/Print Preview/Print Setup:** Enables you to print a project, preview a project you want to print, or set up a printer.
- **Exit:** Exits and closes the Family Tree Builder application.

Edit Menu

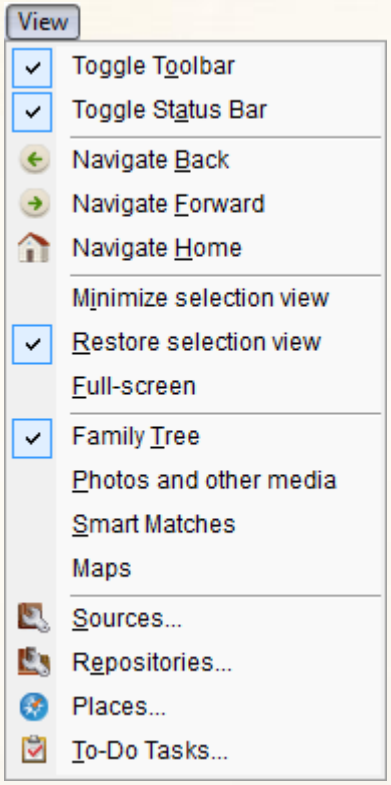
The following describes each of the options in the **Edit** menu:



- **Cut/Copy/Paste:** Enables you to cut, copy or paste information.
- **Search:** Enables you to search for specific people.
- **Find and Replace:** Finds text and replaces it with some other text (see Using the Find and Replace Function).
- **Export to Excel:** Enables you to create CSV files from various lists. This file can be edited in Excel (see Importing/Exporting Family Tree Builder Data).
- **Import from Excel:** Enables you to import the edited CSV back into FTB (see Importing/Exporting Family Tree Builder Data).

View Menu

The following describes each of the options in the **View** menu:



- **Toggle Toolbar:** Shows or hides the toolbar in Tree View.
- **Toggle Status Bar:** Shows or hides the status bar in Family Tree Builder.
- **Navigate Back:** Returns to the previously displayed window in Family Tree Builder.
- **Navigate Forward:** Goes to the window that was displayed before you clicked the **Back** button in Family Tree Builder.
- **Navigate Home:** Displays the Home Person as the central individual in the Tree View.

- **Minimize selection view:** Minimizes the People List on the display to give more room for the display of Tree View, Media View or Charts. The People List is described in People List. You can click the **›** button to enlarge the People List again.



- **Restore selection view:** Redisplays the People List in its full size. The People List is described in People List Panel.
- **Full-screen:** Displays Family Tree Builder window on the entire screen. To exit this mode, click the  button or press the **Esc** key.
- **Family Tree:** Displays Tree View.
- **Photos and other media:** Displays Photos View.
- **Smart Matches:** Displays the Smart Matches window, where you can see the same person as he or she appears in a family tree of another member of MyHeritage (see Smart Matches).
- **Maps:** Displays the Maps window, where you can map your entire family tree, any portion of it or just one individual on an interactive world map (see Using Maps).
- **Sources:** Displays a window in which you can manage sources used in citations (see Managing Sources).
- **Repositories:** Displays a window in which you can manage the repositories used in citations (see Managing Repositories).
- **Places:** Displays an index of places with all the places used in the project (see Managing Places).
- **To-Do Tasks:** Displays the Manage To-Do Tasks window in which you can manage tasks in your project (see To-Do Tasks).

Person Menu

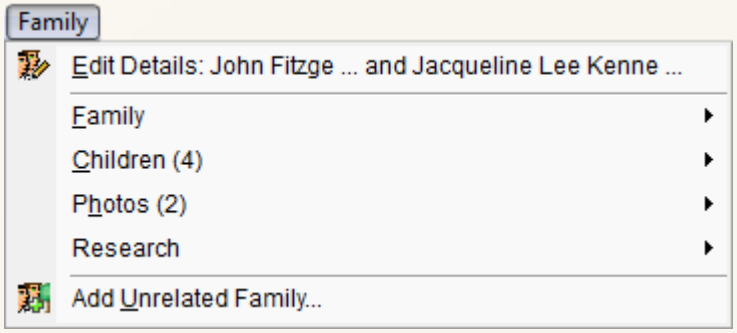
The following describes the options in the **Person** menu:



These options are the same as those described in Person Menu Options.

Family Menu

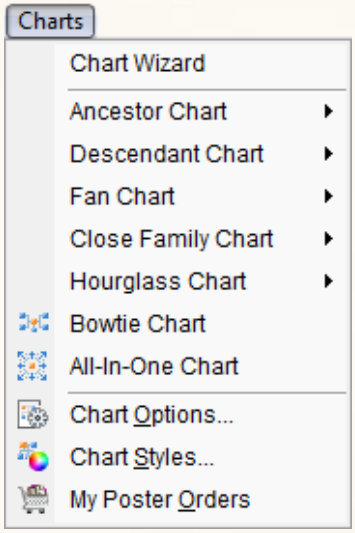
The following describes the options in the **Family** menu:



These options are the same as those described in Family Menu Options.

Charts Menu

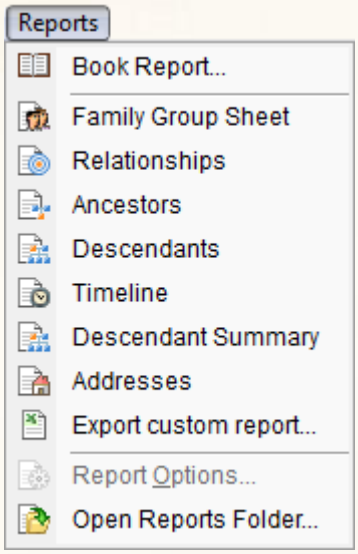
The **Charts** menu provides a variety of attractive and detailed charts representing your Family Tree. The following describes each of the options in the **Charts** menu (for details see Charts):



- **Chart Wizard:** Opens a wizard for selecting the type and style of chart to display.
- **Ancestor Chart:** Shows the selected person, his or her parents, grandparents and so on.
- **Descendant Chart:** Shows the selected person, his or her spouse(s), their children, children's spouse(s), grandchildren and so on.
- **Fan Chart:** Shows the selected person and that person's descendants or ancestors in a fan-shaped chart.
- **Close Family Chart:** Shows the selected person and close relatives of that person.
- **Hourglass Chart:** Shows the selected person, his ancestors and descendants.
- **Bowtie Chart:** Shows the selected person and his or her spouse at the center, their ancestors on either side and their children below.
- **All-in-One Chart:** Shows a chart of all people in the family.
- **Chart Options:** Enables you to determine the content and appearance of a chart of your family tree.
- **Chart Styles:** Select from predefined, attractive templates with chart options that define the look of the chart.
- **My Poster Orders:** Shows all previous orders for printing posters of charts.

Reports Menu

The following describes each of the options in the **Reports** menu (for details see Reports):

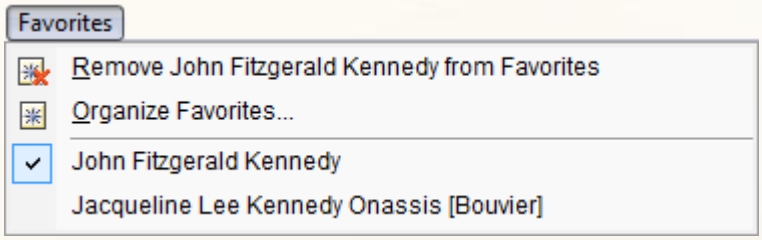


- **Book Report:** Displays a simple wizard that walks you through the process of producing a report for a specific person. The report includes detailed information about the person and his or her family, and can be printed as a book.
- **Family Group Sheet:** Generates a tabular report showing the details of the selected person and their immediate family.
- **Relationships:** Generates a report showing all the relationships of the selected person to all the other people in the family.
- **Ancestors:** Generates a report about a selected person and about each generation that precedes that person, such as parents, grandparents and so on.
- **Descendants:** Generates a report about a selected person and about each generation that follows that person, such as children, grandchildren and so on.
- **Timeline:** Generates a list showing major events of the family of the selected person in chronological order, such as birth, marriage and death.
- **Descendant Summary:** Generates a hierarchical tree showing the descendants of the selected person.

- **Addresses:** Generates an alphabetical list (in the order of each person's name) of the addresses of all the people in the family tree.
- **Export custom report:** Creates an Excel report that contains only those people whose information you want to see.
- **Reports Options:** Displays the Reports Options window in which you can specify what information to show in the report and how to show it.
- **Open Reports Folder:** Displays the list of files in the folder into which reports are saved.

Favorites Menu

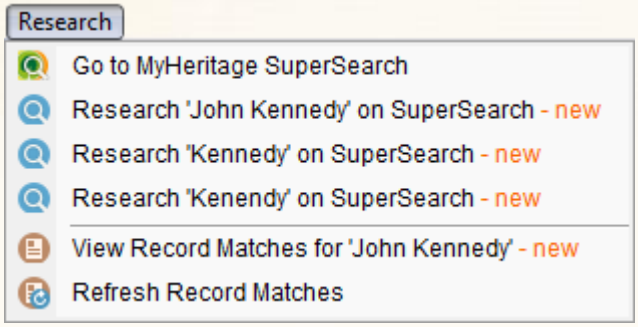
The following describes each of the options in the **Favorites** menu:



- **Remove [Person] from Favorites:** Enables you to remove a person from this menu.
- **Organize Favorites:** Enables you to determine the order in which people appear in this menu.
- **People's Names:** Lists the favorite people that you have added so that when you select a person's name from this menu, that person is displayed in the center of the Tree View.

Research Menu

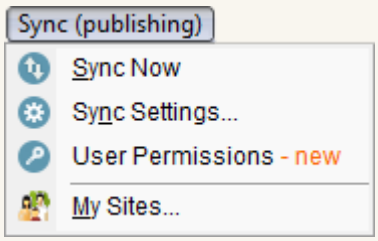
The following describes each of the options in the **Research** menu.



- **Go to MyHeritage SuperSearch:** Provides you with full access to the MyHeritage.com SuperSearch genealogical research tool. This powerful search engine lets you research your family history in billions of historical records.
- **Research [Person] on SuperSearch:** Launches the MyHeritage.com SuperSearch genealogy research engine and automatically starts researching the selected person.
- **View Record Matches for [Person]:** Opens the MyHeritage.com website, displaying matches to historical records for the selected person. See Record Matches.
- **Refresh Record Matches:** Refreshes the record match counts in Family Tree Builder immediately.

Sync (publishing) Menu

The following describes the options in the **Sync (publishing)** menu (for details, see Syncing Your Family Tree):

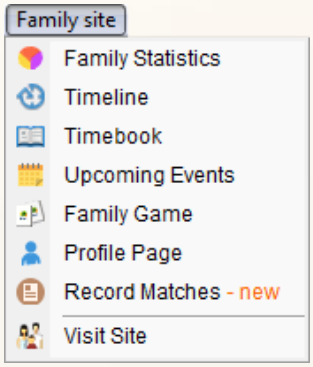


- **Sync Now:** Starts synchronizing changes in the family tree between Family Tree Builder and the online family site connected with this project.

- **Sync Settings:** Displays the Sync Settings window, which enables you to configure sync settings (see Sync Settings).
- **User Permissions:** Displays a window where you can edit the user permissions, and control who can download your tree from the family site, and who can edit it online.
- **My Sites:** Displays a window showing a list of the family sites that you have created on MyHeritage.com and enables you to invite members or visit these sites (see Managing Your Family Sites).

Family site Menu

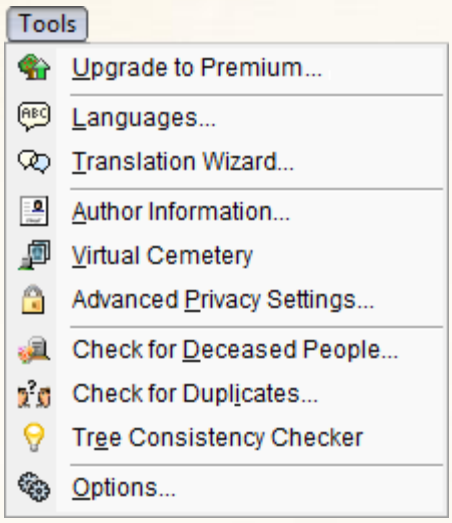
The following describes the options in the **Family site** menu (for details see Using the Family Site Menu):



- **Family Statistics:** Displays various statistics about the family.
- **Upcoming Events:** Displays all upcoming family events, such as birthdays and anniversaries, in a list or monthly view.
- **Profile Page:** Displays the full profile page from the family site for the selected person.
- **Record Matches:** Displays all the historical records that match the family tree in one centralized dashboard (see Record Matches).
- **Visit Site:** Opens the family site's home page.

Tools Menu

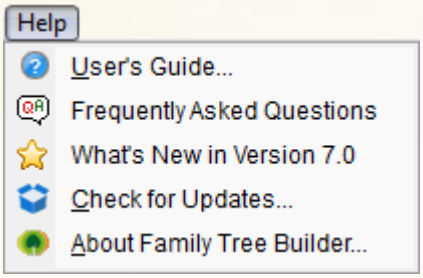
The following describes each of the options in the **Tools** menu:



- **Upgrade to Premium:** If you are not a Premium member, enables you to upgrade to Family Tree Builder Premium membership (see Premium Membership).
- **Languages:** Enables you to select the language used in Family Tree Builder (see Supporting Multiple Languages).
- **Translation Wizard:** Displays the Family Tree Builder Translation Wizard, which walks you through the process of translating all or some of the data in your current project (see Translating in Family Tree Builder).
- **Author Information:** Displays a window in which you can enter information about the author of this family tree. This information will be used if you export this family tree into GEDCOM format.
- **Advanced Privacy Settings:** Defines privacy settings for this project (see Privacy Settings).
- **Check for Deceased People:** Enables you to check your project for people who are deceased, but who are not marked as such in the project (see Checking for Deceased People).
- **Check for Duplicates:** Finds potential duplications in your family tree (see Finding Duplicates in the Family Tree).
- **Tree Consistency Checker:** Checks for consistency issues in your data (see Performing Data Consistency Checks).
- **Options:** Describes additional options for configuring the behavior of your family tree (see Configuring Family Tree Builder).

Help Menu

The following describes each of the options in the **Help** menu:



- **User's Guide:** Opens this document. This document is periodically updated on MyHeritage.com, and it will be offered to you whenever a new version becomes available.
- **Frequently Asked Questions:** Opens the Family Tree Builder FAQ section on the MyHeritage.com web site.
- **What's New in Version 7.0:** Displays information about new and improved features in the latest version of Family Tree Builder.
- **Check for Updates:** Checks whether a newer version of Family Tree Builder is available to download.

> **NOTE**
>
> By default, FTB checks for updates automatically, so you do not need to check for updates manually. Use the manual update option only if the automatic update configuration option was turned off, or if you do not want to wait for the next scheduled check.

- **About Family Tree Builder:** Displays information about the current version of Family Tree Builder.

Toolbar

The following describes the **Toolbar** that appears at the top of the Family Tree Builder window, which gives you quick access a variety of options:



Icon	Name	Description
	New	Enables you to create a new project (see Step 4: Creating Your First Project). This option is shown only when there is no project currently open in Family Tree Builder.
	Open	Displays a window from which you can select a project to be opened. Only one project can be opened at a time, so it will offer to save your current project, if one is open.
	Back	Returns to the previously displayed view in Family Tree Builder.
	Forward	Goes to the view that was displayed before you clicked the Back button in Family Tree Builder.
	Home	Displays the Home Person as the focus of the Tree View, meaning the husband or wife appears in the center of the Tree View. For a description of how to define a Home Person, see Set as Home Person.
	Tree	Displays the Tree View. See Tree View.
	Photos	Displays the Photos View. See Photos View.
	Matches	Displays the Smart Matches View. See Smart Matches View.
	Charts	Enables you to display various graphical charts of your family tree. See Charts View.
	Reports	Enables you to generate various reports describing your family tree. See Reports View.

Icon	Name	Description
	**Maps**	Displays your family on the map. See Maps View and Using Maps.
	**Sync**	Syncs your family tree to and from your family site on MyHeritage.com. See Syncing Your Family Tree.
	**Family site**	View various pages in your family site. Clicking this button opens a dropdown list containing the same options as the Family Site Menu.
	**Research**	Research your family on MyHeritage.com. Clicking this button opens a dropdown list containing the same options as the Research Menu.
	**Premium**	Enables you to upgrade to Family Tree Premium membership. See Premium Membership.
	**Language**	Enables you to select the language used in Family Tree Builder. See Languages and Translation.
	**Help**	Opens this User Guide. If the user guide has updates, clicking this button offers to download a new version.

CHAPTER 3

Getting Started



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Getting Started

About This Chapter:

This chapter suggests a workflow for getting started with Family Tree Builder and describes how to start adding people to your family tree. It contains the following sections:

- **Using Family Tree Builder** describes a basic workflow for building a family tree using Family Tree Builder.
- **Creating Your First Project** describes how to create a project.
- **Adding a Family** describes how to define a family.
- **Describing a Person** describes how to define a person.
- **Expanding the Family** describes how to extend the family tree by defining family members as they are related to the people that you have already defined.
- **Editing Information** describes how to edit families and people after they have been defined.
- **GEDCOM and Family Tree Builder** describes how to import your data from a GEDCOM file.
- **Entering Dates** describes the variety of options available for entering dates or ranges of dates in Family Tree Builder.
- **Citations** describes how to identify the sources and repositories that you used for your research.
- **To-Do Tasks** describes how to manage the various tasks that you want to handle in your project.

Using Family Tree Builder

The following is a simple workflow that you may use when building a family tree using Family Tree Builder:



Step 1: Downloading Family Tree Builder

Family Tree Builder is available free of charge from MyHeritage.com. Simply navigate to the site and follow the instructions that describe how to install it on your computer.

After it is installed, the following icon appears on the desktop:



Step 2: Launching Family Tree Builder

You can launch MyHeritage Family Tree Builder by double-clicking its desktop icon, or by starting it by selecting **Start**, then selecting **All Programs**:



Step 3: Registering as a Member of MyHeritage

In order to use the Family Tree Builder application, you need to be a registered member of MyHeritage. Registration is simple, quick, and free.

If you have not yet registered as a member of MyHeritage, then do so now. If you are already a registered member, login with your username and password.

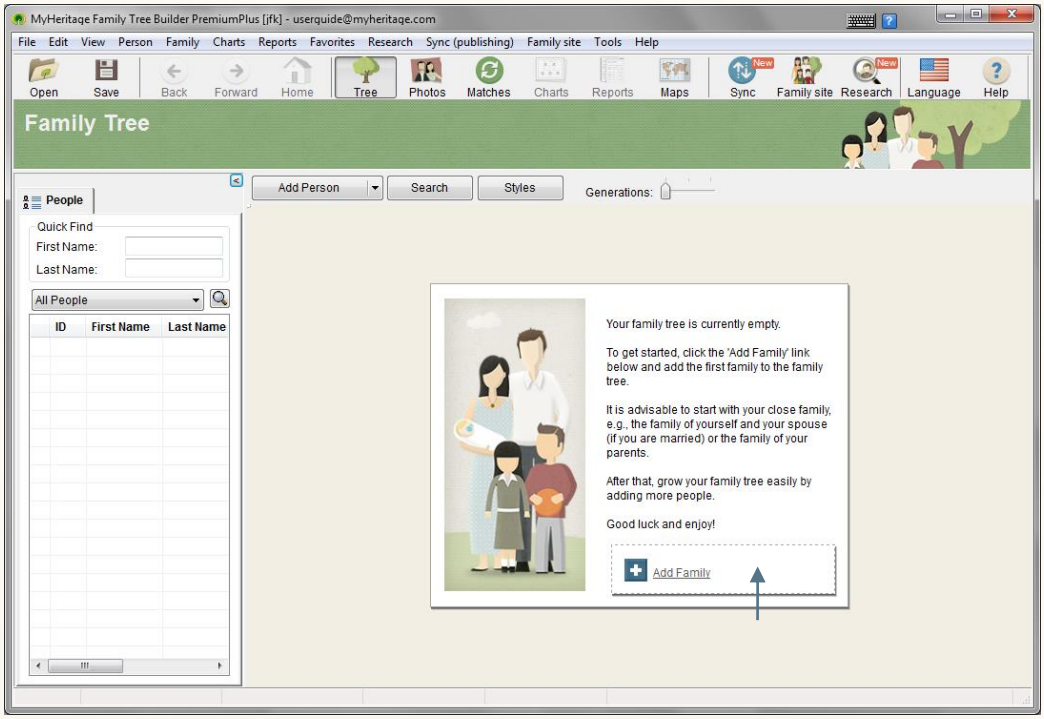
Step 4: Creating Your First Project

Each project in Family Tree Builder represents a family tree. You can have as many projects as you like. Typically, each project represents a family tree comprised of many related families.

The process of creating a project offers you the option to create a family site on MyHeritage.com. You can create a site even if you have not yet filled out your family tree. This will be your own personal family website, where your family tree will be published and then continually synchronized. You can then invite family members and share information about your family.

Step 5: Defining Your First Family

After you define a project, you are offered the option to create your first family: a husband, a wife and their children. Simply click the **Add Family** button. This option is displayed after you create your new project. For instructions for defining your first family see Adding a Family.

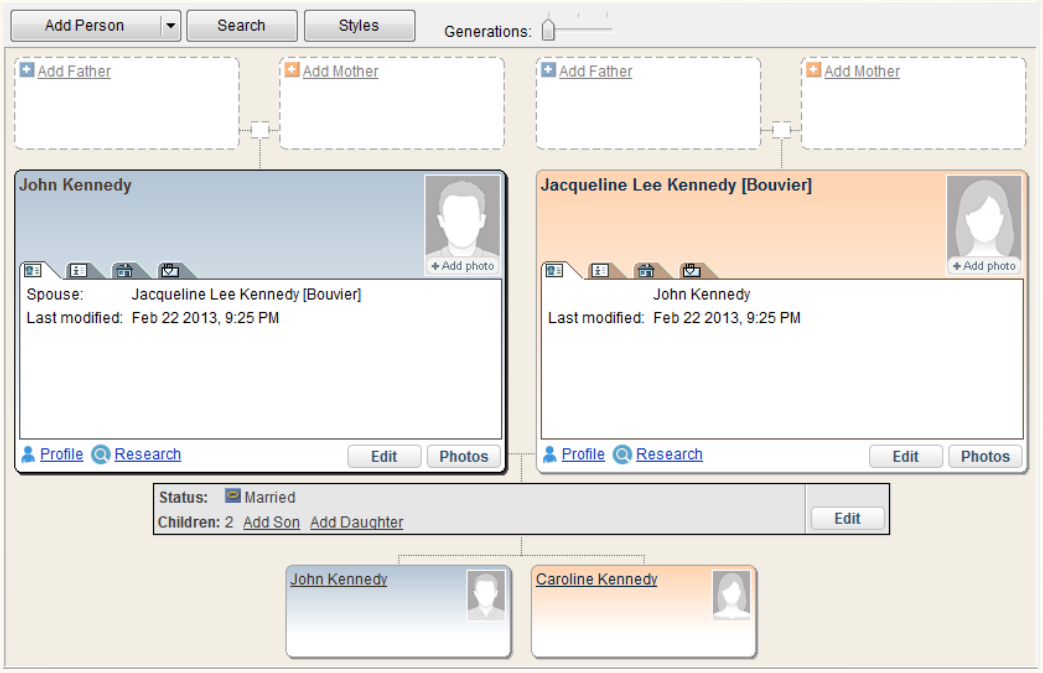


Step 6: Editing People in Your Family

Double-click the card of any person in this view to display a window in which you can describe them by adding their details: names, facts, notes, citations and more.

Step 7: Adding People to Your Family

To add more people to the family, click the empty **Add father**, **Add mother**, **Add spouse**, **Add son** and **Add daughter** cards.



To add a child for a couple who already have a child, click the **Add son** or **Add daughter** links in the family card.

To add a spouse to someone who already has a spouse, right-click this person and select the **Spouses** menu. Then, select the **Add Spouse** option in the submenu.

Step 8: Publishing and Inviting Visitors

Publish your family tree to your family site on MyHeritage.com and invite people to come and see it! Any later change in the family tree will be synchronized to the family site.

Step 9: Finding Matching People

Family Tree Builder enables you to find matches for the people that you have defined in your family tree. They are matched with people in all the other family trees on MyHeritage.com that were created by other members. This enables you to see the information that was entered about this same person in order to enrich your family tree and/or to create a link to that person in the other tree.

Step 10: Generating Charts and Reports

Family Tree Builder enables you to generate a rich variety of charts and reports that represent your family tree. See Charts and Reports.

Creating Your First Project

Each project in Family Tree Builder represents a family tree. You can have as many projects as you like. Typically, each project describes a family tree that contains numerous related families.

You may also decide to back up different versions of a family tree in different projects in case you would like to return to information that you had already changed. You can do this by saving different versions of your family tree in different projects. In addition, all your projects are backed up on MyHeritage servers after you synchronize them to your online family site.

When you create your first project, you are offered the option of enabling automatic syncing, which provides online backup of projects. This protects your family tree and photos from any catastrophe or computer damage. You can also enable syncing for a specific project.

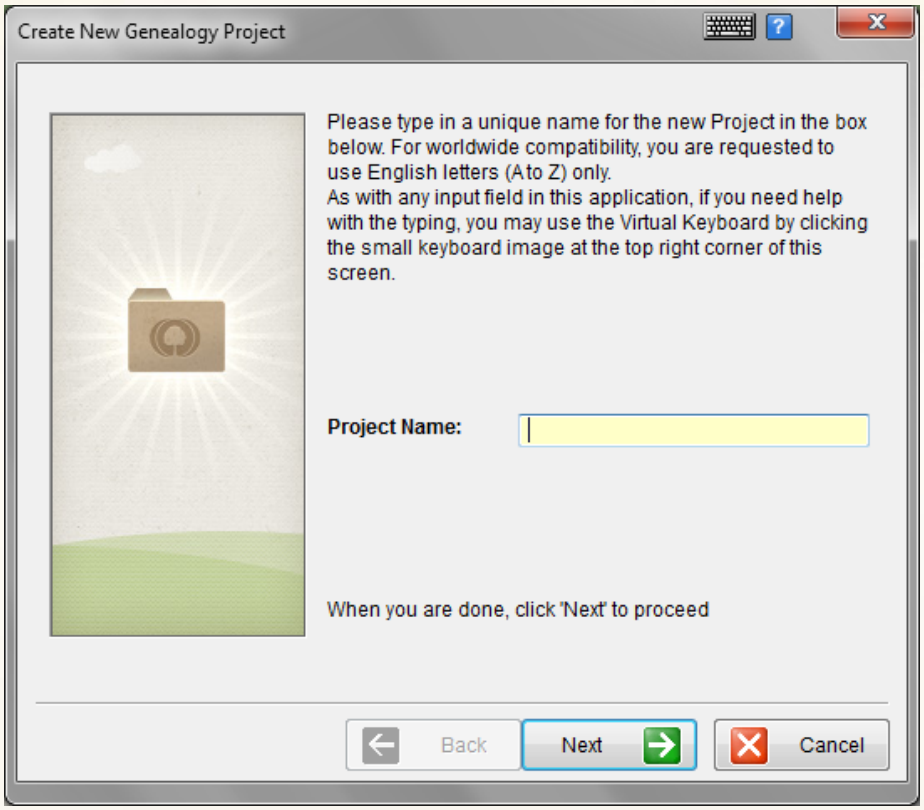
When you create a new project, you are asked to specify its name and its language. You can also specify a secondary language if your family tree contains names in two languages.

The initial project that is created is empty. You can fill the project with information about your family tree as described throughout this guide or you may import data that was stored in a GEDCOM or other format. You may also import a project that was created in Family Tree Builder, Family Tree Legends, Family Tree Maker, Personal Ancestral File, Legacy or The Master Genealogist. The **Import** function is described in GEDCOM and Family Tree Builder.

After you import a project from a GEDCOM file, you are prompted to identify who you are in the family tree. See Identifying Yourself in the Family Tree for more details.

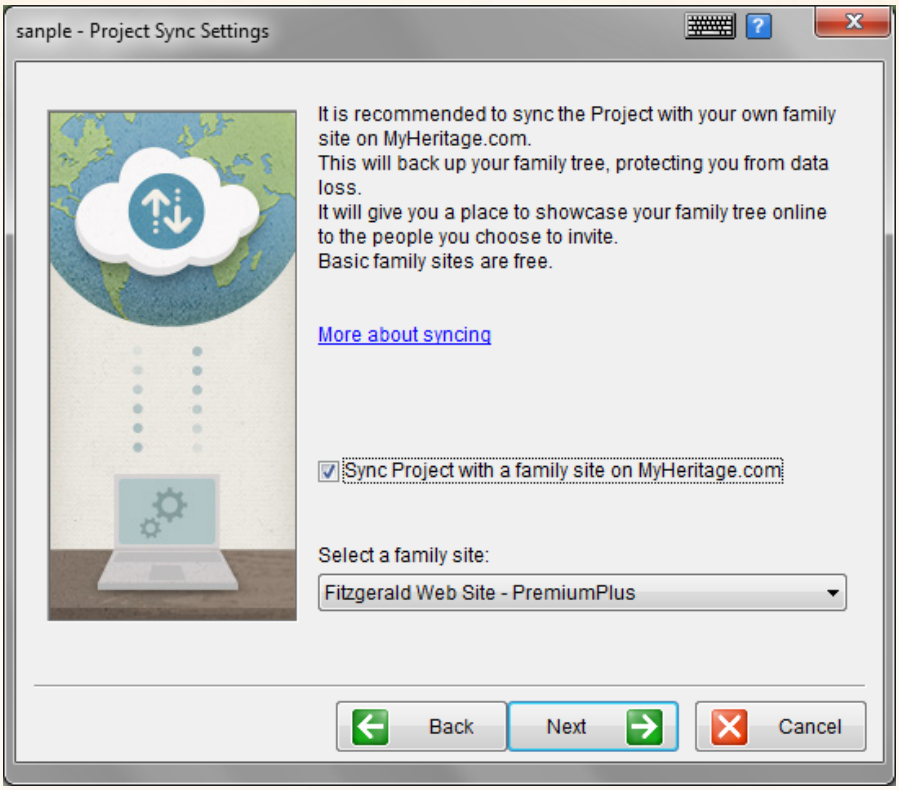
To create a new project:

1 From the **File** menu, select **New Project** or click the icon on the toolbar. The following window appears:



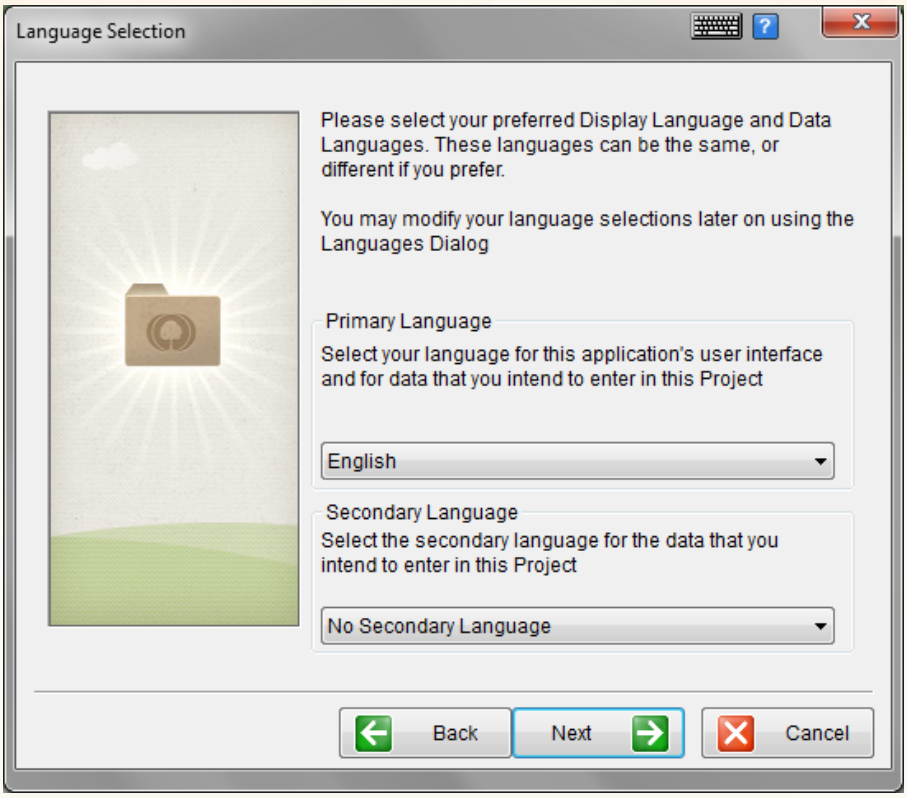
2 Enter the name of your project in the **Project Name** field. It must be entered in English letters, but it may also include spaces and basic characters. The project name must be a legal file name.

3 Click **Next**. The following window appears:



4 To sync the project, check **Sync Project to a family site on MyHeritage.com**. If you have more than one family site, you can select which one to sync to from the dropdown list.

5 Click the **Next** button to display the following window:

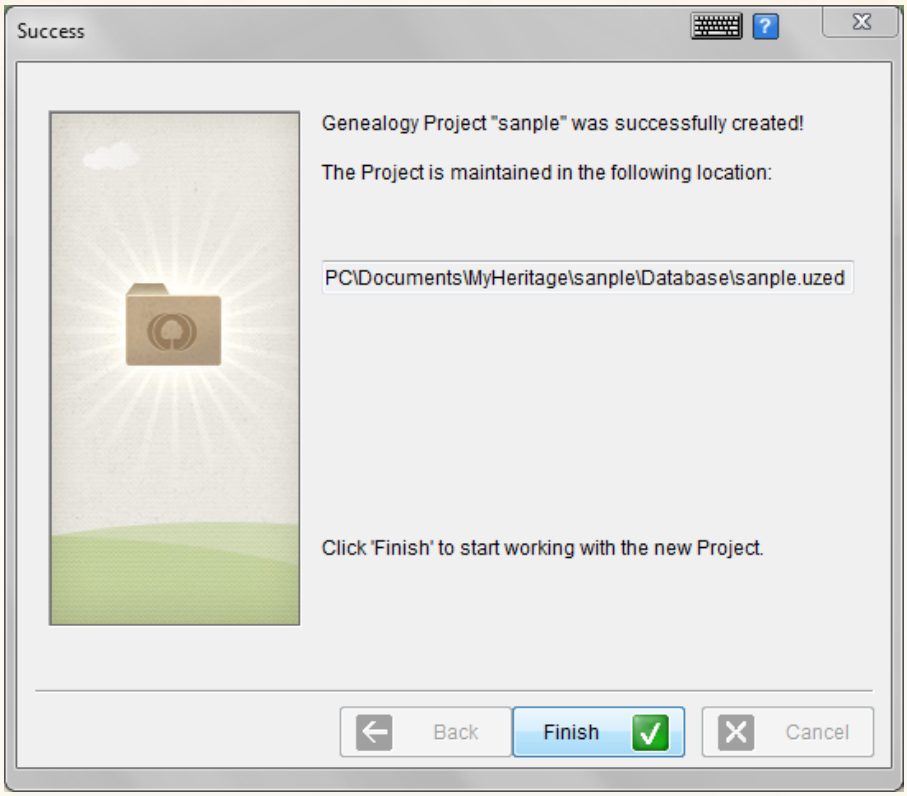


6 Select the **Primary Language**, which will determine the language that is shown in the Family Tree Builder user interface and the language of the data that you will enter.

If you would like to enter data in an additional language, select this language in the **Secondary Language** field.

NOTE Family Tree Builder provides a dual-language mode, which enables you to enter and view data in two languages.

7 Click the **Next** button to display the following window:

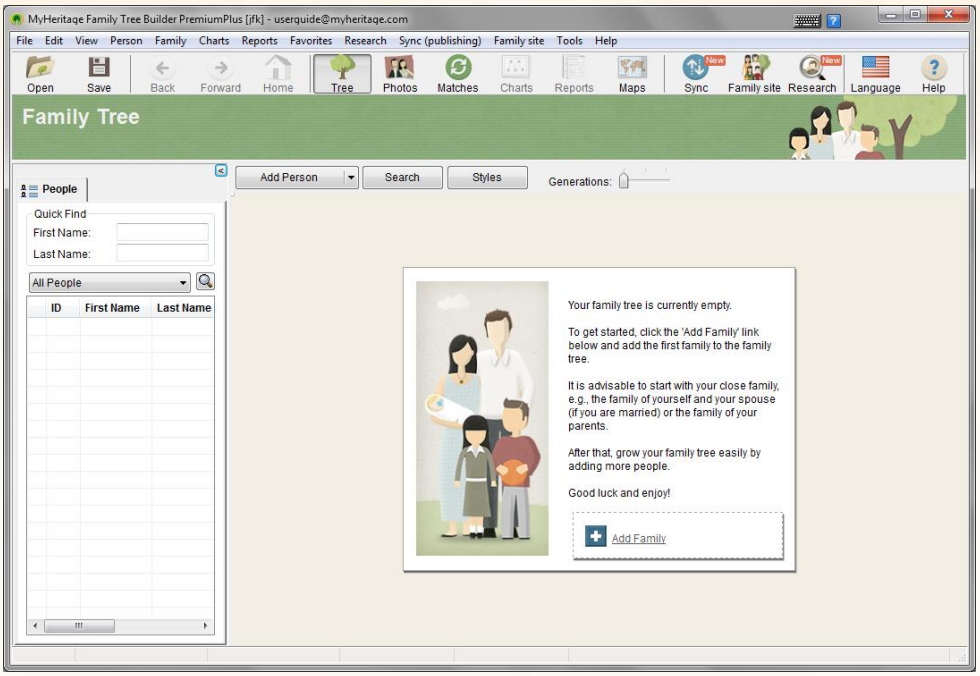


This window indicates that your project has been created successfully.

NOTE

Your project is not stored on MyHeritage.com and it is not available to be viewed by anyone through the Internet until you sync it to your family site.

8 Click the **Finish** button to display the following window:



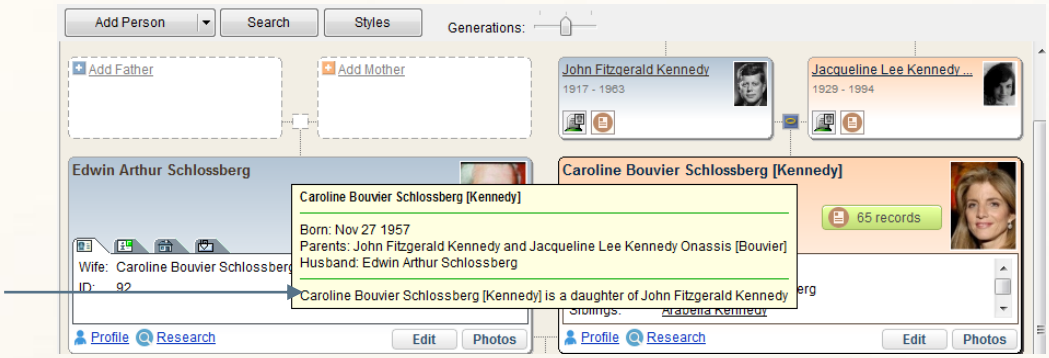
You can now add your first family by clicking the 

button.

Identifying Yourself in the Family Tree

When you open a project that you created or import one from a GEDCOM file, Family Tree Builder attempts to automatically locate you in the family tree, based on the email address you specified when registering with MyHeritage. If you cannot be located in the project based on this email address, you are asked to identify who you are in the family tree. Identifying yourself in the family tree provides several advantages, as follows:

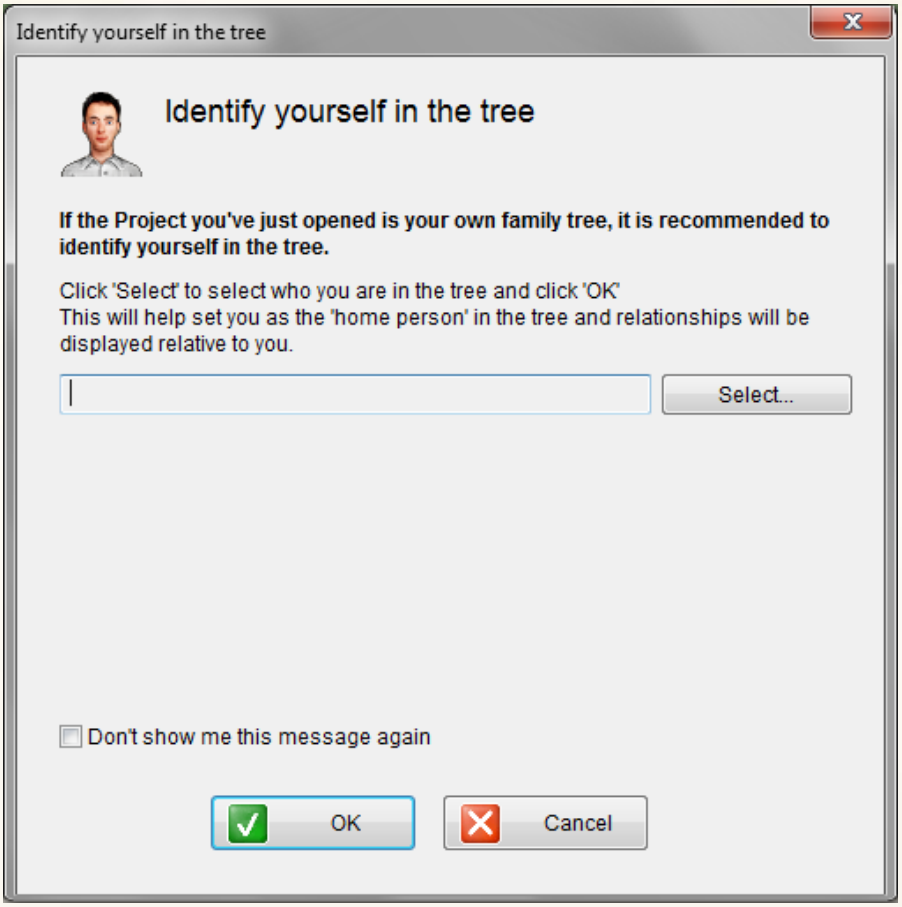
- The family tree indicates all the other people related to you, and indicates their relationship to you in related people's cards and in other places throughout the application, as shown below:



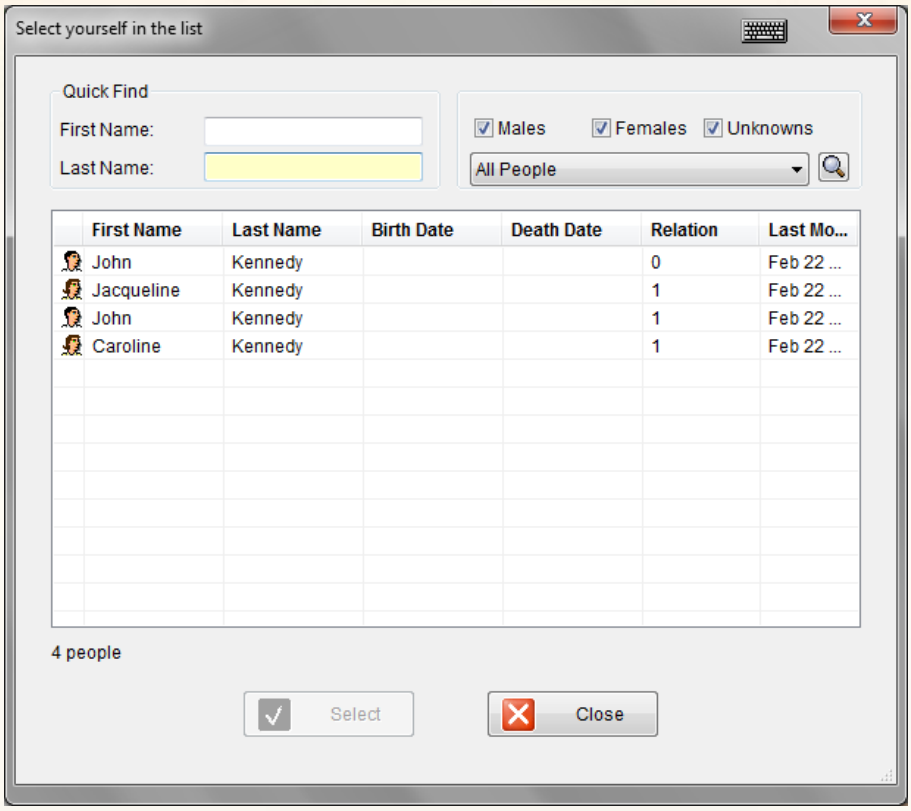
- When you sync to a site, the synced family tree identifies you and specifies this fact there too. Thus, the family tree shows relationships from your perspective, as they relate to you.

To identify yourself in the family tree:

1 If Family Tree Builder cannot locate you in the family tree based on your email address, the following window is displayed:



2 Click the **Select** button to open the following window:



3 Select your name in the list and then click **Select**. The following window is redisplayed.



4 Specify the Home Person for the project by selecting the applicable radio button. See Set as Home Person for more information.

5 Click **OK** to save the settings.

Adding a Family

Family trees are created and edited in Family Tree Builder using an intuitive graphical user interface that is simple to use. It is highly visual, making the process almost effortless. This enables you to create and branch-out a family tree just as one would do using a pen and paper.

NOTE Family Tree Builder is installed with a sample project of the Kennedy family to serve as an example for you.

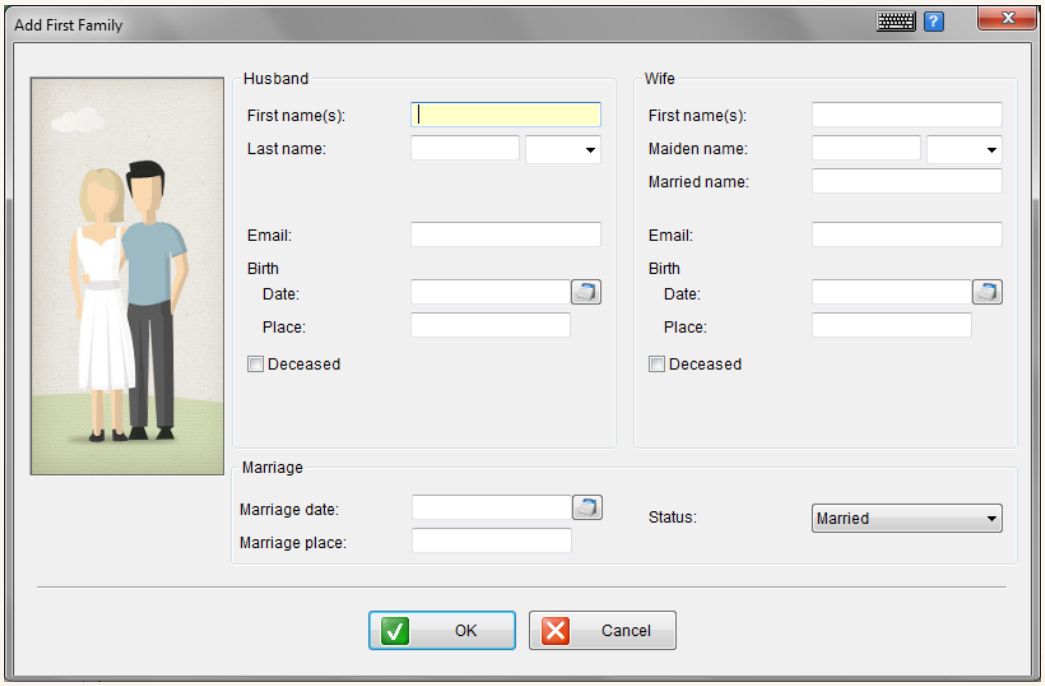
TIP You can also add a family by using the **Add Unrelated Family** option in the Family menu.

For as long as your project is empty, Family Tree Builder will invite you to build the first family from which descendants and ancestors can be defined graphically.

A variety of ways are available to help you get started building your first family and to fill out and enrich the information that describes members of that family. The following describes one simple option for doing this.

Click the **Add Family** 

button to get started. The following window is displayed:



Defining the Husband and Wife

Fill out the details of the husband and the wife of this family.

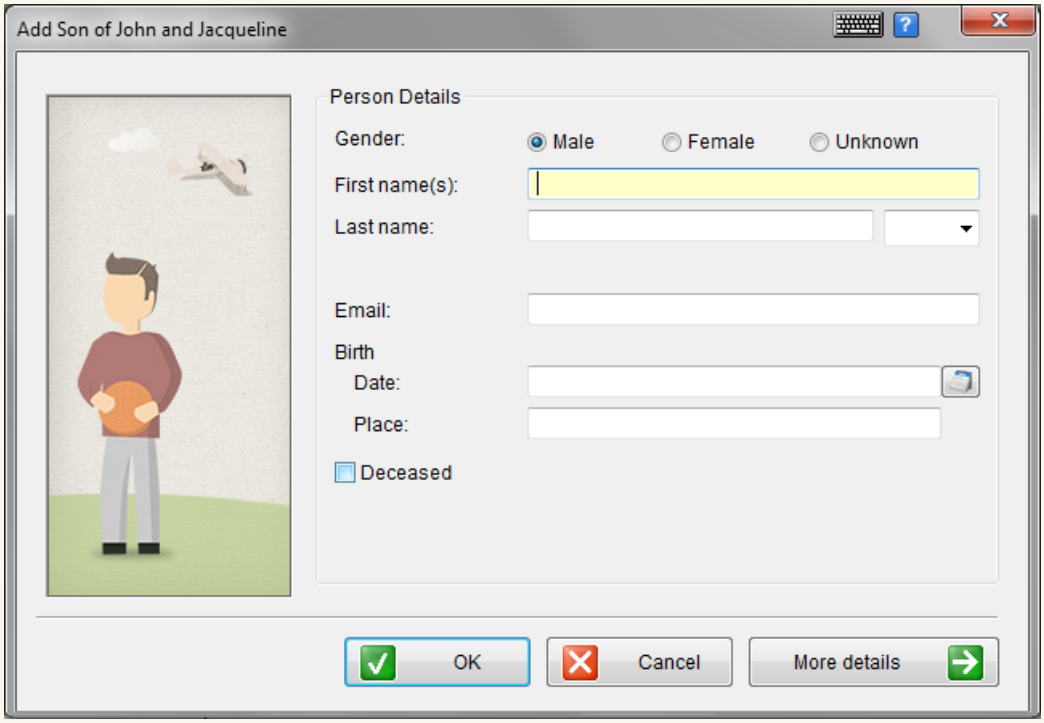
Entering the maiden name of a woman (meaning her surname before her marriage) enables Family Tree Builder to enrich the connections in your family tree.

To enter a date, either type it into the field or click the **Date** icon  that appears on the right of each date field. Family Tree Builder provides a rich variety of options for entering dates or ranges of dates.

After completing this window and clicking **OK** you are prompted to add children to the family, as shown below:



Click the **Add Son** or the **Add Daughter** button to display the following window:



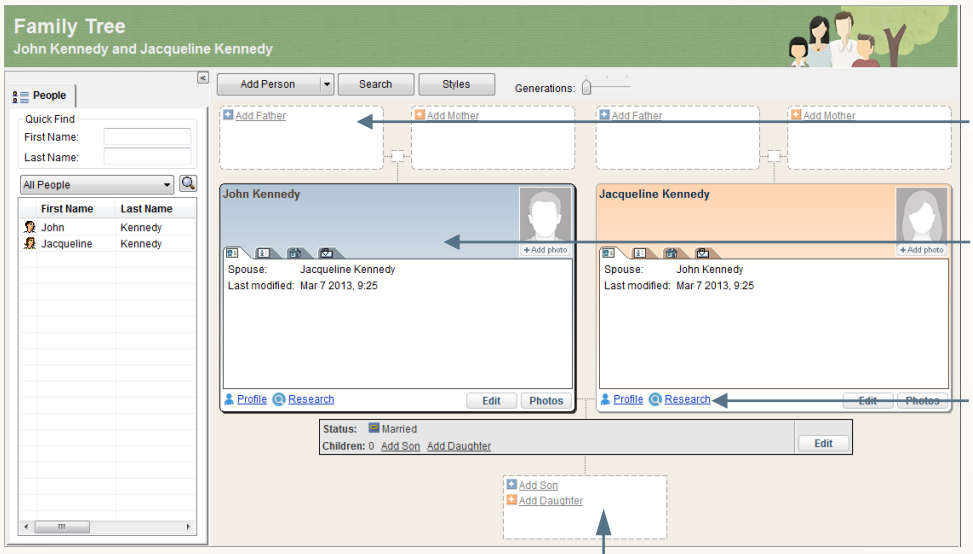
Fill in the details describing this child. You can then click the **More details** button to define a variety of details about this child, or you can click **OK** to return to the Add Children window shown on the previous page. You can then add more children in the same way as described above until you click **Done**. After you click **Done**, the Tree View is then redisplayed showing the husband, wife and children.

NOTE

Family Tree Builder automatically detects when you attempt to add a person who is similar to another person who is already in the family tree. When this occurs, a warning is displayed.

Describing a Person

A simple way to start describing a person in your family tree is to double-click their card or an empty **Add Father**, **Add Mother**, **Add Spouse**, **Add Son** or **Add Daughter** box.



Double-click here to describe this father

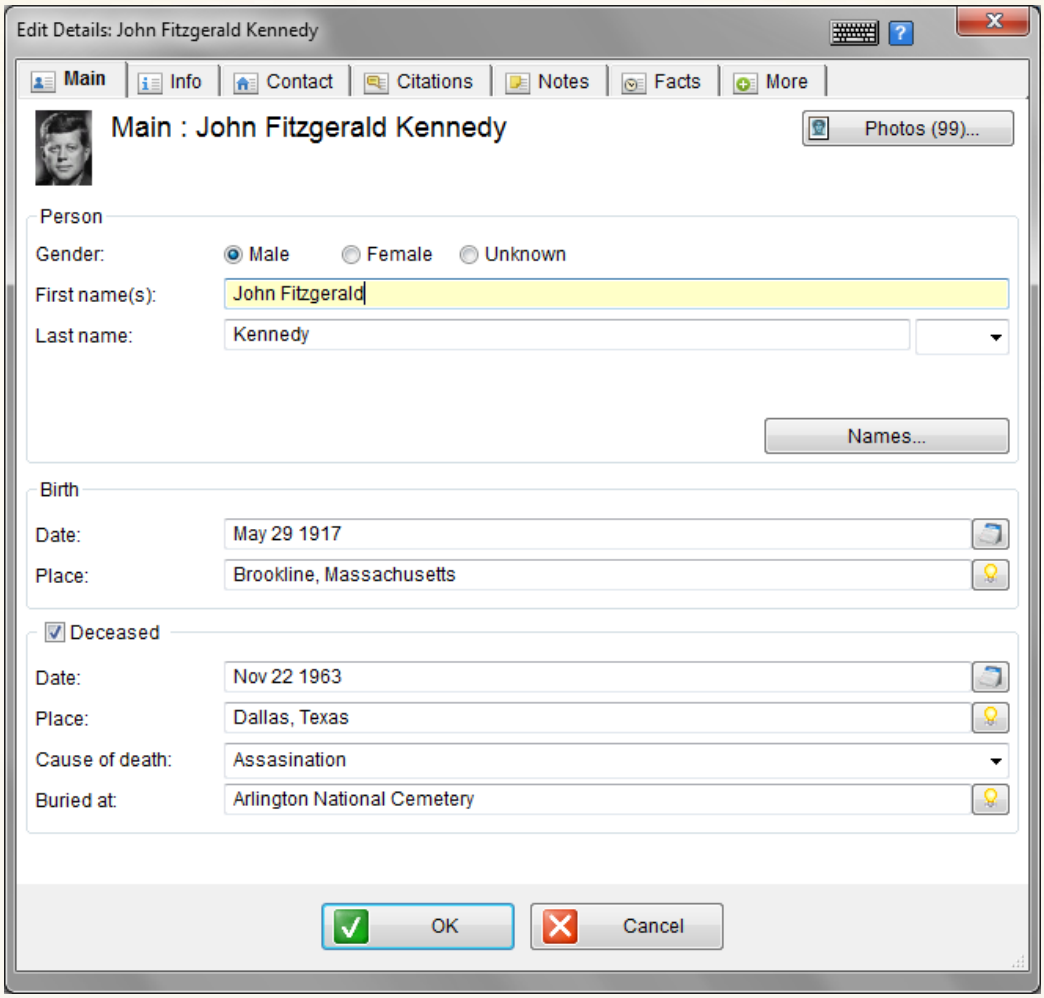
Double-click here to describe this person

Double-click here to describe this family

Double-click here to describe a son or a daughter

Whether you are adding a mother, father, spouse or child to an existing person, or adding a person unrelated to all the others, the **Add Person** wizard is shown.

The easiest way to edit the details of a person in Family Tree Builder is to double-click their card in the Family Tree View. The following window is displayed, enabling you to enter a variety of information for this person:

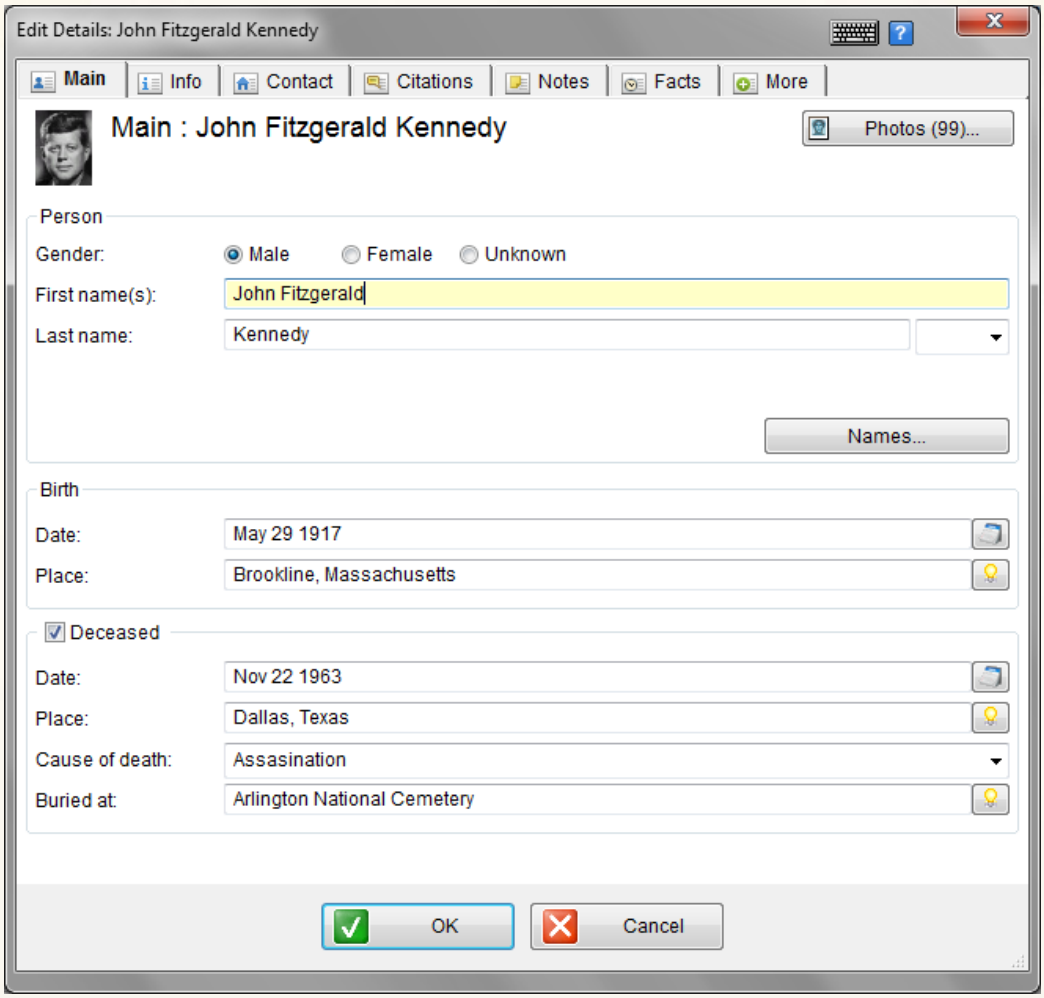


This window contains the following tabs for describing this person:

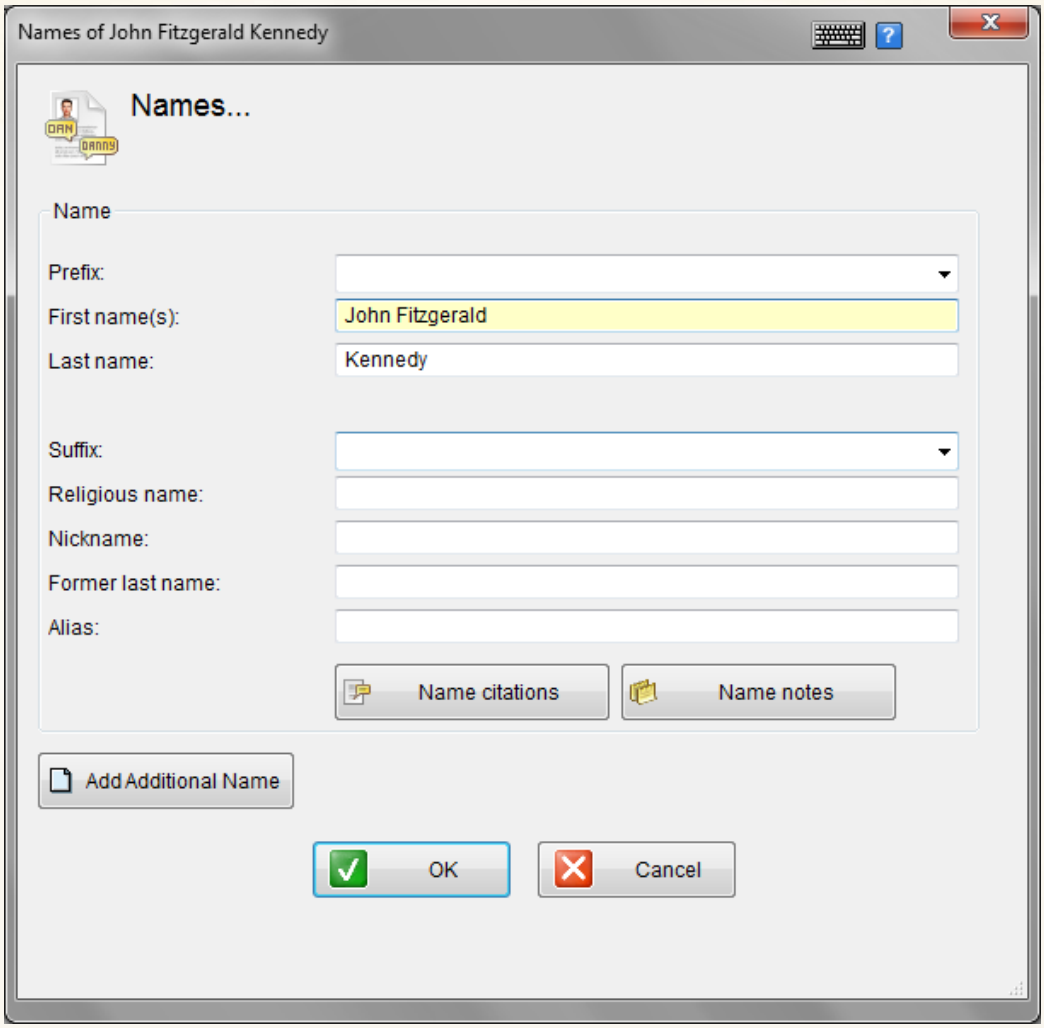
- **Main Tab**
- **Info Tab**
- **Contact Tab**
- **Citations Tab**
- **Notes Tab**
- **Facts Tab**
- **More Tab**

Main Tab – Describing a Person

The **Main** tab enables you to define basic information about a person, such as their name, gender and information about their birth. If the person is deceased, check the **Deceased** checkbox to add information about their death and burial.

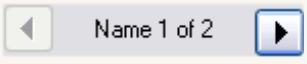


Click the **Names** button to display a window in which you can add additional names of this person and/or various suffixes and prefixes to their name, as shown below:



The name that you entered in the **Main** tab appears in the window above. In this case, you can add additional information about that name in this window. If you would like to add another name, then click the **Add Additional Name** button.

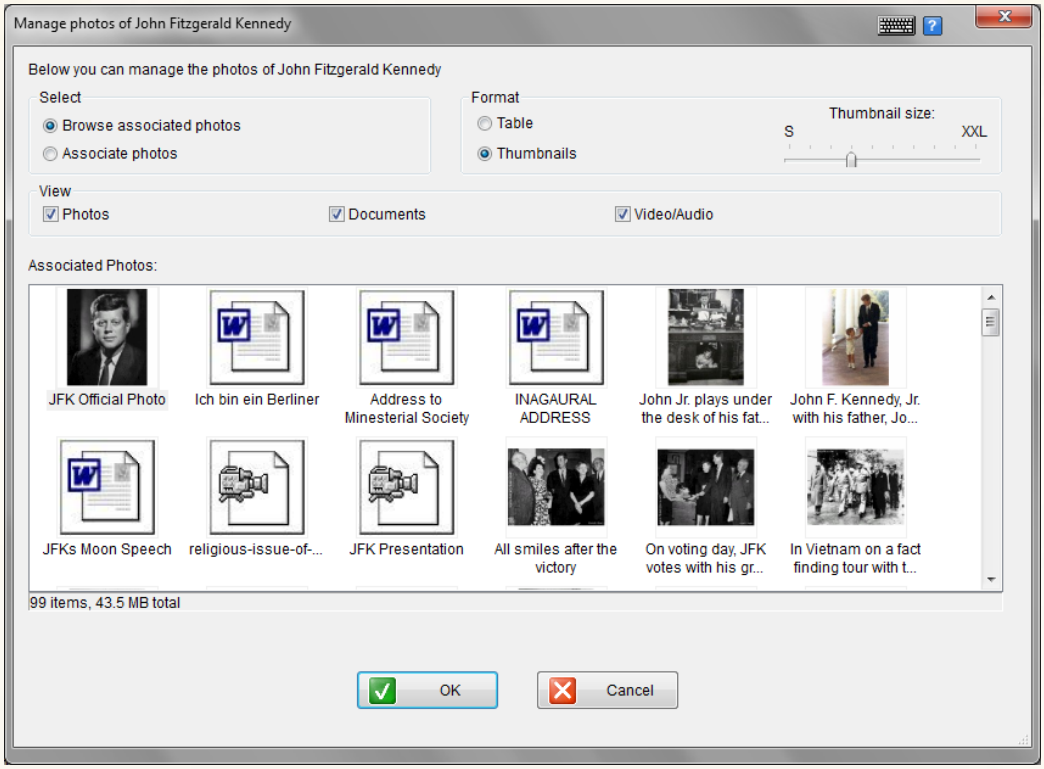
The top of the window indicates how many names were assigned to this person. You can click the right or left arrow, shown below, to browse between the various pages of name information.



To add citation information about this name, click the **Name Citations** button (see Citations).

To add a note about this name, click the **Name Notes** button (see Notes Tab – Describing a Person).

You can click the **Photos** button to view and add photos of this person using the Manage photos window:



This window enables you to view or add photos of this person. The window operates in two modes, which is determined by the buttons at the top-left corner, in the Select area. The Select options are:

- Browse Associated Photos
- Associate Photos

Browse Associated Photos

This window appears as shown above when the **Browse associated photos** option is selected in the Select area at the top-left corner. This is the default option when the person already has photos. Otherwise, the **Associate Photos** option is selected.

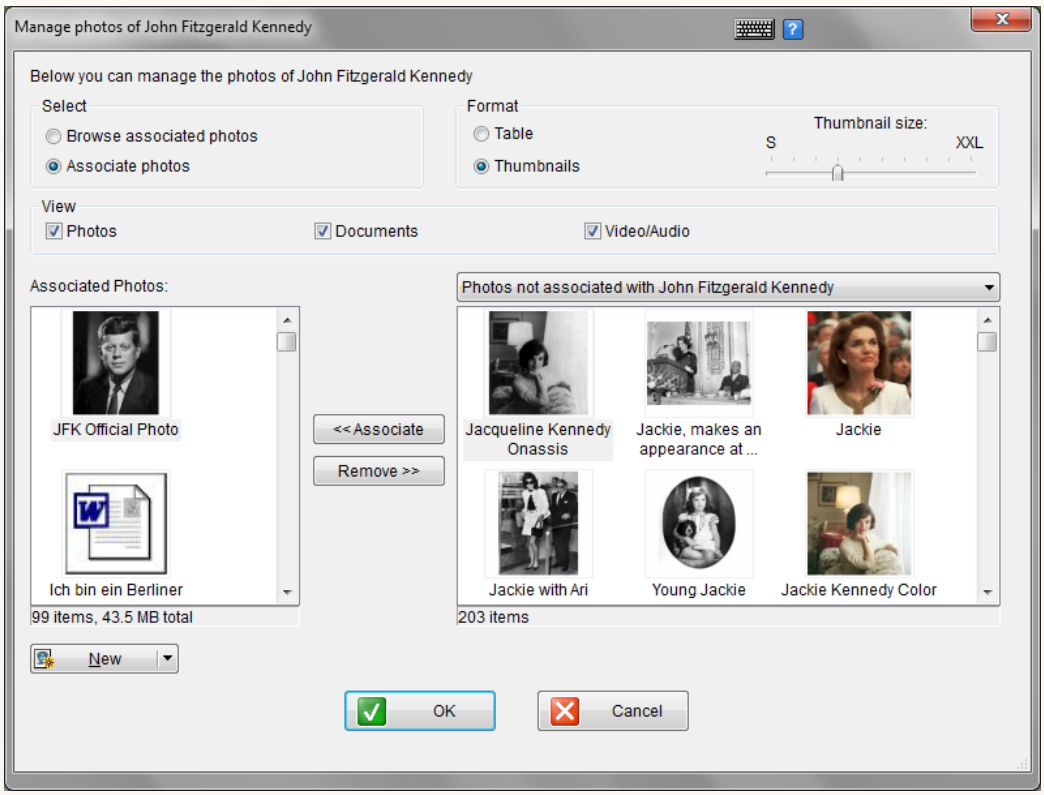
This option enables you to easily browse through all the photos associated with this person.

You can double-click a photo to display it in more detail in the Image Viewer.

The viewing options provided here are the same as those described in Viewing Options below.

Associate Photos

The window appears as shown above when the **Associate photos** option is selected in the top-left corner in the Select area. It enables you to associate a photo with this person



To associate a photo with this person:

1. Browse to the list of photos in the area on the right. In the field above the photos, you can show all photos or only photos of this person that are not yet associated with this person.
2. Click a photo in the area on the right.
3. Click the **Associate** button to move this photo into the area on the left called **Associated Photos**. All the photos listed in this area are associated with this person. This means that they are displayed when you view this person.

Viewing Options

This window provides a variety of options for viewing the photos that have not yet been associated, making it easy for you to select and associate them with this person.

Format

You can select the **Table** button in the Format area to display the photos in the form of a table, or the **Thumbnails** button to display the photos only as thumbnails.

You can adjust the size of the thumbnails using the slider on the top right of the window. Moving it towards the **XXL** (Extra-Extra Large) on the right side makes the thumbnails larger and moving it towards the **S** (Small) on the left side makes the thumbnails smaller.

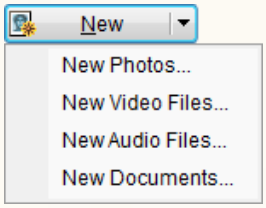
View

In the View area, you can click the **Photos** box to specify that only photos are displayed, or the **Documents** box to specify that only documents are displayed or the **Video/Audio** box to specify that only video or audio files are displayed.

New

You can add new photos, documents and video and audio files to this person and to your family tree.

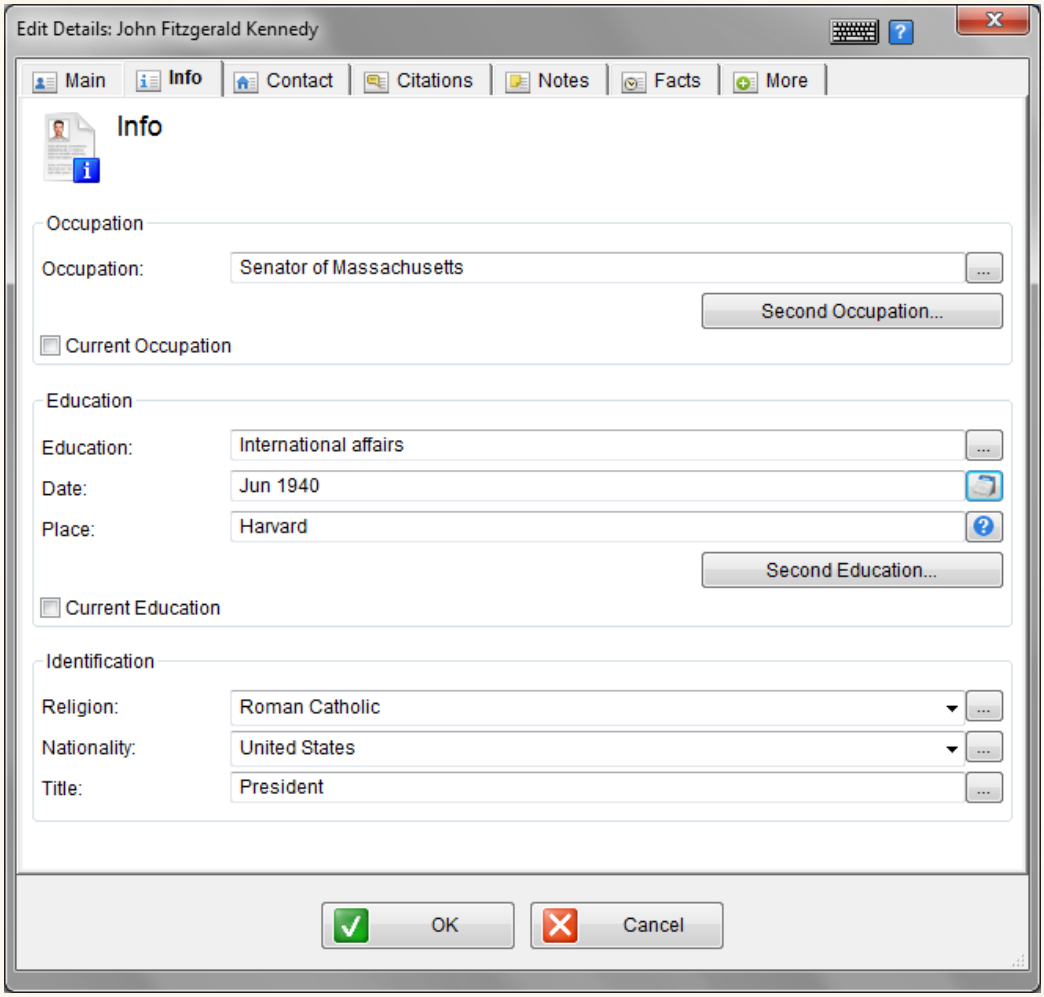
To add one or more media, click the **New** button to add a photo, or on the arrow on the right of the **New** button to display a dropdown menu. This enables you to select which type of media you would like to add to this person.



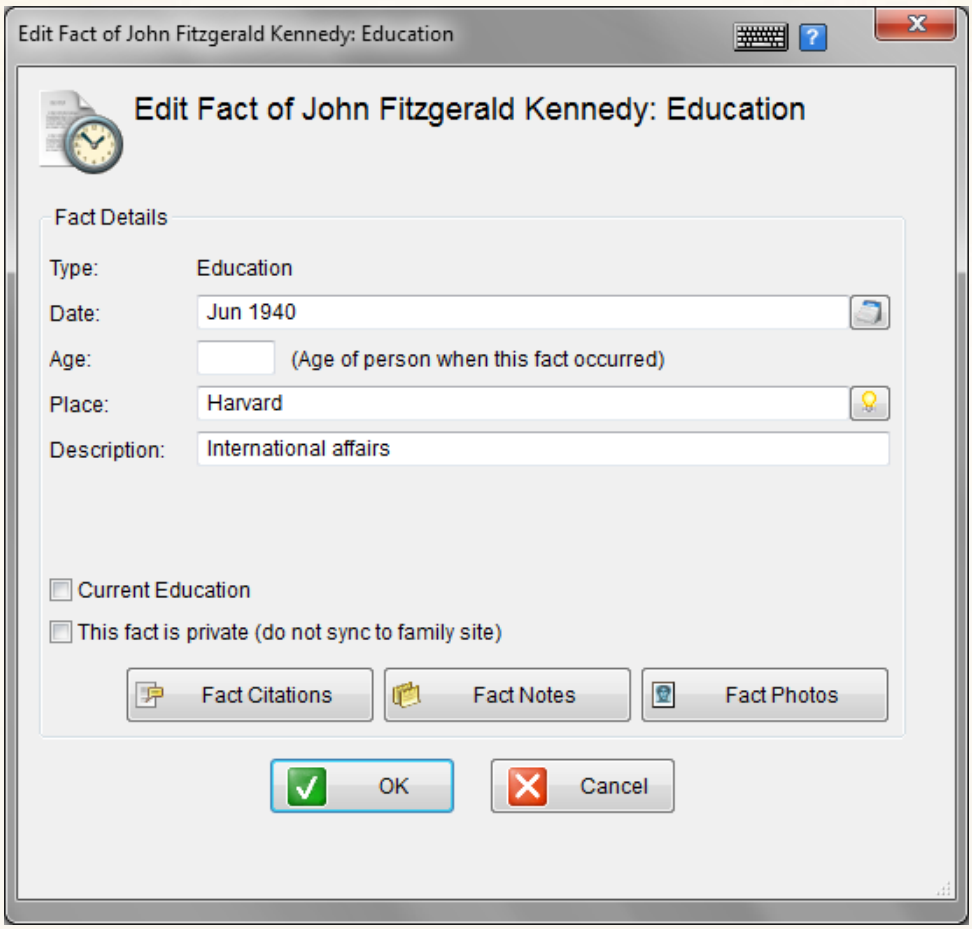
See Handling Photos and Other Media.

Info Tab – Describing a Person

The **Info** tab enables you to enter information about the occupation, education and identification of this person.



You can enter information in any of the areas in the window and then press the ... button to display a window in which you can add more detail about this information, such as the date, place, fact citations, fact notes and fact photos, as shown below:



- **Fact Citations:** For a description of what a citation is and instructions on how to enter a citation, see Citations.
- **Fact Notes:** See Notes Tab – Describing a Person for a description of what a note is and instructions on how to enter a note.
- **Fact Photos:** See Fact Photos.

Check the **Current Education** (or **Current Occupation**) checkbox to specify that this is the current education or occupation (latest information) for this person.

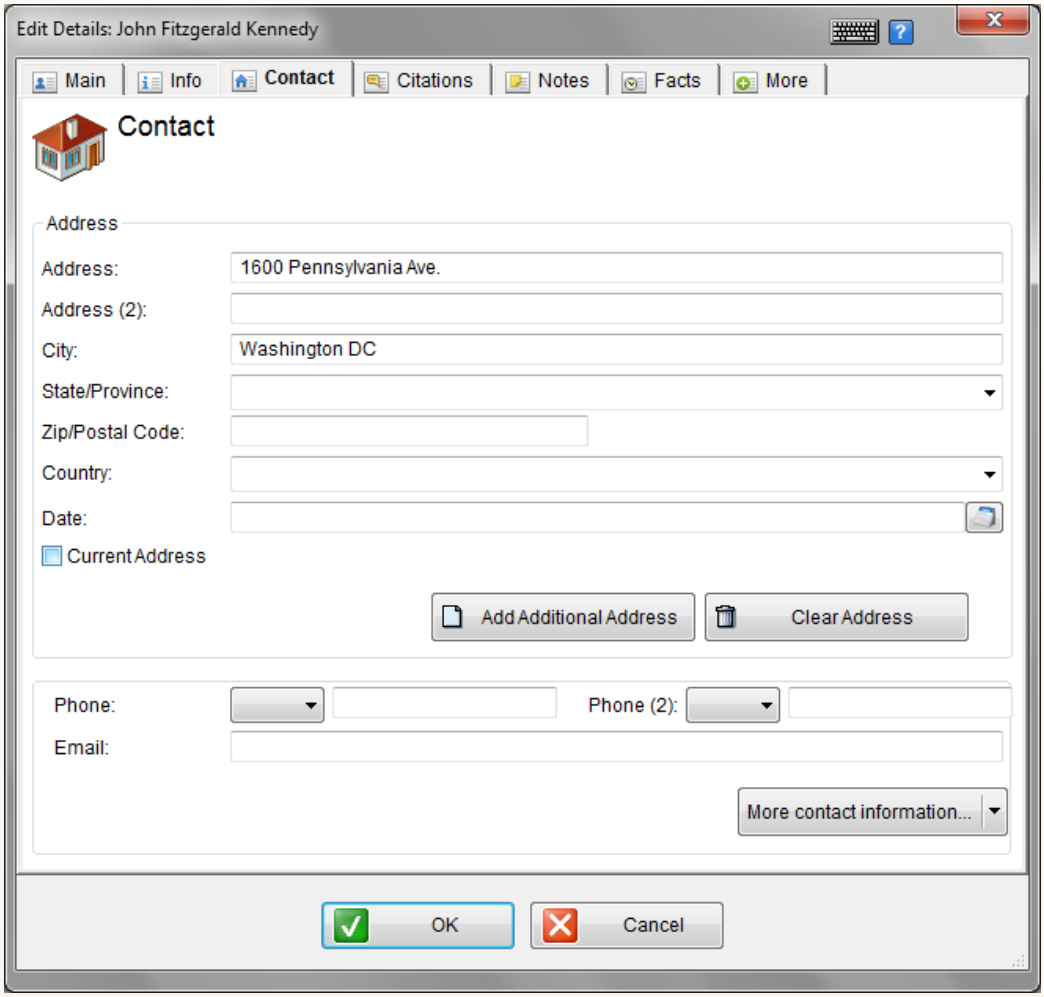
Check the **This fact is privatize (do not sync to family site)** checkbox for the information entered if you do not want this fact synced to a family site. See Privacy Settings for more information.

Fact Photos

Click the **Fact Photos** button to view and add photos associated with this fact. For example, for the immigration of a person, you can add a photo of the ship of the voyage, for an education fact you can add a photo of the school, for a burial fact you can add a photo of the tombstone and so on.

Contact Tab – Describing a Person

The **Contact** tab enables you to enter contact and residence details for this person, as shown below:



In the **Date** field, you can add the period during which the person lived at that address.

Check the **Current Address** checkbox if this is this person's current address.

One or more additional addresses may be entered by clicking the **Add Additional Address** button.

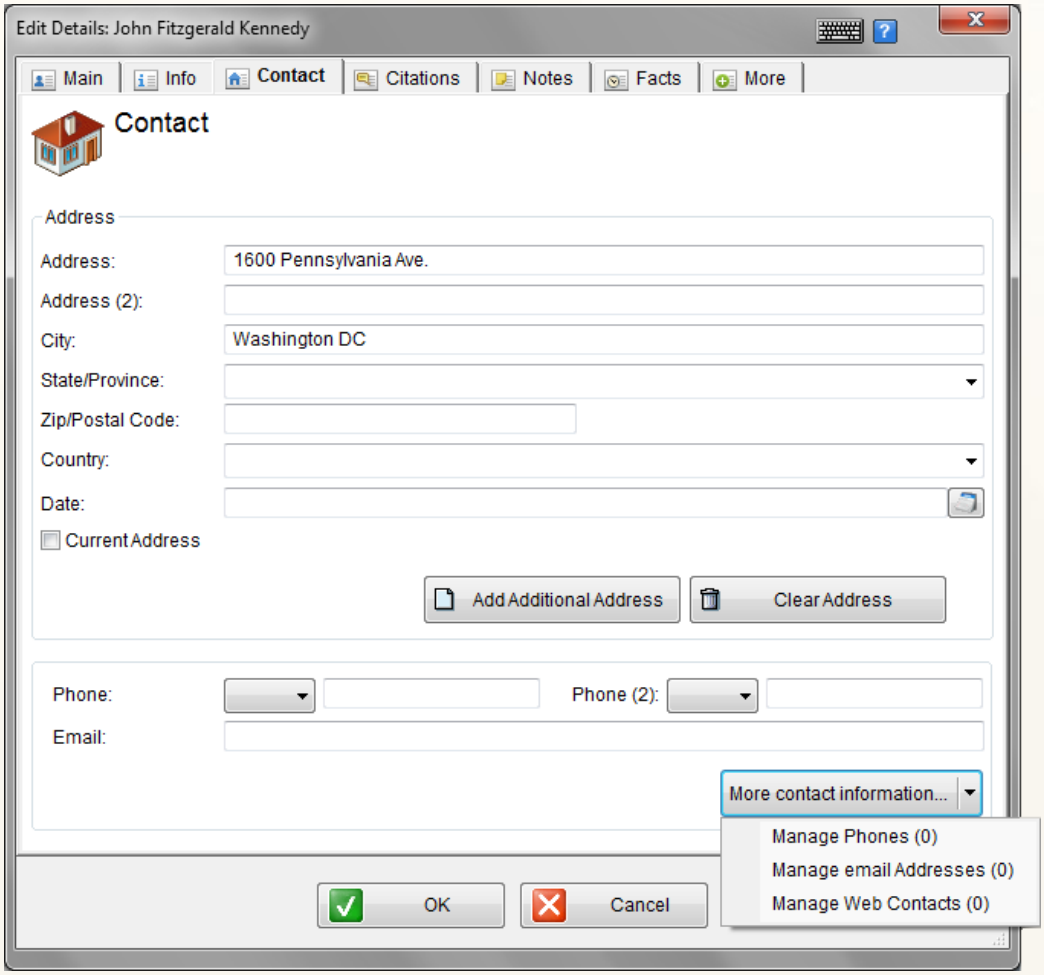
The number of addresses that have been added is indicated at the top of the window as shown below:



TIP

Family Tree Builder provides a report listing all the addresses in your family tree.

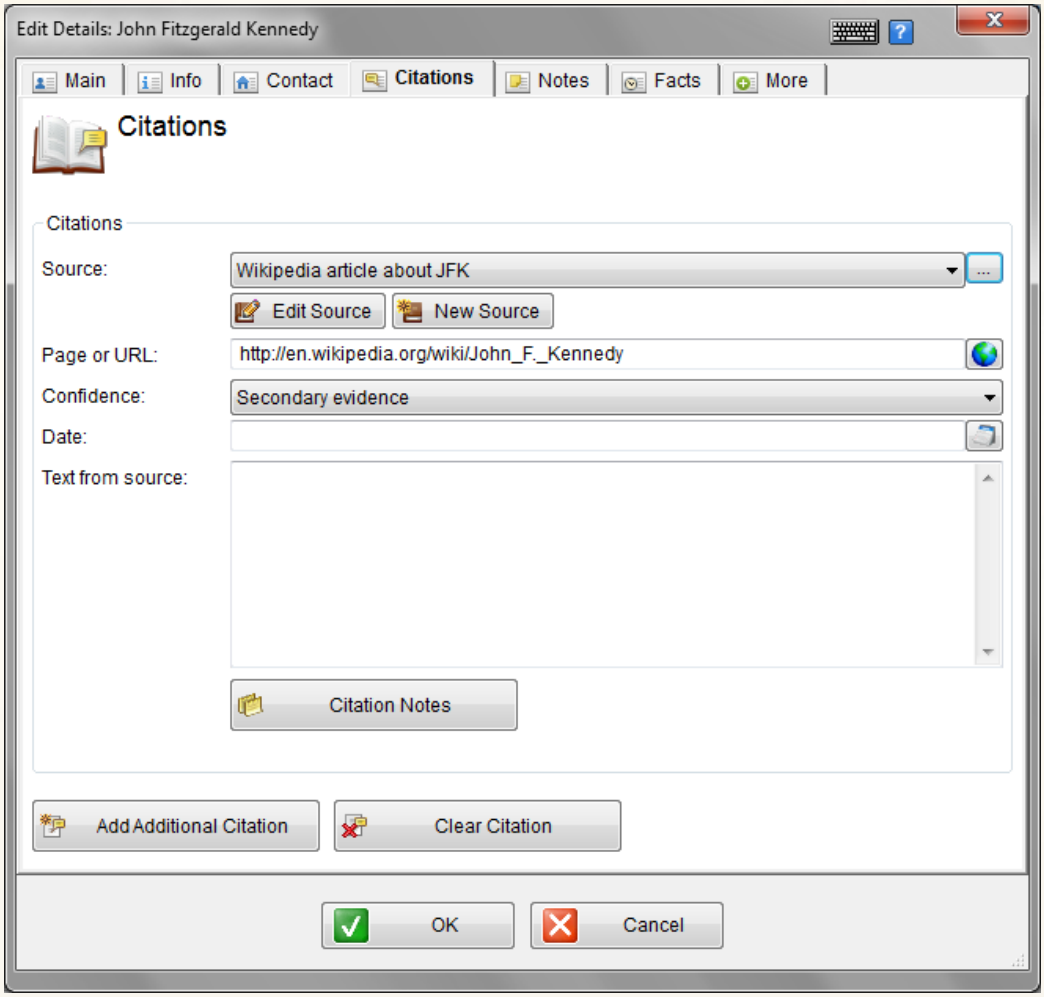
Click the **More contact info** button to add and manage additional phone numbers, email addresses and web contacts.



Citations Tab – Describing a Person

Citations enable you to track and identify the source of your research.

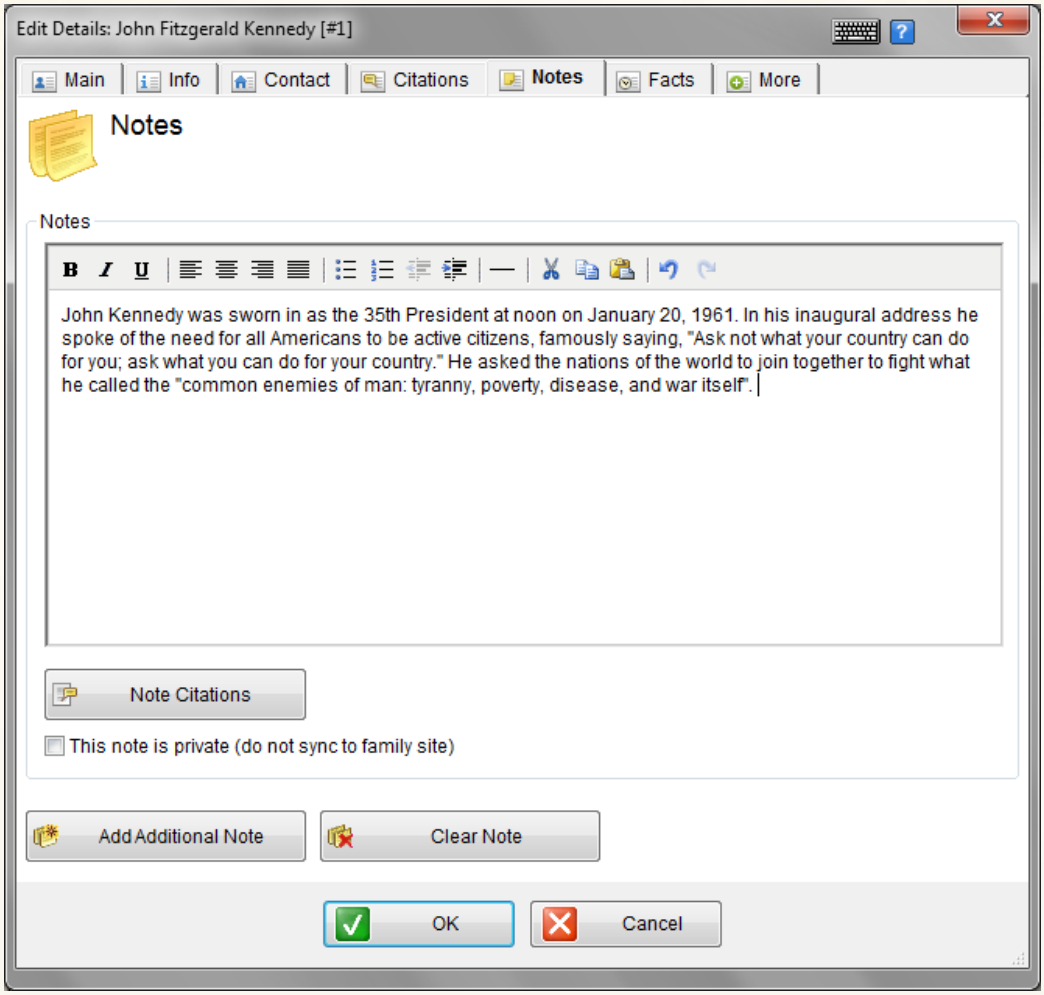
The **Citations** tab enables you to enter citation information, as shown below:



See Citations for more information about citations and how to use them.

Notes Tab – Describing a Person

The **Notes** tab enables you to type in any information that describes this person in free text, as shown below:



Refer to Notes Tab – Defining Notes for more information about notes and how to use them.

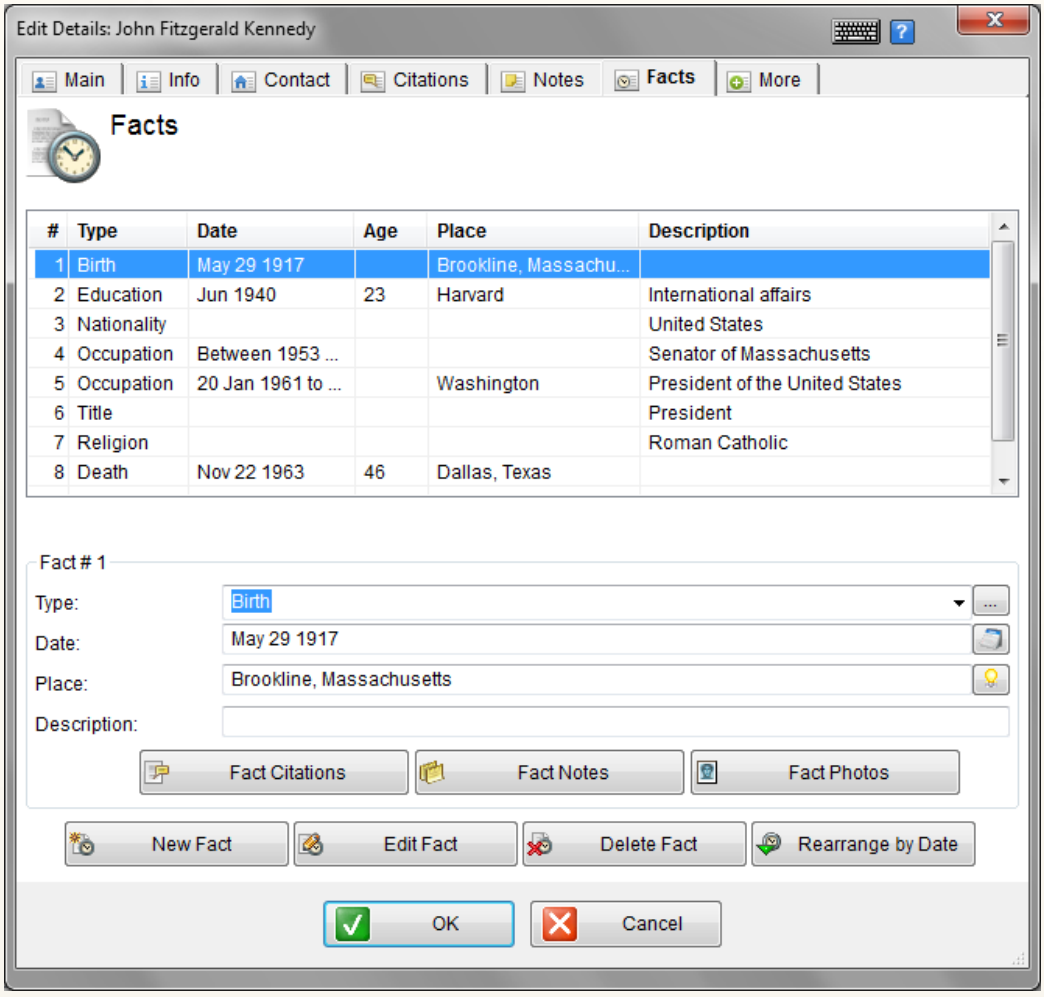
TIP

Before entering a note, check if Family Tree Builder provides a fact type that suits the kind of information that you want to enter. The reason is that Family Tree Builder displays these facts in many of its windows, charts and reports.

Facts Tab – Describing a Person

The **Facts** tab enables you to enter facts about this person. Each type of fact provides a list of fields for you to enter. Family Tree Builder displays these facts in many of its windows, charts and reports.

The most common facts about a person, such as birth, death, occupation, education and so on, can also be edited in the **Main** and **Info** tabs. However, they also appear in the **Facts** tab, which shows a consolidated list of all facts about this person.



The top of the window shows a list of all facts about this person. Each time you click a row, more details about this fact are shown at the bottom of the window. You can also double-click a fact to show the details in a separate window.

The middle of the window provides all the details about the selected fact and enables you to edit it.

The bottom of the window provides the following buttons:

Button	Description
Fact Citations	Displays and adds citations for this fact.
Fact Notes	Displays and adds notes about this fact. For more details about notes, see Notes Tab – Describing a Person.
Fact Photos	Displays and adds photos for this fact.
New Fact	Displays a window in which you can define a new fact about this person.
Edit Fact	Displays a window in which you can edit the facts about this person.
Delete Fact	Deletes the selected fact.
Rearrange by Date	Sorts the facts in chronological order.

To define a new fact:

1 Click the **New Fact** button to display the following window:



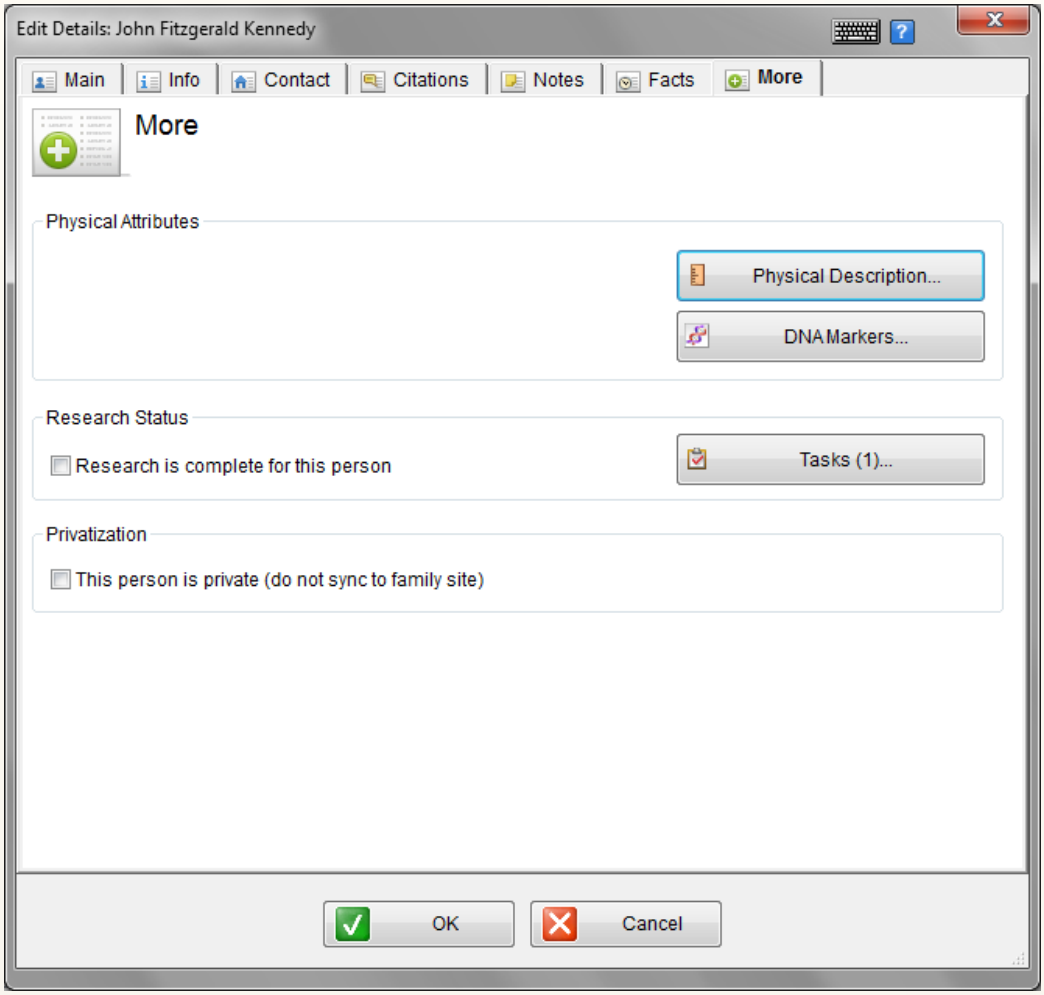
2 Select a category of facts from the list on the left to display a list of facts of that type on the right.

3 Select a fact from the list on the right or type in the name of a new type of fact in the field on the bottom of the window and click **OK**. The new row is then created in the facts table, ready for you to enter more information about this fact, such as date, place and description.

NOTE If the fact that you want to add is not one of the standard facts that is provided by Family Tree Builder, you type the name of this fact in the **Or, enter a custom type** field at the bottom of the window.

More Tab – Describing a Person

The **More** tab enables you to enter information about the physical attributes, status, and privacy of a person, as shown below:

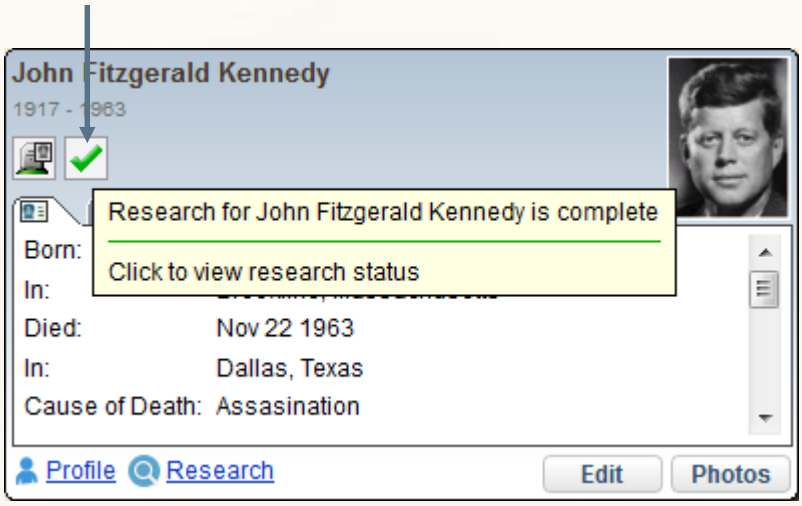


Click the Physical Description... button to view and enter details about the physical description of this person. See Adding a Physical Description for a Person.

Click the DNA Markers... button to view and enter genetic DNA information for this person. See Adding DNA Markers for a Person.

Click the Tasks button to view and enter tasks for this person. See To-Do Tasks.

To indicate that all research has been completed for the person, check the **Research is complete for this person** checkbox. When you select this checkbox, the person's card shows a green checkmark indication. Click this icon to display a tooltip indicating that all research is complete for the person. Click the **Click to view research status** link to open the Tasks window for this person.



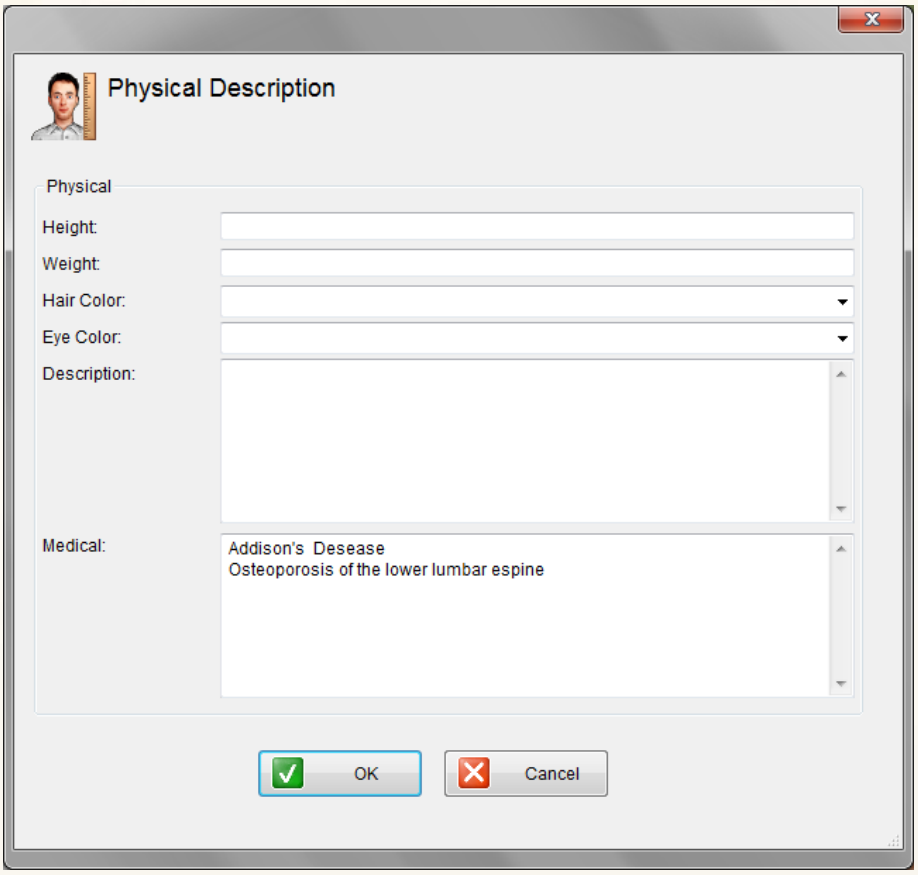
Check the checkbox in the Privatization area if you do not want the information about this person to be synced to a family site, so that it is not displayed there. See Privacy Settings for more details.

Adding a Physical Description for a Person

To add physical information for a person:

1 Click the 

button to display the following window:



2 Enter the physical details for the person and click **OK.**

Adding DNA Markers for a Person

Various companies supply kits that can be used to perform DNA testing. The information obtained from such testing can be stored for a person in Family Tree Builder.

NOTE

DNA-related information is stored encrypted in the Family Tree Builder database. Such information is never published to a family site, nor is it contained in an exported GEDCOM file.

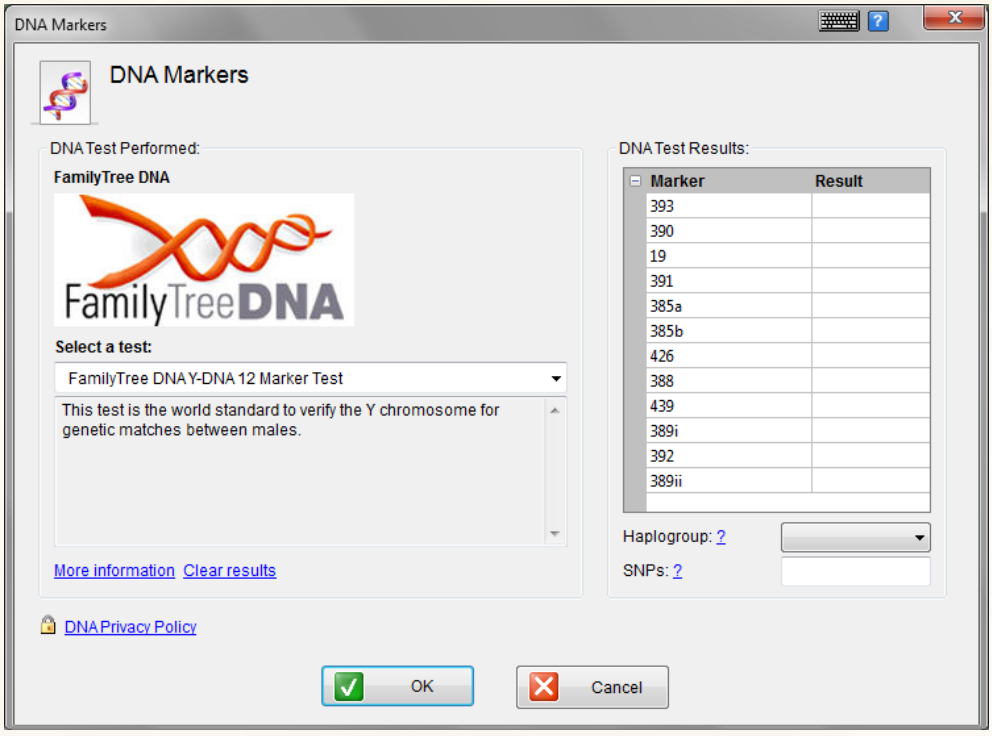
To add DNA information for a person:

1 Click the DNA Markers... button to display the following window:



2 Select the DNA testing company whose testing kit was used to collect DNA-related information, and then click **OK**.

The following window is displayed:



3 Select the applicable testing company and test in the **Select a test** dropdown list.

4 Enter the DNA results in the relevant boxes. Note that field in the window vary, depending on the specific DNA company and test that you selected in step **3**.

5 Enter the **Haplogroup** (a major branch on the human family tree) based on this test, if available.

6 Enter **SNPs** (single nuclide polymorphism) based on this test, if available.

7 After entering all test results, click **OK**.

Expanding the Family

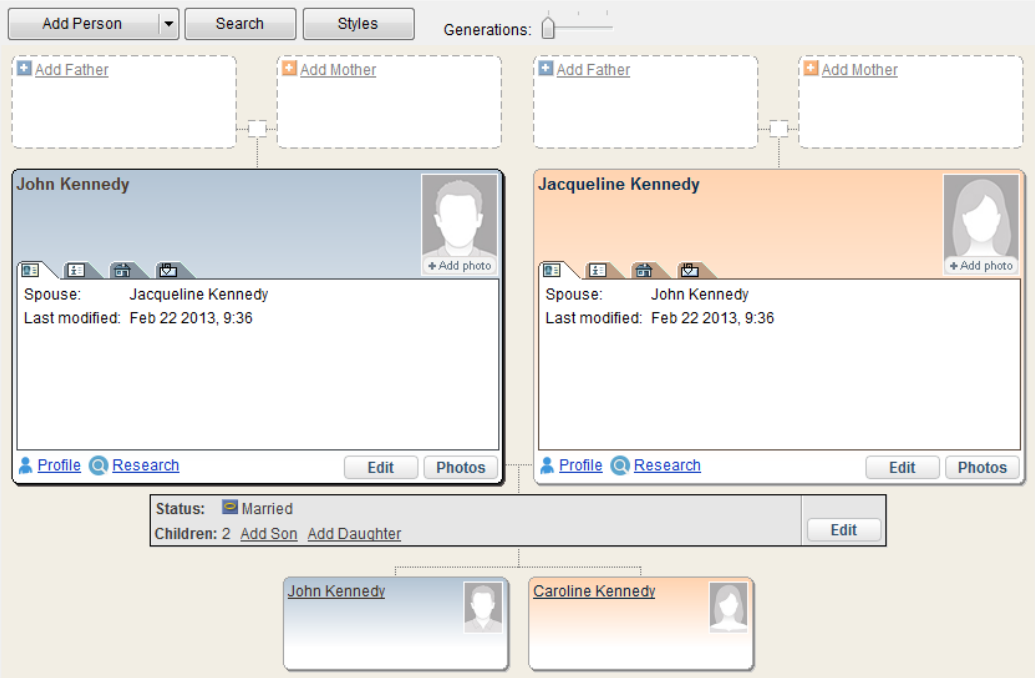
After you have defined information about your first family, you can start defining information about other people in the family. To extend the family tree, add people to the family group you just created. You can branch out in any direction by adding parents, grandparents, brothers, sisters, children, grandchildren and so on.

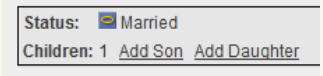
A variety of options are provided for adding members to your family tree, including the following:

- **Double-clicking an Empty Family Card**
- **Right-clicking a Person's Card**
- **Using the Add Person Button**
- **Defining New Children in the Family Tree**
- **Adding an Existing Child to a Family**
- **Adding a Spouse to a Person**
- **Adding Another Spouse to a Person**

Double-clicking an Empty Family Card

When you define a new family, a card is automatically created for a husband, wife and a child. You can add a member to this family by double-clicking an empty card that represents the relevant relation to the people displayed, as shown below:





For example, you can click the links to display a window that walks you through the process of defining a child of these parents. More details are provided regarding defining a child in Defining New Children in the Family Tree.

The same goes for adding a mother or father for either the husband or the wife displayed in this window, and for adding a spouse to a person who does not have a spouse in the family tree.

TIP

To add a brother or sister to either the husband or the wife, simply double-click on one of their parents. That husband or wife then becomes a child of those parents and you can define additional children for that parent, who are, of course, their siblings.

Right-clicking a Person's Card

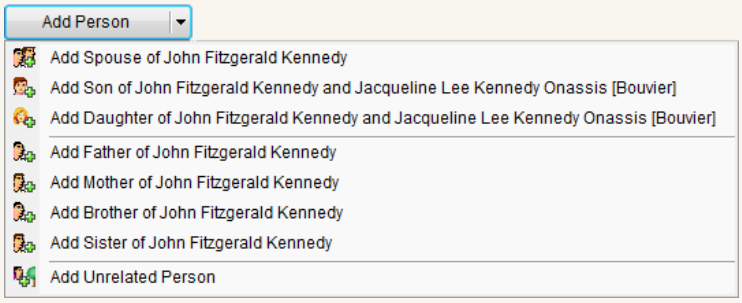
You can right-click a person's card to display numerous options that enable you to add parents, siblings, spouses and other relations to this person.

Using one of the options that starts with the word **Attach**, you can connect a person that already exists in your family tree as a relative in another place of the tree. For example, use the **Attach** option when two cousins marry, when someone was adopted by an uncle or aunt or when two brothers marry two sisters.



Using the Add Person Button

Click the small arrow to the right of the **Add Person** button to display a dropdown list that enables you to add various relations to the people currently displayed in the tree, as shown below:



NOTE

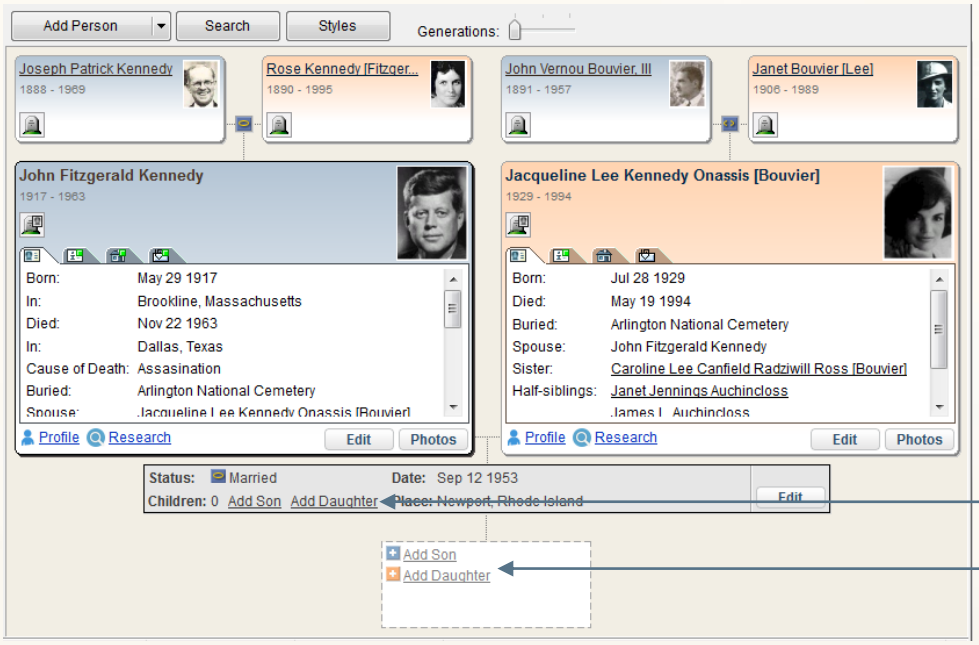
Family Tree Builder automatically detects when you attempt to add a person who is similar to another person who is already in the family tree. When this occurs, a warning is displayed.

Defining New Children in the Family Tree

The visual aspects of the main Family Tree Builder window make it easy to define children and parents. This section describes how to define a child in a family. You can add parents in a similar manner.

TIP

To add a brother or sister, define them as the children of the same parent.



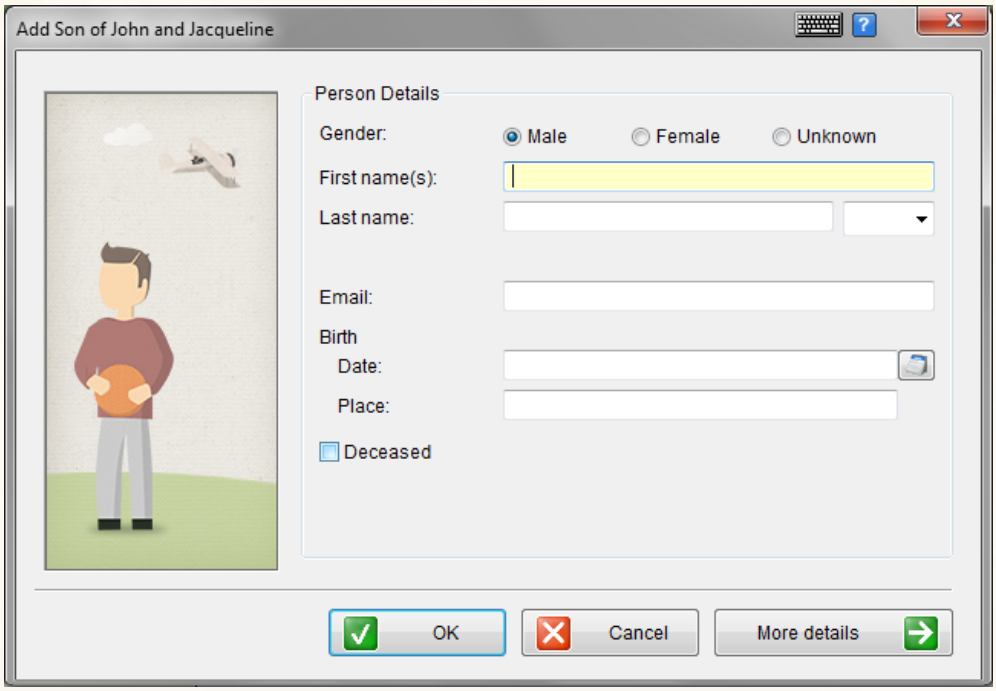
Family details always appear under the husband and wife cards. It shows details of their marriage and indicates the number of children they have. It also provides an **Add Son**/**Add Daughter** option.

TIP

You can also add children in the Edit Family window.

To add a child:

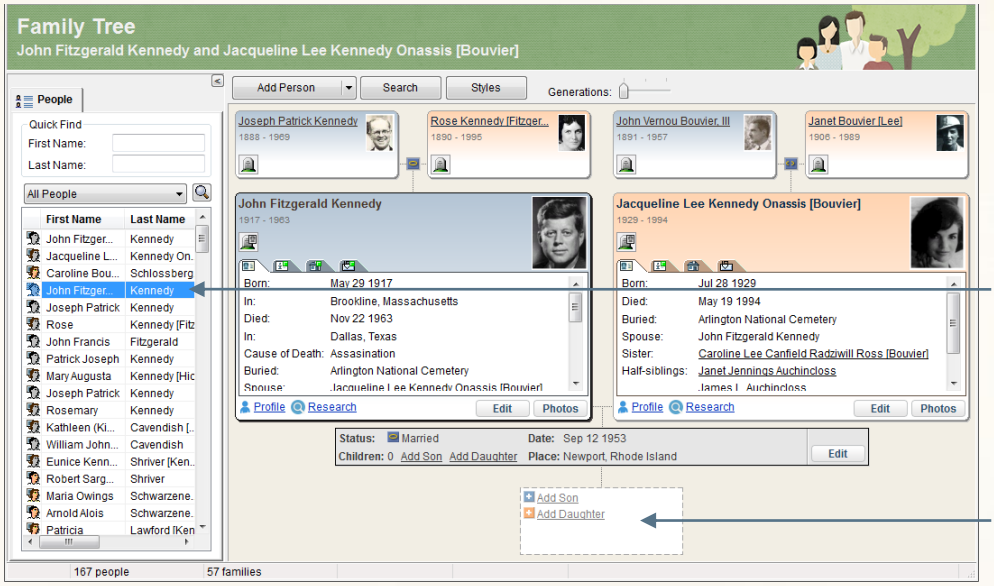
1 Click the **Add Son** or **Add Daughter** buttons, or double-click in the white box at the bottom of the tree that contains the text **Add Son/Add Daughter**, to display the following window:



2 Fill in the fields of this window as you wish. You may click the **More Details** button to open a window in which you can enter a rich variety of information describing this person.

Adding an Existing Child to a Family

If you have already defined a person in Family Tree Builder that is the child of the parents, then it is quite easy to drag and drop that person from the People List into the family tree of his or her parents, as shown below:



To add an existing child:

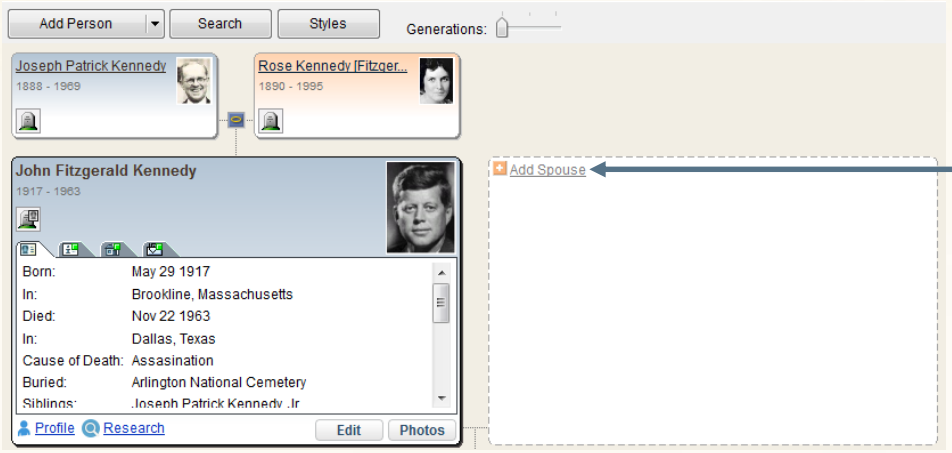
1. Select the child's name in the People List on the left.
2. Drag the child into the white **Add Son/Add Daughter** box at the bottom of the window.

There are several other ways to add an existing child to a family:

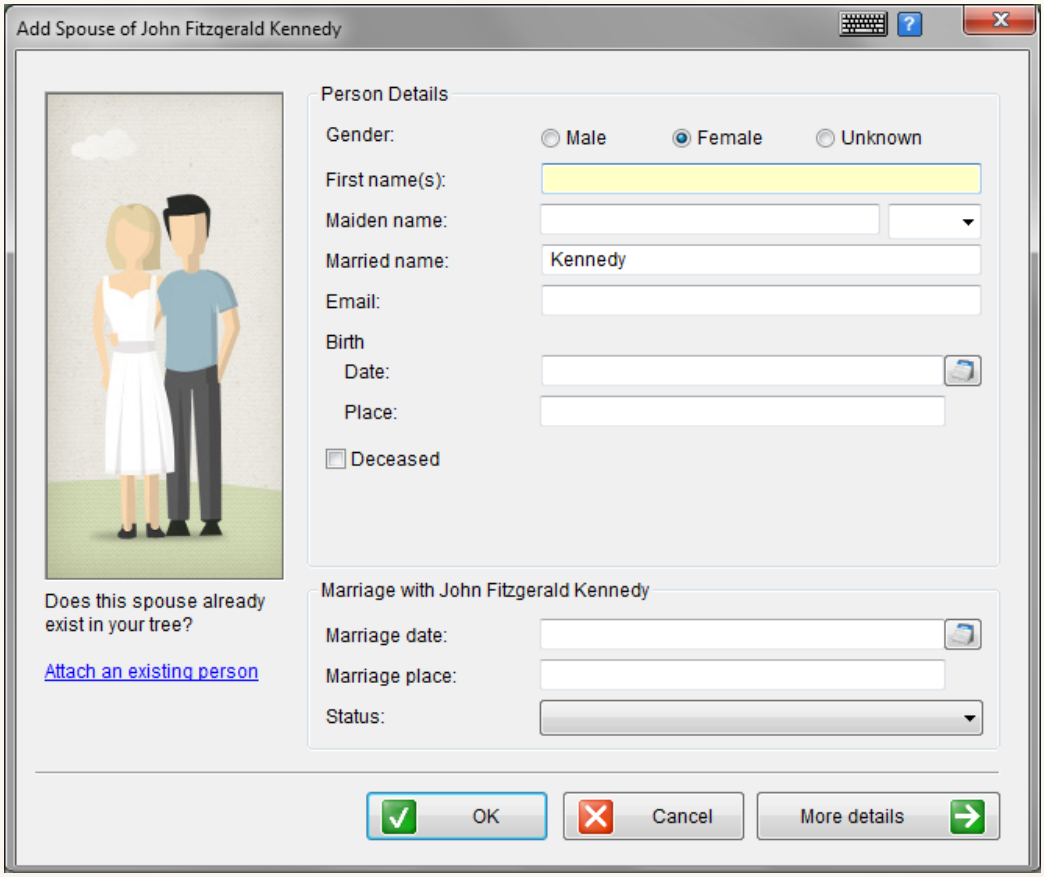
- Right-click a family box (or click its **Edit** button). The **Edit family** menu opens. From the **Children** menu, select **Attach Existing Child** and then select the child from the list of people in the tree.
- Double-click the family. The Edit Family window opens. Go to the **Children** tab, click the **Attach Child** button and then select the child from the list of people in the tree.

Adding a Spouse to a Person

You can add a spouse to a person in the tree by clicking the **Add Spouse** card next to this person.



Fill in the fields of this window as you want. You may click the **More Details** button to open a window in which you can enter a rich variety of information describing this person and the relationship between the spouses.



Adding Another Spouse to a Person

Many times, a person already has a spouse in the family tree and you want to add another spouse for another marriage of that person.

To achieve this, click the **Edit** button at the bottom of the person's card, select the **Spouses** option and then the **Add Spouse** option. A window similar to the one above for adding the first spouse of a person appears, in which you can add the details for the additional spouse.

Editing Information

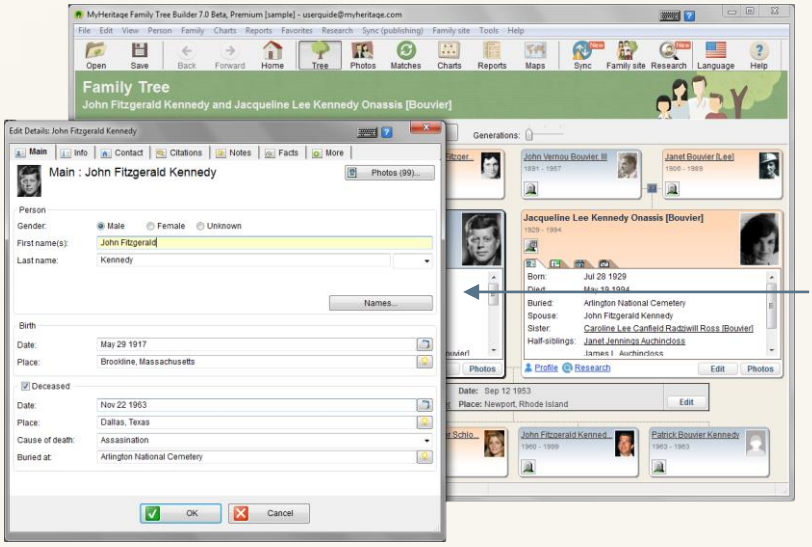
Family Tree Builder is quite flexible and will enable you to edit any information that you have entered at any time. In this section, you can find out about:

- **Editing a Person**
- **Person Menu Options**
- **Editing a Family**
- **Family Menu Options**
- **Editing a Photo**

Editing a Person

You can reach the detailed information entry page of a specific person in several ways:

- Click the **More Details** button in the **Add Person** wizard.
- Double-click the person's card in Tree View.
- Click the **Edit** button on a person card.
- Right-click a person's card and select **Edit Details**.



Double-click a Person's Card to edit its information.

A window opens in which you can enter or modify information and photos about this person.

Person Menu Options

The following describes the options that are available to you when you click the **Edit** button at the bottom of a card or right-click a person's card, as shown below:



When you right-click a person's card in Tree View, the menu enables you to change the status of that person.

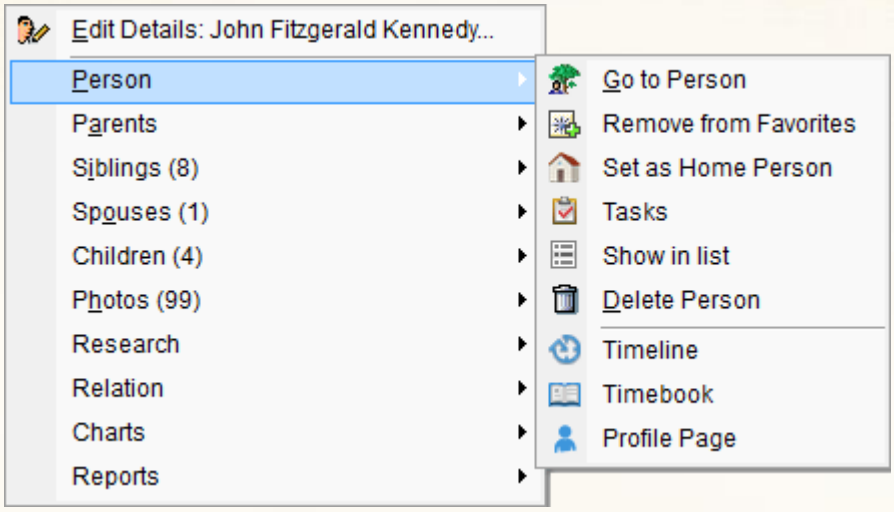
At a glance, this menu provides information about how many parents, children, spouses and photos have been defined for this person. For example, John has eight siblings, one spouse, four children and 8 photos, as shown above.

Edit Details

This option opens the Edit Details window, which enables you to modify or add information about the person.

Person

The following options are available for changing the status of the currently selected person:



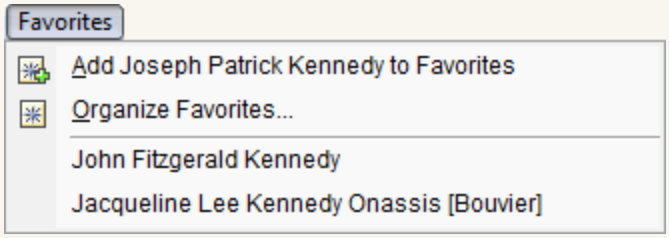
Go to Person

This option displays the current person as the focus of the Tree View, meaning that this person's card now appears in the center of the Tree View.

This option is inactive if the current person is already in focus.

Add to Favorites

This option adds the selected person to the **Favorites** menu. The **Favorites** menu provides a quick means of centering your family tree on a person. An example of the **Favorites** menu is shown below. This one contains two favorite people:

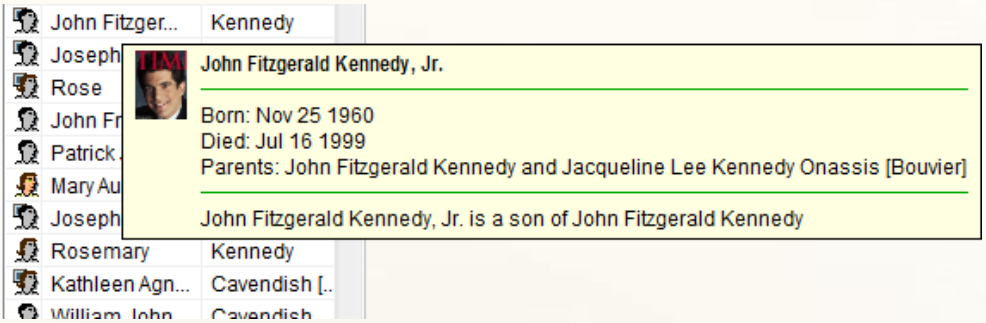


Set as Home Person

This option defines the currently selected person as the Home Person. Each family tree has one Home Person around whom the family tree is centered. The Home Person is influential for several reasons, as follows:

- Clicking the **Home** button brings this person into focus, meaning that it displays this person in the center of the Tree View.

  When you display information about a person, such as by hovering over that person in the People List, the relationship between that person and the Home Person is displayed as shown below:



- When you right-click a person and select the **Relation** option, then this person's relationship to the Home Person is displayed.

You can change a Home Person at any time by selecting the option **Set as Home Person**.

Tasks

Adds and edits tasks related to this person. Click this option to add and remove tasks related to this person.

Show in List

Highlights the selected person in the People List.

Delete Person

This deletes the selected person. You can delete a person at any time. If deleting this person will break relationships in the tree, a warning is displayed.

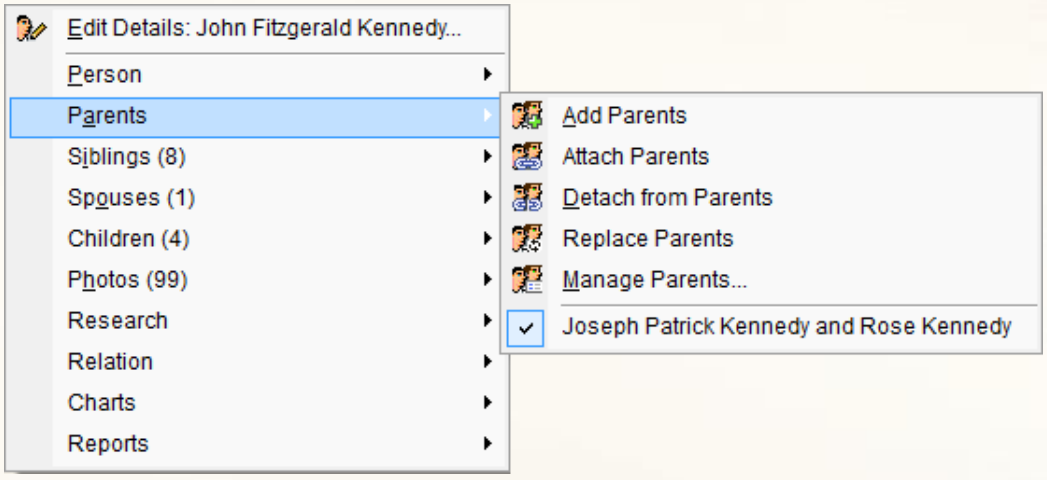
Profile Page

Displays the complete profile page for the selected person. See page 66.

Parents

The **Parents** menu shows how many sets of parents a person has, their names and the type of parents they are, such as natural or adoptive. Simply select one of the **Parents** in the menu to show their cards in the Tree View.

The following options are available for defining parents:



Add Parents

An additional set of parents can be added to a person at any time. For example, both adoptive parents and natural parents may be added.

The Add Parents window is displayed in which you can define how to add a new set of parents.

Attach Parents

This option enables you to connect a person to a set of parents that have already been defined in Family Tree Builder. A window is displayed in which you can select parents.

Detach Parents

This option enables you to detach parents from their child. The parents will still be defined as parents in Family Tree Builder, but not as the parents of the selected person.

Replace Parents

This option enables you to replace the current parents of a person with a different set of parents.

Manage Parents

This option opens a window that shows you a list of the current parents of a person, where you can add, attach, replace and detach parents. You can also define the type of parent they are, such as adoptive or natural.

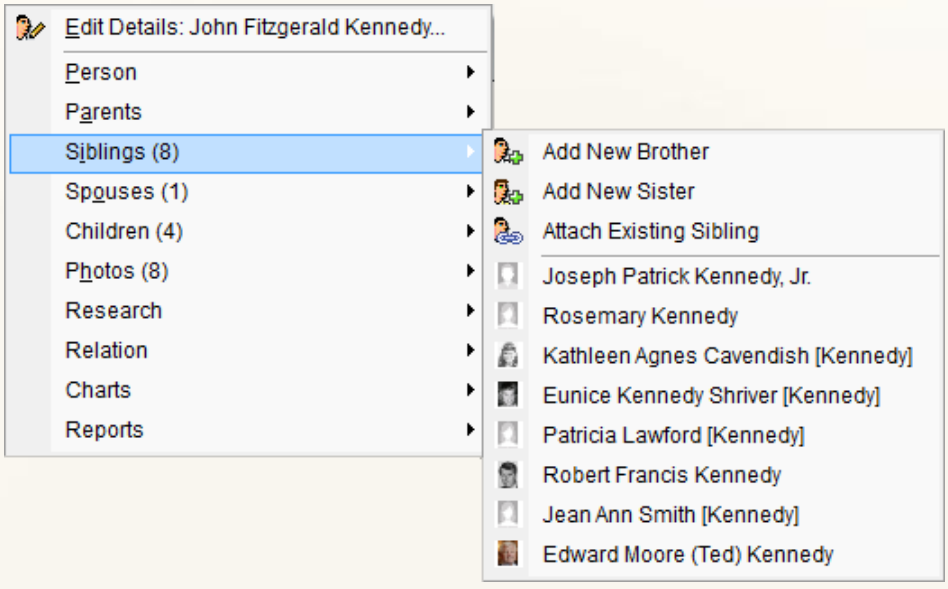
List of Parents

This option lists all the parents defined for this person and indicates their type, such as adoptive or natural.

Siblings

When you right-click a Person's Card in Tree View, the menu shows the number of brothers and sisters of this person and their names. Simply select one of the siblings in the menu to show their card in Tree View.

The following options are available for defining siblings:



Add New Brother/Add New Sister

This option enables you to add a brother/sister to the selected person. A window is displayed in which you can define a brother/sister in the same way that you define any person in the Family Tree Builder.

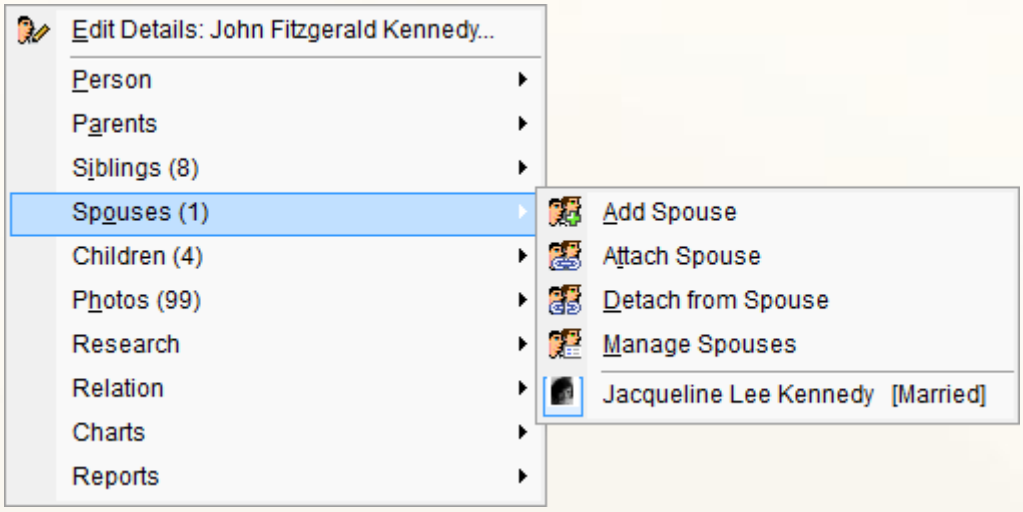
Attach Existing Sibling

This option enables you to attach a person who has already been added to the tree as a sibling to the selected person. A window is displayed in which you can select the person.

Spouses

When you right-click a person's card in Tree View, the menu shows the number of spouses defined for this person and their names. Simply select one of the spouses in the menu to show their card in Tree View.

The following options are available for defining spouses:



Add Spouse

This option enables you to add an additional spouse to the selected person. A window is displayed in which you can define a spouse in the same way that you define any person in Family Tree Builder.

Attach Spouse

This option enables you to create a spousal relationship between two persons already existing in your family tree. For example, if two cousins who were already added to the tree are actually married, you can attach one as the spouse of the other. A list of people in the family tree is displayed from which you can select the spouse to attach.

Detach From Spouse

This option enables you to disconnect a spouse from a person. The person will still be defined in the tree, but he or she will no longer be defined as the spouse of this specific person.

TIP

Do not use this option if the two people are divorced. Rather, mark them as divorced. Use this option only if the two people were mistakenly marked as spouses of each other.

Manage Spouses

Use this option when a person has more than one spouse. It enables you to define more information about their relationship. The order of the spouses is particularly important. The first spouse in the list is the spouse that is shown next to the person in the tree view, by default. Another field of interest is the marriage status, which specifies if a spouse is married, divorced, separated and so on. The following window is displayed:



The top of the window lists the spouse and a brief summary of their information.

The middle of the window provides all the details about the selected spouse and enables you to edit them.

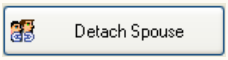
The bottom of the window provides the following buttons:



Displays a window in which you can define a new person as a spouse.



Displays a list of family members from which you can select the spouse to attach.



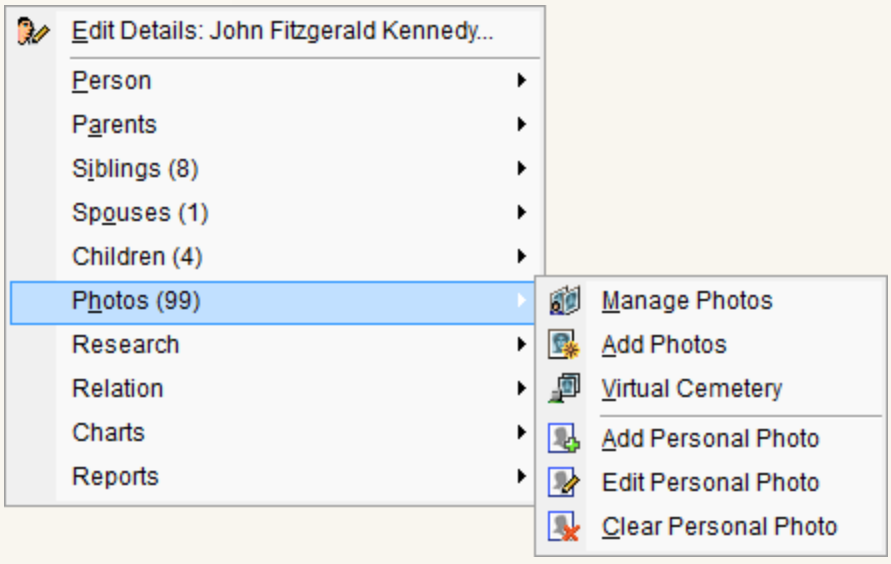
Detaches the selected spouse.


Moves the selected spouse up or down in the list.


Click this button to sort the spouses in chronological order.

Photos

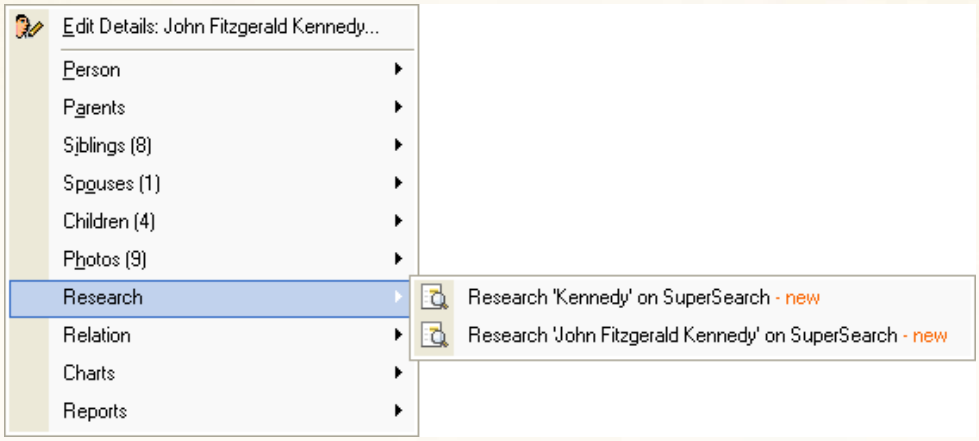
When you right-click a Person's Card in Tree View, the **Photos** menu shows the number of photos for this person.



For more details about the **Photos** menu options, see Handling Photos and Other Media.

Research

When you right-click a Person's Card in Tree View, the **Research** menu provides access to various research options for that person.

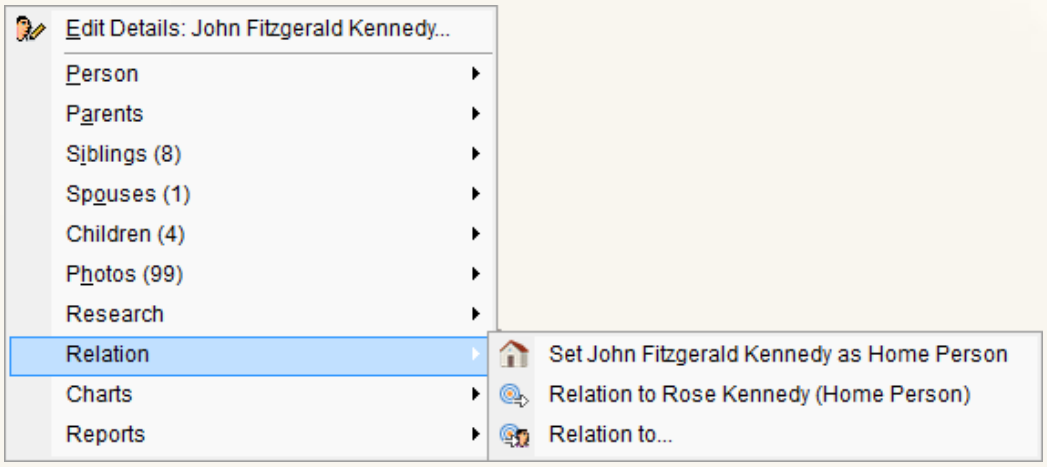


For more details about the **Research** menu options, see Research Menu.

Relation

This option enables you to define the selected person as the Home Person. It also allows you to see information about the relationship of this person to other people in the family tree.

The following options are available in this menu:



Set [Selected Person] as Home Person

This option defines the selected person as the Home Person. Each family tree has one Home Person who is given special treatment in Family Tree Builder.

Relation to Home Person

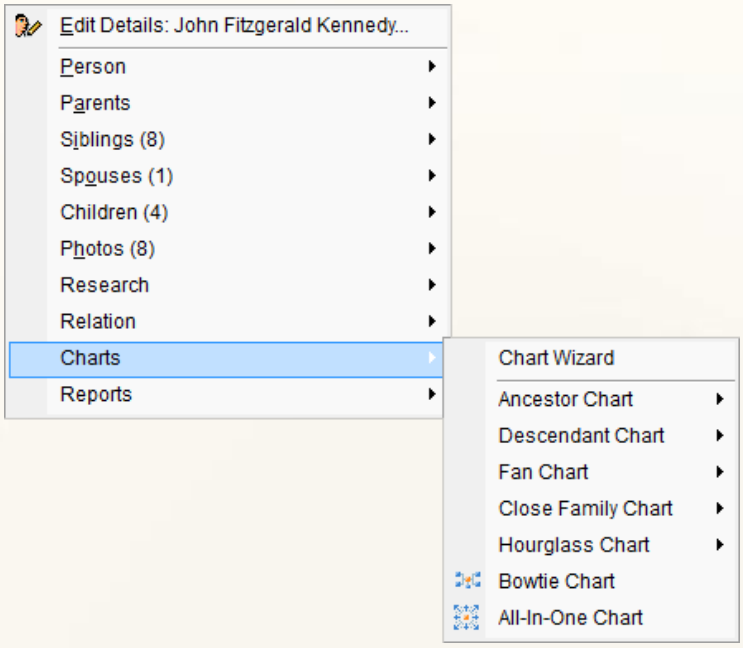
This option displays the relationship of the selected person to the Home Person.

Relation To...

This option enables you to define the relationship of the selected person to anyone in the family tree. A window is displayed listing all the people in the family tree. Select the other person to see the relationship between the two people.

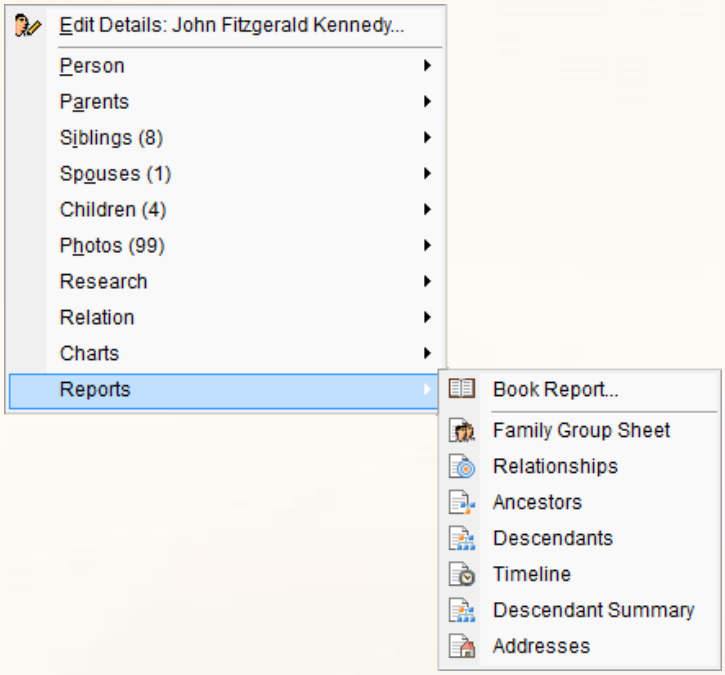
Charts

This option enables you to display charts about the selected person. See Charts.



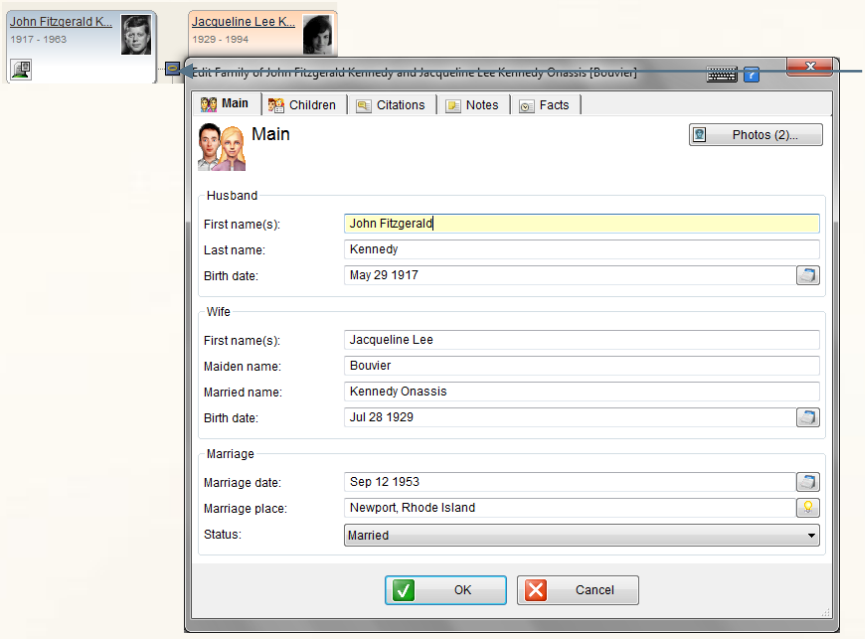
Reports

This option enables you to generate reports about the selected person. See Reports.



Editing a Family

The simple-to-use interface provided by Family Tree Builder enables you to double-click the small box situated between the husband and wife of a family, in order to edit any information about this family.



Double-click here to edit the family's information

A window opens in which you can enter or modify information and photos about this family.

The Edit Family window comprises various tabs, each of which enables you to enter different kinds of information about the family as a unit. The tabs are:

- **Main Tab**
- **Children Tab**
- **Citations Tab**
- **Notes Tab**
- **Facts Tab**

Main Tab

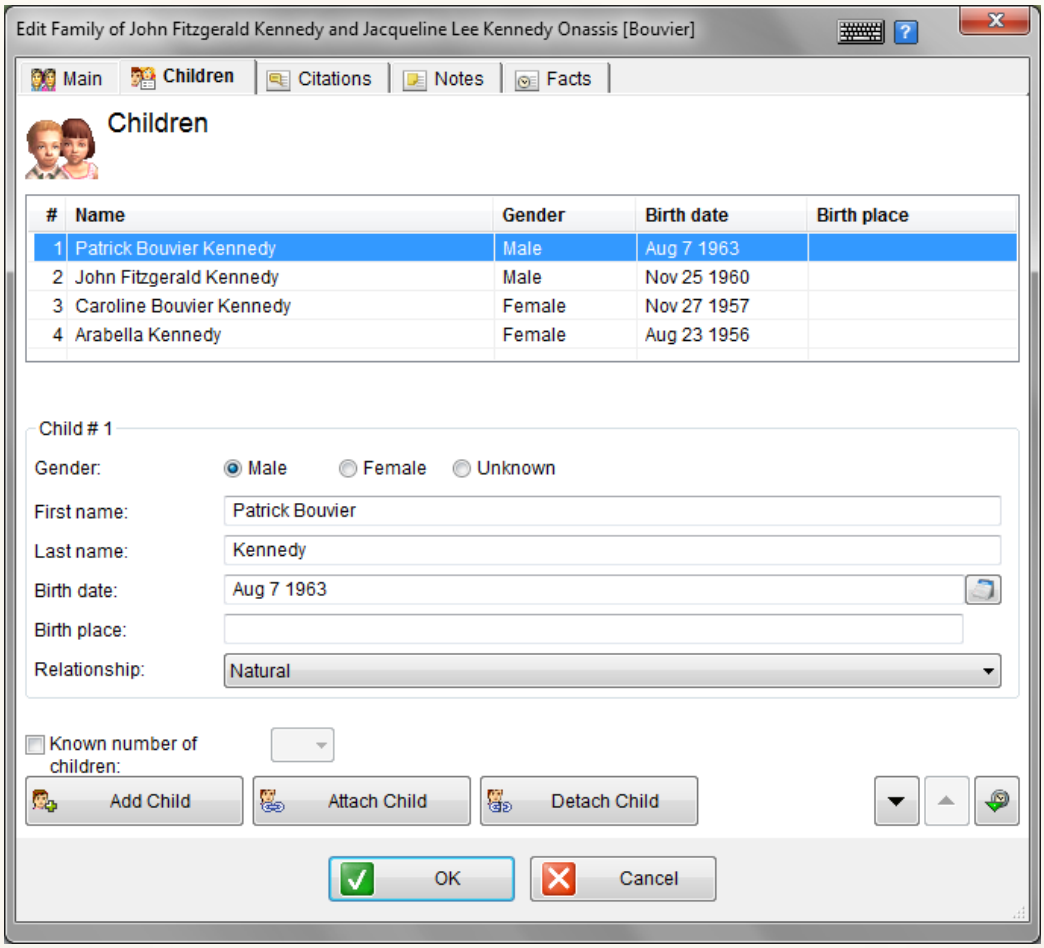
The **Main** tab enables you to describe the husband and wife who represent the center of this family and to enter details of their marriage. Entering the maiden name of a woman (meaning her surname before her marriage) enables Family Tree Builder to enrich the connections in your family tree.

To enter a date, either type it into the field or click the **Date** icon  that appears to the right of each date field. Family Tree Builder provides a rich variety of options for entering dates or ranges of dates.

Click the **Photos** button to view and add photos of this family.

Children Tab

The **Children** tab enables you to define the children of this primary husband and wife. The top of the window lists the children that have already been defined and provides a brief summary of their information.



The middle of the window provides all the details about the selected child and enables you to edit him/her. The **Relationship** field may be of particular interest in the case of adopted or foster children.

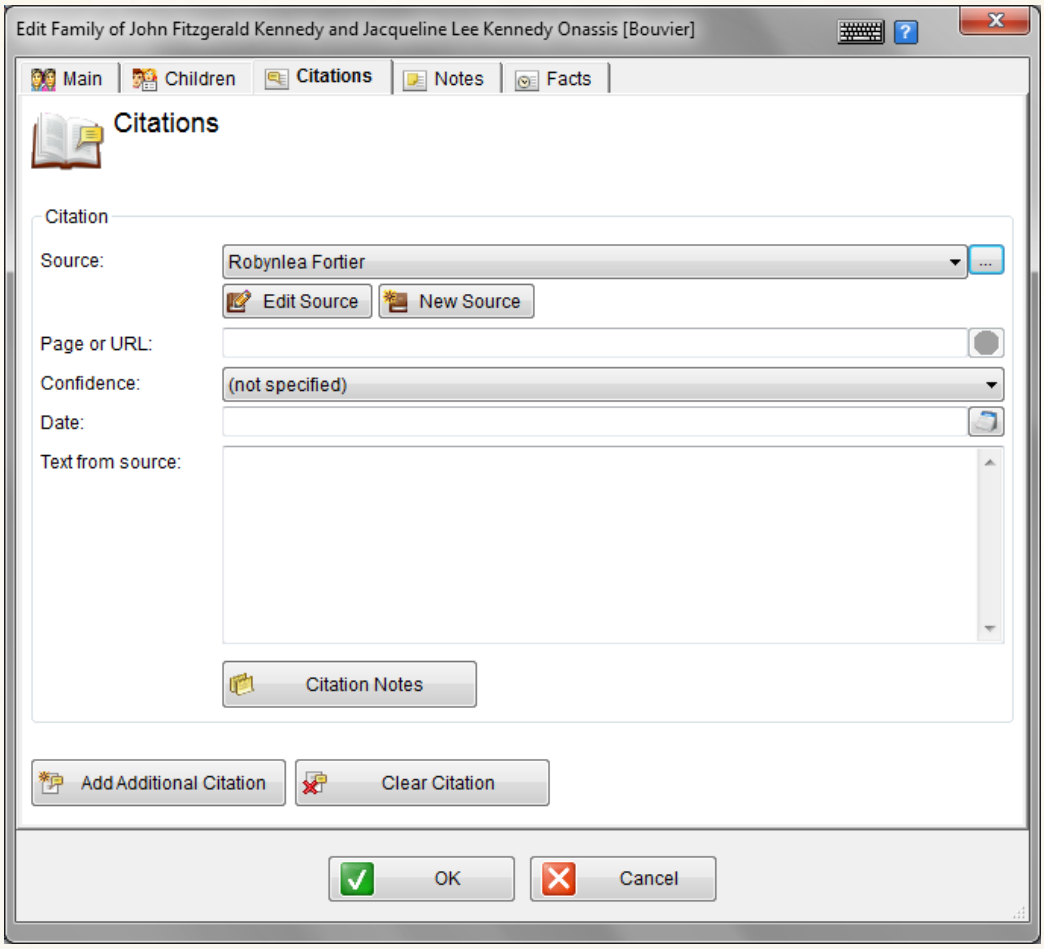
If you only know the number of children in this family, but do not know anything about these children, there are two ways to proceed. You can either add these children without any information about them, or alternatively, you may check the **Known number of children** checkbox and enter the number of children in this family.

The bottom of the window provides the following buttons:

Button	Description
	Displays a window in which you can define a new person who will be a child of these parents.
	Displays a list of family members to which you can attach the selected child.
	Detaches the selected child.
	Select the row of a child and click the Up or Down arrow button to move the child up or down the list.
	Click this button to sort the children in chronological order.

Citations Tab – Defining Citations

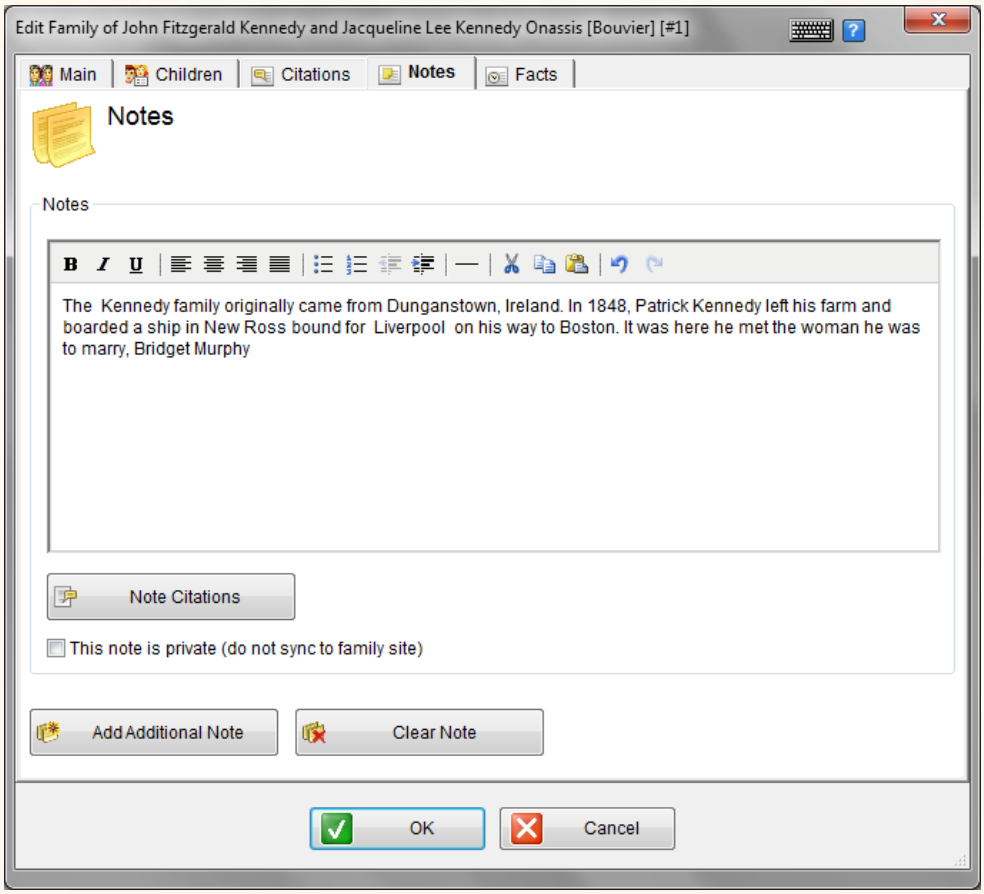
Citations enable you to track and identify the sources and repositories that you used in your research. The **Citations** tab enables you to enter citation information, as shown below:



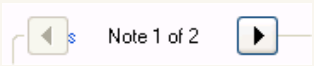
For a description of citations and their use, see Citations.

Notes Tab – Defining Notes

The **Notes** feature in Family Tree Builder enables you to enter free text that is displayed about this family. You can type in the text or copy and paste it from any source into the Notes window, which is shown below:



The top of the window indicates how many notes were assigned to this family. You can click the right or left arrow shown below, to browse between the various pages of notes information.



The toolbar in the Notes window enables you to format the actual note text.

To clear the note, click the **Clear Note** button.

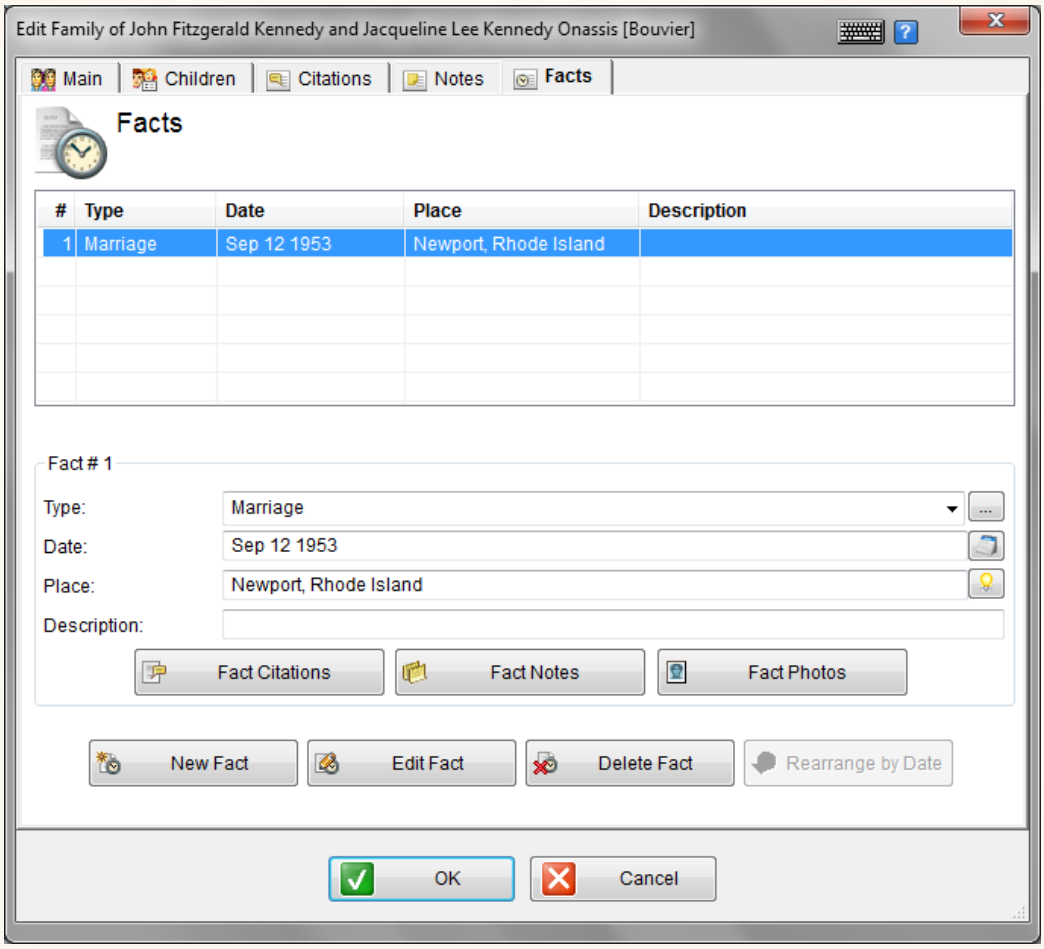
To add another note, click the **Add Additional Note** button.

To add a citation for this note, click the **Note Citations** button (see Citations).

If you want the note to be private and not synced to your family site, check the **This note is private (do not sync to family site)** checkbox.

Facts Tab – Defining Facts

The **Facts** tab enables you to enter various facts about this family. A variety of categories of facts are provided, and each fact has different fields, enabling you to enter information that is relevant to the selected fact, as shown below:



The procedure for entering a fact about a family is similar to entering a fact about a person, as described in Facts Tab - Describing a Person.

Family Menu Options

The following family-related menu options are available:

- **Edit Details:** See Editing a Family.
- **Family:** See Editing a Family.
- **Children:** See Children Tab.
- **Photos:** See Handling Photos and Other Media.
- **Research:** See SuperSearch.
- **Add Unrelated Family:** See Adding a Spouse to a Person.

GEDCOM and Family Tree Builder

GEDCOM, an acronym for GEnealogical Data COMmunication, is a specification for exchanging genealogical data between different genealogy software.

MyHeritage provides a rich variety of visual interface features, media handling features, information authoring and display options that represent a significant improvement over the GEDCOM's specification.

You can start your new genealogy project with Family Tree Builder in the following ways:

- Create a new project.
- Import a project from an existing GEDCOM file. Typically, this will be a GEDCOM file that you have exported from other genealogy software.
- Import a project from another genealogy program, such as Family Tree Legends, Family Tree Maker, Personal Ancestral File, Legacy or The Master Genealogist. When importing from one of these applications, the imported data is automatically converted to GEDCOM format for use in Family Tree Builder.

NOTE	In Family Tree Builder, the main storage unit for your work is a Project. A Project is equivalent to a single GEDCOM file, plus all related photos, documents and files.

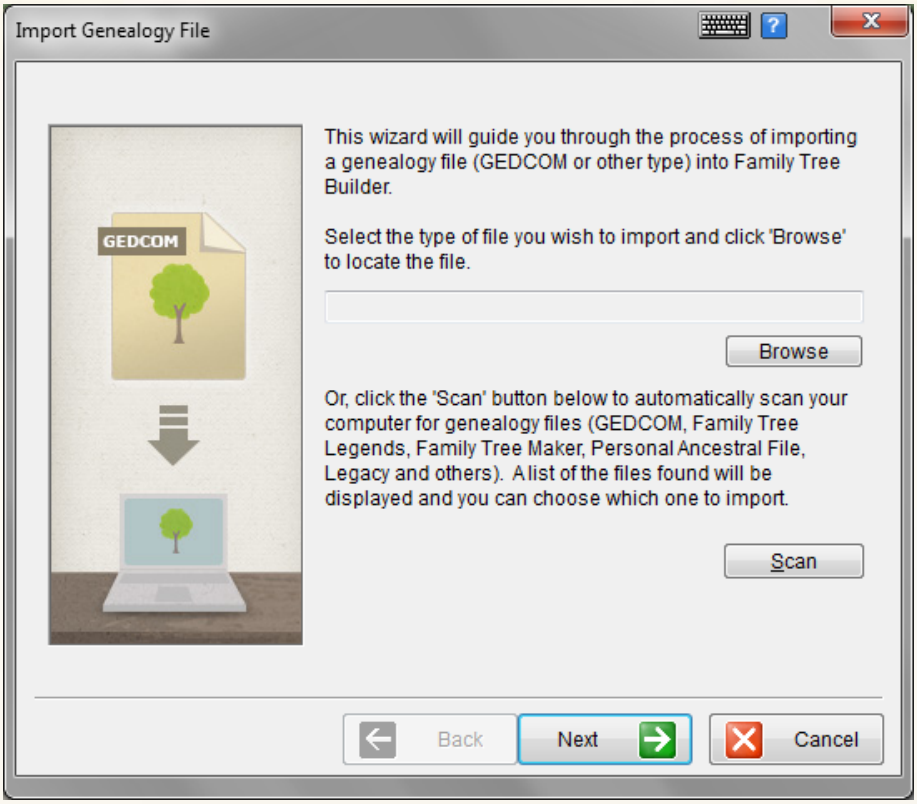
TIP	Alternatively, you can use the **Quick-Start Wizard** option in the **File** menu to import, export or load a GEDCOM project.

Importing an Existing GEDCOM File

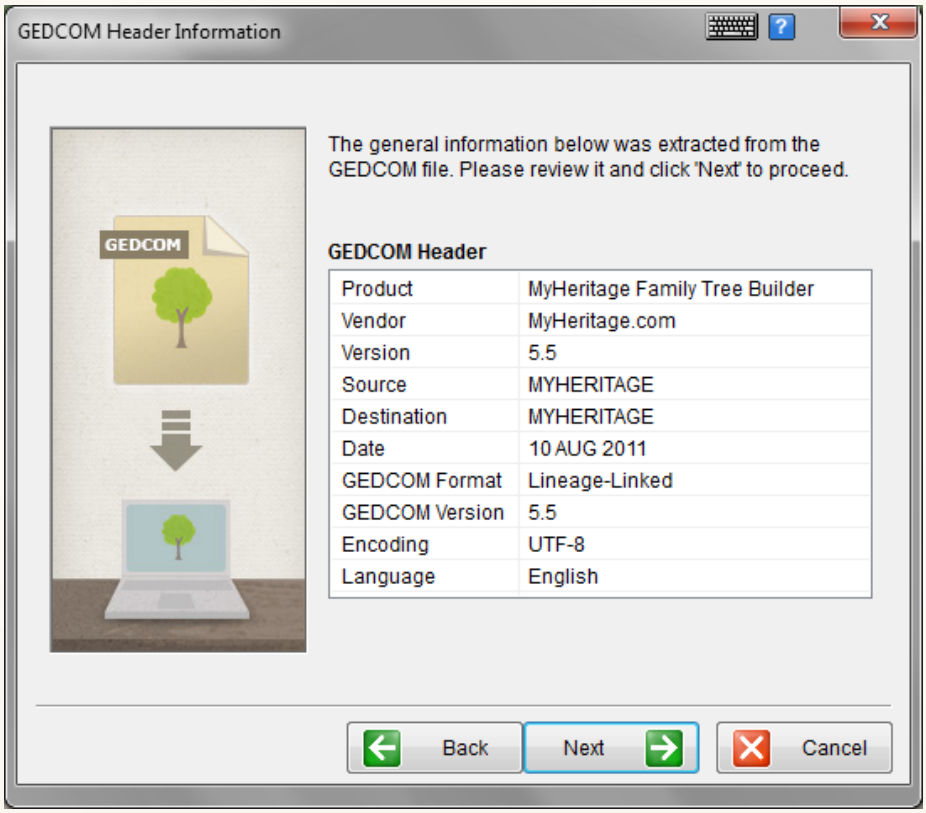
It is possible to start working on your genealogy project with Family Tree Builder by importing your data. You can import a GEDCOM file from another genealogy program (to start a new project, or merge its contents into a current project.

To import your data to Family Tree Builder:

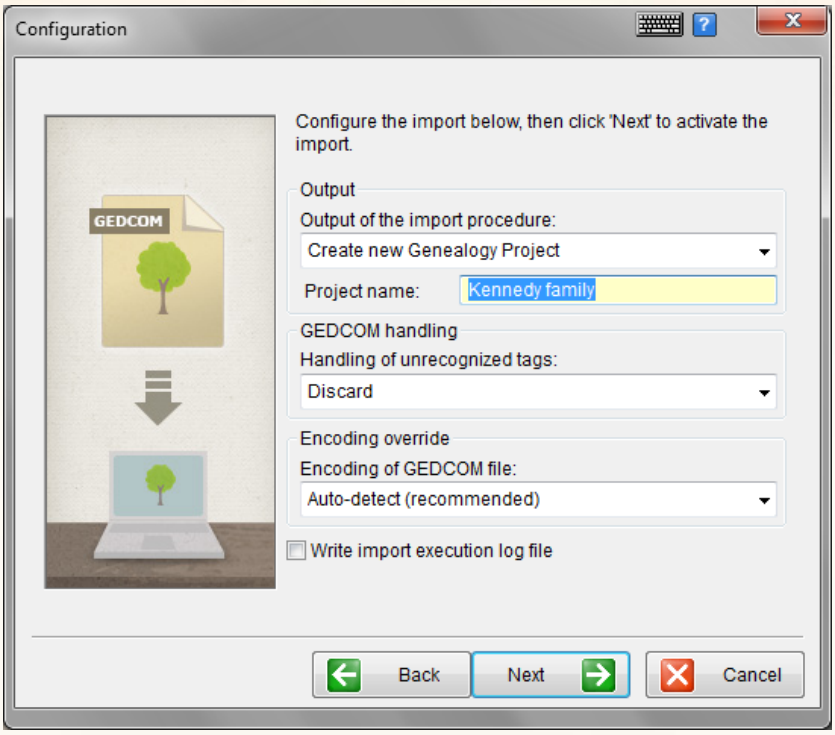
1 From the **File** menu, select **Import GEDCOM**. The following window is displayed:



2 Browse and choose the file that you want to import and click **Next**.
Alternatively, you can click the **Scan** button to automatically scan your computer to locate genealogy files, from which you can select the specific file to import.
After you select the file to import, the following window is displayed:



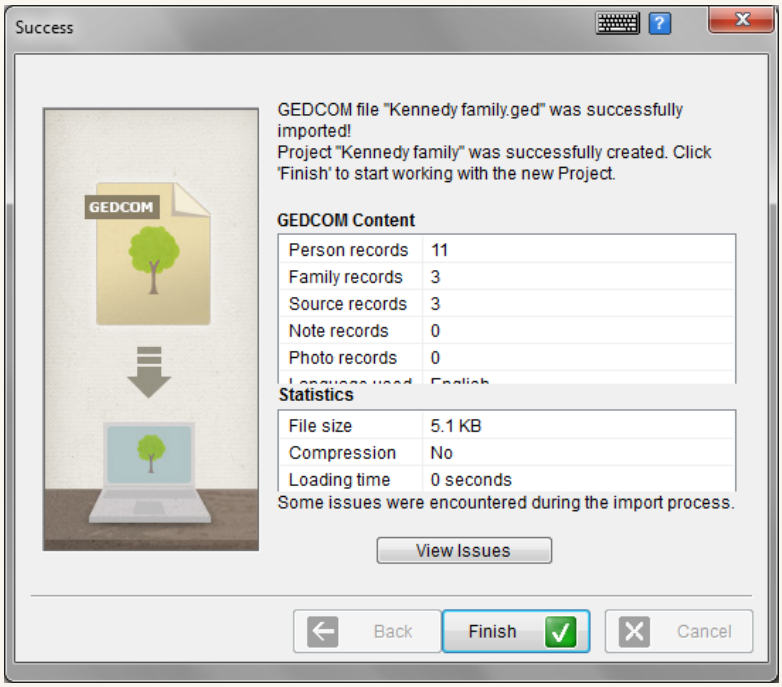
3 Click **Next**. The following window is displayed:



4 In the **Project name** box, type the project name and click **Next**.

NOTE It is recommended that you leave the GEDCOM configuration parameters unchanged.

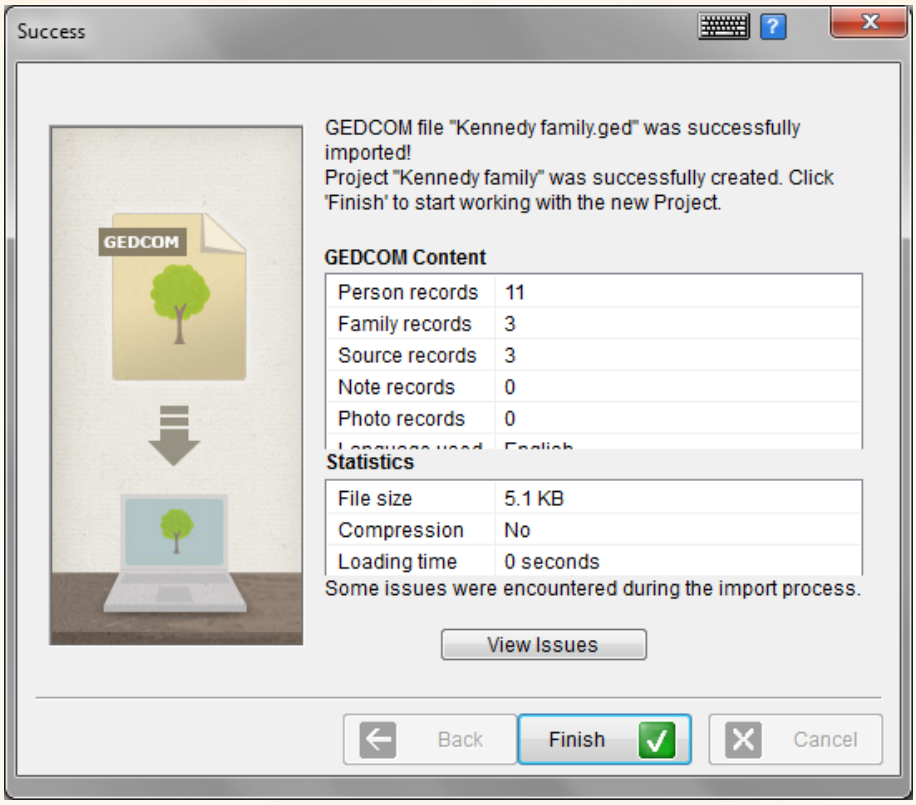
When importing a GEDCOM file, the following window is displayed:



When importing a file from another genealogy program in a non-GEDCOM format (for example, a Family Tree Legends *.FTL file or a Personal Ancestral File *.PAF file), the file is first converted to GEDCOM format before being imported to Family Tree Builder. At the end of this conversion process, the following window is displayed:



5 For a GEDCOM file import, click **Finish**.



6 For a non-GEDCOM file import, click **Next** and then **Finish**. Your FTB project has been created.

The GEDCOM Import feature has been tested thousands of family trees. This was done because many genealogy products do not adhere precisely to the GEDCOM format, or suffer from inconsistencies that exist within the format itself. We do our utmost to recover your data as faithfully as possible, and we believe that we have developed the most accurate GEDCOM import application available. However, there are always new issues found with this capability, so if you notice errors or deficiencies that occurred in the import procedure, send us the details so that we may further improve the import process.

If any issues were discovered during the import of the GEDCOM file, you can click the **View Issues** button to see them.

TIP

We support the importing of media files and documents referenced by a GEDCOM file, including photos. However, some genealogy products reference them using proprietary non-GEDCOM tags. If your photos are not imported correctly, please send us your GEDCOM file for us to fix this.

TIP

Advanced users may view a report produced at the end of the import, showing which unexpected tags were found in your file and how they were handled.

TIP

We support a GEDCOM import from Dorotree, even of bilingual family trees (for example English and Hebrew).

TIP

The ability to merge a GEDCOM file into a current project is done only partially. Currently the merge will not be done in full. There is still no application to compare, side by side, your existing family tree and the one in the imported GEDCOM, where you are asked to pick which specific records you wish to import and which ones to reject. This application is planned for a future release.

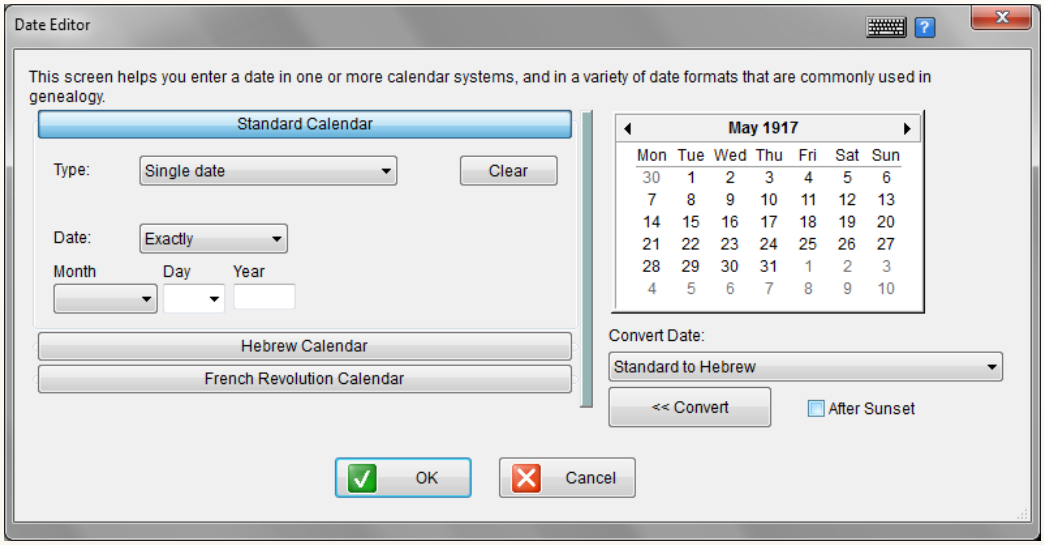
Entering Dates

Family Tree Builder provides a rich variety of options for entering dates or ranges of dates. Many features will provide automated benefits if you enter dates, such as the ability to see a list of people sorted by their birth date or to list the events of a person's life chronologically.

To enter a date, either type it into the field using any format that you like (free text) or click the **Date** icon that appears on the right of each date field.



The following window is displayed:

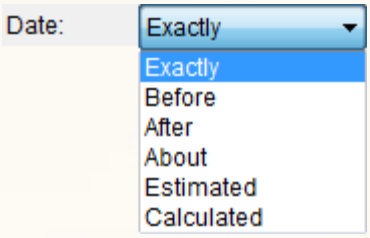


If you would like to enter an exact date, simply make your selection from the **Month** and **Day** fields and type the year in the **Year** field.

You can also use the visual calendar in the top right of the window to click the date of your choice. The date you select will also be shown in the **Month**, **Day** and **Year** fields.

Date Field

The date that you specify can be quite flexible. It can be the exact date as described above, or an approximation. If you are not sure of the exact date select from the **Before**, **After**, **About**, **Estimated** or **Calculated** options to indicate approximately when the event took place.

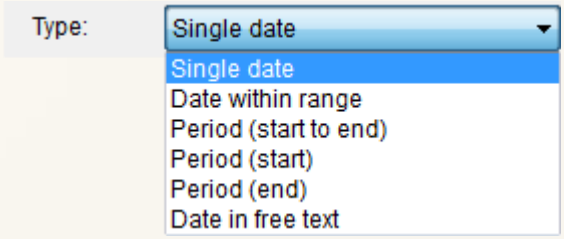


The **Estimated** option is an indication that you are not sure when the event happened.

The **Calculated** option is an indication that you calculated this date. For example by saying that your grandmother was 70 years old when she died in 1985 and therefore may have been born in 1916.

The **Period** options: **Period (start to end)**, **Period (start)** and **Period (end)** are typically used to specify an event that took place over a period of time such as university studies.

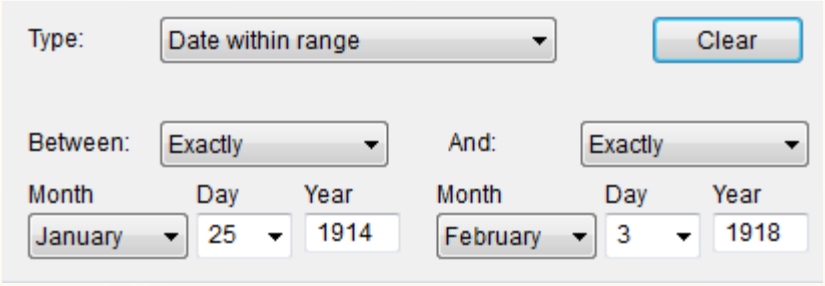
The options for entering a date in this window change according to the selection that you make in the field, as shown below:



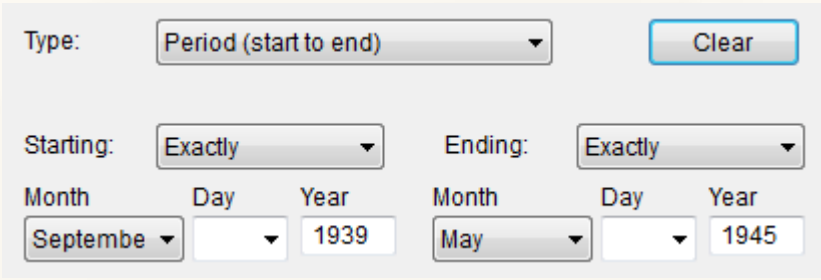
Single Date



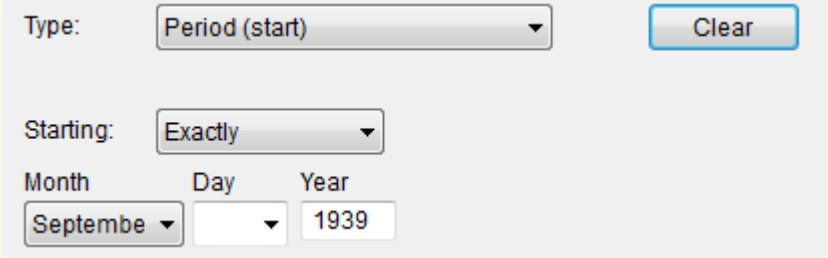
Date Within Range



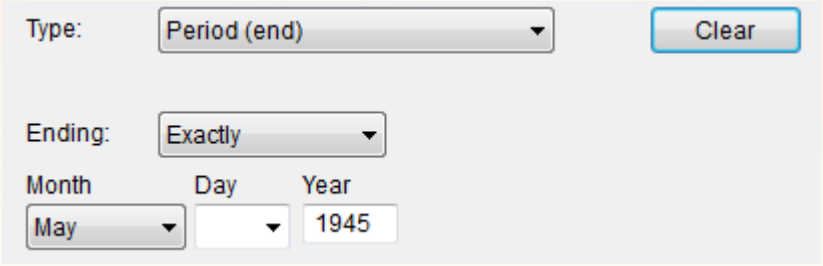
Period (Start to End)



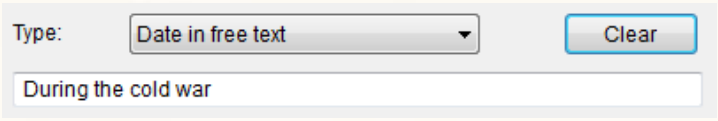
Period (Start)



Period (End)



Date in Free Text



You may check the **After Sunset** checkbox to indicate that this is when the event occurred. This option is relevant when entering dates using the Hebrew Calendar.

Hebrew and French Revolution Calendars

This window also enables you to click the **Hebrew Calendar** button or the **French Revolution Calendar** button at the bottom of the window in order to display the required calendar. You can then make your selections in this calendar in this the same way as in the **Standard Calendar**.

If you like, you can convert this date into the corresponding date in the standard calendar by clicking the **Convert** button.

Citations

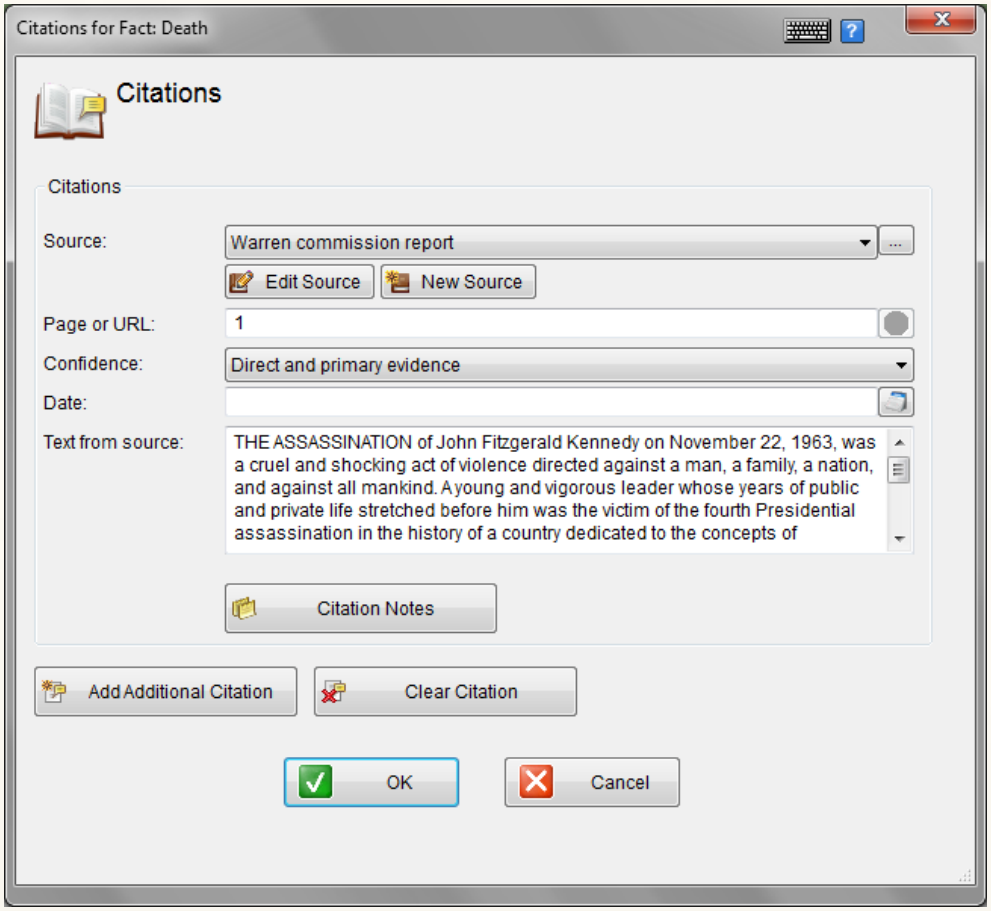
Citations enable you to identify the sources and repositories that you used for your research.

Family trees are richest when they contain numerous citations, specifying the reference of the information in the family tree to a specific source document located in a repository, such as a library. A source can be a variety of entities, such as a book, newspaper clipping, legal document, tombstone photo, interview transcript, letter or web site. The citation is the reference to the specific place in that source that verifies the relevant information in the family tree.

Family Tree Builder supports the full GEDCOM specification that pertains to sources, notes and citations. These elements are supported recursively, so that you can add a note to a person, associate that note with a citation that ties it to a source, add another note on that specific citation and so on. You can also assign notes to specific events in the person's life, or to one of his/her names, instead of assigning them to the person as a whole.

To define a citation:

1 When you click the **Citation** button in any of the Family Tree Builder windows, the Citation window is displayed, as shown below. It is also one of the tabs available when defining a person or family. The name of this button may differ between windows and may be called **Citation Notes** or **Name Citations** and so on.



2 Select the source of this citation reference from the **Source** dropdown list.

> **NOTE**
>
> If the source you are looking for has not yet been defined in this project, click the **New Source** button to define it. You can also use the **Edit Source** button to modify it (see Managing Sources and Repositories).

3 You can add the page of the citation in the source or the URL if the source is a web site.

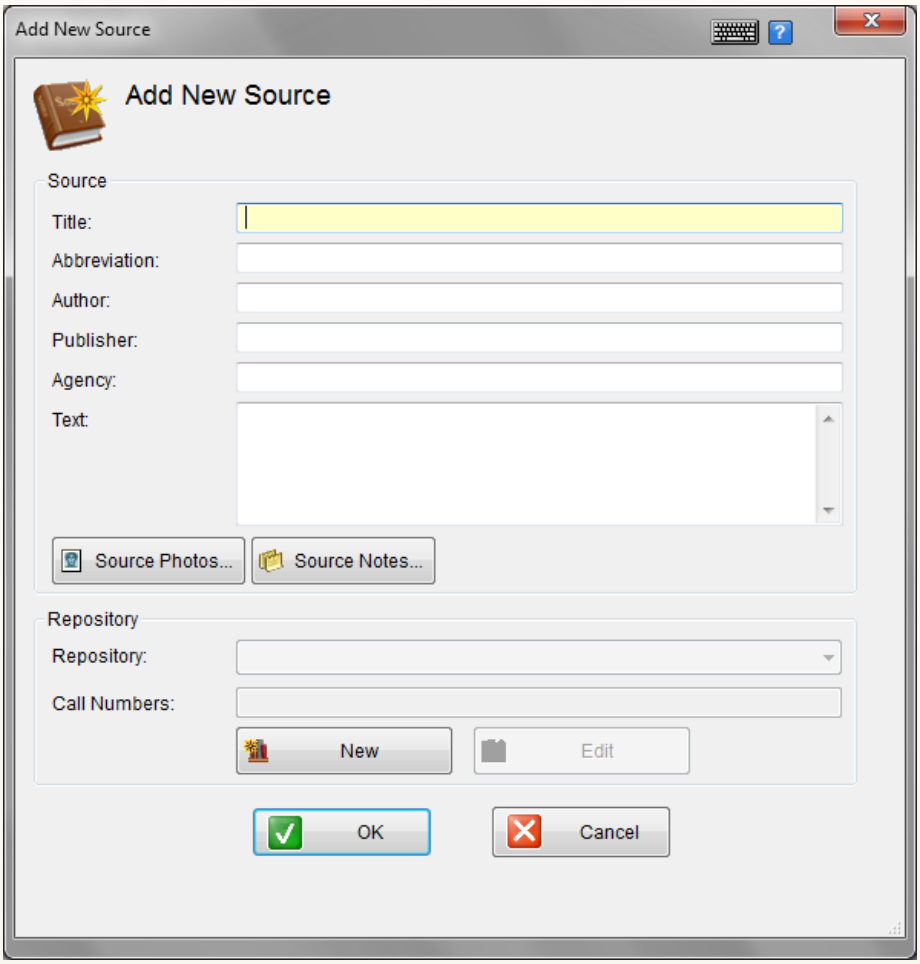
4 Select the level of confidence in the **Confidence** dropdown list, add a date to the citation and add the specific citation text.

5 Click **Citation Notes** to add notes for this citation. See Notes Tab – Defining Notes for details about adding notes.

6 When you finish defining the citation, click **OK** to close the Citations window.

To add a source:

1 Click the **New Source** button to create a new source for your project.



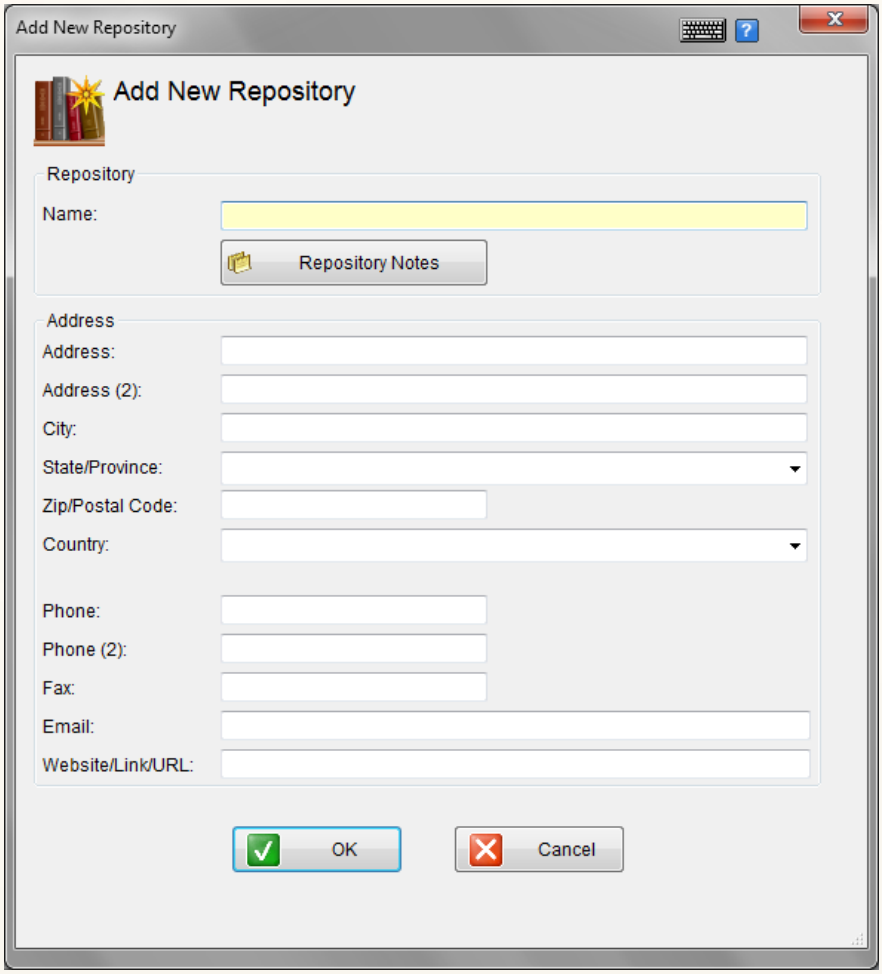
2 Enter information describing the source in this window.

3 Click **Source Photos** to add photos for this source.

4 Click **Source Notes** to add notes for this source.

5 You can also define the repository (such as the name of the library or database) in which the source is located, if required. If the repository already exists, you can select it in the **Repository** field. You can click the 

button to display the following window in which you can define a new repository.



6 Add notes to this repository by clicking the **Repository Notes** button.

7 You can view a list of all sources and all repositories in your project by going to the **View** menu and clicking the **Sources** and **Repositories** options, respectively.

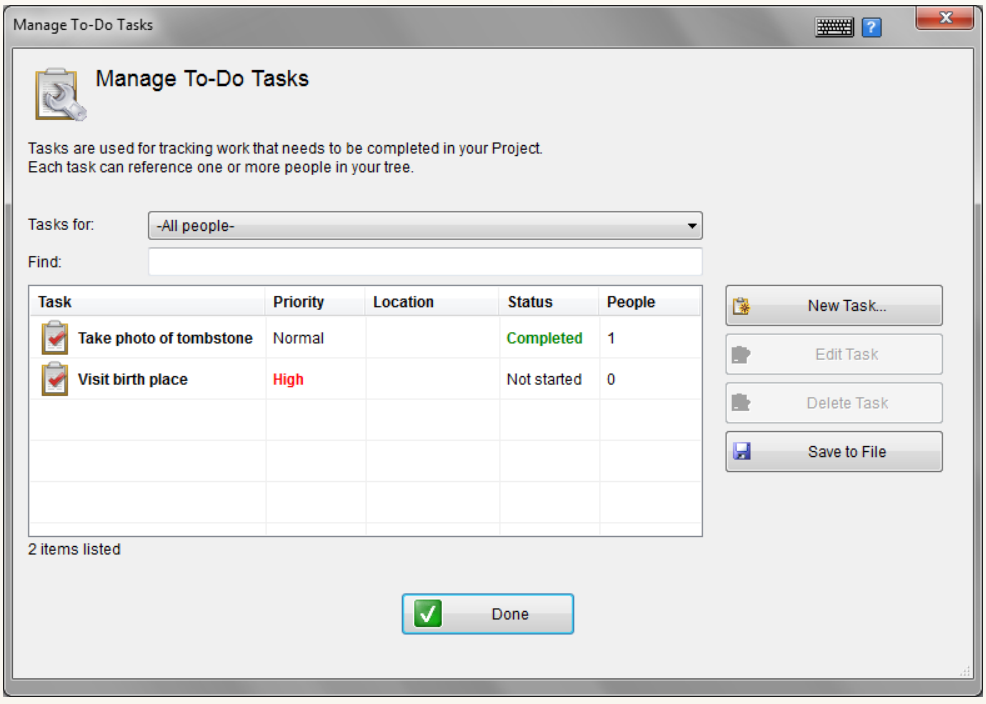
To-Do Tasks

Family Tree Builder's **Tasks** feature enables you to manage the various tasks that you want to perform in your project. In this context, tasks are like notes to yourself or a to-do list. Tasks are not synced to a family site, and are only available in Family Tree Builder. You can add, modify and remove tasks in Family Tree Builder.

When you define a task that relates to a specific person, that person's card displays the icon to indicate that a task is associated with that person (see Viewing Tasks for a Person).

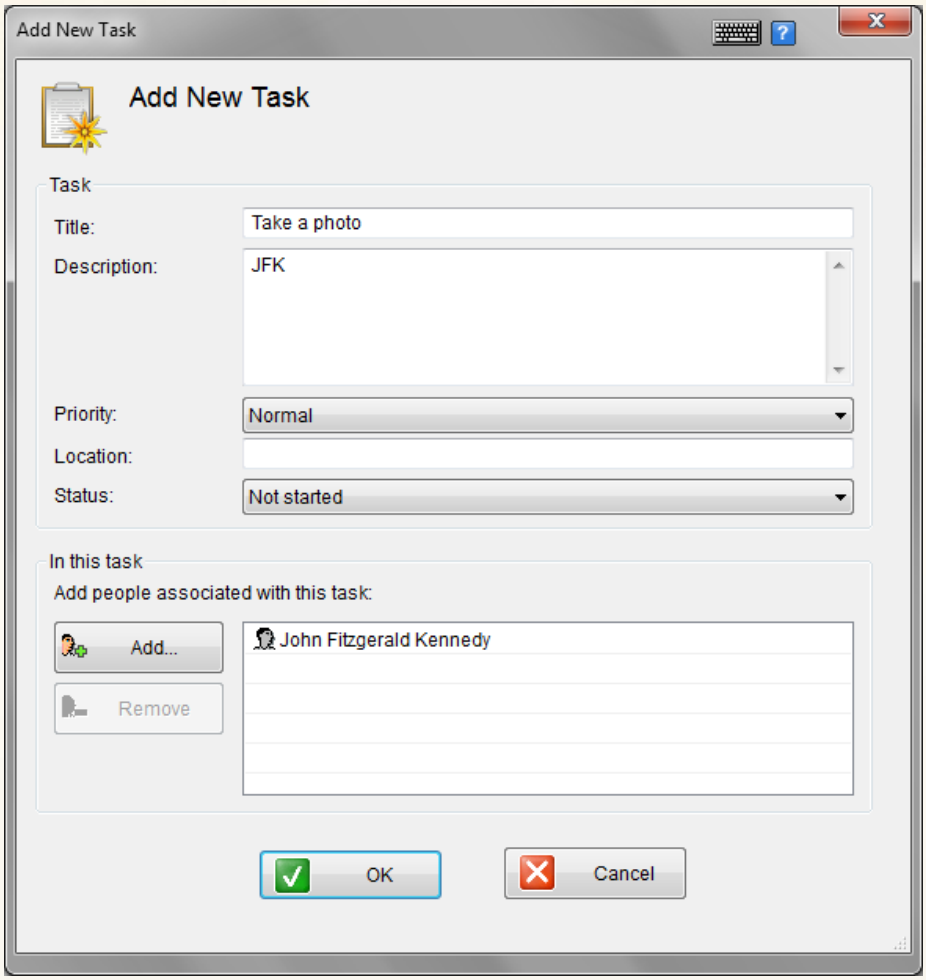
To define a task:

1 In the **View** menu, select **To-Do Tasks** to open the Manage To-Do Tasks window.



2 In the **Tasks for** dropdown list, you can filter to view only tasks that are associated to a particular person or to view all tasks.

3 Click the **New Task** button to create a new task. The Add New Task window is displayed:



4 In the **Title** field, enter a name for the task.

5 [Optional] In the **Description** field, enter a description of the task.

6 In the **Priority** dropdown list, select one of the following options to set the priority of the task:

- Low
- Normal
- High

The **Priority** affects the order of the tasks in the list. You can sort tasks by priority in the list of tasks.

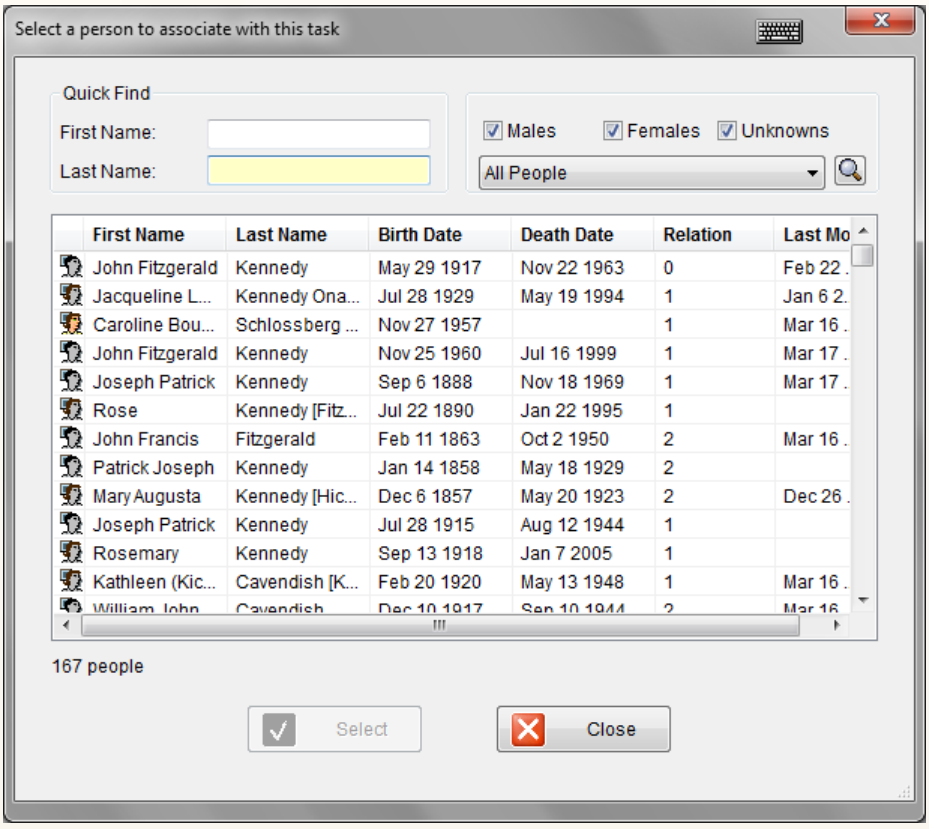
7 [Optional] In the **Location** field, enter the physical where the task will be performed, for example, a library or cemetery.

8 In the **Status** dropdown list, select one of the following options to indicate the current status of the task:

- Not started
- In progress
- Complete
- Postponed
- Cancelled

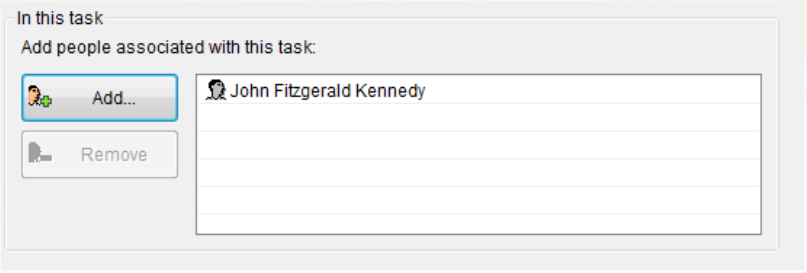
NOTE Tasks with a Cancelled status are shown last in the list and are grayed out.

9 [Optional] Click the **Add** button to open the following window in which you associate a specific person with the task.

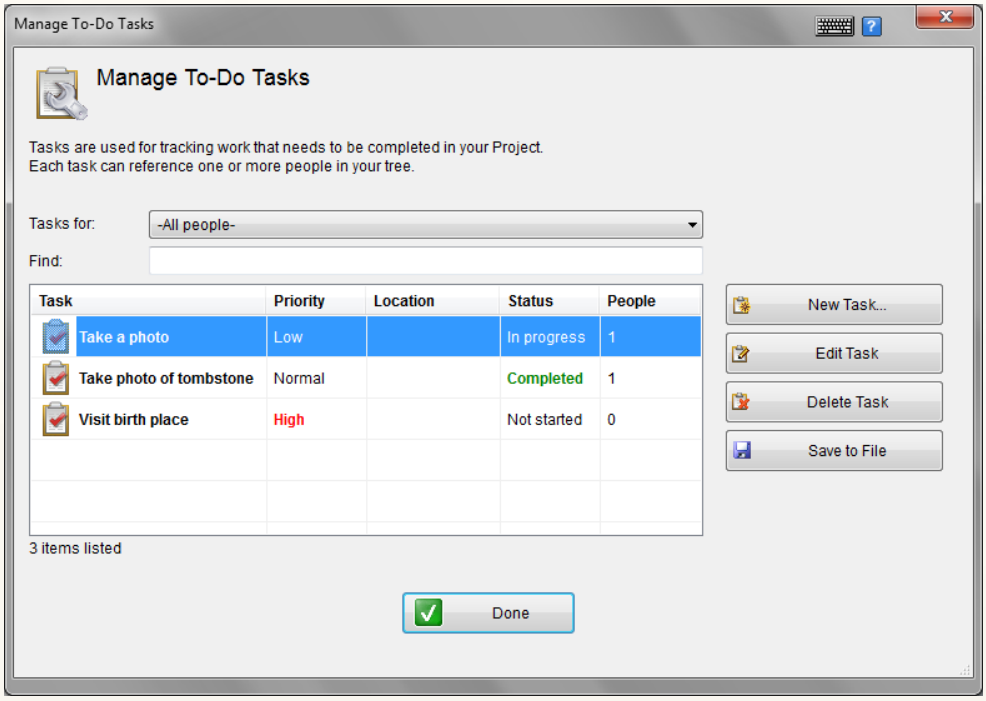


Select the applicable person in the list and then click the **Select** button.

The chosen person is shown in the pane at the bottom of the window.



10 Click the **OK** button to save the task. The task is shown in the list of tasks in the Manage To-Do Tasks window.



Click a column heading to sort the table's contents by that column, in descending order.

11 Click the **Done** button to exit the window.

TIP	Clicking **Abort Syncing** aborts the syncing process.

You can also perform the following additional actions on tasks using the buttons on the right side of this window:

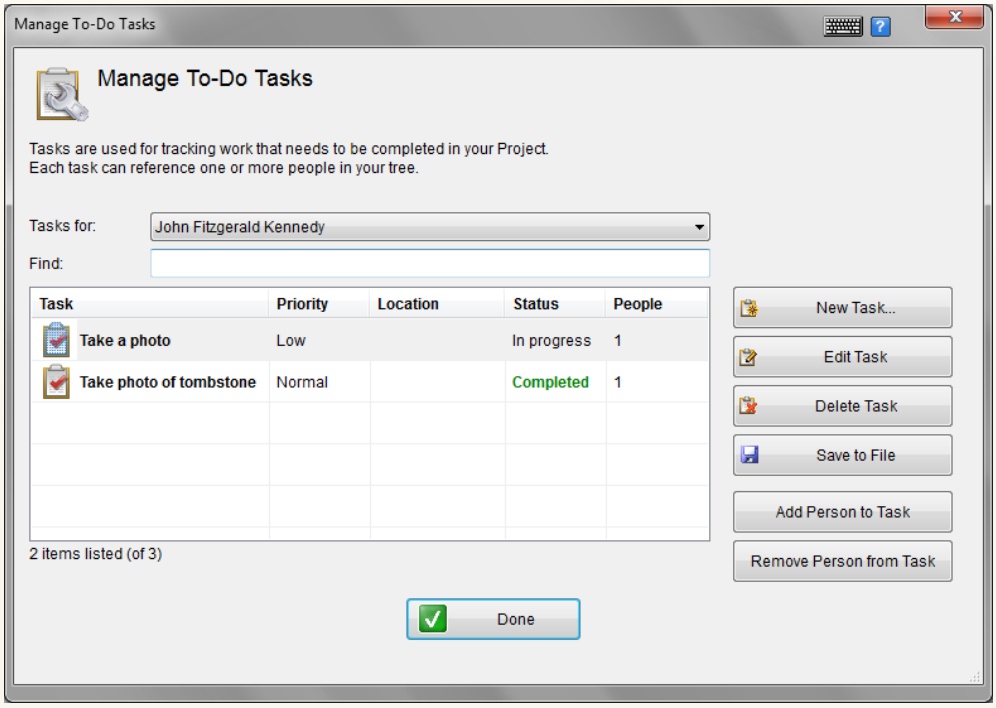
- **Edit Task:** Select a task in the window and click the **Edit Task** button to edit that task.
- **Delete Task:** Select a task in the window and click the **Delete Task** button to delete the task.
- **Save to File**: Save a list of tasks to an Excel file.

Viewing Tasks for a Person

When you add a person as a reference to a task, that person's card displays the icon, which indicates that a task is associated with that person.

To view tasks associated with a specific person:

- Click the icon in a person's card to open the following window:



NOTE You can also view a list of tasks associated with a given person by accessing the person's card and clicking the **More** tab in the card.

Note that this window is very similar to the Manage To-Do Tasks window, except that it only includes those tasks associated with the given person whose information you are viewing, since the selected person is selected in the **Tasks for** menu.

CHAPTER 4

Premium Membership



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Premium Membership

About This Chapter:

This chapter introduces Family Tree Builder's Premium Membership features, and describes their benefits and how to obtain a Premium membership. It contains the following sections:

- **Overview** describes Family Tree Builder's Premium Membership features.
- **Getting Premium Membership** describes how to obtain Premium Membership.

Overview

Family Tree Builder is available free of charge from MyHeritage.com. Simply navigate to the site and follow the instructions that describe how to install it on your computer.

In addition, optional Premium subscription plans are provided for very large family trees or photo collections. This Premium membership also provides access to some nice added features, as described in this section.

The MyHeritage.com website enables you to upgrade to a Premium membership and describes the added benefits that it provides:

- **Basic** membership is free.
- **Premium** membership provides the option to add many more people to your family tree and many more photos to your collection in addition to added functionality.
- **Premium Plus** membership provides the option to add an unlimited number of people to your family tree and an unlimited number photos to your collection in addition to added functionality.

The following describes the additional features that you get with a Premium membership in Family Tree Builder.

Merging of Smart Matches

Smart Matches help millions of users on MyHeritage.com discover new relatives by finding connections between family trees. Now, with the new Smart Match Merge features, you can easily merge information from any matched family tree into your own family tree.

An intelligent wizard guides you through the merging of names, dates, places, notes, photos and any other fact of any matched person.

And, there is more. You can merge additional information about the parents, spouses, brothers, sisters and children of this person too!

In order to use Smart Match Merge, you must upgrade to a Premium account on MyHeritage.com.

All-in-One Charts

The All-in-One Chart is a great tool for seeing the big picture in your family tree. This is a chart that contains ALL relatives of any given person. You can print is as a poster of the entire family tree or email it to your family.

In order to create All-in-One Charts, you must upgrade to a Premium account.

Full Map Support

Maps are a great feature for viewing your family history on an interactive world map. Using our maps, you can explore your family's origins and gain better knowledge of your family.

The free version of Family Tree Builder shows only some of the places mentioned in your family tree on the map. To see all of the places in your family tree on the map, you must upgrade to a Premium account.

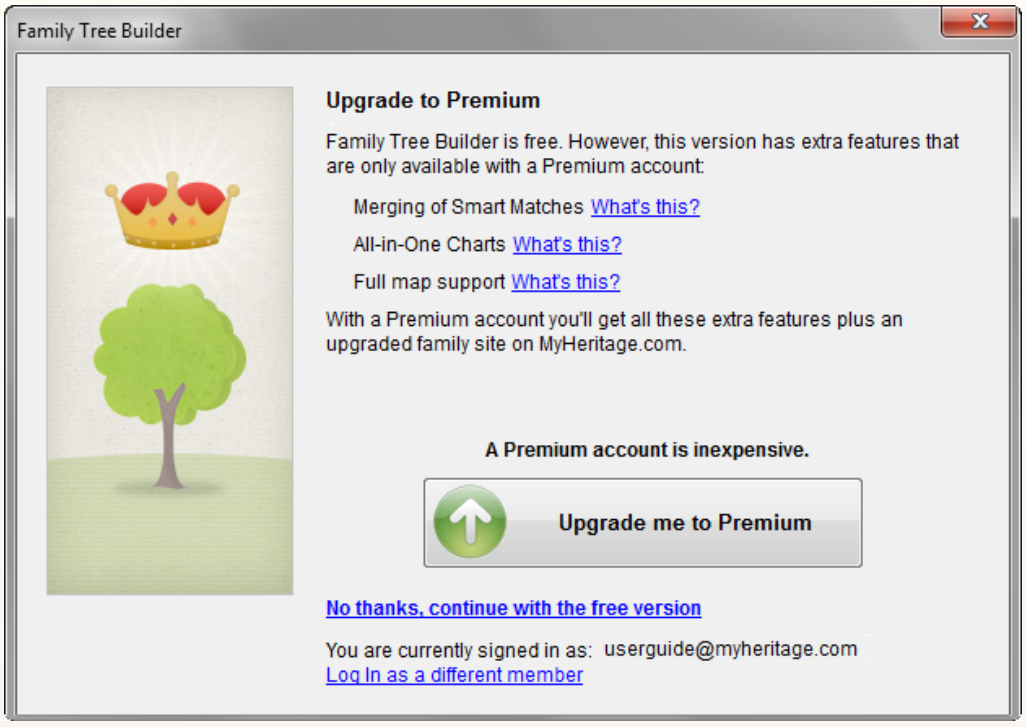
Search MyHeritage Trees

A Premium Plus membership enables you to use MyHeritage's SuperSearch online research engine to search all MyHeritage family trees that were created by other MyHeritage users. Basic users and those with a Premium membership must purchase a Data Subscription to use SuperSearch.

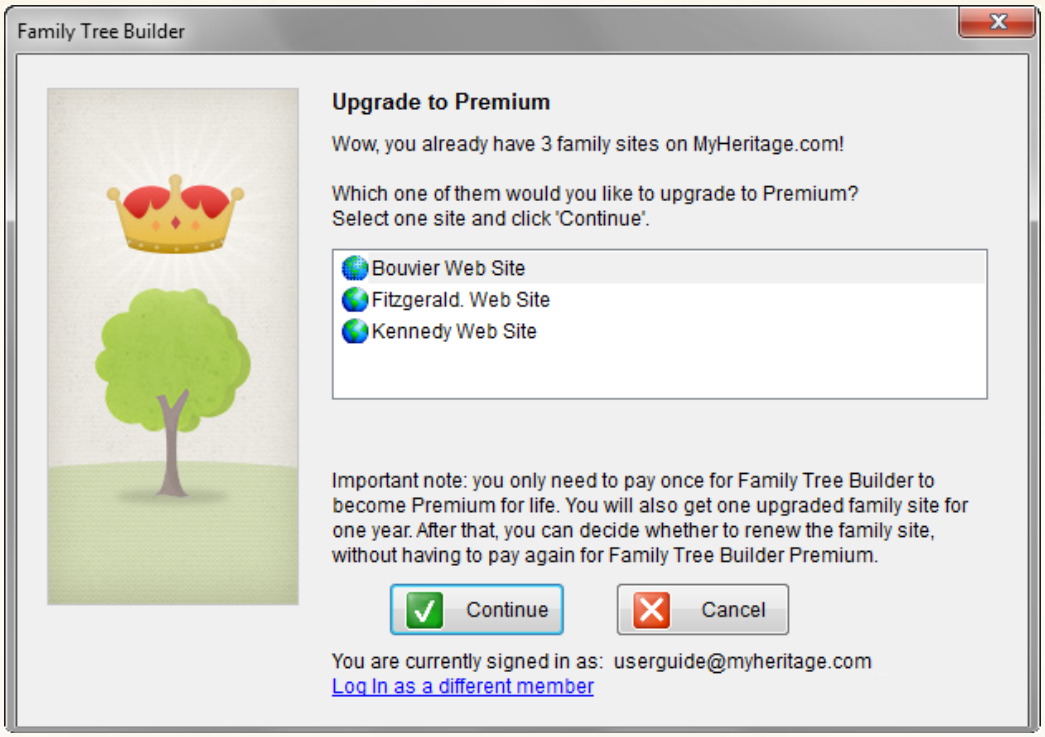
Getting Premium Membership

A variety of options are provided in the Family Tree Builder interface for accessing the option to upgrade to Premium membership, as follows:

- Click the  icon in the toolbar in the top left of the Family Tree Builder window.
- Click the **Upgrade me to Premium** button in the following window that is displayed when you launch Family Tree Builder and when you try to access a premium feature:



The following window is then displayed if you already have more than one family site in MyHeritage.com.



This window enables you to select the site that will be upgraded to a Premium membership.

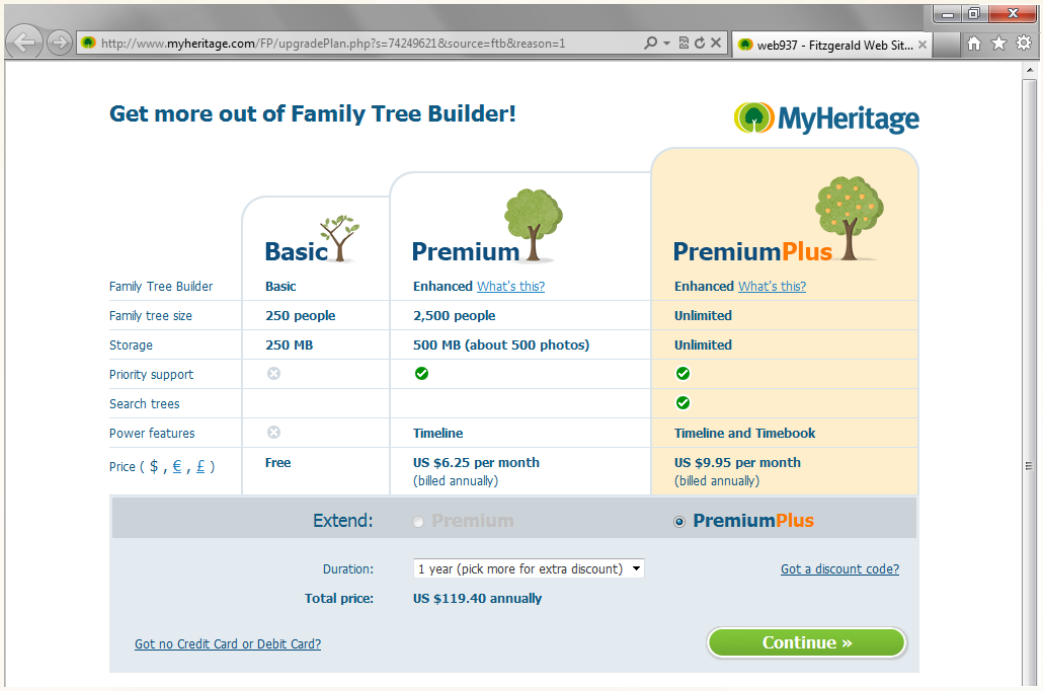
NOTE

You only have to pay once in a lifetime for a Premium membership in order to get all the Premium features of Family Tree Builder. The Premium membership also gives you an upgraded Premium family site. The family site subscription is automatically renewed each year, but you can cancel it at any time via the My purchases page, which is accessible from the account dropdown in your family site. Even if you cancel the Premium subscription for your family site, Family Tree Builder's Premium features will still be available to you.

If you do not have any sites, then you can enter the name of your new site.

Select the plan you want to upgrade to (Premium or Premium Plus) and the number of years. After payment is made, your Family Tree Builder program will unlock Premium features.

A web page then displays, enabling you to pay and upgrade your Family Tree Builder.



CHAPTER 5

Handling Photos and Other Media



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Handling Photos and Other Media

About This Chapter:

This chapter describes how to add, annotate and automatically mark faces in photos and how to use documents and video/audio files to enrich your family tree. It contains the following sections:

- **Overview** describes Family Tree Builder's powerful photo handling tool.
- **Media Types** describes how to enter a variety of types of information and how to associate various types of media with this information.
- **Photos in Tree View** describes how to edit a photo in the Tree View.
- **Viewing and Managing Photos** describes a variety of options for viewing photos, associating photos with people and facts, and adding information about photos.
- **Photos People List** lists the people that you have defined in Family Tree Builder.
- **Photos List** shows all or some of the photos defined in Family Tree Builder, according to your specifications.
- **Adding New Photos** enables you to add photos, documents and video and audio files to your family tree.
- **Editing a Photo** enables you to benefit from the wonderful photo features provided by Family Tree Builder.
- **Photo Albums** lists the photo albums that you have defined in Family Tree Builder.
- **Image Viewer Window** displays a large view of the photo, its name, place and date it was taken, and provides a list of the people that are marked in it.
- **Photos Menu Bar** describes the menu options that appear in Media View.

Overview

Powerful photo handling is one of the strongest and most helpful features of Family Tree Builder. This special feature, created by MyHeritage, represents a significant improvement of GEDCOM's specification for photos (for more information, see GEDCOM and Family Tree Builder).

Photos are invaluable for genealogy research and help bring a family tree to life. By scanning old photos, adding them to your project on Family Tree Builder and properly annotating them, you will store the treasures of your family's history. This enables your family, relatives and friends to enjoy these photos in more ways than you may have thought possible.

Adding old photos will most likely also benefit your research, because they can often jog the memory of older relatives and lead to the discovery of information that cannot be found elsewhere.

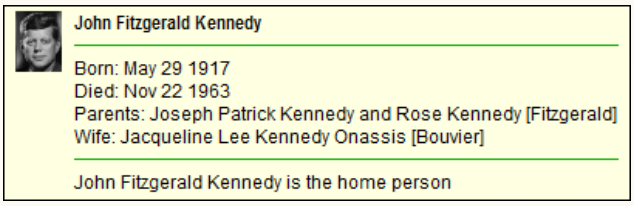
NOTE

The term *photo* and *media* may be used interchangeably in this chapter. Media may refer to a photo, document or video/audio file.

The Family Tree Builder photo handling tools enable you to:

- Add a photo just once and then associate it with a variety of relevant entities in Family Tree Builder so that they are displayed together, such as elements in the family tree, a person, a family, personal facts, family facts, a source and more.
- Browse photos according to level of interest, including tooltips that show a photo and a summary of relevant information. For each person, a Personal Photo is displayed if one was specified. Otherwise, an anonymous silhouette is shown. We found that it is much more intuitive to navigate inside a family tree when photos are displayed for each individual, especially if you are highly familiar with that family tree. This intuitive navigation is one of the most useful capabilities of Family Tree Builder.
- Import large numbers of digital photos into your Family Tree project all at once.

- Tag photos. Mark where people's faces appear in photos in order to show who is who. This is particularly useful for group photos, which contain more than one person. This is much better than a textural description, such as, "Grandma is the 14th person on the right, on the sixth row from the bottom."
- Designate any marked face as a Personal Photo of a person, meaning that it will become the portrait photo representing that person, which appears in the Tree View and in various reports. This saves having to use or create a separate personal portrait photo.



  This is an improvement over other genealogy products, which can only specify a specific person's photo as primary and show it in reduced size. In these products, photos often include more than just the face, such as a full body shot, which when reduced, becomes an unidentifiable miniature. This is not the case in Family Tree Builder.

- View both sides of a scanned photo as a single entity. Old photos often have important inscriptions and dedications on their reverse side. Family Tree Builder enables you to associate a scan of the reverse side with the front side of each photo, instead of treating them as separate photos.
- Run powerful photo searches. For example, search for all of the photos taken with a relative, in a certain place (or a similar-sounding place, using Soundex), at a certain date, or all the photos of a person and their descendants.

Media Types

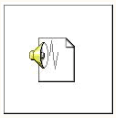
Family Tree Builder enables you to enter a variety of types of information, as described throughout this manual, and to associate various types of media with this information: photos, documents (such as a Word file or a PDF of a scanned birth certificate) and multimedia (video/audio). Some examples of how media files may appear in Photos View are shown below:



Document



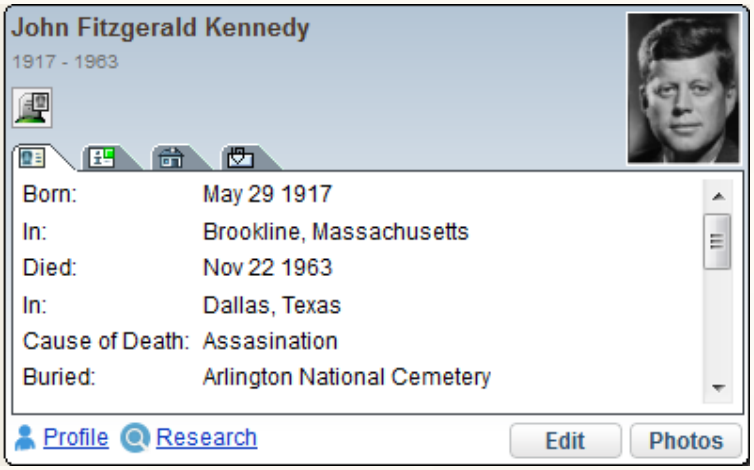
Photo



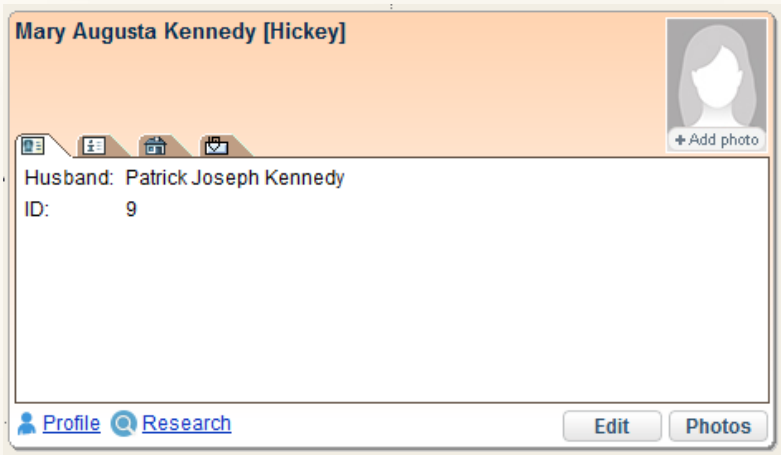
Video/Audio

Photos in Tree View

You can set a personal photo for each person in the tree, which represents this person in many places.

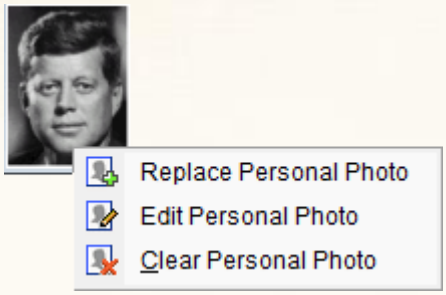


An anonymous silhouette is shown for people who do not have a personal photo.



To add a personal photo, click this person's silhouette in the Tree View. A window opens that walks you through the process for adding a new photo and setting it as the personal photo of this person.

If a person already has a personal photo, you can double-click it in the Tree View to edit the photo's property. To replace the personal photo, right-click the photo in the Tree View and select **Replace Personal Photo** from the menu.



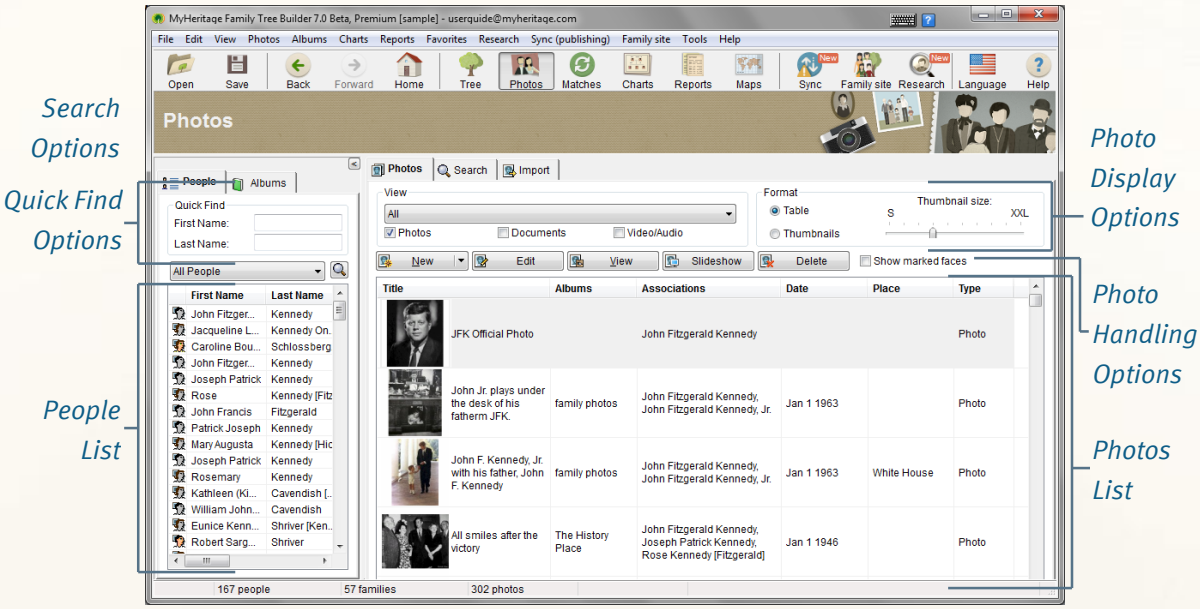
Select **Edit Personal Photo** to change the information about the current personal photo. Select **Clear Personal Photo** to remove this person's personal photo.

Viewing and Managing Photos

The Photos View provides a variety of options for viewing photos, associating photos with people and facts and adding information about photos.

To view and manage photos:

- Click the  button in the toolbar. The Photos View window is displayed, as shown below:



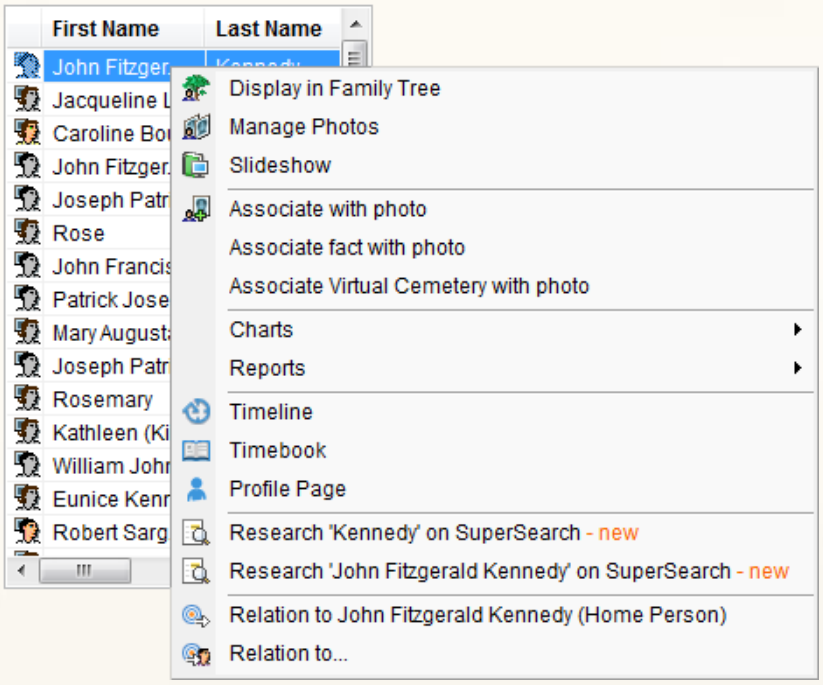
This window contains the following areas:

- **Photos People List** lists all the people that you have already defined in Family Tree Builder and enables easy access to their photos.
- **Photos List** lists photos according to your request. It may show all the photos defined in Family Tree Builder, all the photos that are associated with a person or any other filtered list of photos that you specify by indicating in what or in whom you are interested.
- **Photo Display Options** enables you to control how photos are displayed in this window.

- **Quick Find Options** enables quick access to a photo according to a person's name.
- **Photo Handling Options** enables you to add photos, edit information, mark faces and view or delete photos.
- **Advanced Photo Search** provides advanced options for searching for photos in your project.

Photos People List

The People List in Photos View lists all the people that you have defined in Family Tree Builder. It behaves in the same way as the People List that appears in Tree View.



To display all the photos associated with a specific person:

- Double-click a person's name in the People List to display all the photos that are associated with that person. Instructions for associating a photo with a person are provided in Associations Tab.

NOTE

When you are in the Photos View and you right-click a person in the People List, the menu that opens shows some additional options, in addition those that are available when you are in the Tree View. See People List.

The following shows the options available by right-clicking a person in the People List:

- **Display in Family Tree:** Displays the person card for the selected person.
- **Manage Photos:** Opens the **Photos** tab in the Photos View for the selected person.
- **Associate with Photo:** Associates this person with the selected photo(s).
- **Associate Fact with Photo:** Opens the Select Fact window, where you can select a fact of the selected person and associate it with the selected photo(s).
- **Charts:** Enables you to create a chart for the selected person. See Charts.
- **Reports:** Enables you to create a report for the selected person. See Reports.
- **Profile Page:** Displays the full profile page for the selected person. See page 66.
- **Research [Person Name] on SuperSearch:** Opens an external browser, displaying the record matches results list for the selected individual.
- **Relation to [Home Person]:** Displays a window that describes the relationship between the selected person and the Home Person.
- **Relation to:** Displays a window in which you can select another person to see the relationship between this person and the selected person.

Photos List

The Photos List is displayed in Photos View when the **Photos** button is selected. It shows any of the following:

- All the photos defined in Family Tree Builder.
- Only photos relevant to the current person or family.
- Only photos that match the options you have specified, such as in the **View** field.

TIP Double-click a person in the People List to display all their photos.

Photos are initially listed in a table in the order in which they were added to the project, starting with the first photo:

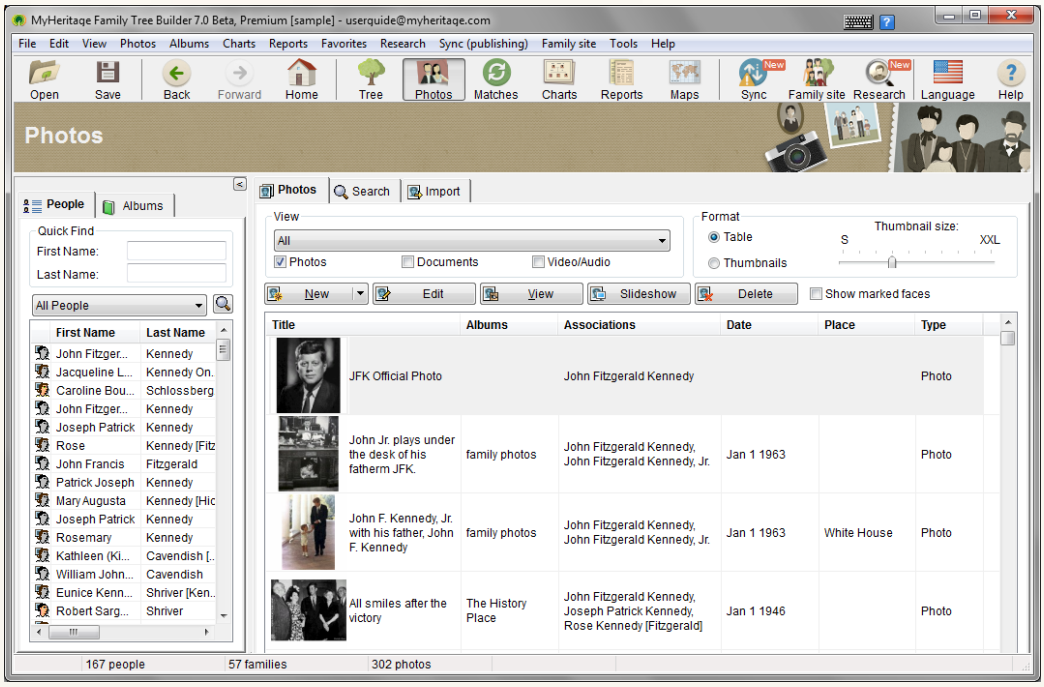
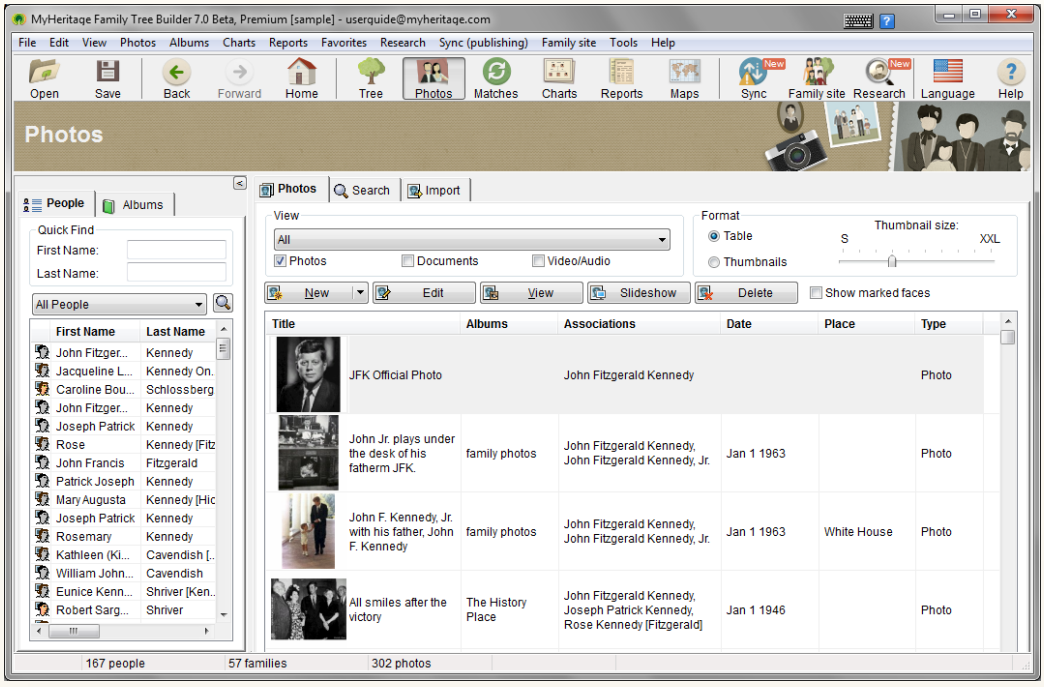


Photo Display Options

The following describes the options that enable you to control how and which photos are displayed in Photos view:

Photos View

The **View** field enables you to select any of the values in the dropdown menu in order to specify which photos are displayed.



The following types of options are available:

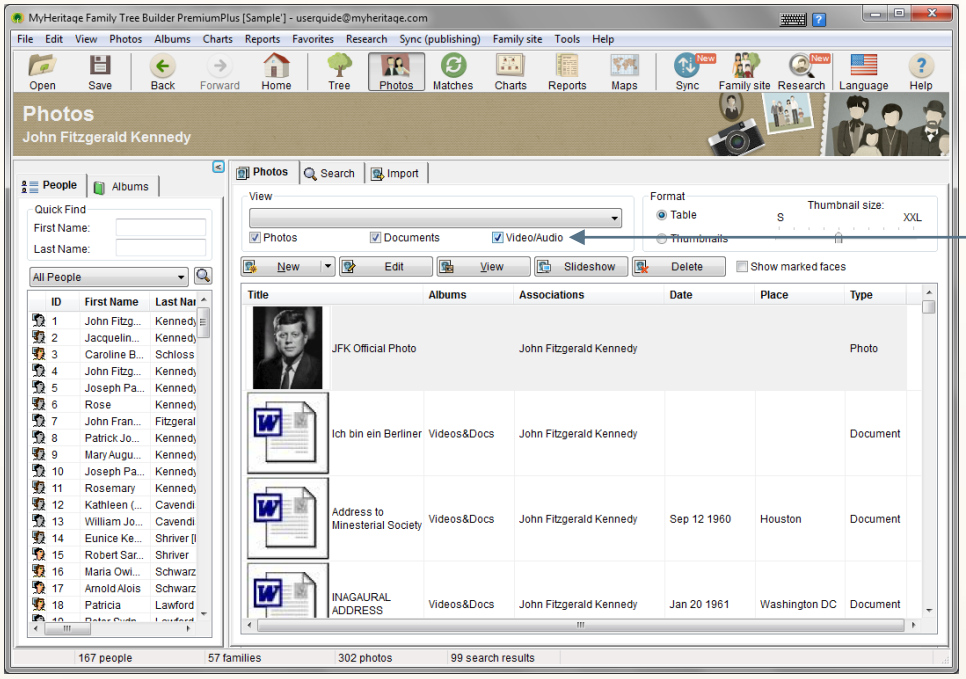
- **All:** Shows all the photos in your family tree.
- **[Full Name]:** Shows all the photos for the named person.

Photos Type Display

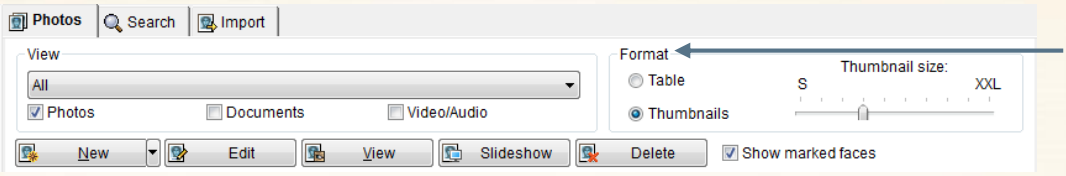
This section enables you to define what types of media are listed in the list.

To specify the media type display:

- Under the **View** field, you can click the **Photos** checkbox to display photos, the **Documents** checkbox (Word, PDF and so on) to display documents and the **Video/Audio** checkbox to display video and audio files.

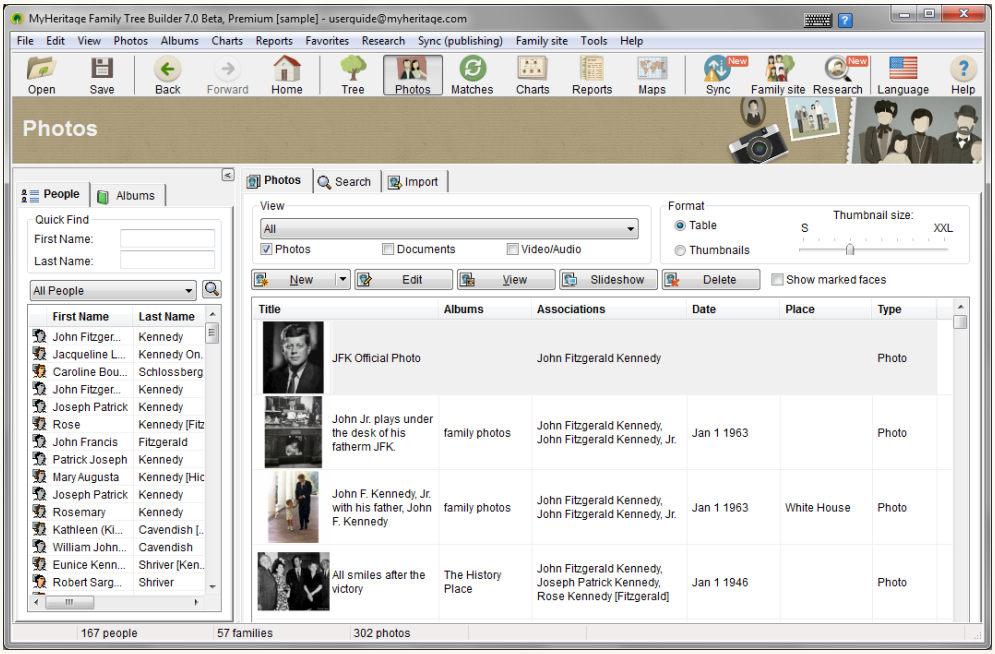


Photos Format Display



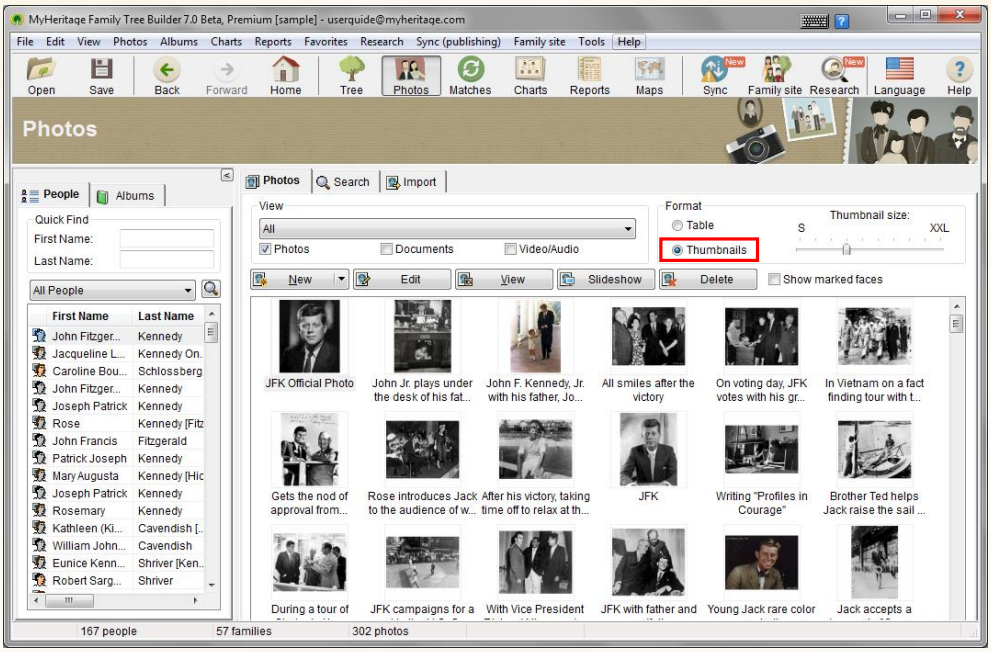
To specify the photos format display:

- Select the **Table** radio button in the **Format** area to display the photos as a table.



The **Table** option then displays a thumbnail and the title of the item, its albums, its type, date and place. You can sort the list by any of these columns by clicking the column's header at the top of the list.

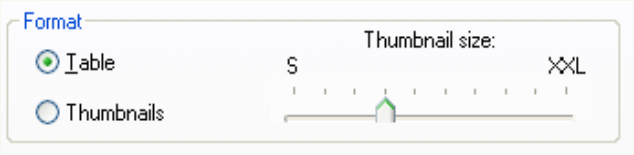
Select the **Thumbnails** button to display only photo thumbnails, as shown below:



In this view, you can see more photos, but less information about each photo.

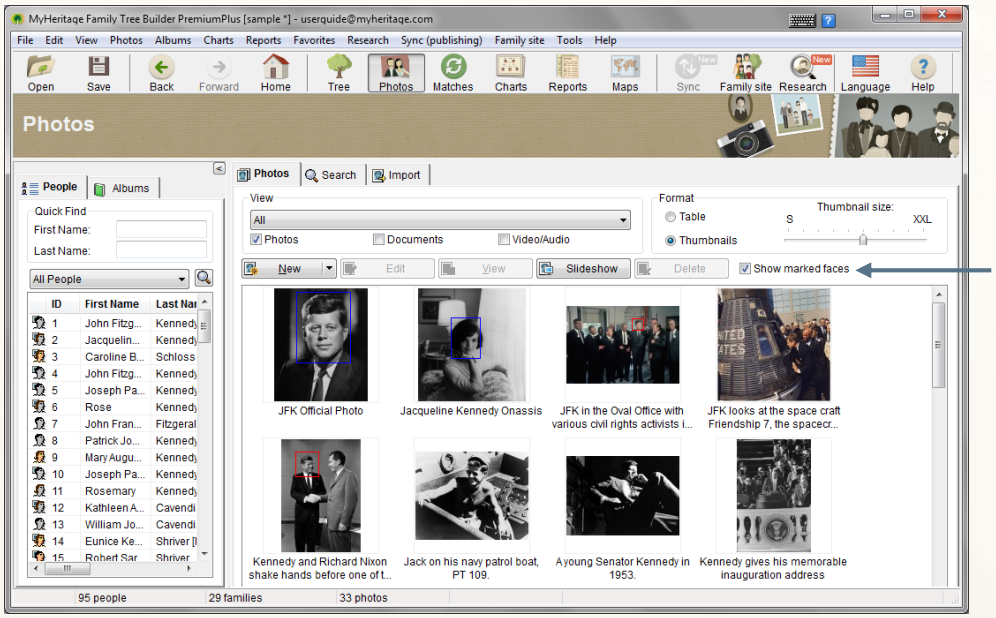
To adjust the size of the thumbnails:

- You can adjust the size of the thumbnails using the slider on the top right of the window. Moving it towards XXL (Extra-Extra Large) on the right side makes the thumbnails larger, and moving it towards S (Small) on the left side makes the thumbnails smaller.



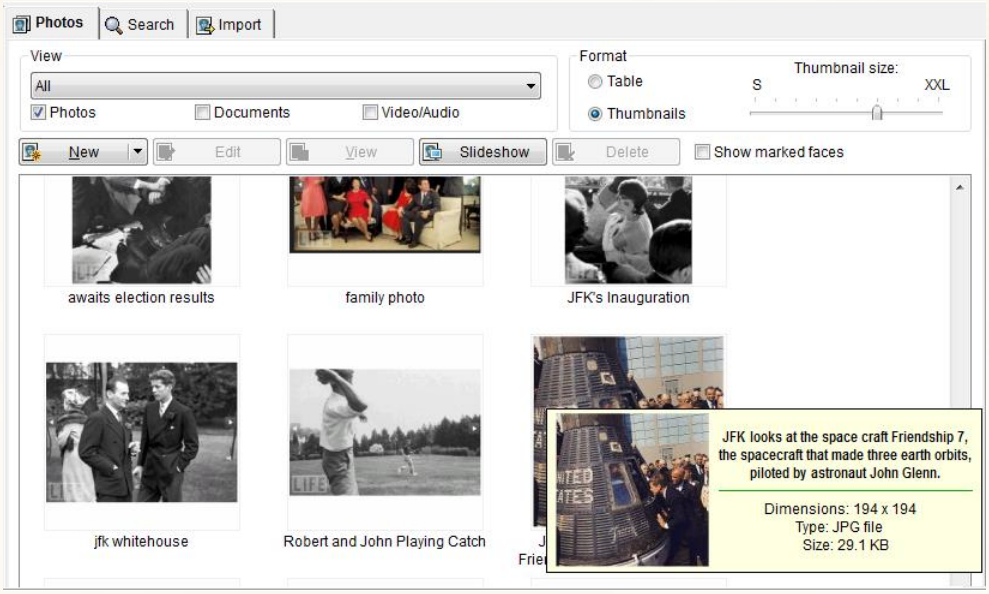
To mark identified faces:

- You can click the **Show marked faces** checkbox to mark the faces identified in each photo, as shown below. Each person has one Personal Photo that represents him/her in Family Tree Builder, such as in Tree View. By default, the photo that contains this Personal Photo marks the face in a blue rectangle. Other occurrences of that person's face are marked by a red rectangle. Blue rectangles are used for people's personal photos (those that appear in people's cards in the Tree View) and red rectangles are used for other photos where people are tagged.



To display more information:

1 You can hover over a photo to display a larger photo image and more textual information, as shown below:



2 You can also double-click the Photo View and edit information about a photo.

Sorting Photos

You can click a column header to sort the photos according to that column.

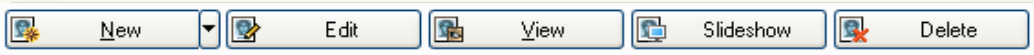
Quick Find Options

The **Quick Find** area above the People List enables quick access to a photo according to a person's name. You may refer to Quick Find for a description of this feature, which is the same as in Tree View.

The People List also enables you to sort this list by first name, last name, birthday date, death date, relationship and more. Click a person in the list to show their photos.

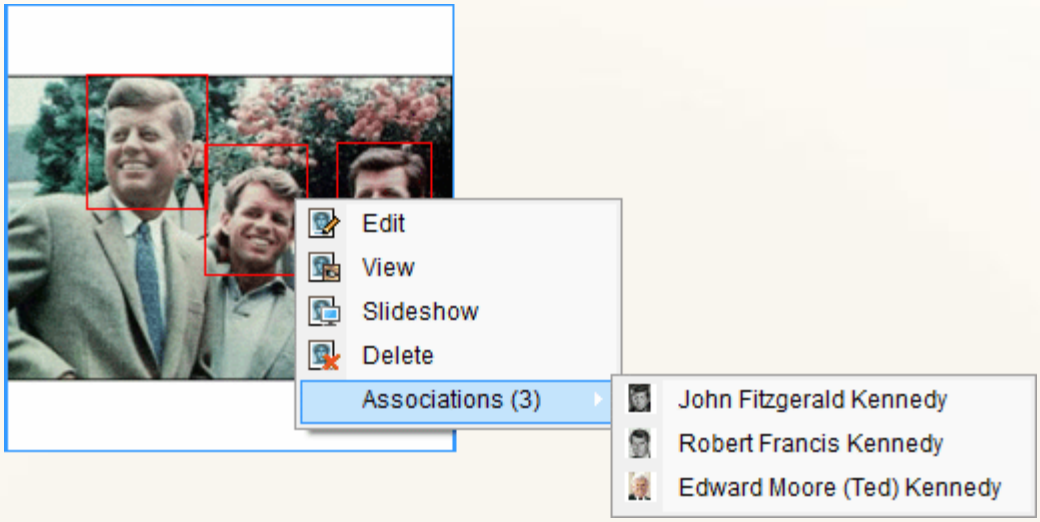
Photo Handling Options

The following buttons enable you to add, edit, view or delete photos:



- **New:** Opens a wizard that walks you through adding new photos or any other media to Family Tree Builder.
- **Edit:** Opens the Edit Photo window, where you can define various characteristics of the photo.
- **View:** Opens the Image Viewer, which provides various display options.
- **Delete:** Removes the selected photo(s) from your project.

You can also right-click a photo to display the following menu:



This menu provides the following additional option:

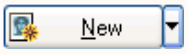
- **Associations:** Displays the people in this photo. You may select a person from this list to display them at the center of the Tree View (see Associations Tab for a description of how to define associations). You can then click the **Back** button in the toolbar to go back to the Photos List.

Adding New Photos

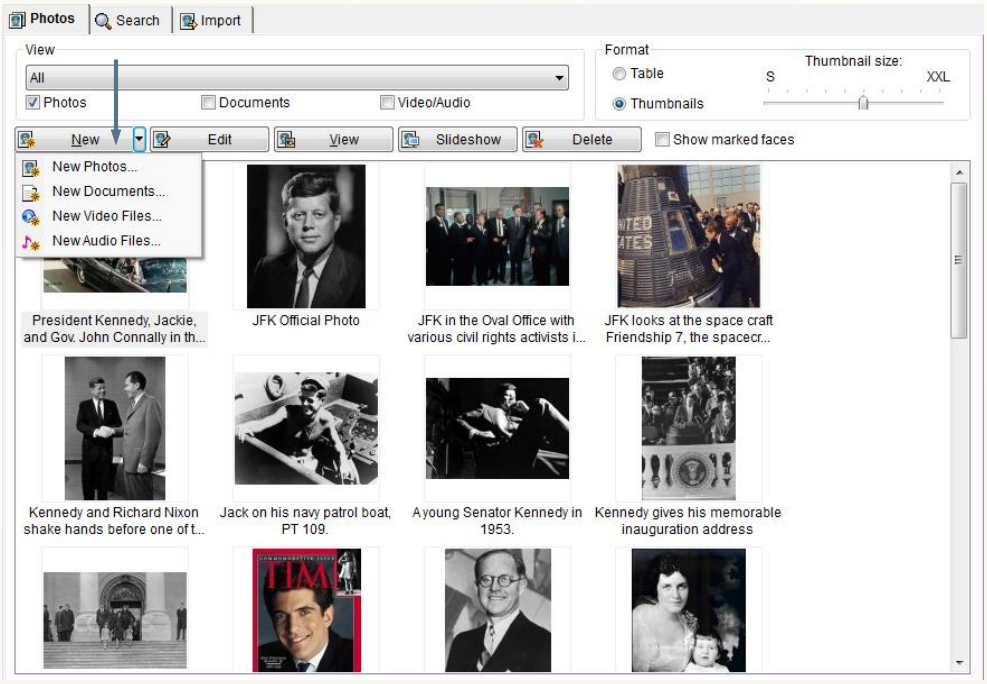
Family Tree Builder enables you to add photos, documents and video and audio files to your family tree.

Family Tree Builder provides a simple process for importing all your digital photos in a single process. These photos are then available for you to associate with the members of your family tree.

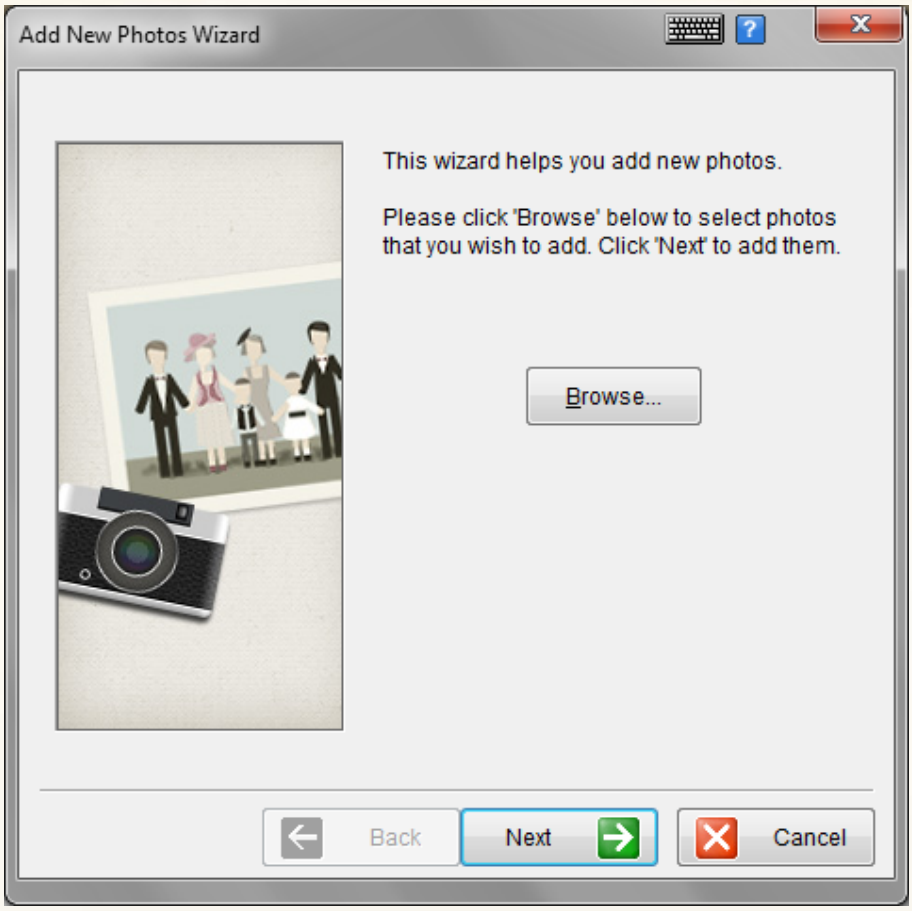
To add one or more photos:

1 Click the 

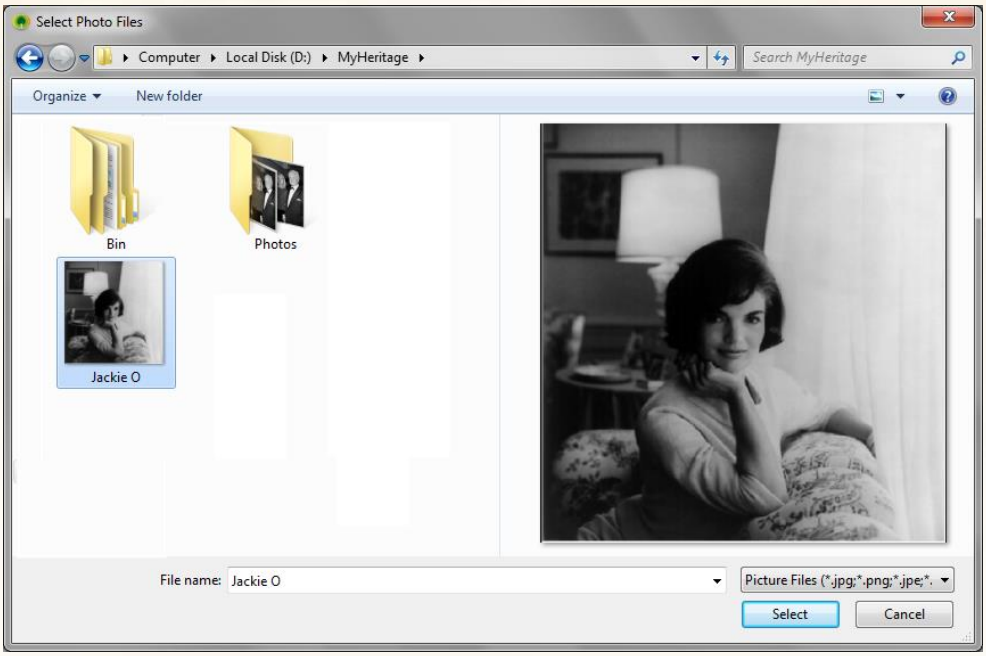
button as shown below, and then select the type of media you want to add (Photos, Documents, Videos or Audios):



If you select to add photos, the following window is displayed (a slightly different version of this window is displayed if you select another media type):

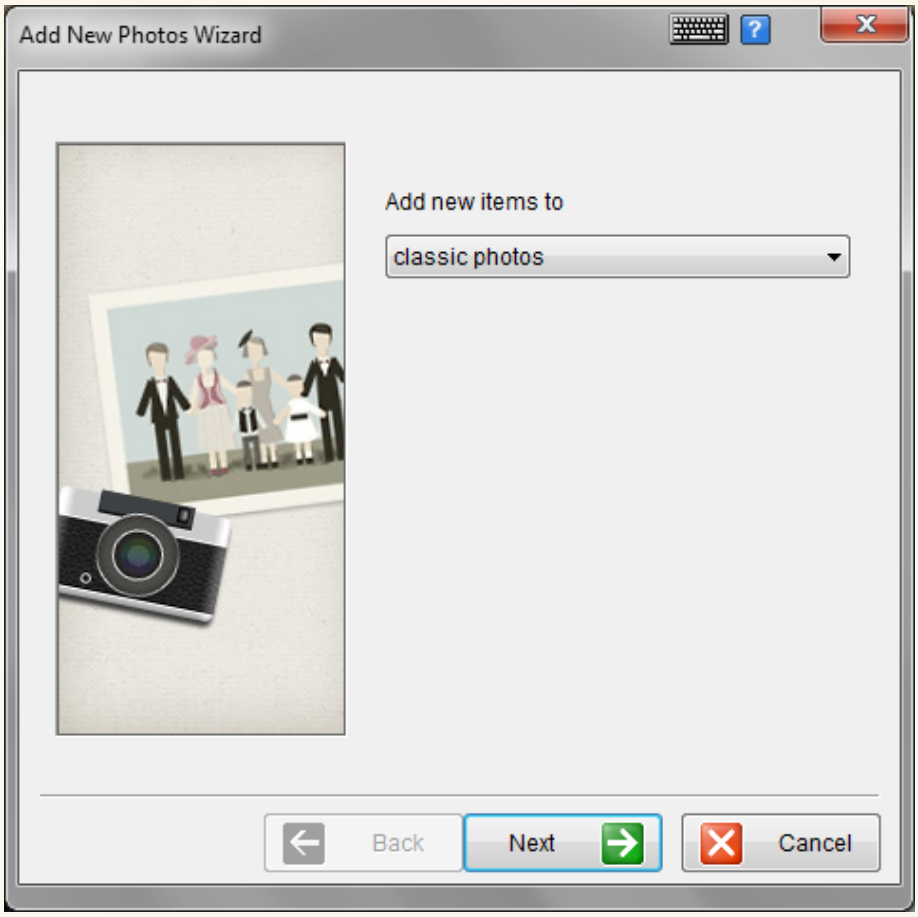


2 Click the Browse... button to display a Select Photo Files window:



3 Select a file and click Select. You also have the option of selecting multiple photos using the **Ctrl** and **Shift** keys on your keyboard. When you have selected all the photos you want to add, click **Next**.

4 If you have set up albums in your project, the following window enables you to select the album of the photos you are adding (see Photo Albums):



5 Select the album to which you want to add the photo and click **Next**. The following window is displayed:



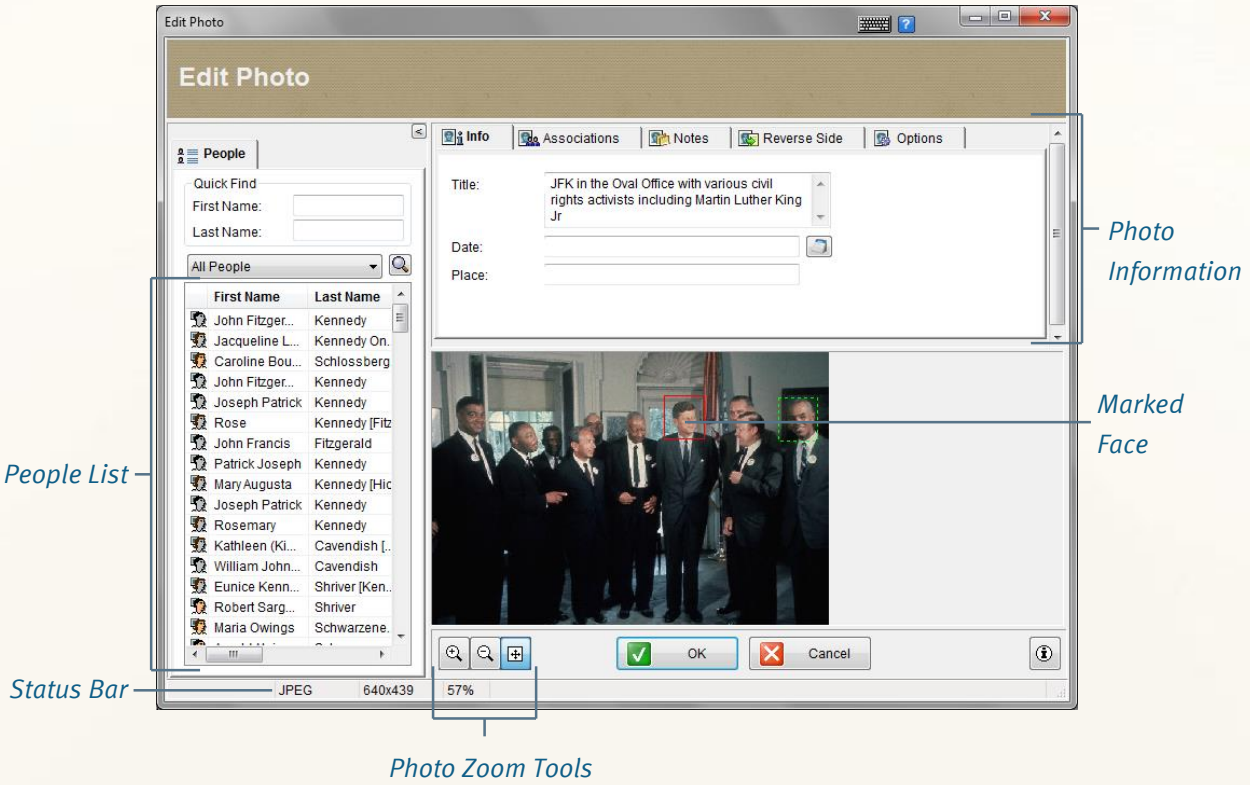
6 The photo has now been added to you project. Click **Finish** to edit the photo details and add a title, date, place and identify people in this photo. After you add a photo, you can always enter more information about it by selecting the photo in the Photos List and then clicking the **Edit** button, or by double-clicking it.

Editing a Photo

Editing a photo in Family Tree Builder enables you to benefit from many wonderful photo features.

The Edit Photo window, shown below, is displayed:

- Automatically after you finish adding a single photo.
- When you double-click a photo in Photos View or Tree View.
- When you select a photo and click the **Edit** button.



The Edit Photo window provides a number of tabs that enable you to handle the photo and associate it with information.

This window contains the following areas:

- **People List:** Lists all the people that you have already defined in Family Tree Builder and enables you to easily select a person that appears in this photo.
- **Photo Information:** Provides a number of tabs in which you can specify information about the photo.

- **Photo Zoom Tools:** The following tools are provided for customizing the display of the photo, as follows:
  - **Zoom In**  : Enlarges the view of this photo.
  - **Zoom Out**  : Reduces the view of this photo.
  - **Fit to Window**  **:** Resizes the display of the photo so that all of it is displayed in the current window size. If you enlarge the window, the photo will adjust its display size accordingly.
- **Status Bar:** Shows the file type of the photo, its size in pixels and the percentage of its size at which it is displayed:

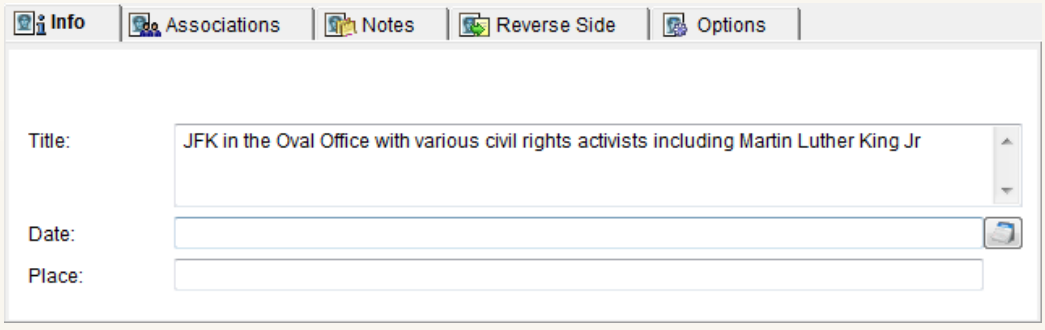


Photo Information

At the top of the Edit Photo window, tabs are provided for entering information about the photo.

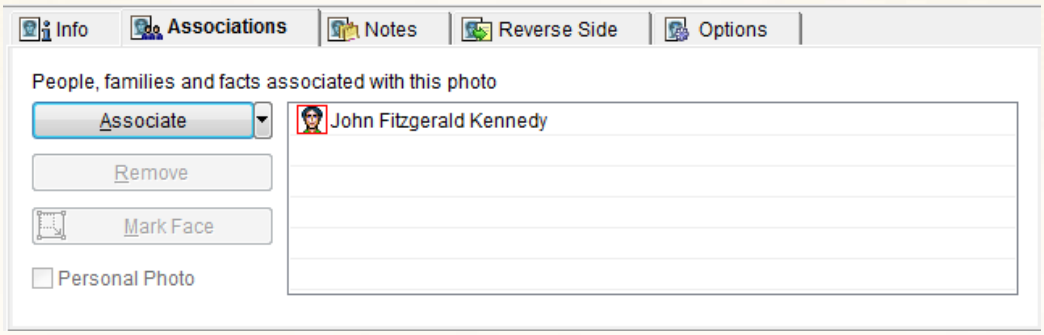
Info Tab

The **Info** tab enables you to enter the title or name of the photo, which will appear next to it wherever it appears in Family Tree Builder. You can also enter the date it was taken and the place where it was taken (for details about entering dates, see Entering Dates).



Associations Tab

The **Associations** tab enables you to identify the people in the photo or to associate this photo with a particular fact about a person or a photo.

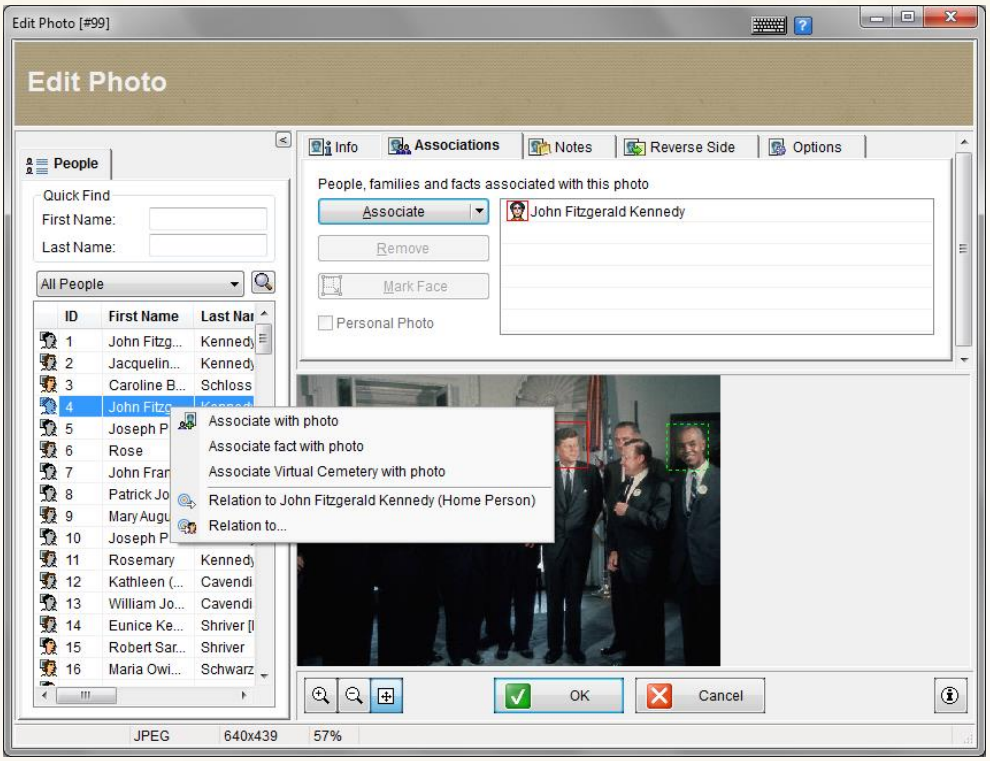


The list in the center shows the people, families or facts that have already been associated with the photo. The icon to the left of each description indicates what it is associated with, as follows:

- : Indicates a person.
- : Indicates a fact.
- : Indicates the virtual cemetery.
- : Indicates a family.
- : Indicates a source.

To associate a person with a photo, do one of the following:

- Right-click the relevant person(s) in the People List and select **Associate with photo**, as shown below:

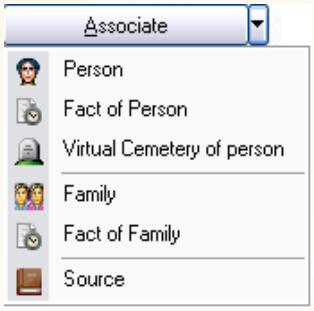


- Select the relevant person(s) in the People List and click the **Associate** button.
- Click the arrow to the right of the **Associate** button and select **Person**.
- Drag the person from the People List and drop it onto the photo. If a face was identified, you can drop it into the relevant green rectangle.
- Click the **Associate** button and then select the person from the Associate Person with Photo window.

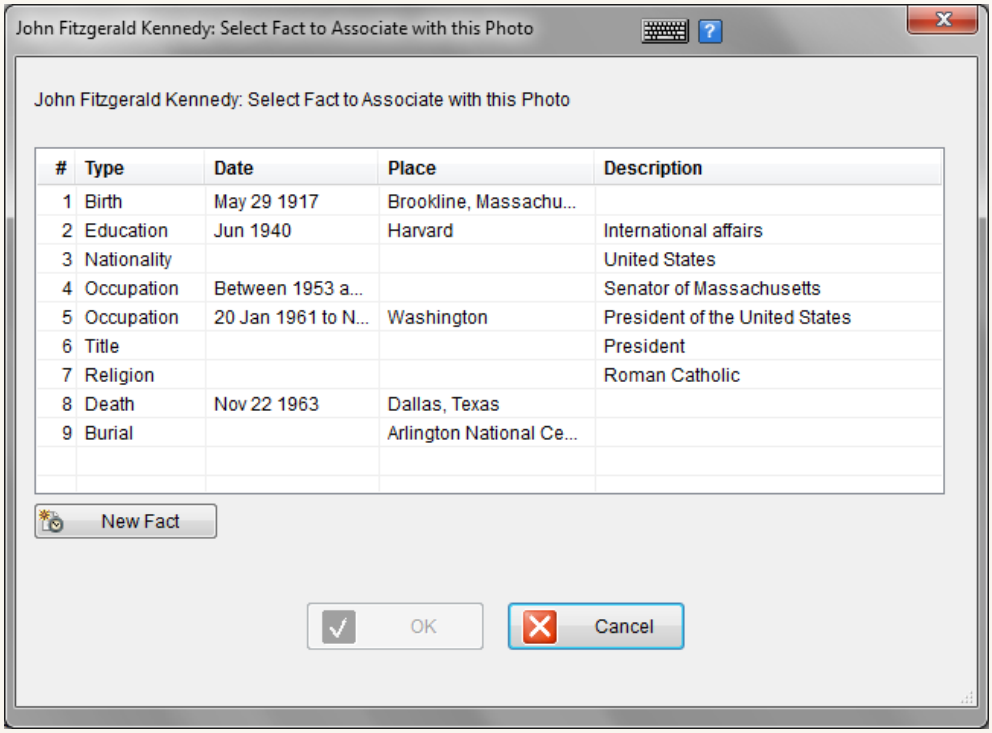
NOTE	Once a person is associated with a marked face, a red rectangle marks that person's face.

Associating Other Information with a Photo

In addition to people in a photo, you can also associate other information from the family tree with a photo by clicking the down arrow to the right of the **Associate** button, as shown below:

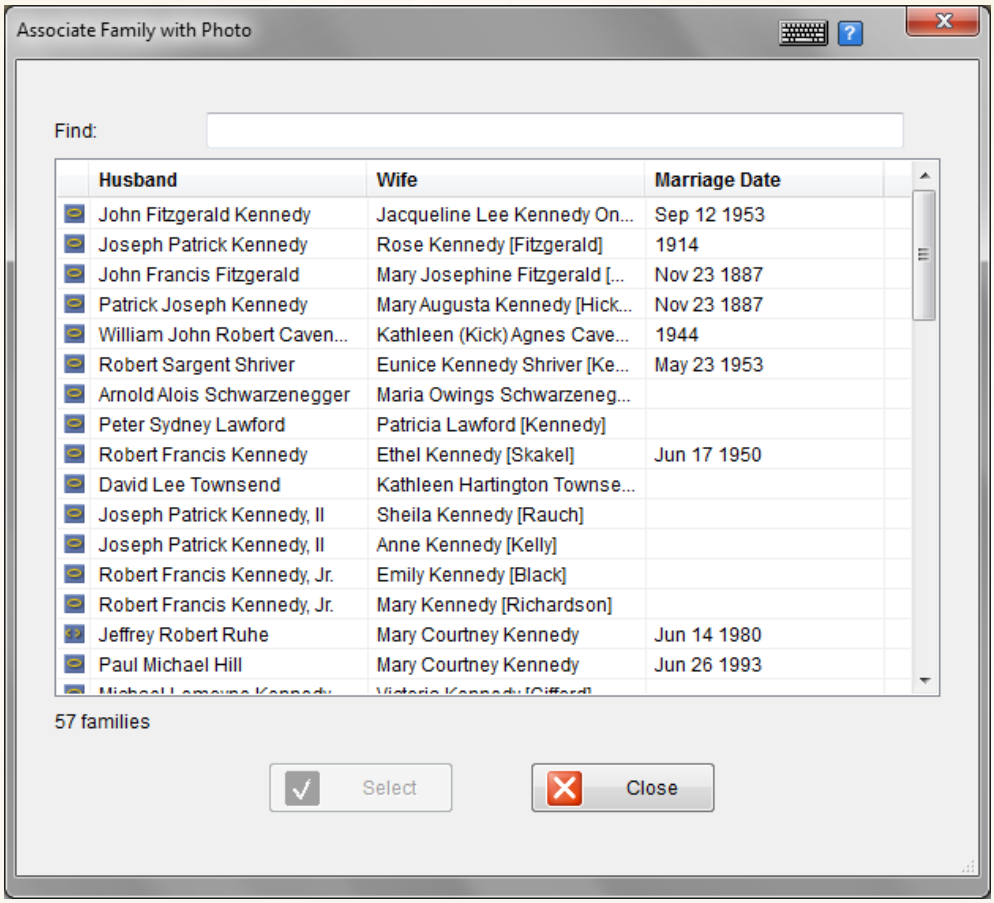


- **Person:** Selecting this option opens a list of people who you can associate this photo.
- **Fact of Person:** This option displays a list of people, which you can select. After selecting a person, the window below is displayed. In this window, you can select a fact about that person to associate with this media. You can also define a new fact for that person, if required.

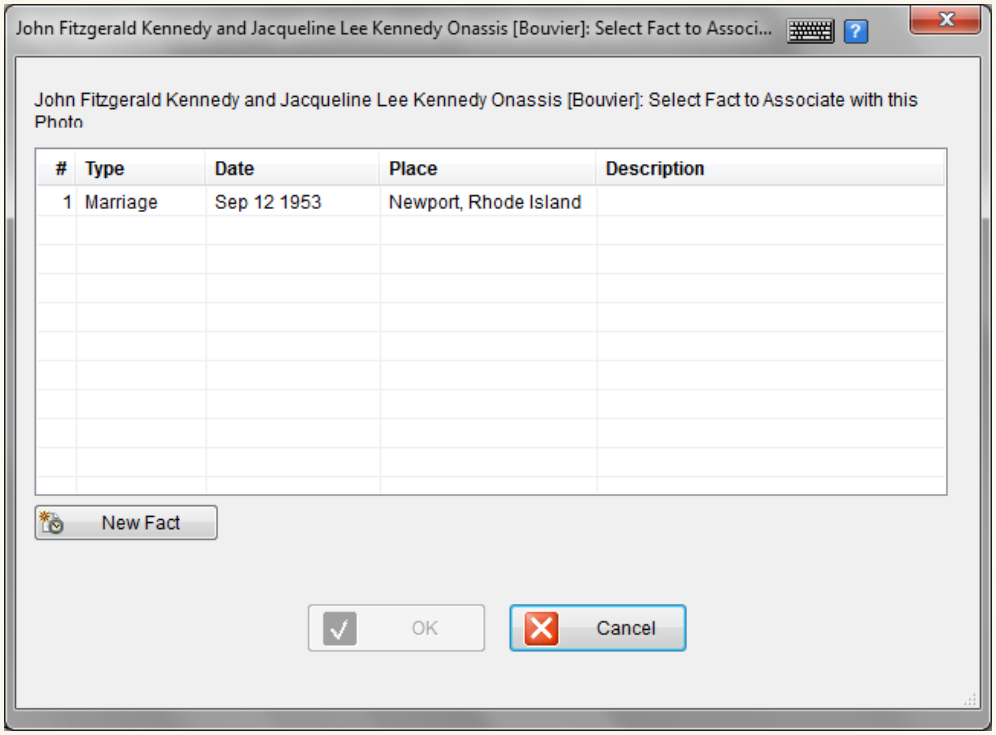


For example, you can associate an immigration fact about a person with a photo of the ship used for the voyage, or an education fact with a photo of the school and so on.

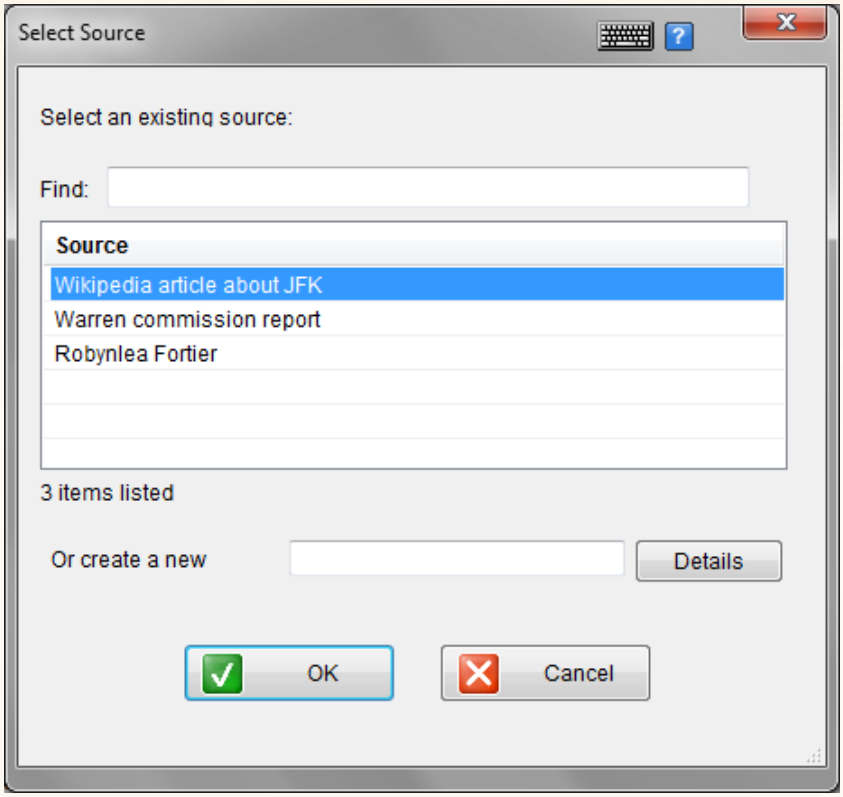
- **Family:** Selecting this option displays the following window, where you can select a family to associate with this photo.



- **Fact of Family:** Selecting this option first displays a list of families for your selection. After selecting a family, the window below is displayed. In this window, you can select a fact of that family to associate with this photo. You can also define a new fact for that family, if required.

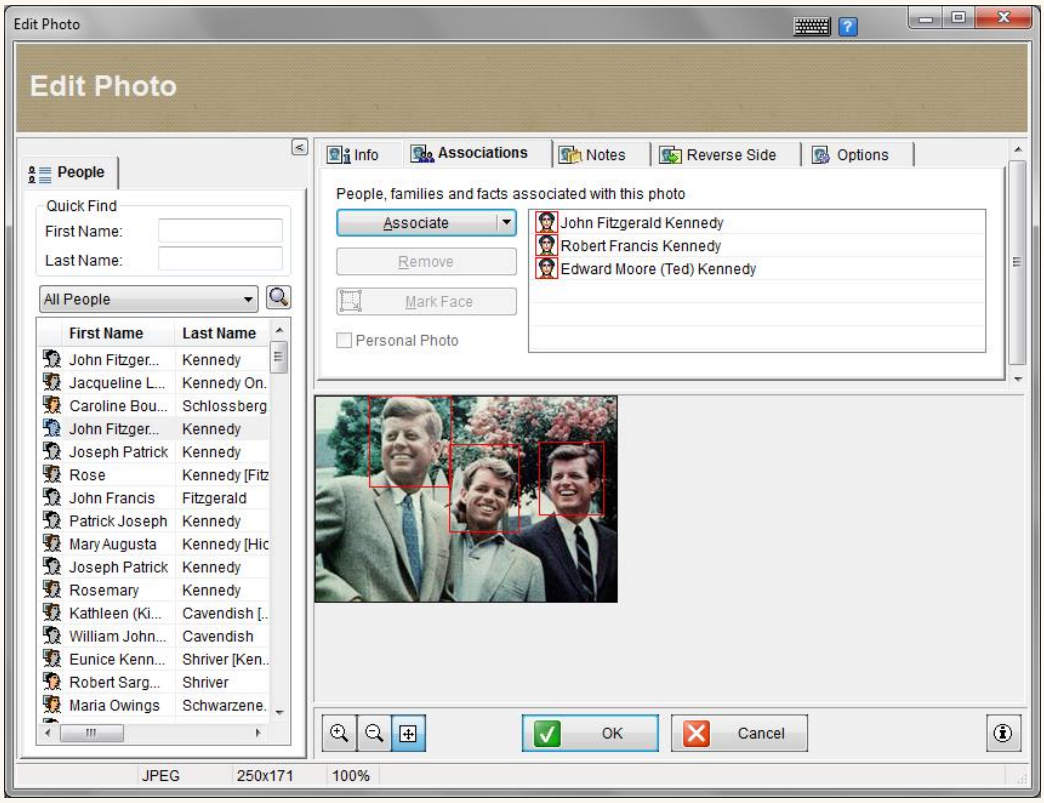


- **Source:** Selecting this option displays the list of sources for your selection.



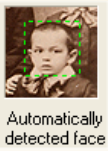
Face Recognition - Marking a Face

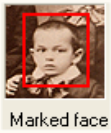
Family Tree Builder enables you to mark specific faces in a photo and to associate this marking with a specific person. This is very useful in group photos, like the one shown below. After a person's face has been marked, that person's name is automatically displayed when you hover over the photo.

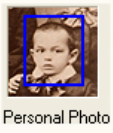


Family Tree Builder also provides a wonderful feature that automatically identifies faces in a photo. Faces that are automatically identified are marked by a green rectangle. This option is turned on by default, or it can be turned off/on in the **Options** tab.

You may click the  button on the bottom right of the Edit Photo window to display a legend reminding you that:

- 

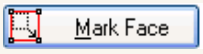
Automatically identified photos are highlighted by a green rectangle, as described above.
- 

Manually marked faces in photos are highlighted by a red rectangle.
- 

The face in a photo that you marked as the Personal Photo is highlighted by a blue rectangle.

NOTE	**Personal Photos:** Family Tree Builder enables you to assign a single picture to each person in order to represent them wherever possible, such as in a report, in a thumbnail that is displayed when you hover over a person, in a list or when they are shown in Tree View. Typically, this photo should be a portrait of their face.

To mark a face:

1. Select the name of the person in the **Associations** list. If that person does not exist in the list, then add him or her.
2. Click the 

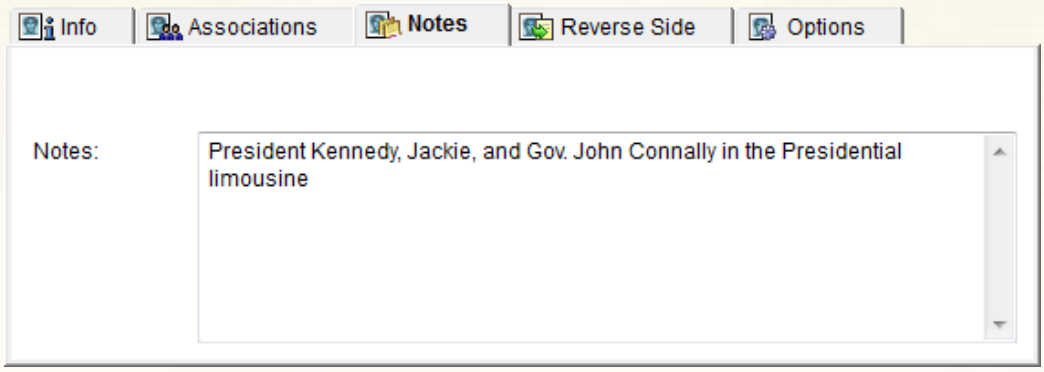
button. The cursor becomes a crosshair.
3. Click and drag to draw a box around the person's face.
4. You can then resize or move the box as necessary.

NOTE	The little white boxes on the Mark Face rectangle are called *handles*, and they indicate which box is selected. You can click on them and drag them to resize the box.

5. Check the **Personal Photo** checkbox to specify that a specific photo is the Personal Photo, which will represent that person in various places in Family Tree Builder, such as Tree View. The box is then displayed in blue. The dimension of a Personal Photo always retains the height/width proportions of 3x4 and thus will force the shape of the rectangle to these proportions.

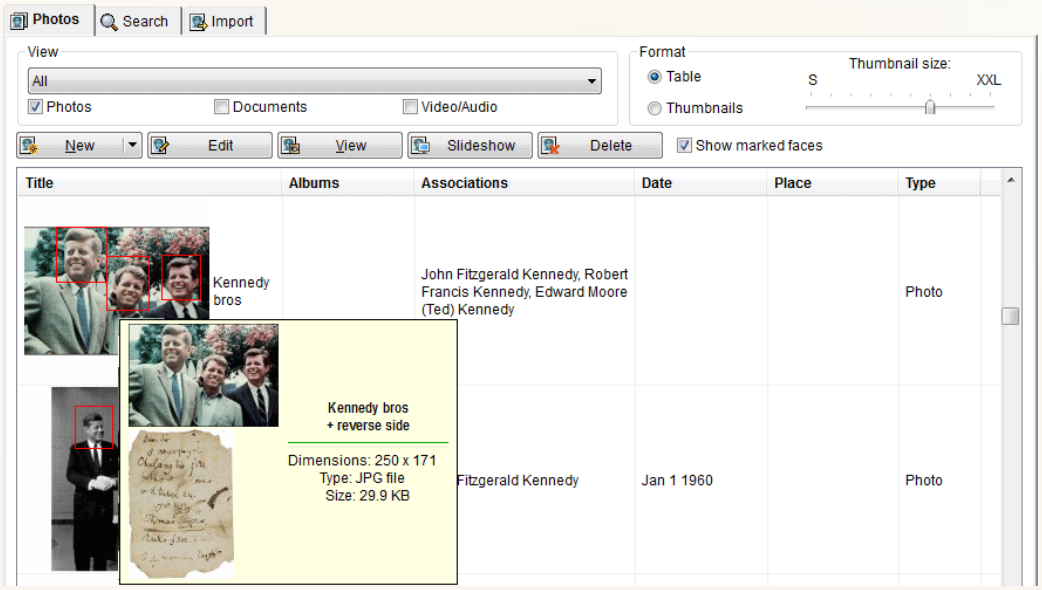
Photos Notes Tab

The **Notes** tab, shown below, enables you to enter notes describing the photo:



Reverse Side Tab

Old photos often have important inscriptions and dedications on their reverse side. Here is an example of the information that is displayed when you hover over a photo that has a reverse side:

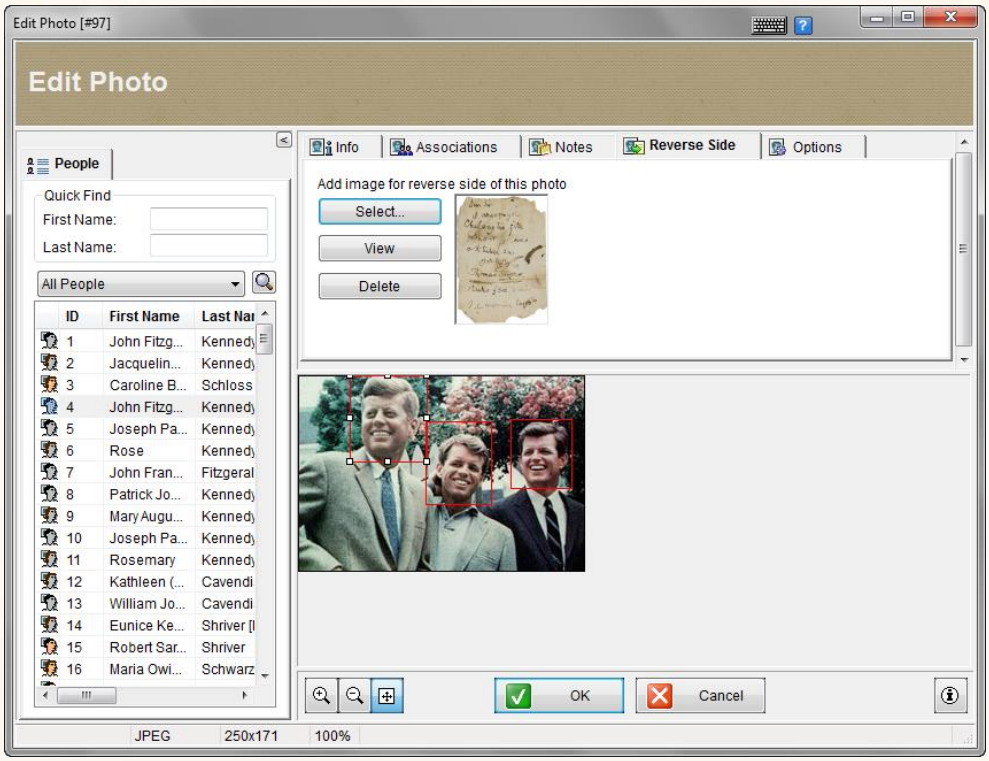


Family Tree Builder enables you to add a scan of the reverse side of a photo, instead of treating it as a separate photo.

To define a reverse side:

1 In the **Reverse Side** tab, click the **Select** button. A file selection window is then displayed.

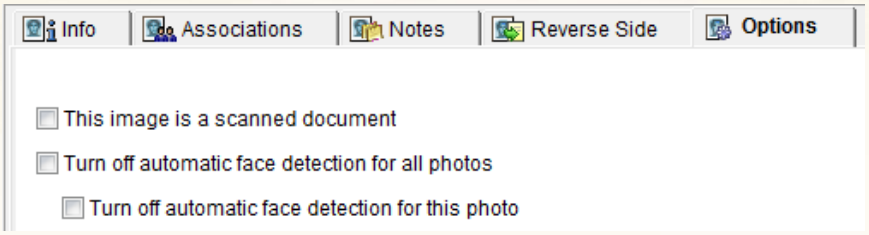
2 Select the file of the reverse side and click **Select**.



Once a reverse side is defined, you can click **View** to view it, or click the **Delete** button to remove this photo's reverse side.

Options Tab

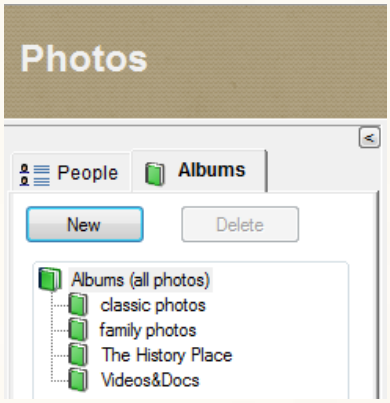
The **Options** tab provides the following options:



- **This image is a scanned document:** Check this option when the media file is in a format that may be used for a photo, such as JPEG, even though it is a scanned document.
- **Turn off automatic face detection for all photos:** Check this option to turn off automatic face detection for all photos. Automatic face detection marks faces that are found in photos in green.
- **Turn off automatic face detection for this photo:** Check this option to turn off automatic face detection for this photo only, which marks faces that are found in the photo in green.

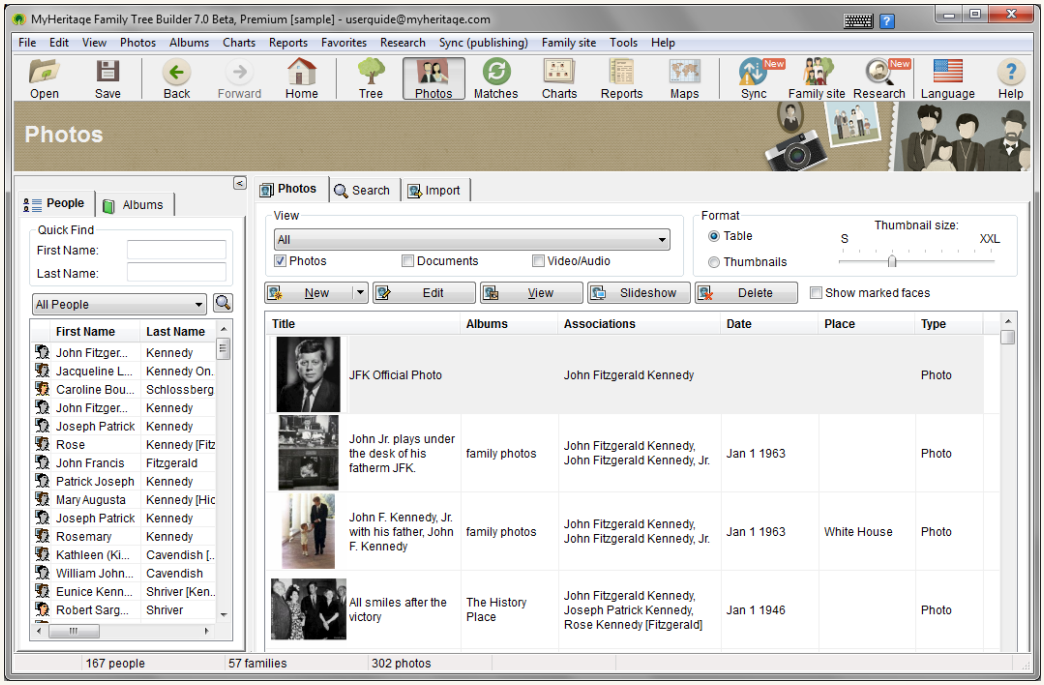
Photo Albums

The Albums List in the Photos View lists all the photo albums that you have defined in your project.

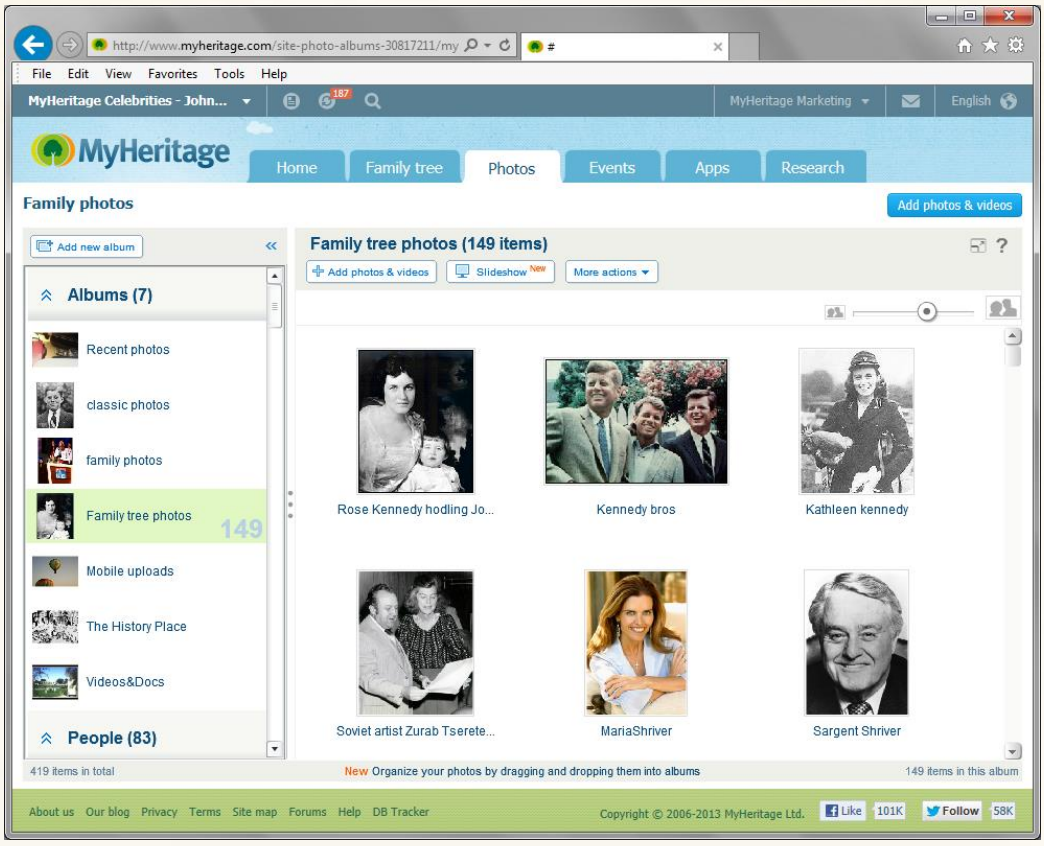


When handling photos in Family Tree Builder, you can choose whether to put them in one or more photo albums. You can add a photo to an album when you initially add the photo (see Adding New Photos), or at any future point in time.

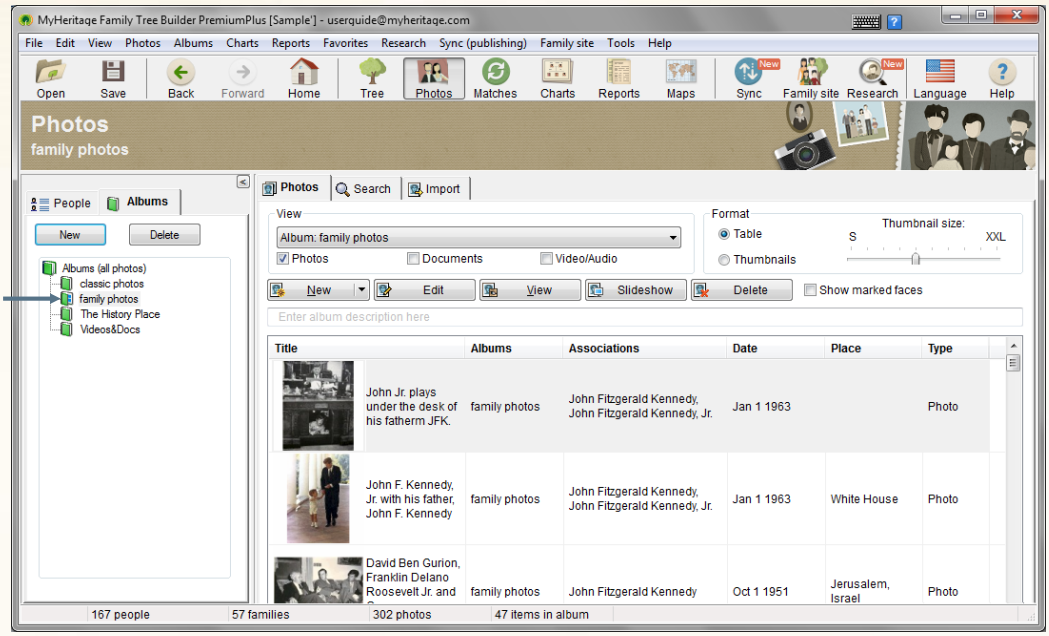
The Photos List contains a column that indicates the album(s) to which a given photo belongs.



When you sync your family tree to a family site, the album structure that you created in Family Tree Builder is reflected in the album structure of the photos in the family site, as shown in the example below:

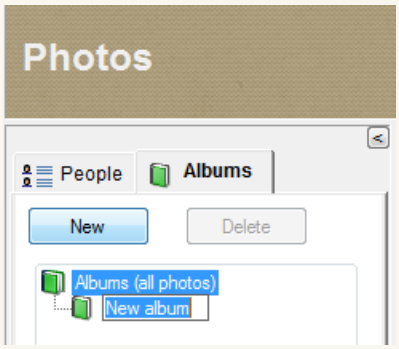


To view the photos of a specific album, simply click the album name in the Albums List.



To add an album:

- In the **Albums** tab, click the **New** button, and then specify a name for the album. You can now add photos to this album.



To delete an album:

- In the **Albums** tab, click the album that you want to remove, and then click the **Delete** button. Note that this action does not delete any photos from your project, but only the album. Any photo that is in this album will remain in your family tree.

To add a photo to an album:

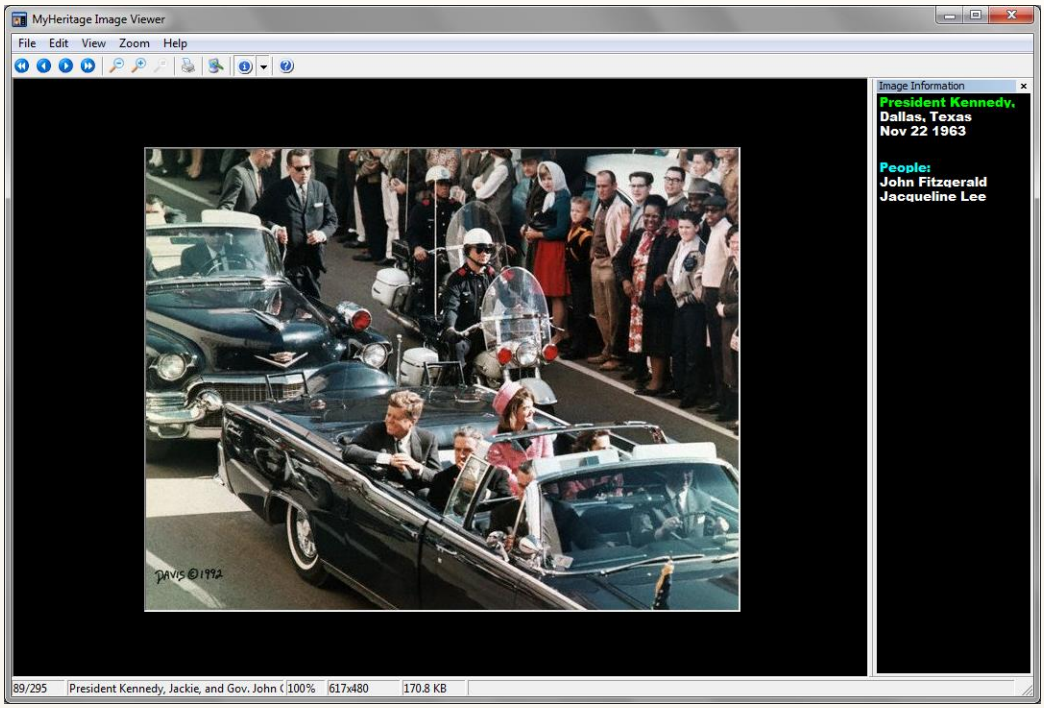
- Click a photo in the Photos List and then drag it into an album in the Albums List. A photo may belong to more than one album. You can also add a photo to an album when you initially add the photo to your project, as described in Adding New Photos.

Image Viewer Window

The Image Viewer is a tool for displaying a full version of a photo. Open it by performing one of the following actions:

- Click the **View** button in the Photos View.
- Right-click a photo and select **View**.

This displays a large view of the photo including its name, and the place and date it was taken. It also provides a list of the people who are marked in the photo on the right, as shown below:



These tools enable you to browse through the images listed in Photos View and provide various display options, as follows:

-  : Goes to the first image listed in Photos View.
-  : Goes to the previous image listed in Photos View.
-  : Goes to the next image listed in Photos View.
-  : Goes to the last image listed in Photos View.
-  : Zooms out. The relative size of the image that is displayed in the window (for example 30%) is shown on the bottom right of the window.
-  : Zooms in. The relative size of the image that is displayed in the window (for example 150%) is shown on the bottom right of the window.
-  : Displays the image in its actual size, meaning 100%.
-  : Prints the image.
-  : Sets this image as the background for your desktop (also called *wallpaper*).
-  : Toggles on and off the display of the **Image Information** panel, which shows the image's name, place and date it was taken, and provides a list of the people that are marked in it on the right. You can click the arrow to the right of this tool to specify that the image information be displayed on the top, bottom, right or left of the image, or if it should be a separate window.
-  : Opens the About MyHeritage Image Viewer window.

The menu options provided in the Image Viewer perform the same functions as above with a few simple and clear additions.

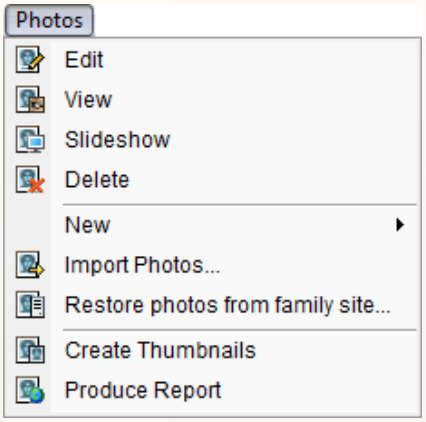
Photos Menu Bar

When Family Tree Builder displays the Photos View, some additional menu options are available from the main menu:

- **Photos Menu**
- **Albums Menu**

Photos Menu

The following describes each of the options in the **Photos** menu:

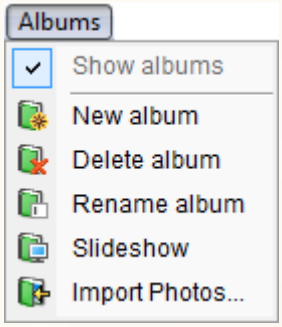


- **Edit:** Opens the Edit Photo window, where you can define various characteristics of the media. (See Editing a Photo)
- **View:** Opens the Image Viewer, which provides various display options. (See Image Viewer Window)
- **Delete:** Removes the selected photo(s) from your project.
- **New:** Opens a wizard that guides you through adding a new photo or any other media item to your project. (See Adding New Photos)
- **Restore photos from family site:** Use this option if you do not have all of the photo files in your project. This may happen if the photo files were deleted from your computer or if you restored your project from a backup. If you have synced your project to a family site, you can restore the photos by copying them from the family site.

- **Create Thumbnails:** Generates thumbnails for photos. Use this option if you see that some of the photos in the Photo List show a placeholder camera for a photo.
- **Produce Report:** Produces a photo album.

Albums Menu

The following describes each of the options in the **Albums** menu:



- **Show albums:** Toggles to show or hide the Album List on the left side of the main window.
- **New album:** Creates a new album and provides a name for it.
- **Delete album:** Deletes the selected album in the Album List.
- **Rename album:** Provides a new name for the selected album in the Album List.
- **Import Photos:** Scans your computer for photos and selects which of them to add to your project.

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CHAPTER 6

Smart Matches



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Smart Matches

About This Chapter:

This chapter describes how to find out whether the people in your family tree match people in other family trees on MyHeritage.com. It contains the following sections:

- **Overview** describes how to match people in your family tree with people in other family trees.
- **Matches in Tree View** describes how a person who is a potential match with someone in your family tree appears in Tree View.
- **Smart Matches Window** describes the functions provided by the Smart Matches window.

Overview

Family Tree Builder enables you to match people that you have defined in your family tree with people in other trees that members all over the world have created on MyHeritage.com. Other people may have the same people in their family tree as you have in yours. This provides you with an opportunity to significantly expand your family tree by automatically finding links between your family and others through Family Tree Builder. **Remember, if someone else has the same person in their family tree as in your family tree, then they may be your family too!**

When you use the Smart Matches feature, each person in your family tree is compared with all the people in all the other family trees on MyHeritage.com. You can then review the list of people that Family Tree Builder suggests may be a match. Afterwards, you can confirm or reject the match by reviewing the people's personal information and photos. Confirming a match creates a link to that person in the other tree. You can also merge items (information, photos, notes) from their family tree into your own.

When you create a new family tree, or when you add people to your tree, it is always recommended to sync the tree to MyHeritage.com in order to receive Smart Matches. The Smart Matches feature in Family Tree Builder makes syncing your family tree even more interesting. It opens the door for Family Tree Builder to enable others to check if the people in **your** tree are a match for theirs. **This means that you may have new and previously unknown family members making contact with you very soon!**

NOTE

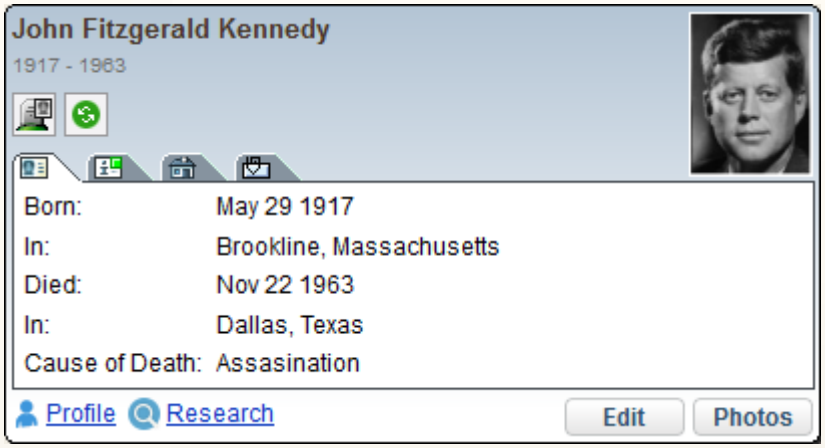
In order to receive Smart Matches, your computer must be connected to the Internet.

In Tree View, the Smart Matches application indicates that a potential match has been found for a person. It does so by showing an icon in that person's card, as described on this page. The Smart Matches application also provides a window that reviews your entire family tree, compares all the people in your tree to those on MyHeritage.com and then shows you the Smart Matches.

Family Tree Builder uses the first and last names, birth and death dates and relationships with other people in the tree to find potential matches for the people in your family tree. These potential matches are presented to you with a percentage score, indicating how closely they match. You can then confirm or reject them as being the same person.

Matches in Tree View

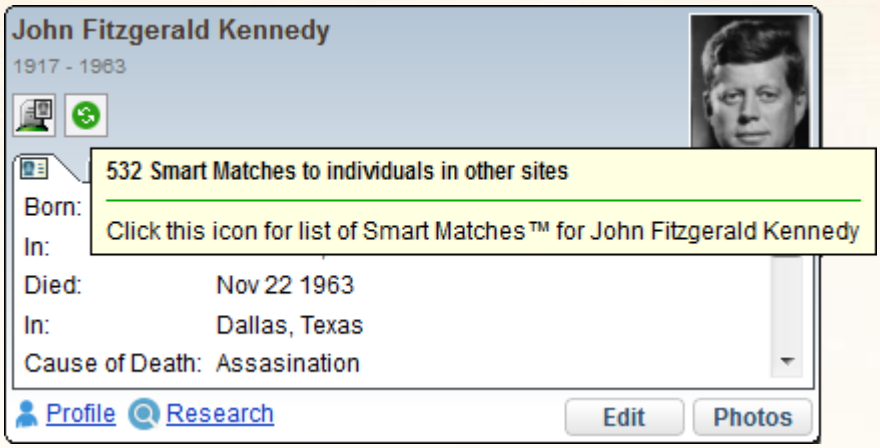
The Smart Matches option indicates whether a potential match has been found for a person in Tree View by showing the icon on that person's card, as shown below:



Each time you add a person or update the details of a person, Family Tree Builder rechecks if any matching people can be found in other family trees. While it is checking, the icon appears gray. If one or more matches are found, this icon then turns green and blinks for a few seconds. If no matches are found, this icon disappears from that person's card in Tree View.

NOTE In order to receive Smart Matches, your computer must be connected to the Internet.

If the icon is green, then you can hover over it to display the following:



This popup indicates how many people are potential matches in other trees. In the window above, this number is 532.

Clicking the icon on that person's card in Tree View opens the **Matches** tab in the Smart Matches window.

Smart Matches Window

The Smart Matches window is displayed by doing one of the following:

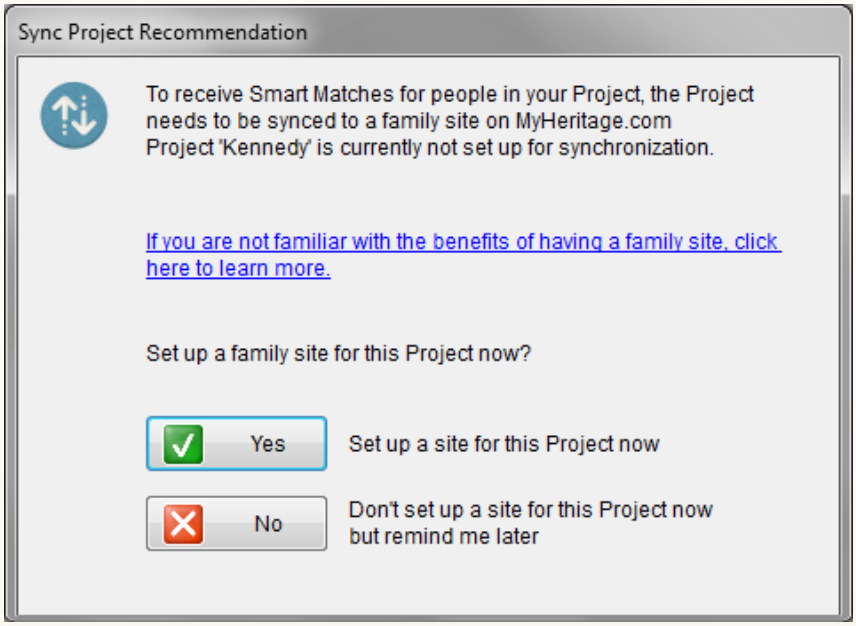
- Clicking the  button in the toolbar opens the **Overview** tab in the Smart Matches window.
- Clicking the  icon in a person's card in Tree View opens the **Matches** tab in the Smart Matches window.

The Smart Matches window contains three tabs, as follows:

- The **Overview Tab** shows either a list of people in your family tree that have matches or a list of other family trees in which those matches where found.
- The **Matches Tab** shows the matches for a specific person in your family tree.
- The **Compare Tab** graphically compares a person in your family tree to the potentially matching person in someone else's family tree. This enables you to merge the information from the compared family tree into your own family tree.

Smart Matches and Syncing

The Smart Matches feature finds matches to people in family trees of other MyHeritage users. Therefore, it is recommended that you also sync your family tree to a family site. If you have not already done so, the following window is displayed when you open the Smart Matches window:

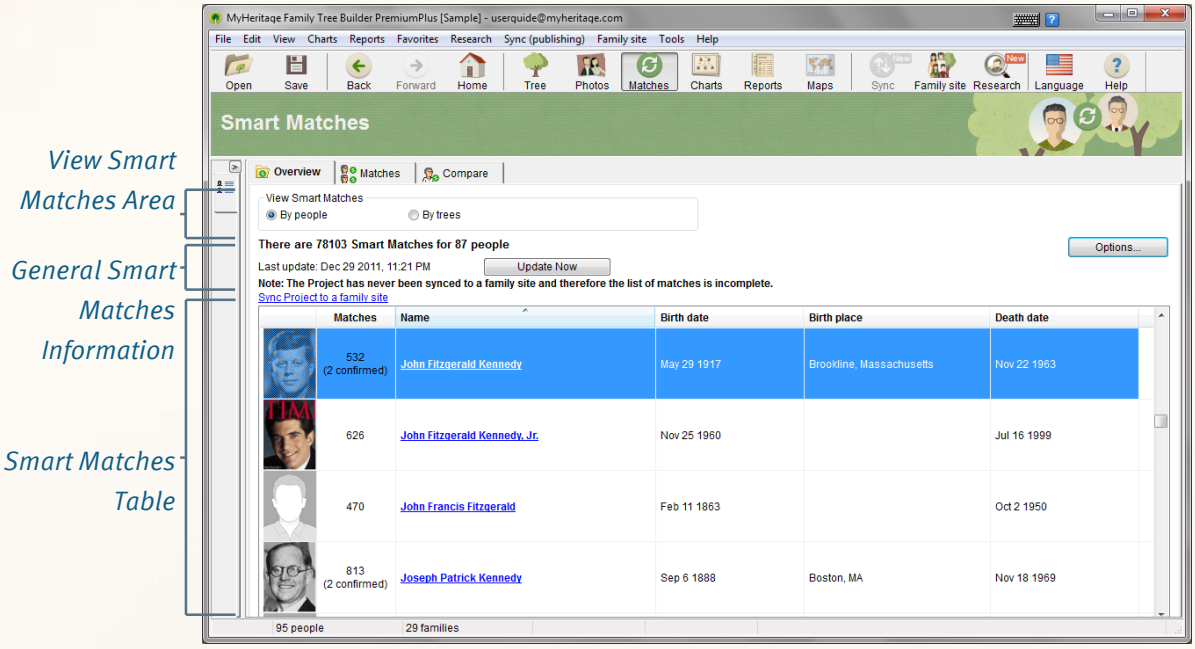


Click **Yes** to set up a family site if you have not already done so, and then sync this tree to the family site.

Overview Tab

Clicking the button in the toolbar opens the **Overview** tab in the Smart Matches window.

The **Overview** tab shows a list of the people in your tree that match people in other family trees, as shown below:



Family Tree Builder compares all the people in your family tree with all the other people in all other trees on MyHeritage.com, in order to identify those people that may match the people in your tree. It then displays each person in your tree that has a match in a row of the Smart Matches Table.

The following columns describe each person in this window. You can sort this list by clicking the column header:

- **Photo:** Shows the personal photo of this person.
- **Matches:** Specifies how many matches were found for this person in other trees.

> **NOTE** If no matches were found for a person in your tree, then that person does not appear as in this window.

- **Name:** Specifies the name of this person in your tree. Click the name to display all of the person's matches.
- **Birth Date, Birth Place, Death Date:** Specifies these details for the person in your family tree.

View Smart Matches Area

The top section of this tab enables you to select whether to display the matches **By people** or **By trees**:

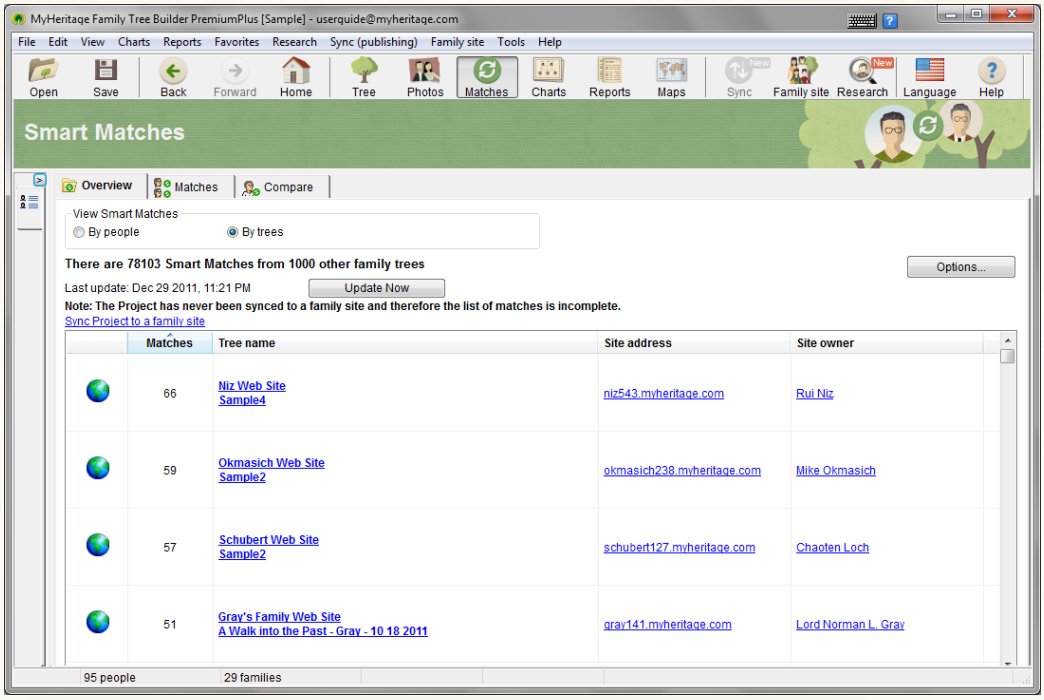
- Viewing this window **By People** shows which people in your tree have matches and how many matches they have, as described above.
- Viewing this window **By Trees** shows the family trees in which you have matches and how many matches each has. This may help you identify other family trees that contain numerous people that match your family tree, thus enhancing the possibility that you have found new family members!

The top section of this tab also shows general information about the Smart Matches shown in this window, such as how many people have been found in other trees on other sites that match the people in your tree.

> **NOTE** The **Update Now** button can be clicked to update and refresh the displayed data.

View Smart Matches by Trees

To view a list of family trees that match people in your family tree, click the **By trees** option in the View Smart Matches area:



The following columns describe each matching family tree in this window. You can sort this list by clicking a column header:

- **Matches:** Specifies how many matches were found in this tree.
- **Tree name:** Specifies the name of the family site and the name of the family tree in this site. Click the name to view all matches from this family tree.
- **Site address:** Specifies the address of this family site. Click the address to view this family site in your web browser.
- **Site owner:** Specifies the name of the manager of this site. Click the name to view more information about this member in your web browser.

Right-click Menu – Overview Tab

You can right-click a row in the **Smart Matches** table to display the following menu:

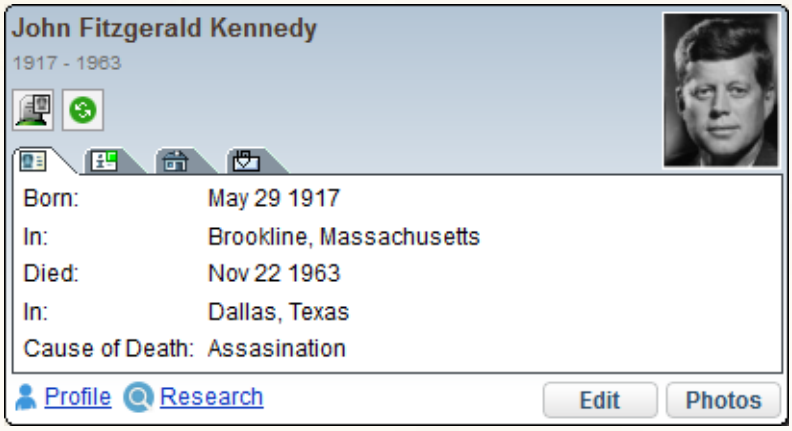


The following describes the options in this menu:

- **Display Smart Matches for [Person's Name]:** Displays this person in the Matches tab as described below. You can also click a person's name or double-click a line to view the Matches tab.
- **Display in Family Tree:** Displays the selected person in Tree View.
- **Edit Details:** Opens the Edit Details window for the selected person, in which you can update information for that person.
- **Relation to Home Person:** Displays a window that describes the relationship between the selected person and the Home Person.
- **Relation To:** Displays a window in which you can select another person to see the relationship between this person and the selected person.

Matches Tab

The **Smart Matches** icon that appears on a person's card in Tree View indicates that a potential match has been found for the person:

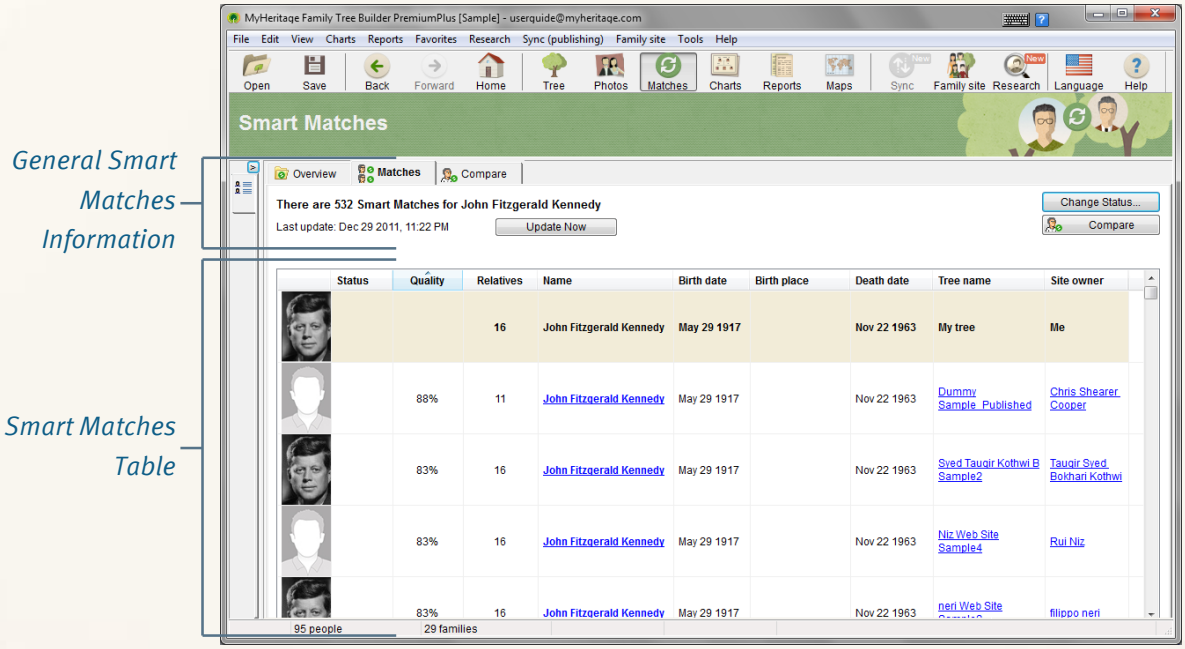


Clicking the icon opens the **Matches** tab in the Smart Matches window.

NOTE

You can also display the **Matches** tab by clicking the button in the toolbar. This opens the **Overview** tab in the Smart Matches window. You can then click a person's name to view this person's matches in the **Matches** tab.

The **Matches** tab in the Smart Matches window lists the people in other family trees that match a specific person in your family tree, as shown below:



General Smart Matches Information

The top-left part of this tab shows general Smart Matches information, such as how many people in other trees have been matched to the selected person. The window above indicates that there are 532 potential matches.

The **Update Now** button refreshes the displayed data from the MyHeritage.com database.

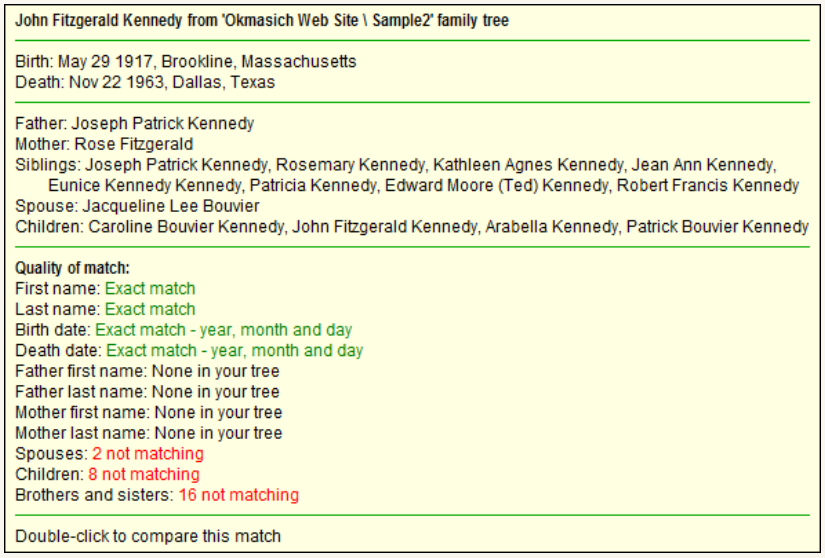
NOTE

Some matches may not be shown in this window because their names (or other information) are slightly different. You can customize the strictness of matches in the Options window.

The Table of Potential Matches

This window presents one row for each person in the **Smart Matches** table. The top row is highlighted in beige and represents the person in your tree for whom you are checking for matches. Each subsequent row represents a match to a person in another tree. These matches appear in the order of their *Quality*, meaning how accurate Family Tree Builder assesses the match to be. The higher the score, the greater the certainty that the match is accurate. The quality is higher as more of the data about the two people are the same.

You can hover over the data in any column to display more information about this person. For example, the following is displayed when you hover over the **Quality** column of a person in this window:



The fields in this window are color-coded, as follows:

- **Green:** These fields are identical or similar for these two people.
- **Red:** These fields are different for these two people.
- **Black:** These fields do not exist for either of these two people.

The following describes the columns of this window. You can sort this list by clicking the column header.

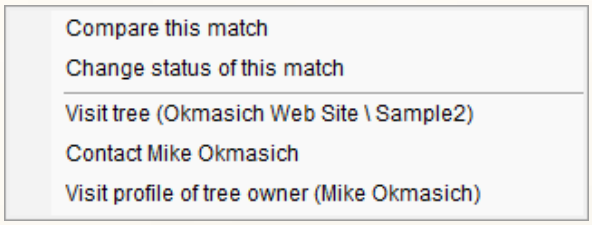
- **Photo:** Shows a photo of this person in the other tree.
- **Status:** Specifies whether you have confirmed or rejected this match. This column may have one of the following values:
  - **Empty:** This is the starting status for a person who is a potential match.
  - **Confirmed:** This status indicates that you have confirmed that this is the same person.

    NOTE You can view the data of this other person and then enter it into your tree or create a link to it in the form of a citation.
  - **Rejected:** This status indicates that you do not think that this is the same person. Rejected people appear at the bottom of the list.
- **Quality:** Shows a percentage score indicating how closely Family Tree Builder assesses that person is a match. The more details and relatives this person shares with the person in your tree, the higher the score. People with a higher score have more green fields showing in the popup that is displayed when you hover over this field. People with a lower score have more red or black fields showing. For example, people with the same name and birth date get a higher score than someone with the same name, but a different birth date. Also, someone with the same first name and the same parents may get a higher score.
- **Relatives:** Specifies the number of direct relatives that the person in the other tree has. This is quite interesting, since this may indicate a family tree that is full of information. You may be very interested in looking at that tree in order to expand your family tree by adding these relatives to your tree.
- **Name:** Specifies the name of the person in the matched tree. Click the name to open the **Compare** tab and compare the families of the person in your tree with the selected person in the other tree.

- **Birth date, Birth place, Death date:** Specifies this information for the person in the other tree.
- **Tree name:** Provides a link to the tree of the matched person on the other family site. This tree is displayed in a separate browser window and the matched person is in focus in the tree.
- **Site owner:** Provides a link to the personal information of the owner of the matched site.

Right-click Menu – Matches Tab

You can right-click a row in the Smart Matches Table to display the following menu:

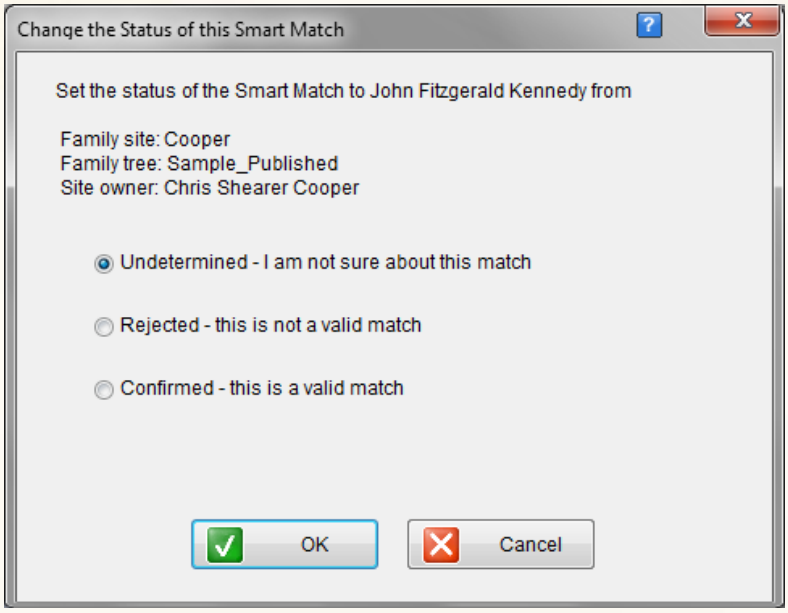


The following describes the options in this menu:

- **Compare this match:** Displays this person in the **Compare** tab, which is a graphical representation of the tree compared with the person in the other tree. This behaves the same way as when you click a person's name that is displayed as a link.
- **Change status of this match:** Enables you to confirm or reject whether this is the same person. The word Confirmed or Rejected then appears in the rightmost column of the table of this person's row in the Matches tab.
- **Visit tree:** Displays the entire tree of the matched person in a separate browser window. This behaves the same way as when you click a tree's name that is displayed as a link.
- **Contact:** Opens a window in which you can compose an email message to the site owner.
- **Visit profile of tree owner (site owner name):** Provides a link to the personal information of the owner of the matched site. This behaves the same way as when you click an owner's name that is displayed as a link.

Change Status of the Match

The Change the Status of this Smart Match window enables you to confirm or reject whether the matched person is the same person as in your tree.



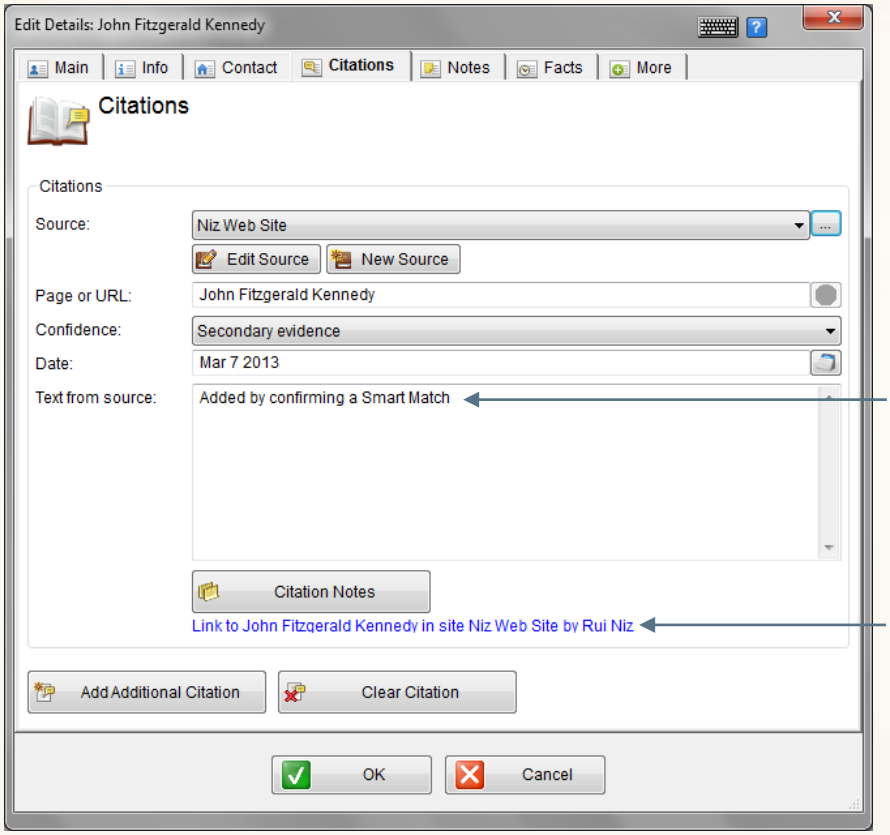
This window can be displayed by one of the following methods:

- Right-clicking any row (excluding the first one) in the table shown in the **Matches** tab, and selecting the **Change Status of this Match** option in the menu that is displayed.
- Selecting any row (excluding the first one) in the table shown in the **Matches** tab and clicking the **Change Status...** button.

You can select one of the following options in the window and click **OK**:

- **Undetermined:** This is the starting state for a person that is a potential match. This indicates that you have not yet confirmed or rejected this match. Use this option when you change your mind, after having confirmed or rejected the match in the past.
- **Rejected:** This status indicates that you do not think that this is the same person. Rejected people appear at the bottom of the list in the **Matches** tab.

- **Confirmed:** This status indicates that you have confirmed that this is the same person. If you select this option, an additional field is displayed, enabling you to add a link from this person in your tree to the matched person in the form of a citation:

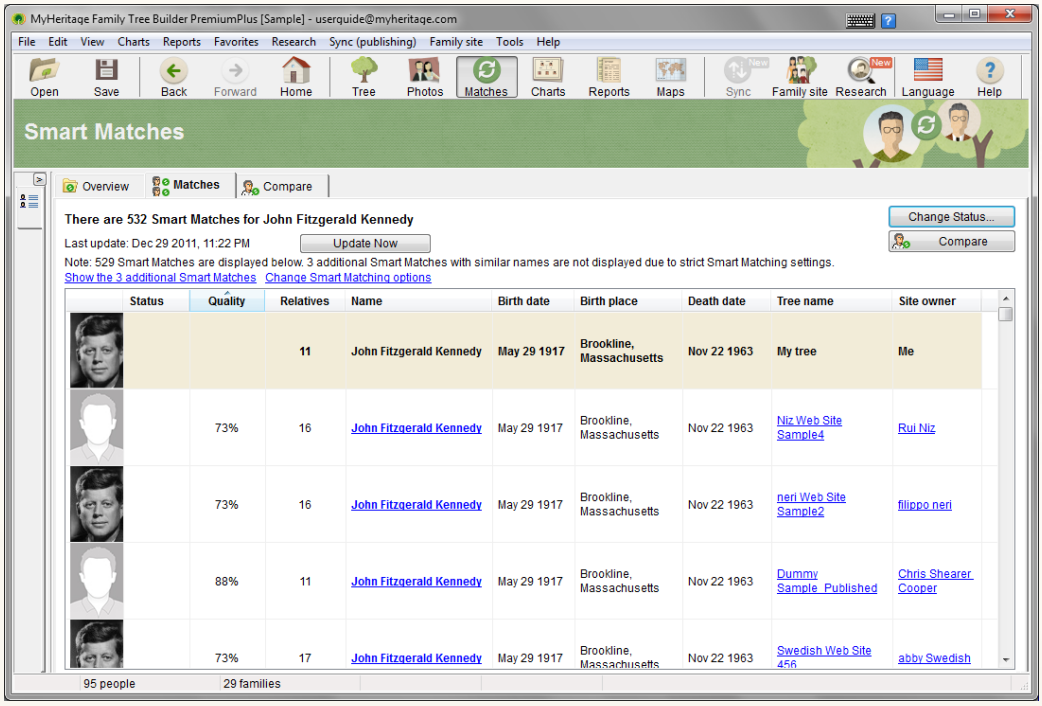


The window above shows an example of a citation that was added by confirming a Smart Match. The bottom of this window provides a link to the matched person in the other tree.

Accessing Additional Matches

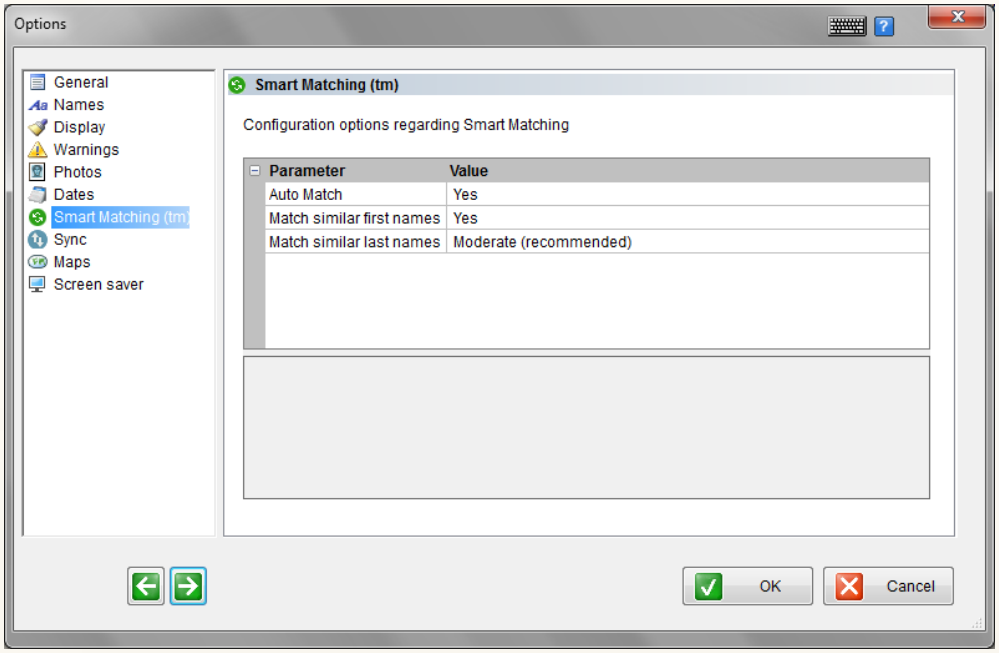
Some matches may not be shown in the **Matches** tab because their names (or other information) differ too much from the person in your family tree.

If there are additional matches, a special indication appears above the list of matches. In the example below, the person has 532 matches, but the list only shows 529 matches. There are 3 additional matches that are hidden because they differ significantly from the person in your tree:



Two links are provided above the list of matches in the **Matches** tab that enable you to access more matches, as follows:

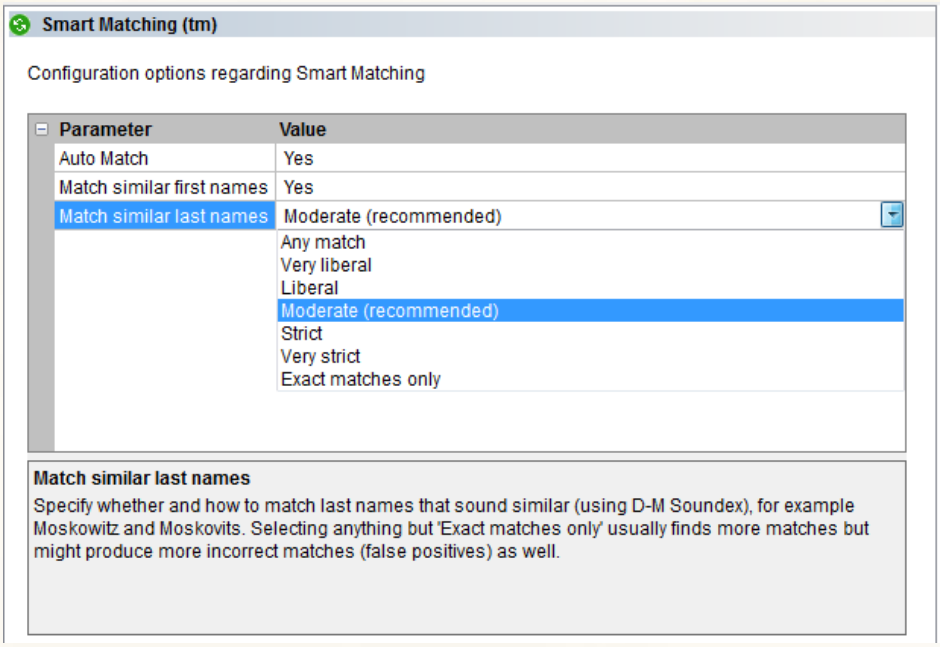
- **Show the additional Smart Matches:** This link adds the people who were not shown in the list because of the strict definitions in the Options window. These people are displayed in gray.
- **Change Smart Matching Options:** This link displays the Options window, where you can customize how strict the Smart Matching feature is when comparing similar information, as shown below:



This window contains the following parameters:

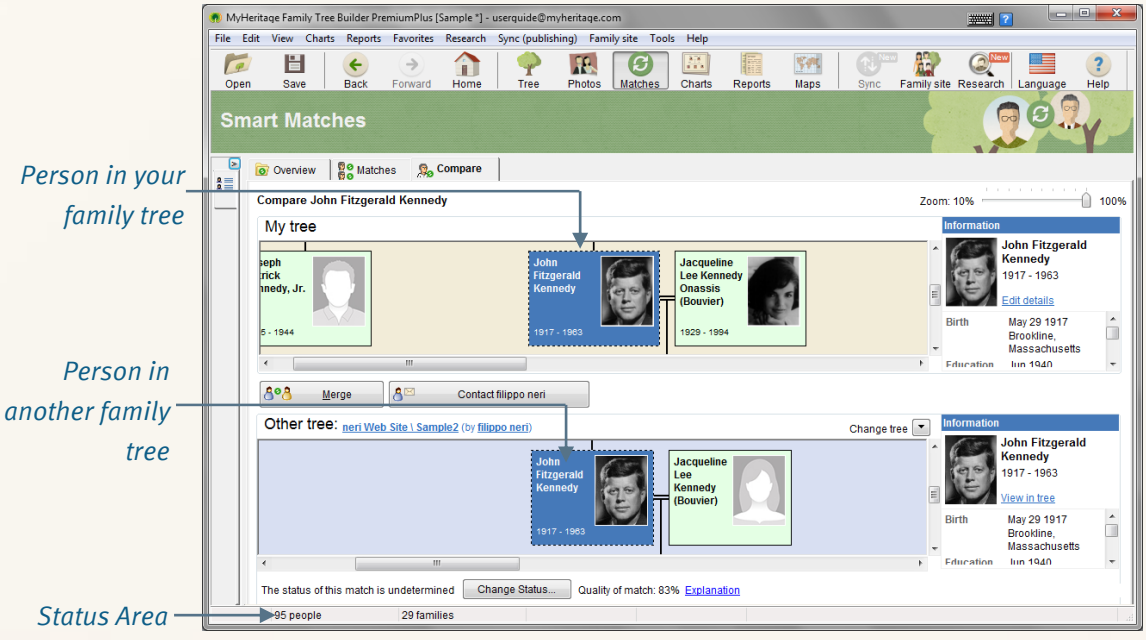
- **Auto Match:** Specifies whether or not the automatic matching features that appear in a person's card and that show a green icon are activated. Selecting **No** deactivates the feature that automatically searches for matches whenever you add a person or edit a person's details.
- **Match Similar First Names:** Determines whether to match people with a similar first name, for example, Robert and Bob.

- **Match Similar Last Names:** Specifies how strictly to compare last names during Smart Matching. Select one of the options from the dropdown list shown below:



Compare Tab

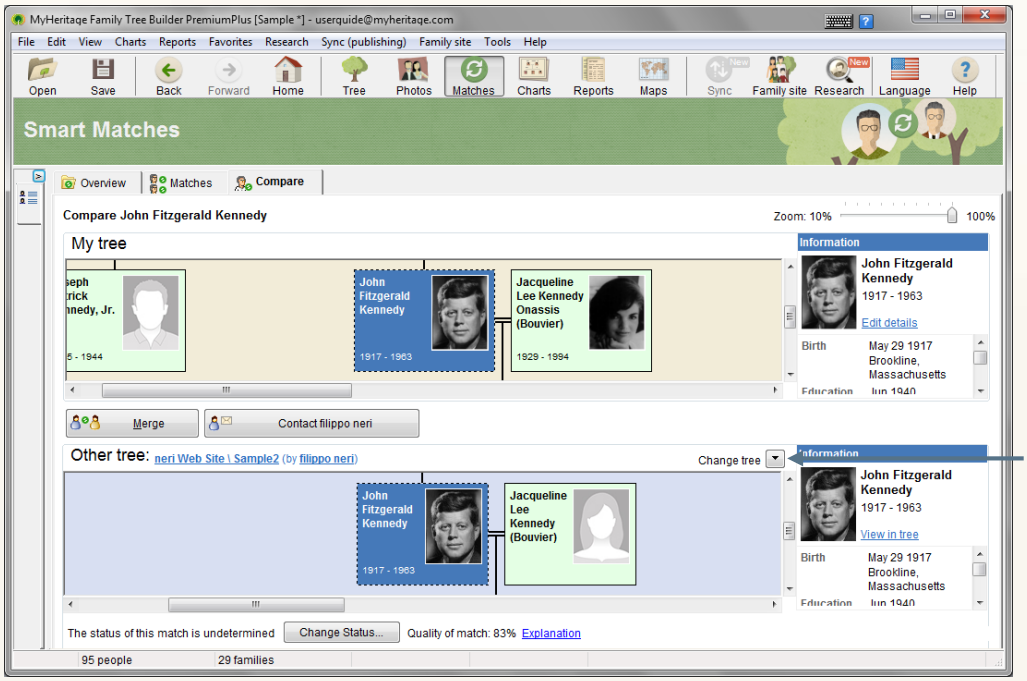
The **Compare** tab shows a visual comparison of the person in your family tree with the matched person in someone else's tree, as shown below:



You can display the **Compare** tab of the Smart Matches window by performing one of the following:

- Double-clicking any row (excluding the first) in the table shown under the **Matches** tab.
- Clicking the name of the person in any row (excluding the first) in the table shown under the **Matches** tab.
- Right-clicking any row (excluding the first) in the table shown under the **Matches** tab, and selecting **Compare This Match** from the menu that is displayed.
- Selecting any row (excluding the first) in the table shown in the **Matches** tab and clicking the **Compare** button that appears in the top right part of the window.

Compare Trees



The top part of this window shows the person that is in your tree as the focus of his or her family.

The bottom part of this window shows the matched person in the other tree as the focus of his or her family.

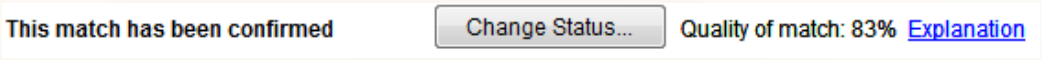
The middle-right of this window provides a **Change tree** button that opens a menu from which you can view any of the trees where there is a match to this person in your tree.

Each person's card is color-coded, as follows:

- **Dark Blue:** Indicates the selected person in each tree. When you select a person in one tree, his or her matching person in the other tree is selected automatically.
- **Green:** Indicates a relative of the person in your tree for whom a match was also found in the other tree.
- **White:** Indicates a relative for whom no match was found.

The name of the matched site and tree, as well as the site owner, is displayed above the bottom tree. Clicking these opens a separate browser window to display the full tree or the site owner's details.

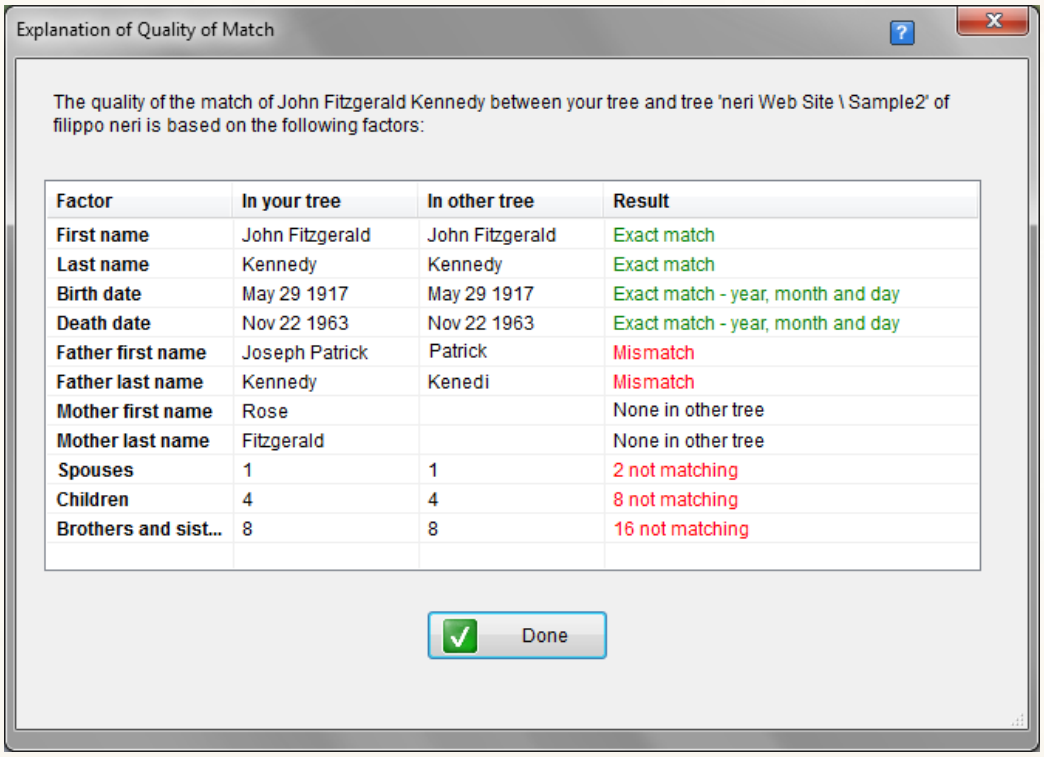
Status Area



The bottom part of this window indicates the status of this match, meaning whether this match was confirmed, rejected or undetermined.

The bottom part of this window also shows the **Change Status...** button, which allows you to confirm or reject this match. (See Change Status of the Match)

The **Quality of Match** field shows a score indicating how well this person matched. The more details and relatives this person shares with the person in your tree, the higher the score. People with a higher score have more green fields showing in the window that is displayed when you click the **Explanation** link. People with a lower score have more red or black fields showing in the window. You can select **Explanation** to display the following window:



This window shows the various types of information defined for this person in your tree and in the matching tree, and indicates whether they match in the **Result** field. These fields are color-coded, as follows:

- **Green:** These fields are identical or similar for these two people.
- **Red:** These fields are different for these two people.
- **Black:** The field does not exist for at least one of these two people.

Personal Information Cards

Personal information cards let you compare vital information about the matched people quickly and easily. They look like this:



When you select a person in the My tree chart or in the Other tree chart, the selected people in the Personal Information cards are changed as well. The top card shows the details of the person in your tree and the bottom card shows the details of the matched person in the other tree.

The information is color-coded in the following way:

- **Red:** The information is different for these two people.
- **Blue:** The information exists for the matched person, but not for the person in your tree.
- **Black:** The information for the two people is the same.

Zooming in under the Compare Tab

This slider controls the display size of the trees in the window. Slide it to the right to enlarge the view or to the left to shrink the view.



To contact a family site owner:

- Under the **Compare** tab, click the **Contact** button to send a MyHeritage message to the manager of the matching site.

TIP

The **Compare** tab enables you to compare your tree to any of the matched trees. However, any living people in the matched tree for whom you do not have a matching relative in your tree are considered private. You can contact the Family Site owner of the matched tree for permission to access this information.

Smart Match Merge Utility

After matching your family tree to trees on other sites, you can use the Smart Match Merge Utility to add details, notes and photos about the matched person and his/her relatives from the matched tree to your tree.

NOTE

The information for a deceased person is never private.

Merging Information

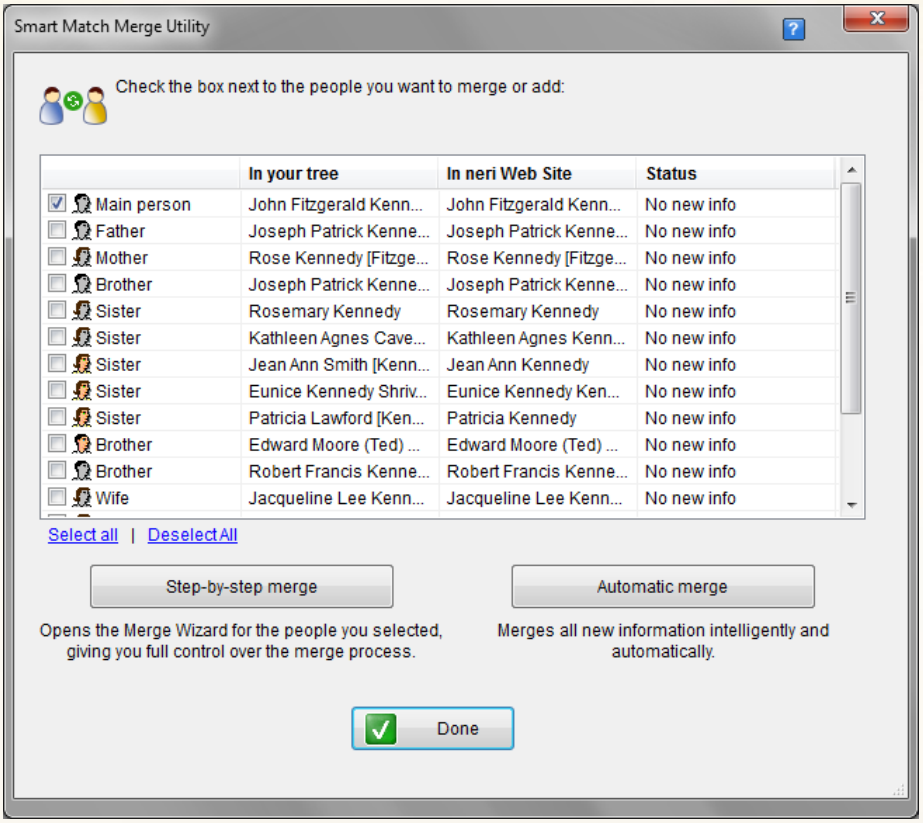
You can merge all information about the matching person and his or her relatives into your family tree. This can either be done automatically by accepting all the intelligently merged information, or performed manually, step by step, confirming each data merge separately.

NOTE

This feature is only available for Premium memberships. See Merging of Smart Matches for more details.

To merge compared tree information into your family tree:

1 Click the **Merge** button under the **Compare** tab, which displays the Smart Match Merge Utility window:



This window displays a list of all the people in your tree and in the compared tree. For all matched people, both the name of the person in your tree and in the compared tree are displayed, as well as their relation to the main person and an indication of whether or not new information is available in the matching tree. Living relatives of the compared person who you do not have in your family tree are considered private and only their last name will be shown.

New relatives and people who have new information are selected by default. You can accept this selection or check and uncheck the people in the list to determine which people's information will be merged.

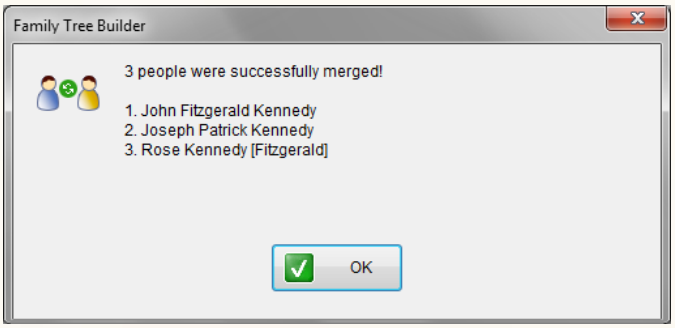
2 You can now do one of the following:

- Perform an automatic merge, where all items are intelligently merged automatically.
- Perform a step-by-step merge, where you can confirm each merge.

To perform an automatic merge:

NOTE This feature is only available for Premium memberships. See Merging of Smart Matches for more details.

1 In the Smart Match Merge Utility window, click **Automatic merge**. The merge is performed automatically. This may take a few seconds, as the information is copied to your tree. At the end of the process, Family Tree Builder shows the following summary:



The information from the compared family tree is merged into your tree and the status of each person in the Smart Match Merge Utility window is changed to **Merged** and marked in green.

2 Click **OK** to close the window.

To perform a step-by-step merge:

NOTE This feature is only available for Premium memberships. See Merging of Smart Matches for more details.

- Click Step-by-step merge.

  The following information can be merged for each person selected in the Smart Match Merge Utility window:

  - Name
  - Birth details
  - Death details
  - Marriage
  - Facts

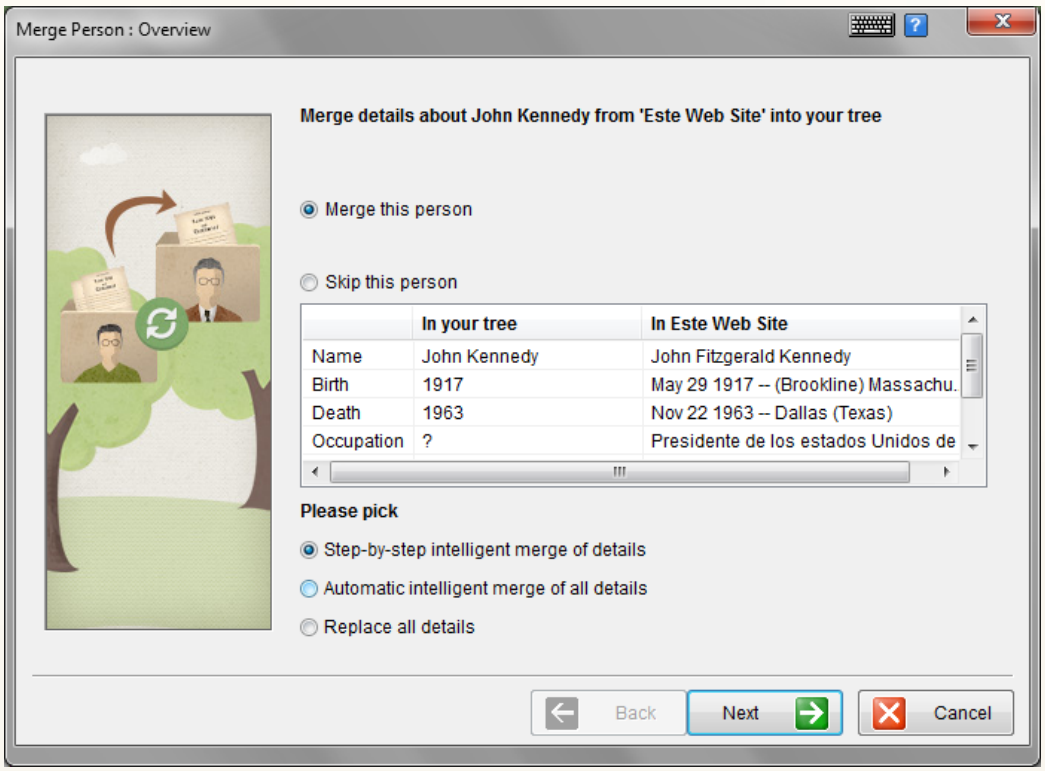
- Notes
- Photos

NOTE The specific merge steps depend on the information available in both trees.

For each person who was selected in the list, the Smart Match Merge Utility shows a series of steps in a wizard format. Each of the steps in the wizard is described below.

Overview Step

If you are merging the main person who is compared, the following window is shown in the **Overview** step:



A summary of the details of the person in your tree appears next to the details of the compared family tree.

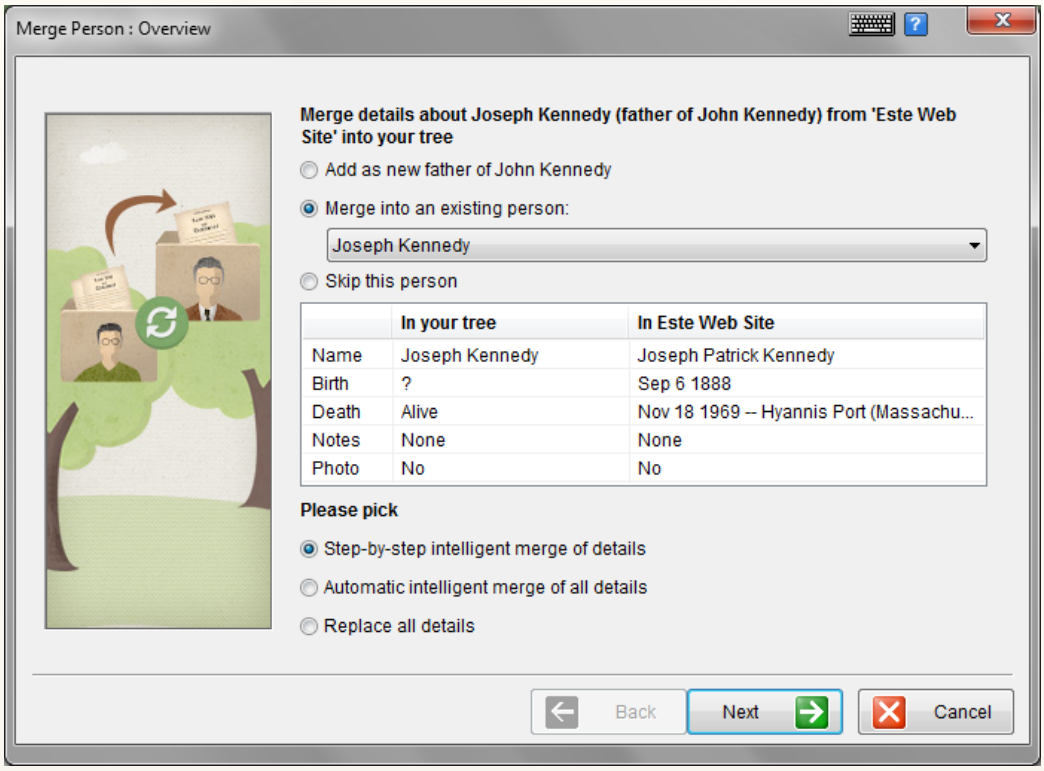
Pick one of the following options:

- **Step-by-step intelligent merge of details:** Merges the details in a step-by-step wizard that assists you through the detailed merge procedure.
- **Automatic intelligent merge of all details:** Accepts all the defaults of the merge wizard for merging the information about this person.
- **Replace all details:** Replaces all details about the person in your tree with the information about this person in the matching tree.

Click **Skip this person** if you do not want to merge information about this person and skip to the next person in the list.

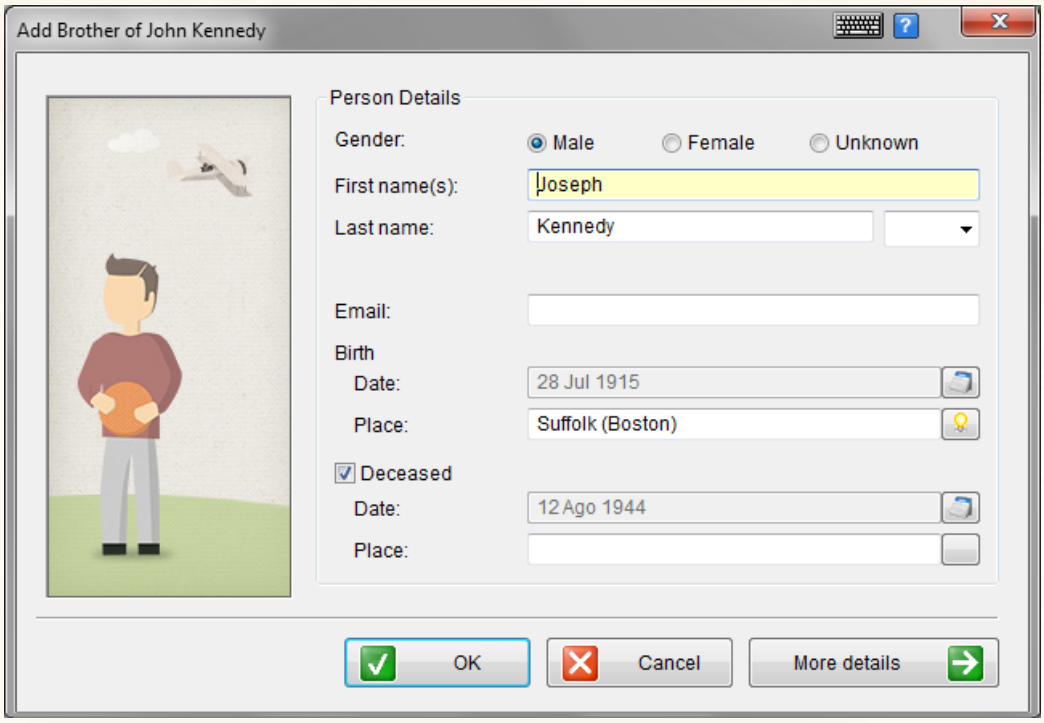
Click **Next** to display the next steps that show matching information.

If you are merging information about a relative of the person that is being compared, the following window is displayed:



Here, in addition to the options discussed above, you can select whether to merge this relative into a relative you already have for this person, or to add this person as a new relative in your tree. If this matched relative already matches a similar relative in your family tree, then Family Tree Builder will suggest to merge these people. Otherwise, you are prompted to create a new relative in your tree.

If you select to add a new relative to your tree, you are presented with the Add Person window, which includes information about this relative as it was copied from the matching family tree:



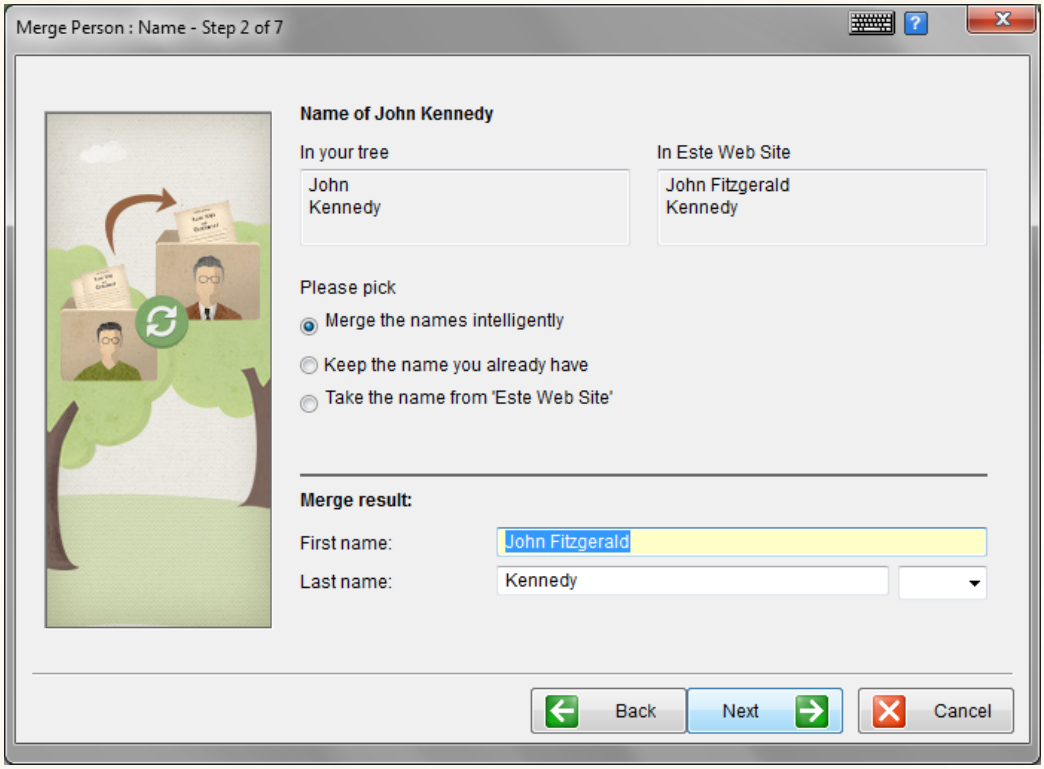
You can click **OK** to confirm or add/change details, and click **OK** when you finish.

NOTE

Click **More details** to display the person's card.

Name Details

The **Name Details** step is displayed when there is new or conflicting information about the name of this person in the matching tree.



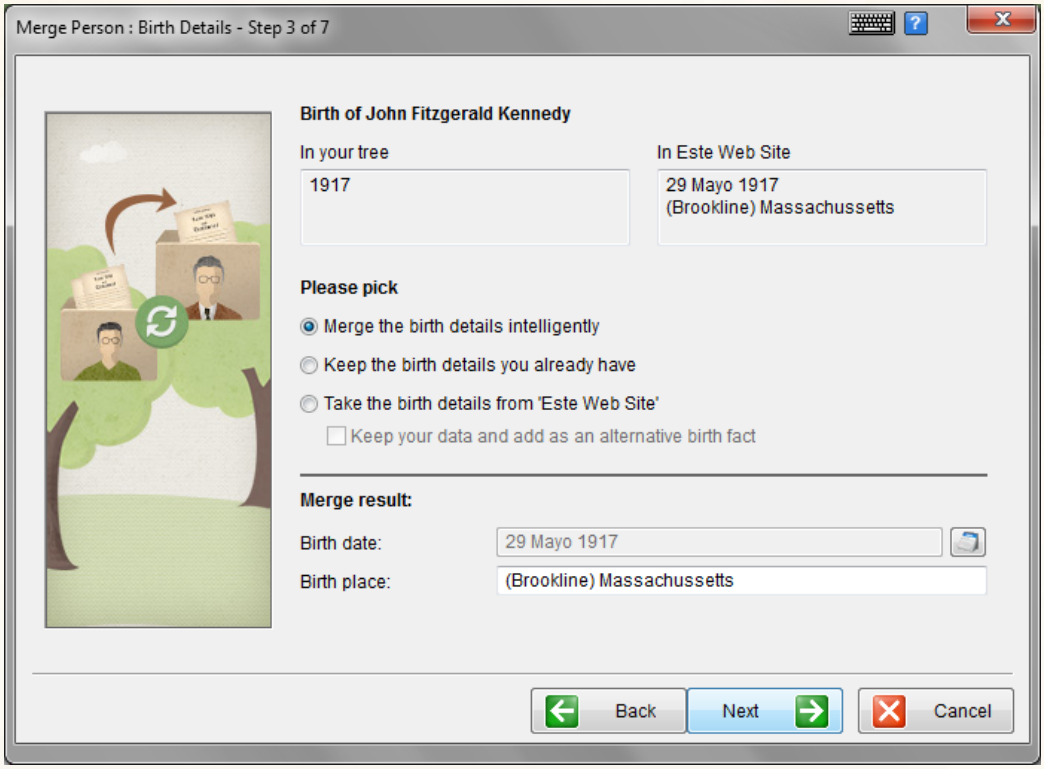
The top section of the window displays two panels with name details. You can choose to keep your names, replace your details with the details from the other tree or merge the two intelligently.

The lower area displays the results of your choice.

When you are finished, click **Next** to display the next step.

Birth Details

The **Birth Details** step is displayed when there is new or conflicting information about the birth of this person in the matching tree.



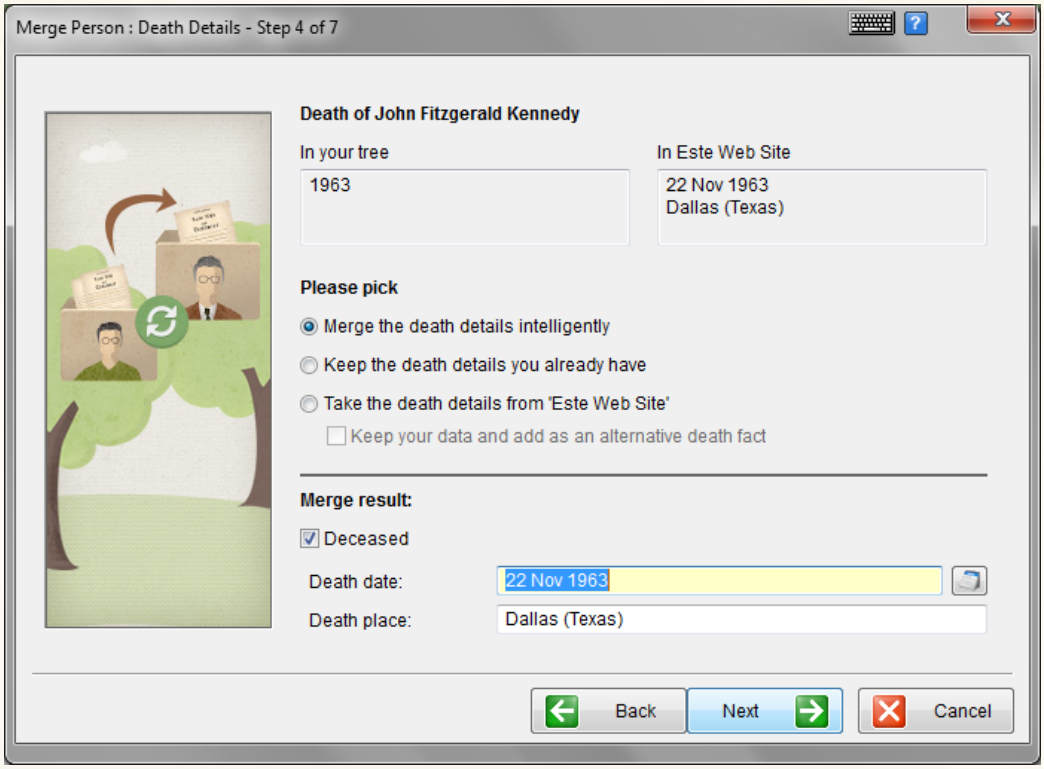
The top section of the window displays two panels with birth details. You can choose to keep your birth details, replace your details with the details from the other tree (in which case you can choose to add your data as an alternative birth fact) or merge the two intelligently.

The lower area displays the results of your choice.

When you are finished, click **Next** to display the next step.

Death Details

The **Death Details** step is displayed when there is new or conflicting information about the death of this person in the matching tree.



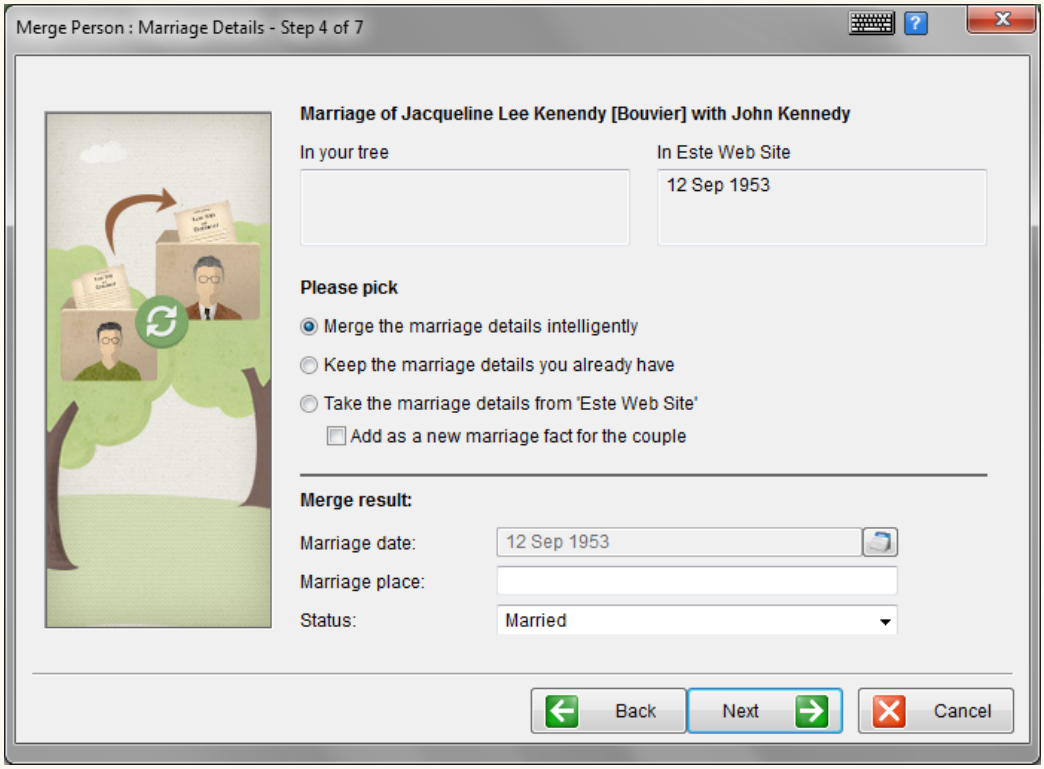
The top section of the window displays two panels with death details. You can choose to keep your death details, replace your details with the details from the other tree (in which case you can choose to add your data as an alternative death fact) or merge the two intelligently.

The lower area displays the results of your choice.

When you are finished, click **Next** to display the next step.

Marriage Details

The **Marriage Details** step is displayed when you are merging the spouse of the compared person.



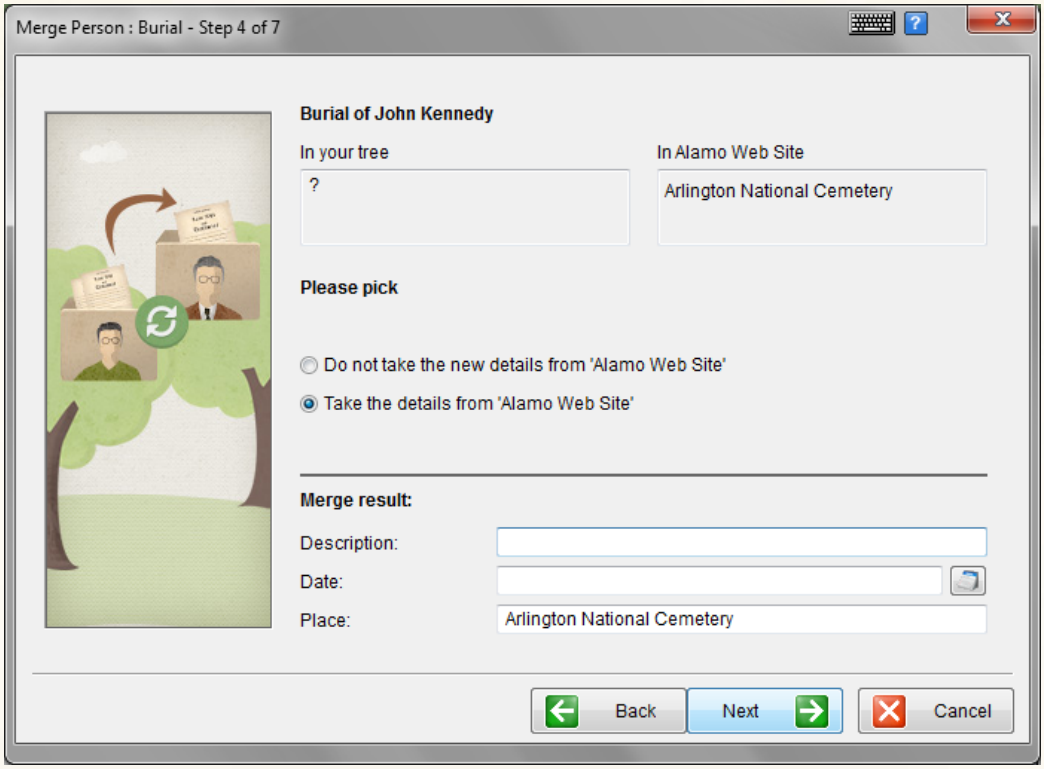
The top section of the window displays two panels with marriage details. You can choose to keep your marriage details, replace your details with the details from the other tree (in which case you can choose to add your data as an alternative marriage fact) or merge the two intelligently.

The lower area displays the results of your choice.

When you are finished, click **Next** to display the next step.

Fact Details

The **Fact Details** step is displayed for each new fact about this person in the matching tree.



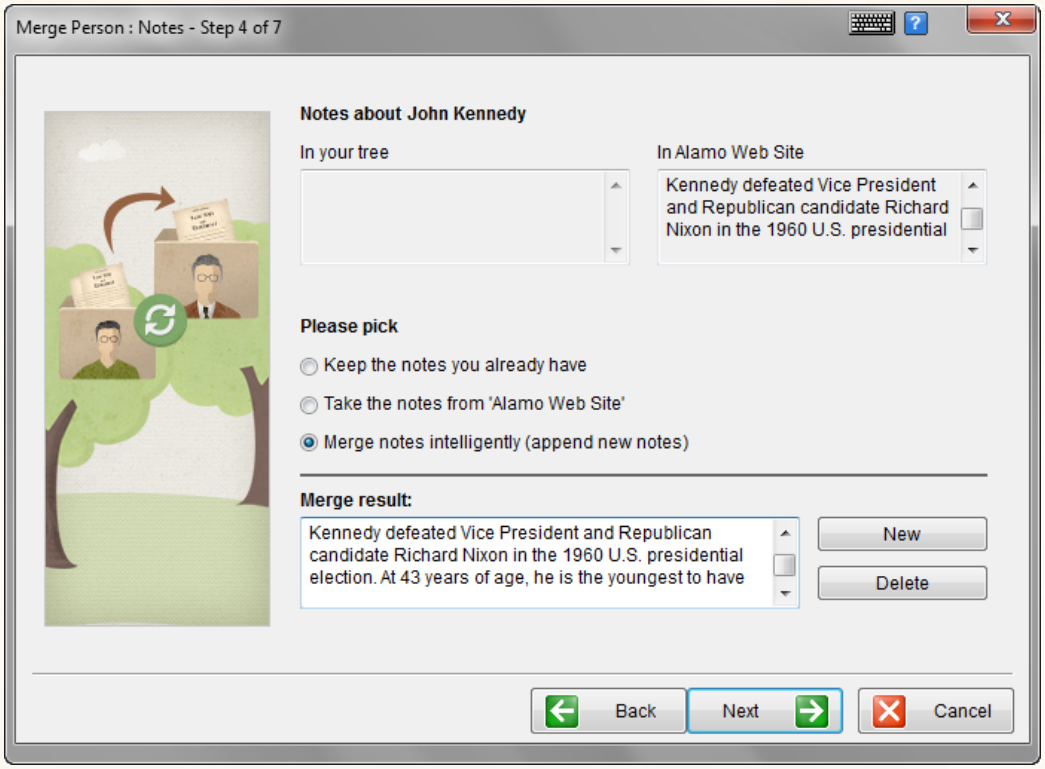
The top section of the window displays two panels with fact details. You can choose to take this fact or not.

The lower area displays the results of your choice.

When you are finished, click **Next** to display the next step.

Notes Details

The **Notes Details** step is displayed when there are notes about this person in the matching tree.



The top section of the window displays two panels with note details. You can choose to take each of the new notes from the matching tree.

The lower area displays the results of your choice.

When you are finished, click **Next** to display the next step.

Photos Details

The **Photo Details** step is displayed when the person has a personal photo in the matching tree:

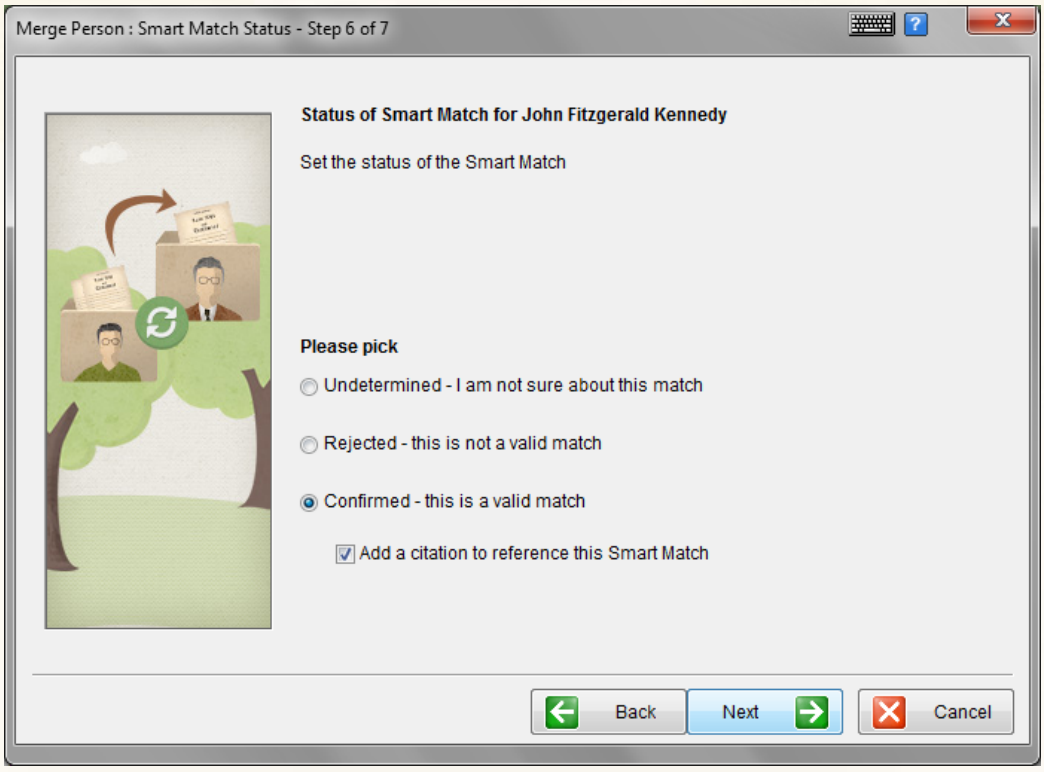


The upper area displays the person's personal photo in your tree (or a silhouette if not) and the personal photo in the other tree.

You can elect to take the photo from the other tree, determine whether to use it as the person's personal photo and determine whether to take the photo from which this personal photo was cropped.

Smart Match Status

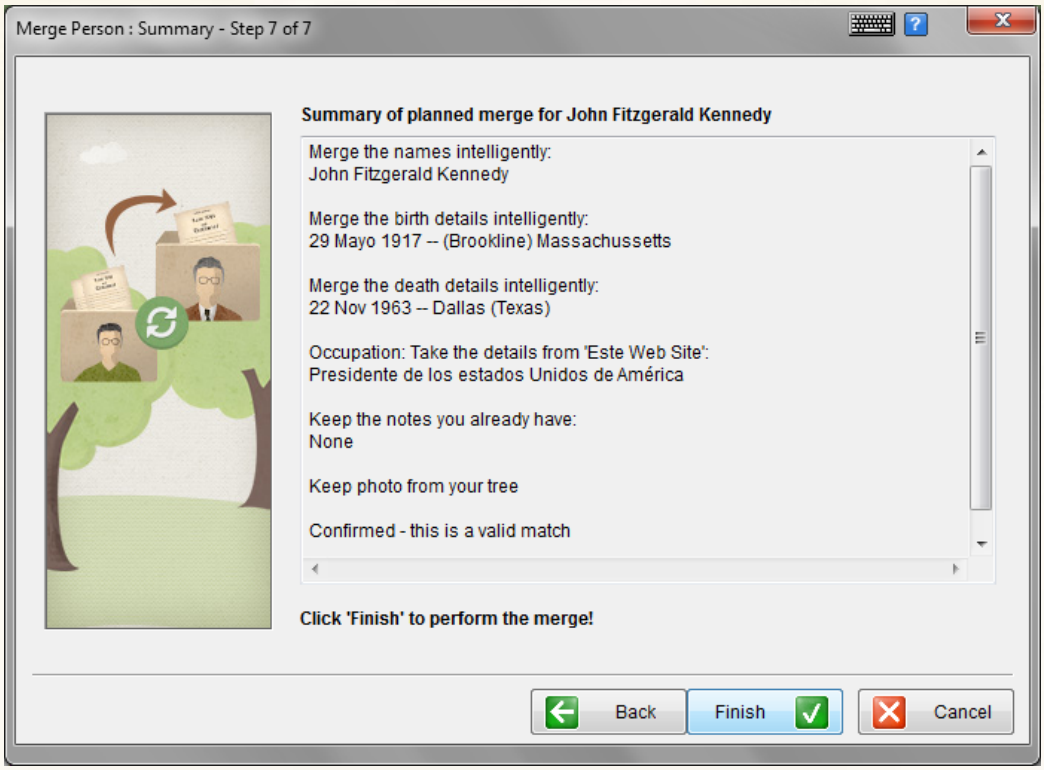
This step allows you to confirm the match based on the merge.



It is recommended to confirm the match, since you merged information from this match. (See Change Status of the Match)

Confirm Merge

The last step of the wizard shows a summary of the merge.



Click **Finish** to perform the merge and copy the information into your tree.

A summary of the planned merge is displayed. Check the information and click **Finish** to perform the merge for this person and continue to perform the merge for the next person in the list.

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CHAPTER 7

Maps



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Maps

About This Chapter:

This chapter describes how to manage information about places in your project, as well as how to view this information on an interactive map. It contains the following sections:

- **Overview** introduces the concept of places in Family Tree Builder and how place-related information can be used in your project, as well as viewed on an interactive map.
- **Managing Places** describes how to define and view information about places in your project.
- **Using Maps** describes the functions provided by the Family Tree Builder Maps feature.

Overview

Maps enable you to view your family history on an interactive world map. Using the Maps feature, you can explore your family's origins, gain knowledge of your family and perform the following in Family Tree Builder:

- Fix place names according to smart suggestions and improve your data.
- Map your entire family tree, any portion of it or just a single place.
- Map birth places, places of residence, other particular facts or all facts.
- See all people, events and photos associated with any particular country or place.
- See all places of importance in a person's life.
- Find any place on the map.

The Maps feature works in conjunction with the place-related information defined in your project.

Managing Places

The Family Tree Builder uses places in different contexts:

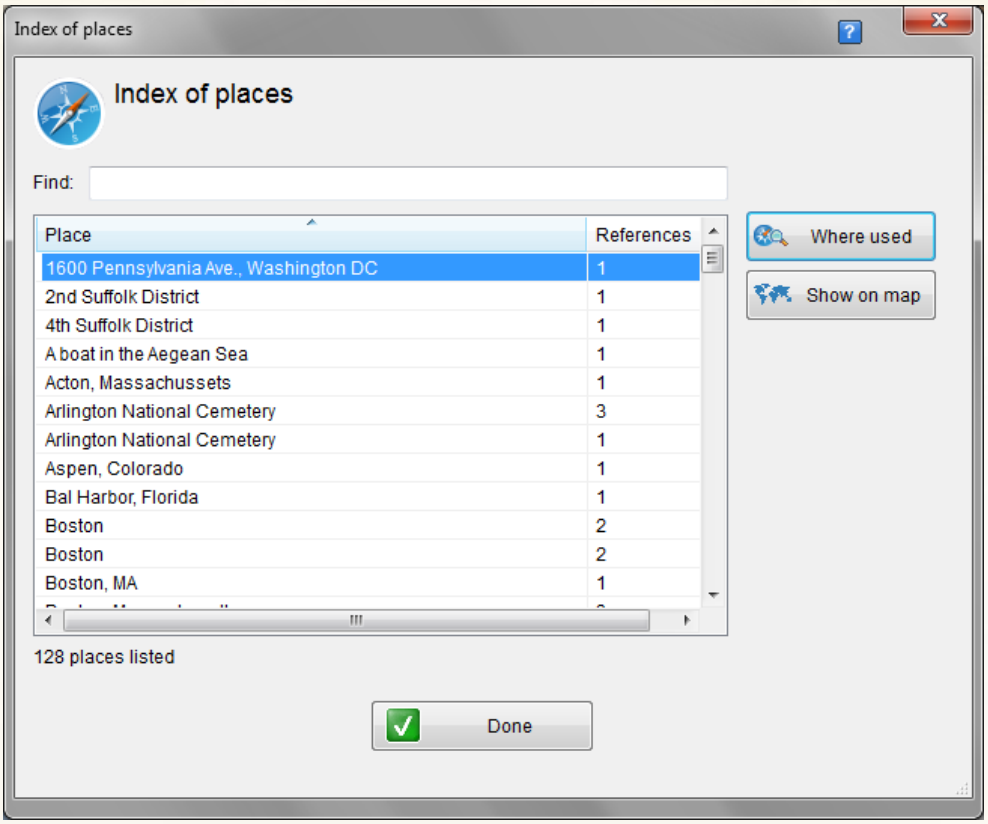
- Facts about people or families include places, such as place of birth, marriage and death.
- Photos include places where the photo was taken.
- Contact information can include addresses, which are considered places as well.

Family Tree Builder allows you to manage different places easily. You can make sure, for example, that the spelling of a place is consistent throughout your project even when information was obtained from different sources.

You can view a list of all the places specified in the project as well as the number of times each is referenced and where. You can also view the location of places on a map using Google Maps.

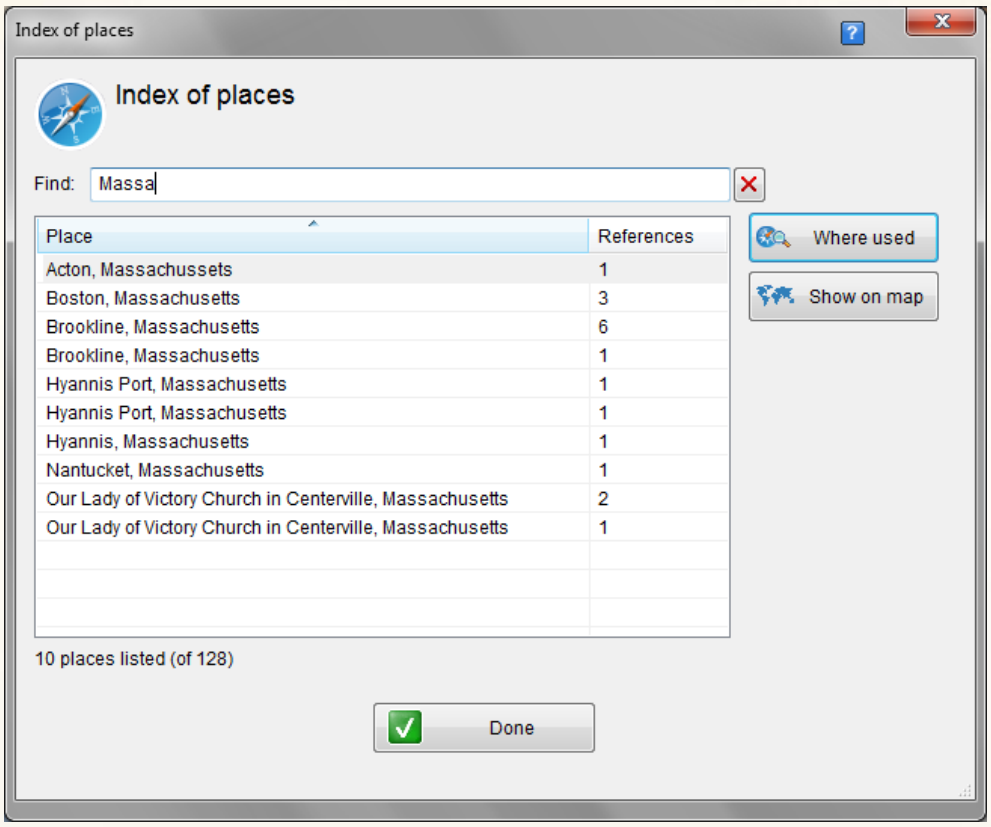
To display places information:

- From the **View** menu, choose **Places** to display the Index of places window:



You can sort this table alphabetically by place name by clicking the **Place** column heading (click again to alternate between ascending and descending order). You can also sort the table by clicking the **References** column heading, which sorts based on the number of times the place is referenced in your project.

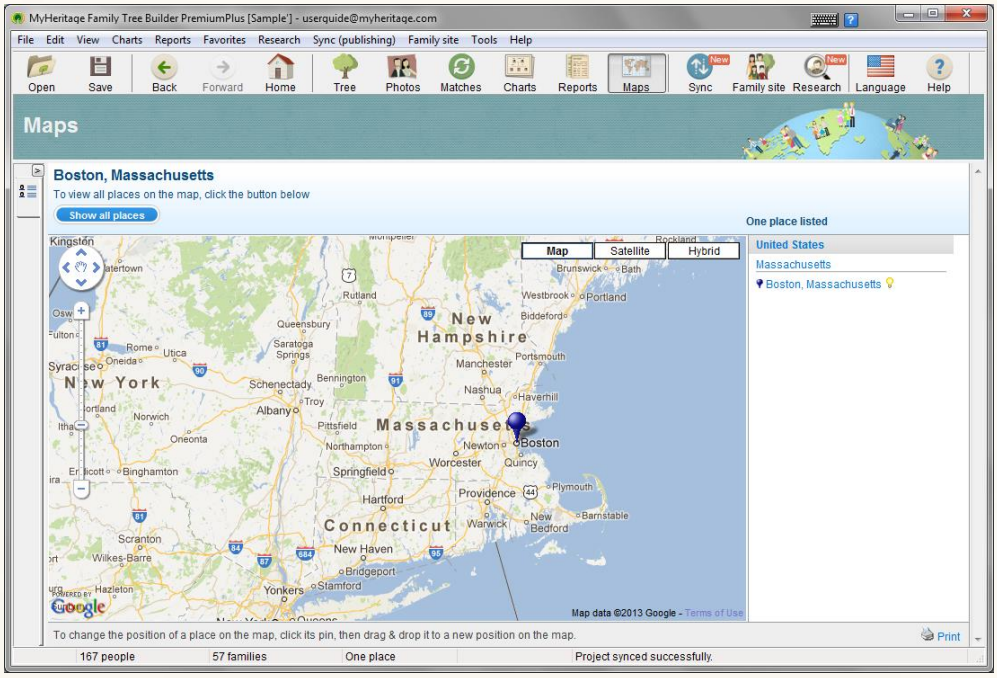
Use the **Find** box to search for a specific text string that is contained in the place name that you want to see. The places matching this string are displayed in the list as you type. Click the red ✕ to clear the contents of the **Find** box.



To show a place on the map:

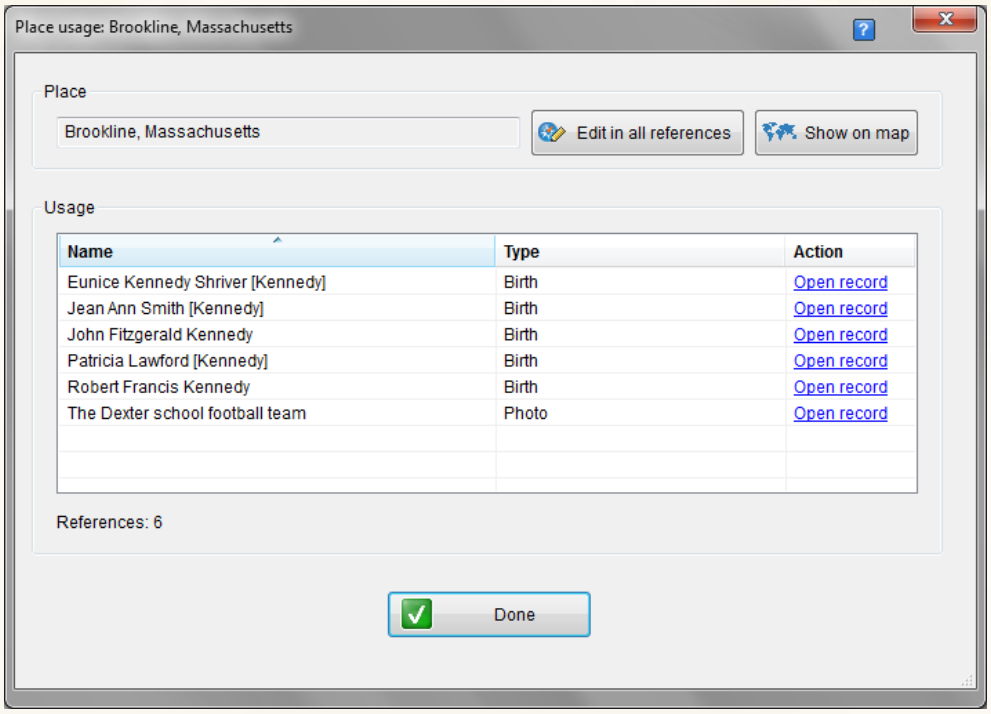
1 Select a place from the list and click **Show on map**. A menu appears with two options: one for showing only this place and one for showing all places.

2 Select the option to show only this place. Family Tree Builder opens a map using Google Maps and displays this place on it:



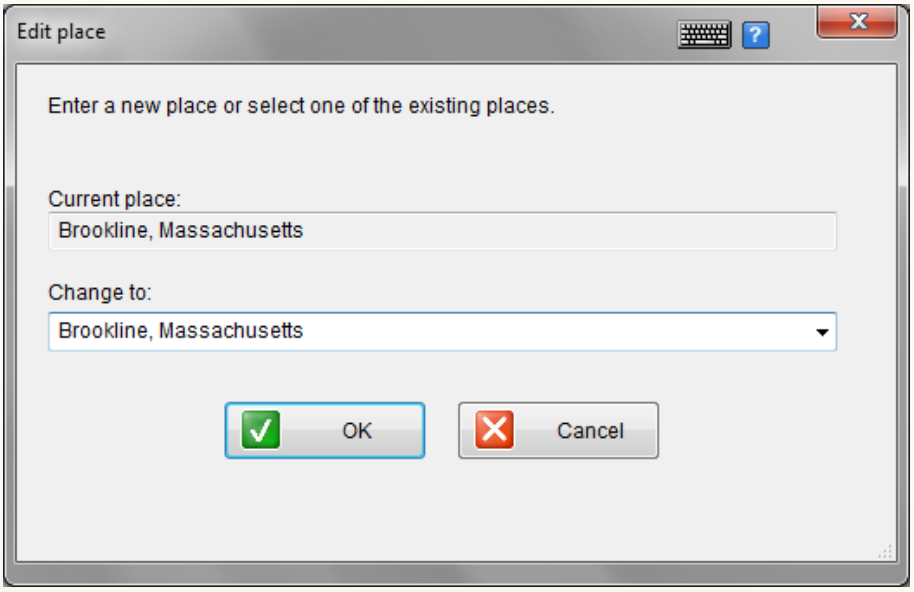
To show where a place is used:

- To see where a place is used in the project, select the place from the list and click **Where used** to display the Place usage window:



This window shows you the name of the place and the references to this place in your project. In this window, you can:

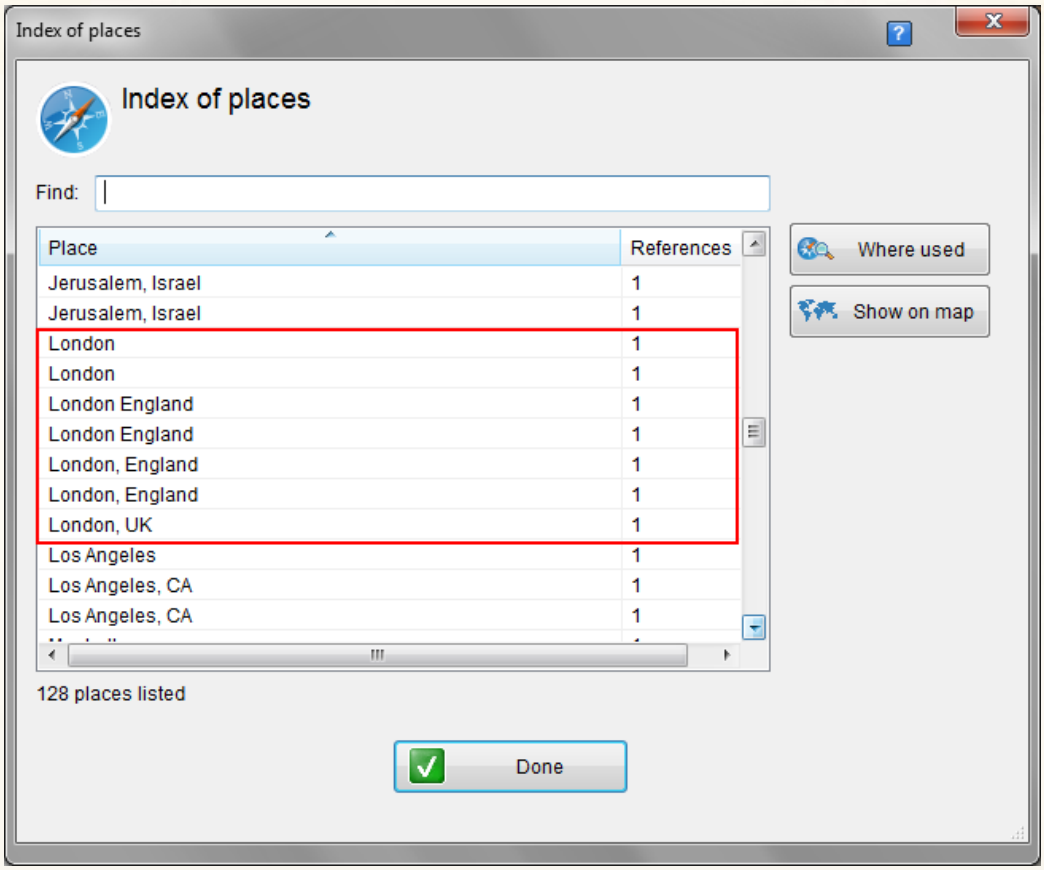
- Click **Edit in all references** to edit the name of the place in all references to this place in your project. Use this option if want to change the way a place is spelled. In the **Change to** box, type in the new name or select one of the existing place names that are currently used in the project.



  When you finish, click **OK** to close the window.
- Click **Show on map** to display the place on a map using Google Maps, as described above.
- Click the **Open record** link for a reference in the Usage list to display the person, family or photo window where the place is used.

Unifying Place Names

The Index of Places window may display different spellings of the same place, as in the example below:



Using the **Places** tool, you can easily combine the different spellings. Just select the preferred spelling and edit all the others.

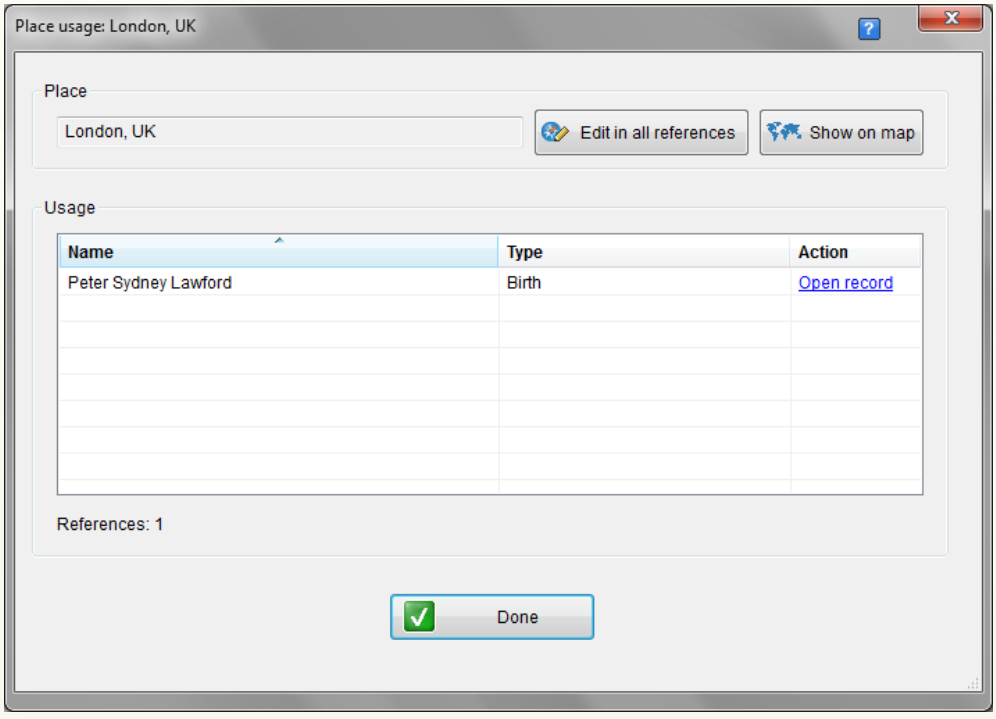
To unify place name spellings:

1 From the **View** menu, choose **Places** to display the Index of Places window (see image above).

2 Locate the different spellings of the place and choose the spelling you want for the name (in the example, we chose London, England over London, London England and London, UK).

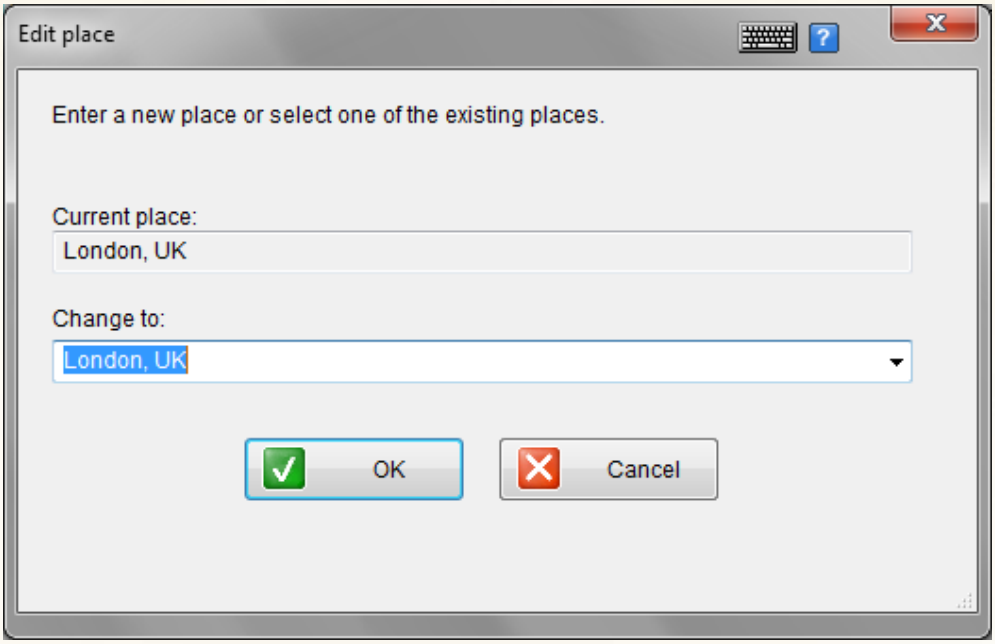
3 Select the spelling you want to change and click **Where used**.

The Place usage window appears:

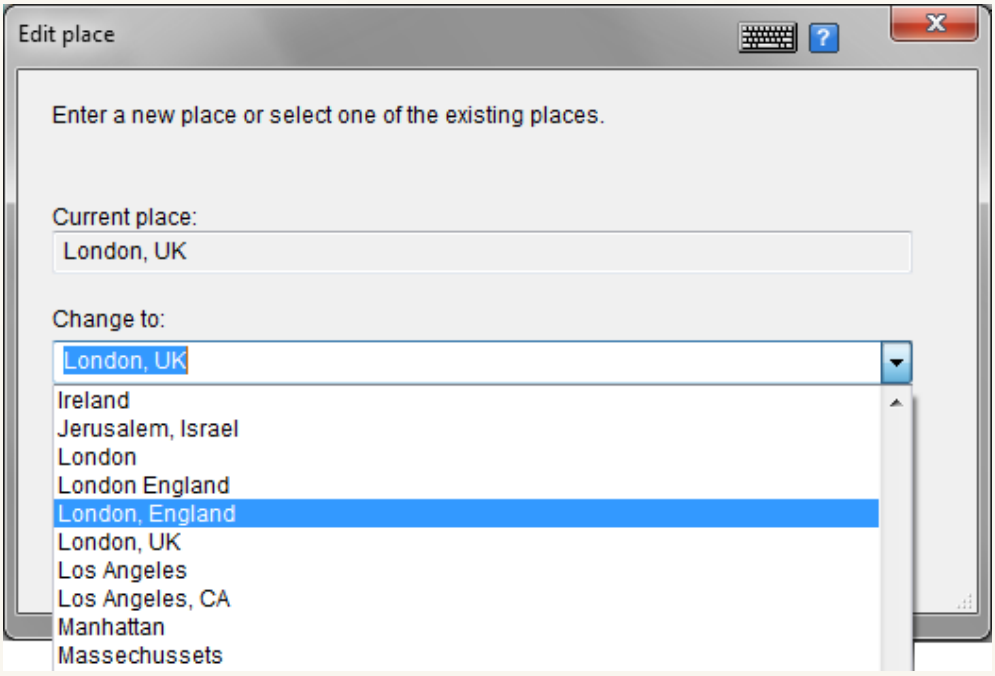


4 Click **Edit**.

The Edit place window appears:



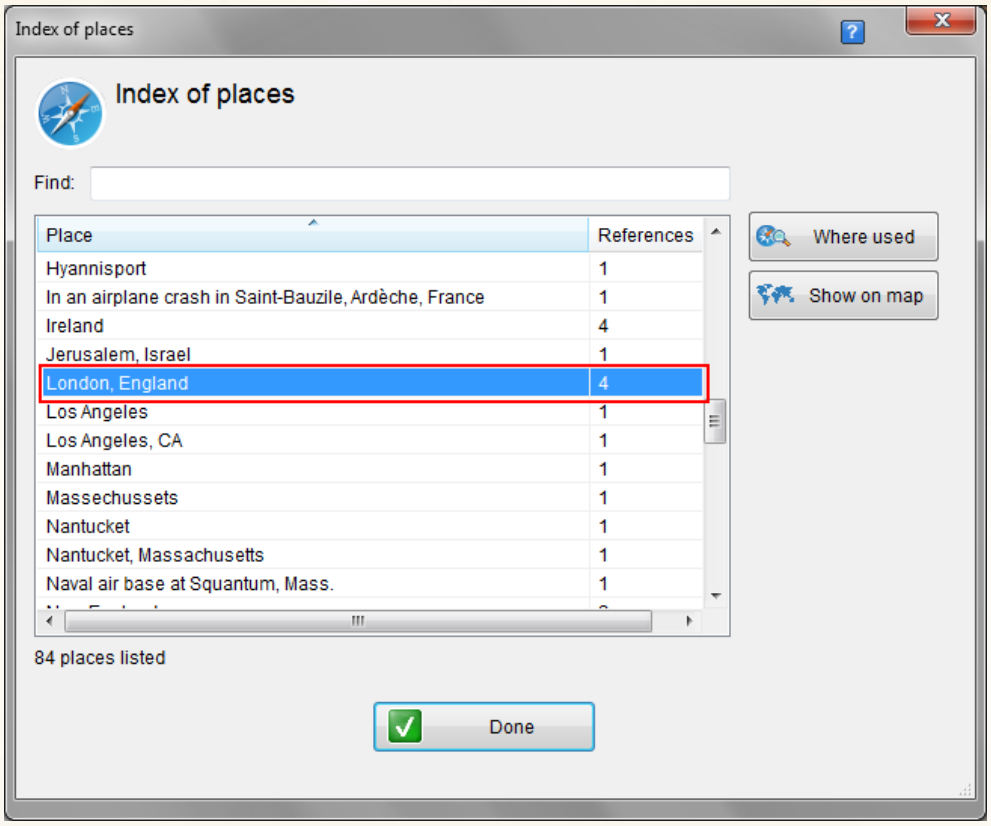
5 Open the **Change to** dropdown list and select your preferred spelling:



6 Click **OK** to close the window.

7 In the Place usage window, click **Done**.

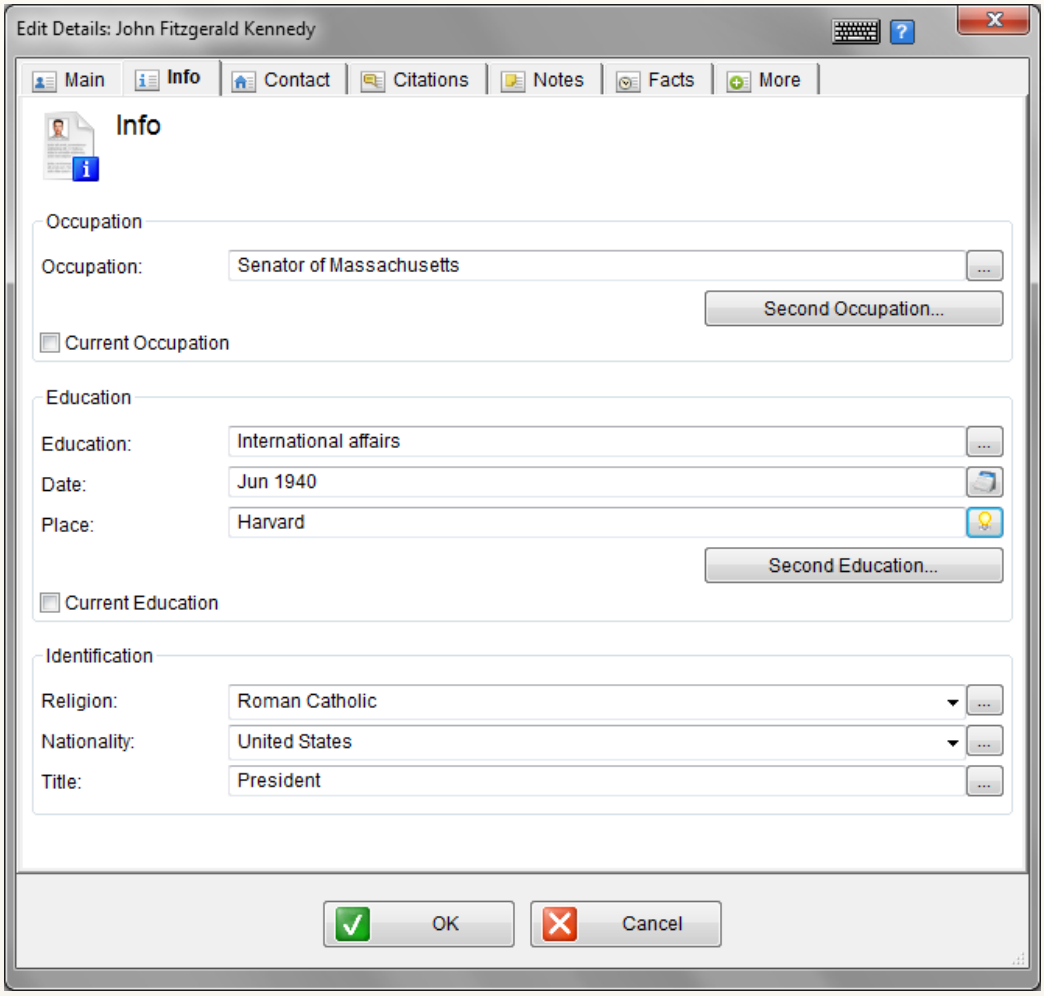
8 Continue to change all inconsistent spellings until only your chosen spelling is left.



Alternative Place Spelling Suggestions

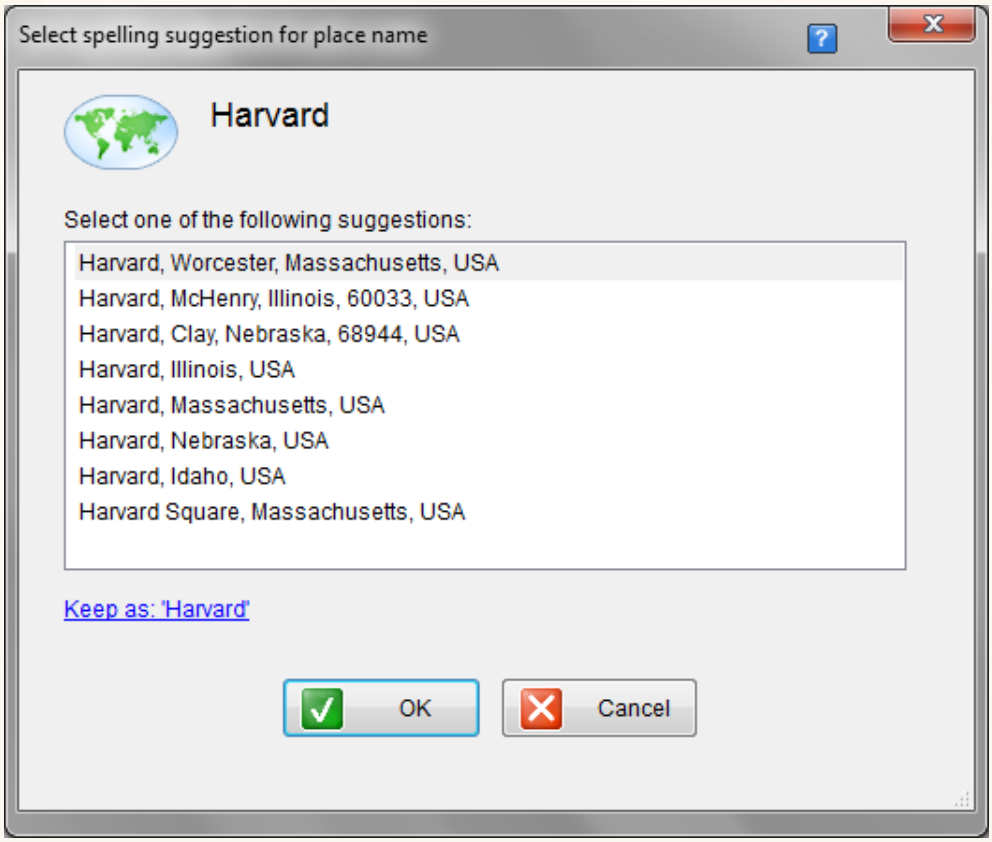
Family Tree Builder enables you to edit names of places in various windows, when entering places for facts and photos. When you enter a place name in a place field, Family Tree Builder searches this place on the map and determines whether an alternative spelling exists for this place.

A special icon is shown in place-related fields that indicates the result of this search, as shown, for example, when entering an education-related place in the Edit Person, as shown in the window below:



The various possible icons are:

- The light bulb icon indicates that alternative spelling suggestions for this place were found. Click the icon to view suggested spelling alternatives, which opens the following window:



  You can select one of the suggestions as the name for this place. To do so, select the correct entry and click the **OK** button, or simply double-click the entry in the list.

  Alternatively, if you are satisfied with the spelling that you have entered for this place, click the **Keep as** link at the bottom of the page.

  After you confirm a place name in this fashion, its icon changes to a green checkmark in the Edit Details window (see below).

- The green checkmark icon indicates that no alternative spelling was found for this place. This can happen if you entered the best spelling, if you confirmed this place name by picking it from the list or if you elected to keep this spelling as described above.

- The blue question mark icon indicates that Family Tree Builder has not yet retrieved suggestions for this place name. This icon indicates a temporary state and is displayed until the place name in this field is searched. You can click the icon to start a search.
- This icon indicates that this place was not found by Family Tree Builder.

Using Maps

Family Tree Builder's **Maps** feature enables you to map your entire family tree, any portion of it or just one individual on an interactive world map. The Maps feature uses standard Google maps, in which you can pan, zoom in/out and so on for easy maneuverability.

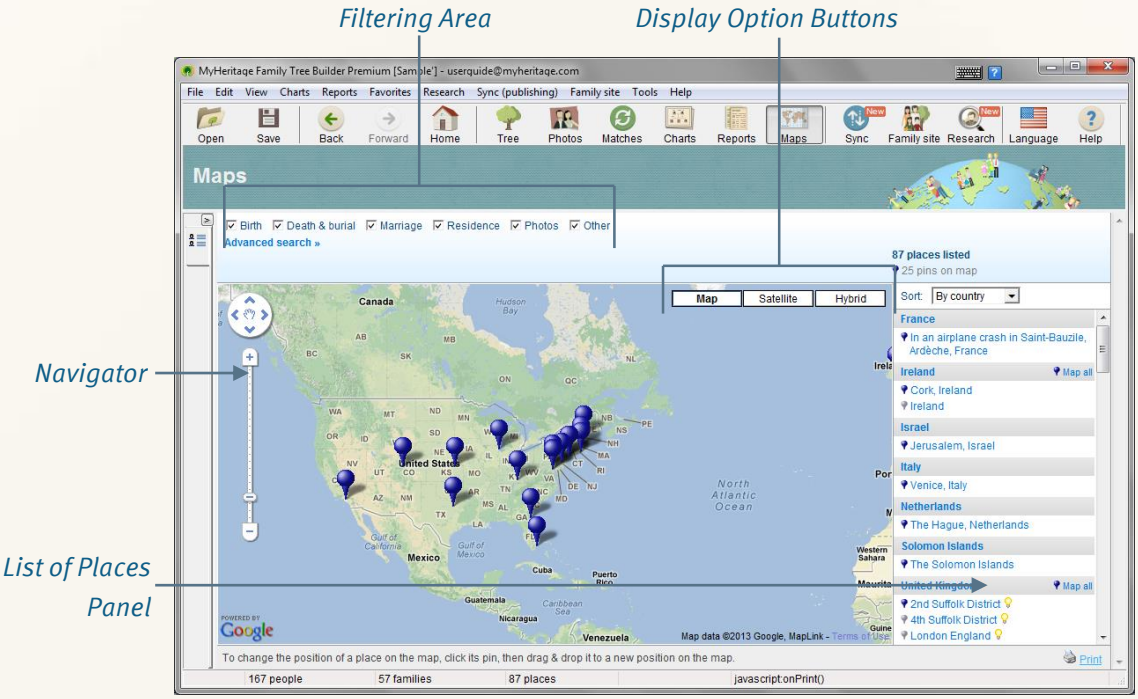
NOTE

This is a premium feature that is limited by your membership type.

Premium users can view all places on the map.
Non-premium users can view only a portion of the places in their project on the map.

You can upgrade to a premium membership when prompted, or click the **No thanks, continue with free version** link to continue with a standard membership.

To access the *Maps* window, click the  tool in the toolbar or select **Maps** in the **View** menu.

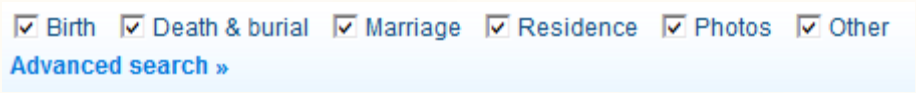


When you access the Maps window, Family Tree Builder searches for and loads all the places in your project on a world map.

The Maps View displays an interactive world map, with pins indicating the places in your project. To avoid clutter on the map and to increase speed, when initially loading the Maps View, Family Tree Builder only displays one pin per country. For countries with multiple states or provinces, such as the USA and Canada, one pin is displayed per state/province. When you zoom in on the map, the map displays all pins for the selected zoom area.

Filtering Area

The Filtering area contains a series of checkboxes that enable you to limit the types of places that are displayed on the map.

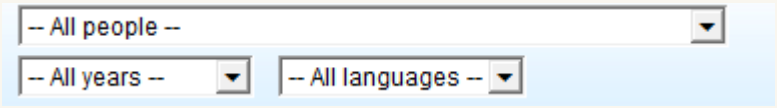


Simply check a checkbox to include that type of place information on the map. For example, check the **Birth** checkbox to view birth places and the **Marriage** checkbox to view marriage locations. The **Other** checkbox displays places that do not fall into one of the other defined categories (Birth, Death and Burial, Marriage, Residence and Photos), such as education.

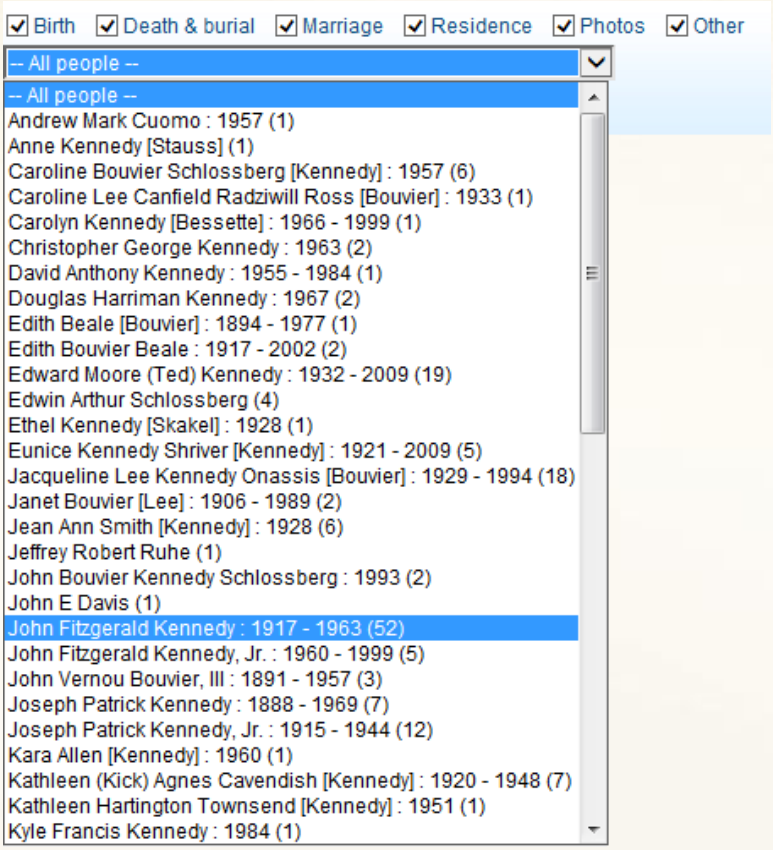
Note that many places may have several types, if the same place is used both as a birth place and as a marriage place in your project.

Performing an Advanced Search

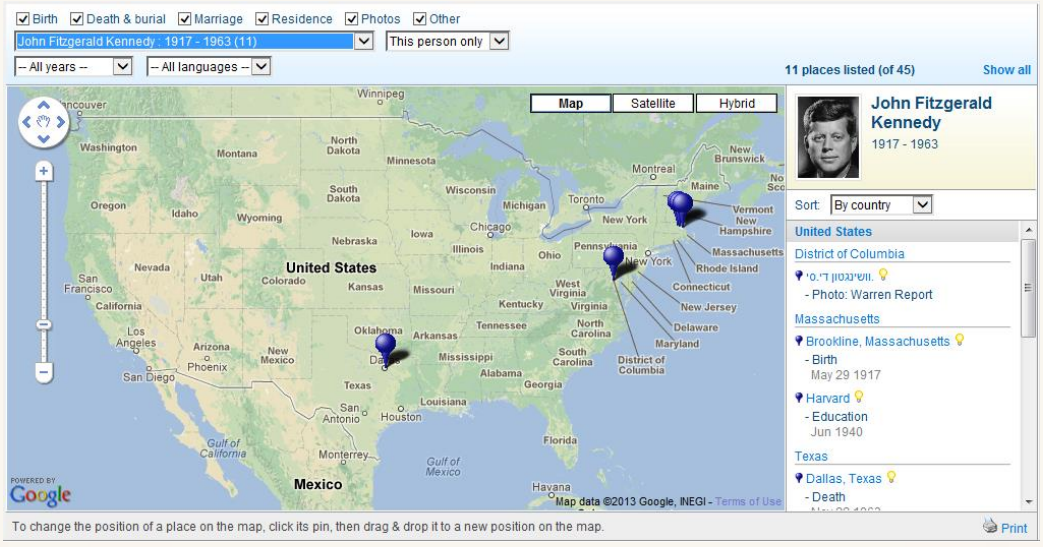
The **Advanced search** option enables you to further limit the information displayed on the map. Click the **Advanced search** link to access additional options. You can filter to display information for a particular person, time period and/or language.



For example, select a particular person in the top dropdown list to display all the places associated with that person on the map.

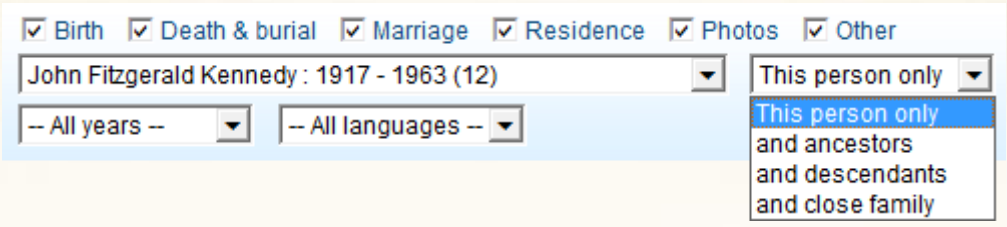


After making your selection in the dropdown list, the map displays all places where that person is referenced, along with that person's photo and details in the right pane.

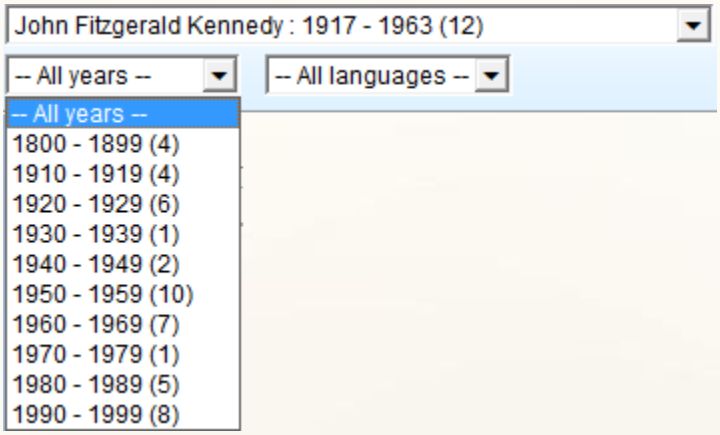


Click the **Show all** link to clear the Filtering area.

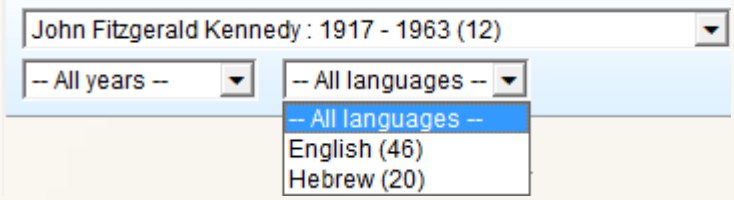
You can choose to display information for only the selected person, or for ancestors, descendants and close family too. In this context, close family refers to the person's spouse, siblings, parents and children.



You can also filter by time period.



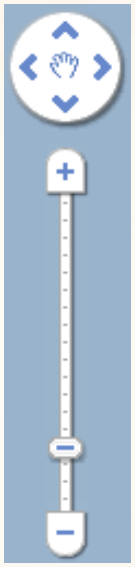
You can also filter by language.



When you specify filtering criteria in multiple dropdown lists simultaneously, an **AND** condition applies, which means that all specified conditions must be met.

Navigator

The Navigator area contains an easy-to-use navigation wheel and slider for navigating the map.



Click one of the arrowheads on the wheel to pan in that direction on the map. Click the hand icon in the middle of the wheel to return to the previous position on the map (before using one of the arrowheads on the wheel).

The slider enables you to zoom in and out on the map. Drag the slider toward its plus end to zoom in and toward the minus end to zoom out.

Alternatively, you can double-click the map to zoom in and right-double-click to zoom out.

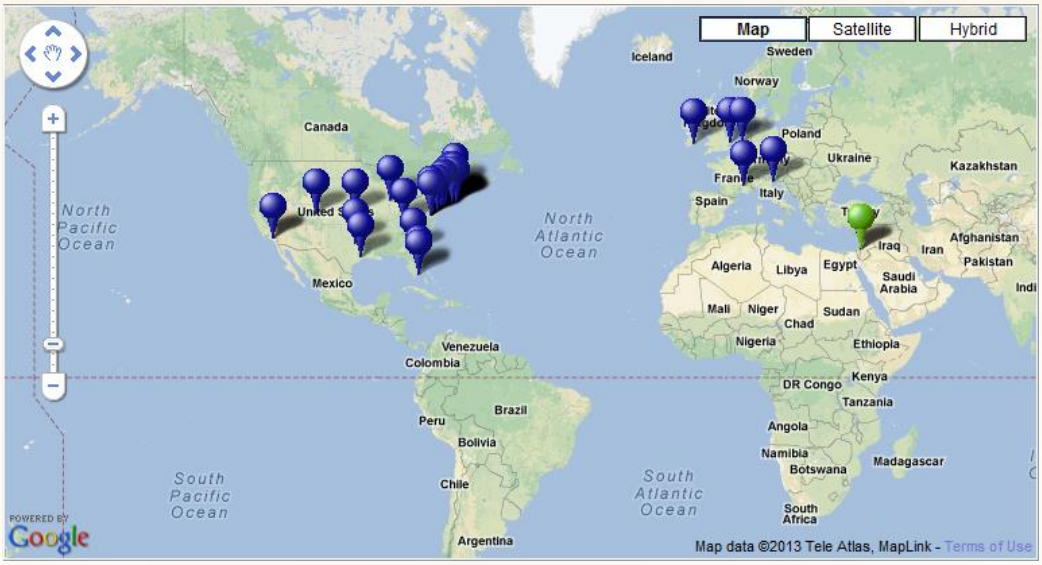
Display Option Buttons

The Display Option Buttons area contains three buttons that control the way in which the map is displayed, as follows:

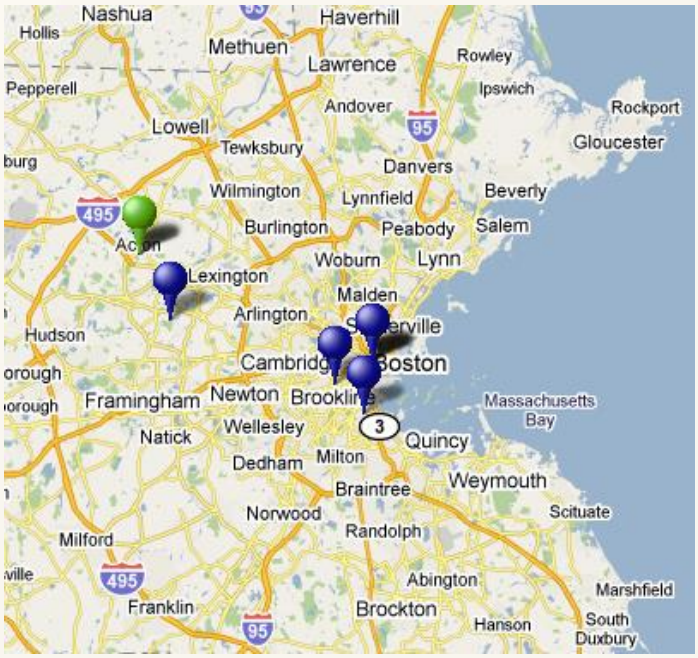


Map View

Click the **Map** button to display the default map view. This view presents a standard street-map view of the world or selected area.



You can zoom in to display country and state borders, as well as roads and place names.



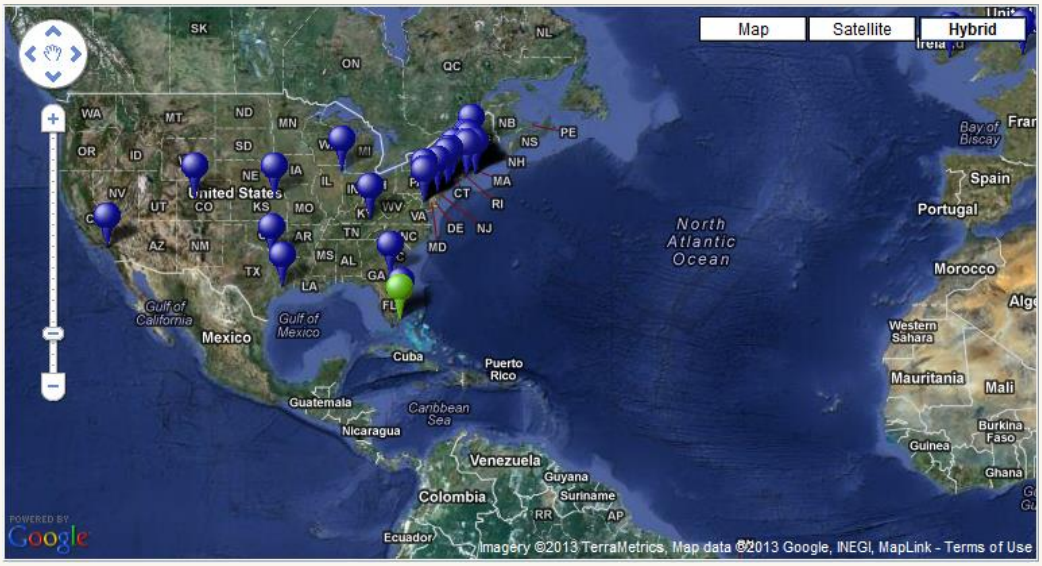
Satellite View

Click the **Satellite** button to display a satellite imaging topographical map view.



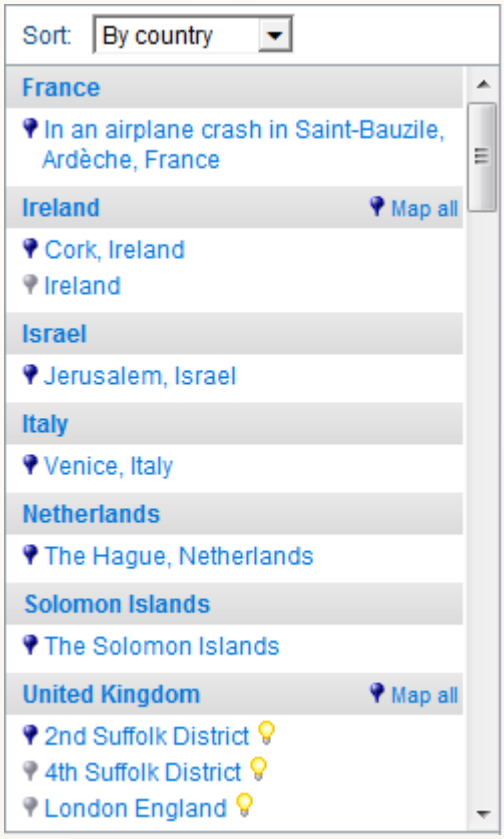
Hybrid View

Click the **Hybrid** button to display a satellite imaging topographical view of the map, which also shows country and state borders, as well as roads and place names.



List of Places Pane

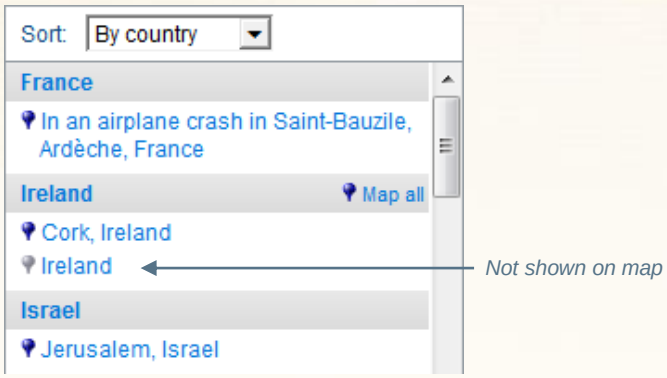
The List of Places pane presents a list of all the places displayed on the map. You can sort the places list alphabetically, by country, by number of references or by date. In the **By Country** sort, shown below, information is also categorized by state/province for the USA and Canada. The default sort is by country.



The **By References** sort arranges the places list based on the number of references this place has in your project. This option sorts the list in descending order, so that the more the place is used, the higher up it is in the list.

The **By Date** sort arranges the places list according to date, from the oldest date to the most recent.

The List of Places pane displays those pins that are shown on the map in blue, and those pins not yet shown on the map in gray, as shown below:

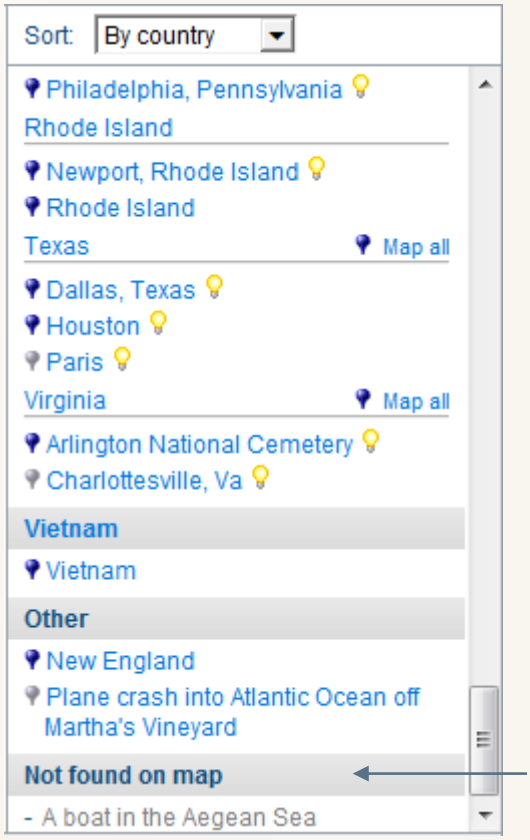


When you click a gray pin in this pane, it shows you the location of that pin on the map and then the pin turns blue.

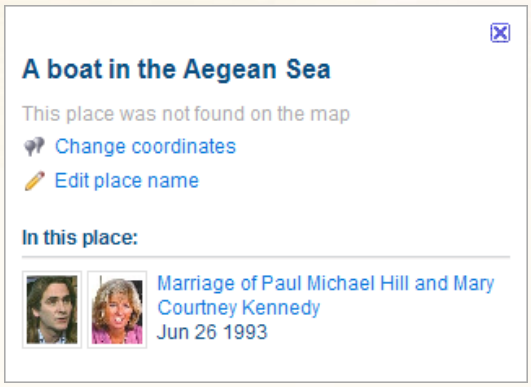
You can also click a country, state or province in the list to zoom in to it to show all the pins in that country, state or province.

The **Print** button at the bottom of the List of Places pane enables you to print the current view of the map.

Places that cannot be found on the map are shown at the bottom of the list.

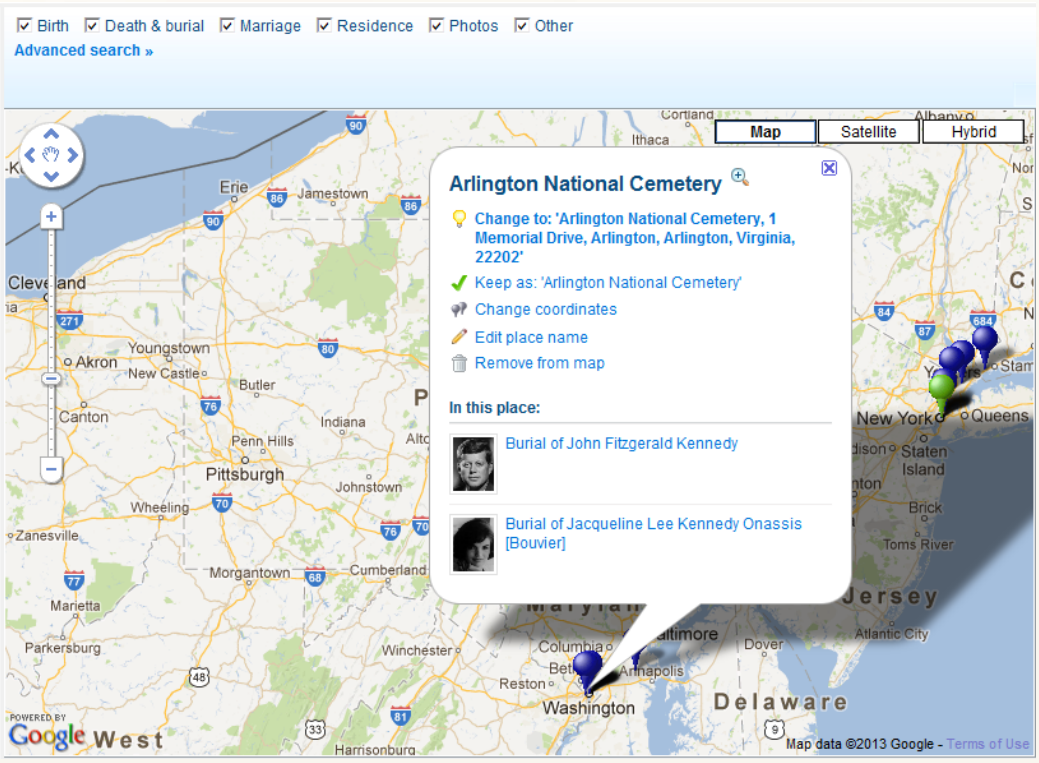


If you click the link for a place that could not be located on the map, a callout opens in which you can edit the data for that place.



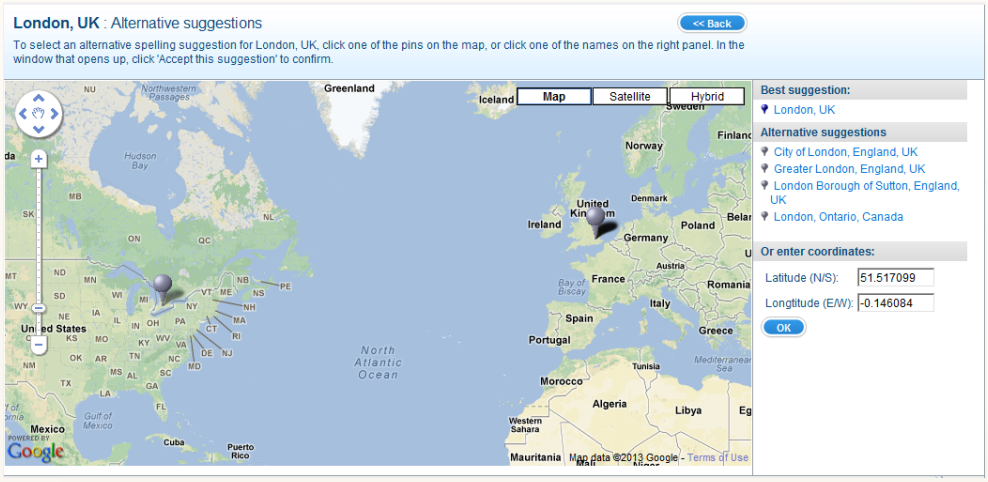
Displaying Callouts

Simply click a place in the List of Places pane to zoom in to that place on the map. This action also displays a callout from the relevant pin on the map. The callout contains actions and details about the selected place.



Callout Actions:

- Click the icon to zoom in to the respective place on the map.
- Click the link to change the place name to a suggested alternate name. This action appears if an alternate name was found for this place.
- Click the link to keep the place name with its current name. This action appears if an alternate name was found for this place, but you do not want to use it.
- Click the link to select from a list of suggested alternative place names. This action appears if the name that you entered for this place is ambiguous and can be located in several places on the map. For example, if you entered *London* as a place, you get the following suggestions:

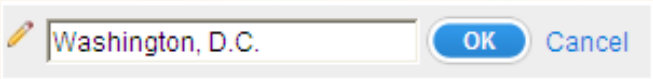


When you use this option, suggested alternative places are shown both on the map (as gray pins) and in the pane on the right. Select the alternatives or click **Back** to keep your spelling of the place.

Another option is to manually enter the coordinates of the place on the map and then click **OK**. This option is useful when Family Tree Builder could not locate the exact location of your place on the map.

Alternatively, you can simply drag a pin on the map to change its location.

- Click the link to edit the place name. You can perform inline editing directly from the callout to change the place name, as shown below:



- Click the link to remove the place from the map. You may need to remove a place from the map when its place name does not correspond to an actual physical place on the map. For example, you may want to do so with place names like *Hospital*, *At home*, *At sea* and so on, which do not indicate actual places on the map.

CHAPTER 8

Research Tools



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Research Tools

About This Chapter:

This chapter describes searching for and adding genealogical information to the people in your family tree based on information found using MyHeritage's powerful SuperSearch engine. Family Tree Builder provides you with full access to the powerful research tools provided by MyHeritage.com. These tools enable you to research families and/or specific people in billions of records, such as birth, marriage, death, burial, census, military and immigration records, newspaper articles and more. It contains the following sections:

- **SuperSearch** describes how to find research information in MyHeritage's SuperSearch engine that matches information about people in your own tree.
- **Record Matches** describes how to use the information automatically collected by **Super Search** to identify record matches, which are historical records that are highly likely to match your family tree.

SuperSearch

Overview

Family Tree Builder's Research feature enables you to search for and add genealogical information to the people in your family tree. This feature uses MyHeritage's **SuperSearch** genealogical search engine that looks for historical records, such birth, marriage and death records, as well as census data, military and immigration records, newspaper articles, grave records and more.

You can start a search by entering information in a form on the SuperSearch website. Family Tree Builder also provides a built-in capability to search any specific person in your family tree.

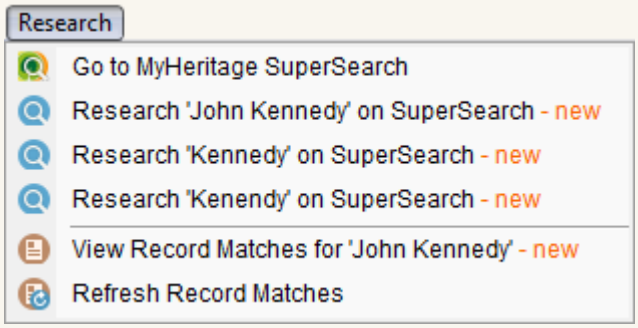
NOTE

The Family Tree Builder **Record Matches** feature uses the information collected by SuperSearch to identify record matches.

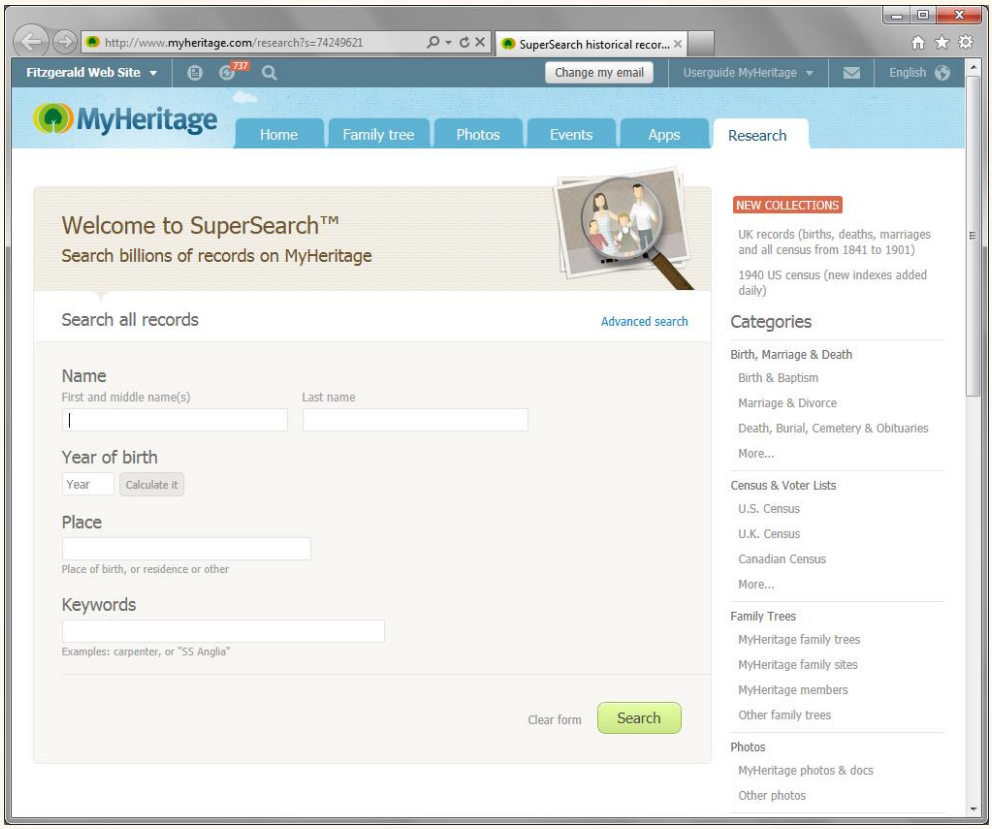
SuperSearch provides a relatively wide range of results, in contrast to the Record Matches feature, which provides only the highest-quality results for individuals in the tree.

Research Menu and Toolbar Options

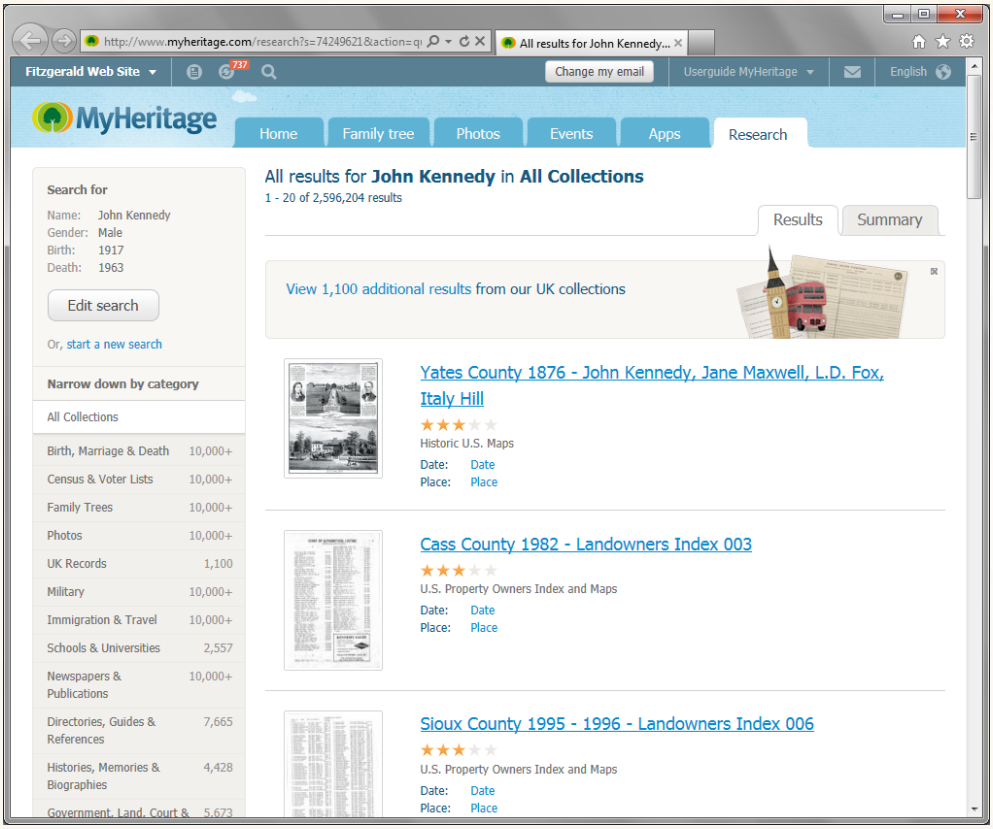
The **Research** menu and **Research on MyHeritage.com**  toolbar button provide access to the following research-related options:



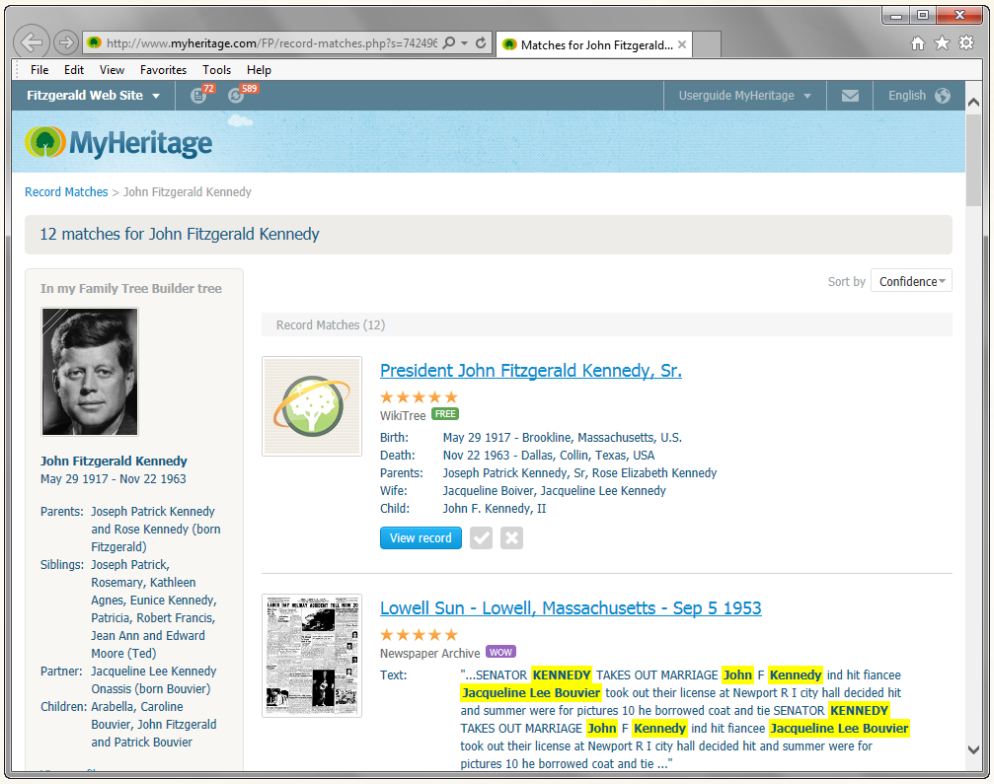
- **Go to MyHeritage SuperSearch:** Opens your browser to the SuperSearch window.



- **Research [person's full name] on SuperSearch, Research [person's last name] on SuperSearch** and **Research [person's spouse's last name] on SuperSearch**: Opens your browser, displaying the Record Matches results list for the selected individual or last name.



- **View Record Matches for [person's name]:** Opens your browser, displaying all the Record Matches for the selected person.



- **Refresh Record Matches:** Refreshes the record matches results list.

Research-related functions can be accessed in the following ways:

- Clicking the **Research on MyHeritage.com** button on the toolbar.
- Selecting one of the options from the **Research** menu.
- Right-clicking a person in the People List and choosing **Research [person's name] on SuperSearch**.
- Right-clicking a person's card in the Tree View and choosing **Research [person's name]** on **SuperSearch**.

Record Matches

The Family Tree Builder **Record Matches** feature uses the information collected by **SuperSearch** to identify record matches, which are historical records about someone in your family tree, for example, a document relevant to your family's history, such as a birth record of one of your ancestors, a tombstone photo of a relative in your family or a newspaper article describing how your great-grandfather met and fell in love with your great-grandmother.

By default, Family Tree Builder checks for Record Matches automatically whenever you change information about people in your family tree that affects matches, such as names, birth dates and so on.

TIP

To disable automatic Recording Matching, select **Options** in the **Tools** menu. Then, select the **General** pane and set the **Automatic Record Matching** parameter to **No**.

Family Tree Builder provides you with the number of Record Matches for each person. Viewing and managing (confirming and rejecting) the matches is done online on the MyHeritage.com website.

NOTE

Record matches for your entire family tree can only be viewed if you synchronize your tree and wait for the record matches to be calculated on the server.

Accessing some of the records identified by the Record Matches feature are free, but most require a separate data subscription (see Data Subscriptions).

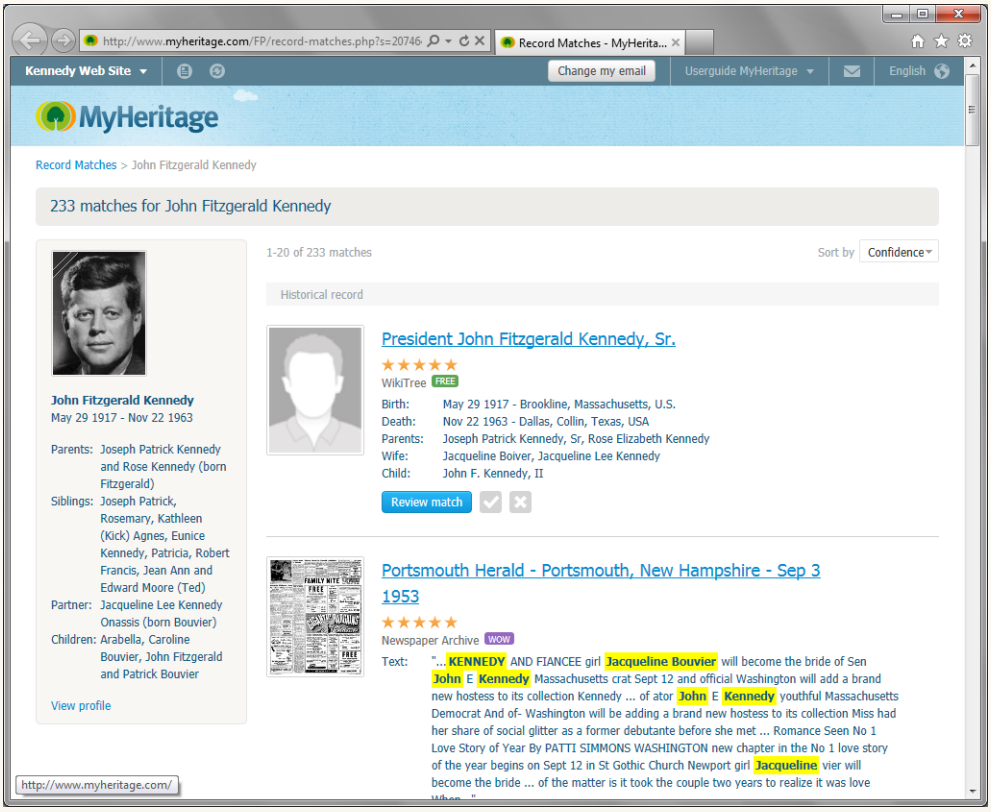
Reviewing a Person's Record Matches

When records are matched in a MyHeritage SuperSearch for a person in your family tree, an icon or button is shown in that person's card in the Tree view. You can then either approve or reject each record match that was found.

To view Record Matches for a person:

1 In a person card, click the green **X records** 

button, where X designates the number of records matched for that person that are either approved or pending ,but not rejected. The following window is displayed, showing the list of Record Matches for this person:



Note that the results are displayed in an external browser.

NOTE

If Record Matches are found for a person, the Records button is shown whenever you open that person's card, even if the family tree has not been synchronized (see Syncing Your Family Tree). However, if the specific person for whom you are viewing a record is not synchronized, then you can only view their Record Matches, but cannot confirm or reject them.

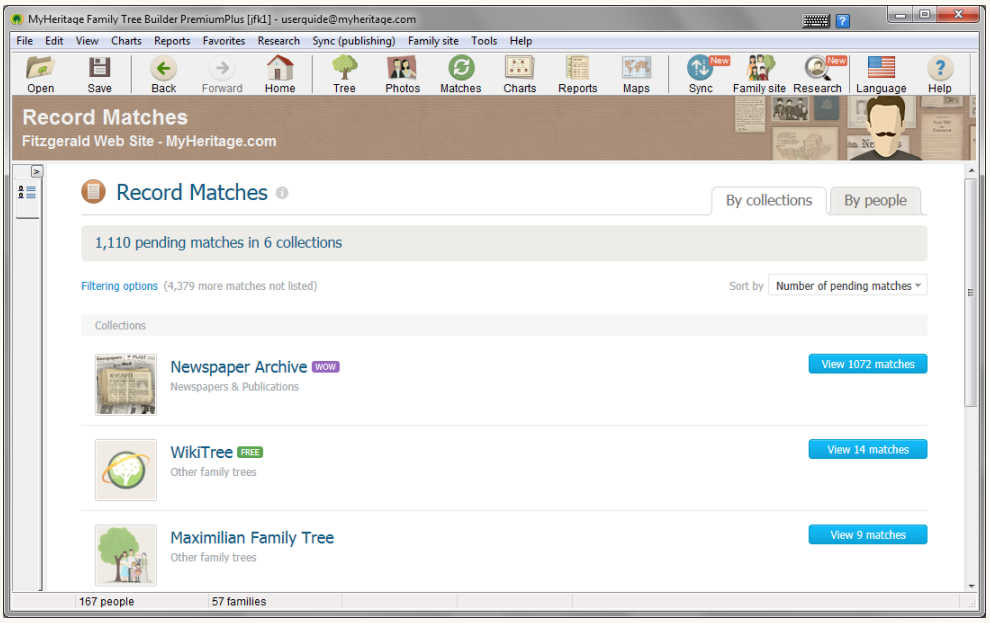
2 At this point, you can review the list and click the green checkmark  to confirm a match, or click the red X  to reject it.

Alternatively, you can drill down further to view even more detail for a specific Record Match by clicking its **Review match** button. Review the match and click the **Confirm** button to approve the match or the **Reject** button to delete it.

Reviewing Record Matches for the Entire Family Tree

To review Record Matches for the entire family tree:

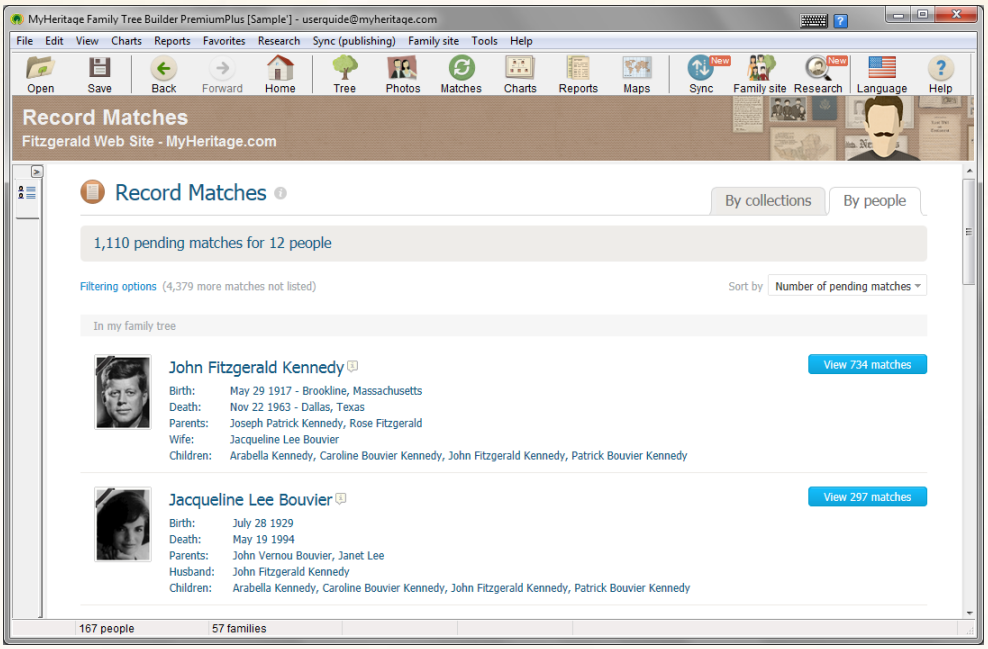
1 In the **Family Site** menu, select **Record Matches**. A summary of all Record Matches to your family tree is displayed:



This window shows the total number of Record Matches for the entire family tree at the top.

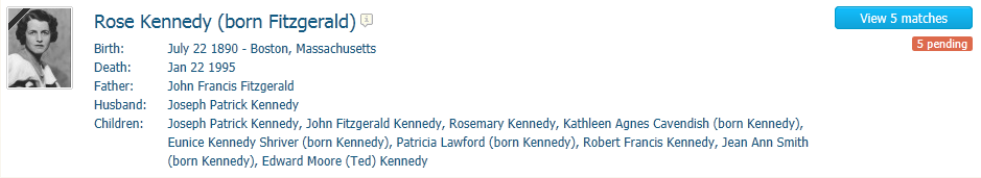
The window contains two tabs: **By collections** and **By people**. The **By collections** tab presents the results list by record collections, such as by Newspaper Archive, Social Security Death Index and so on, as shown above.

The **By people** tab displays Record Matches by person for each person in the family tree, as shown below:

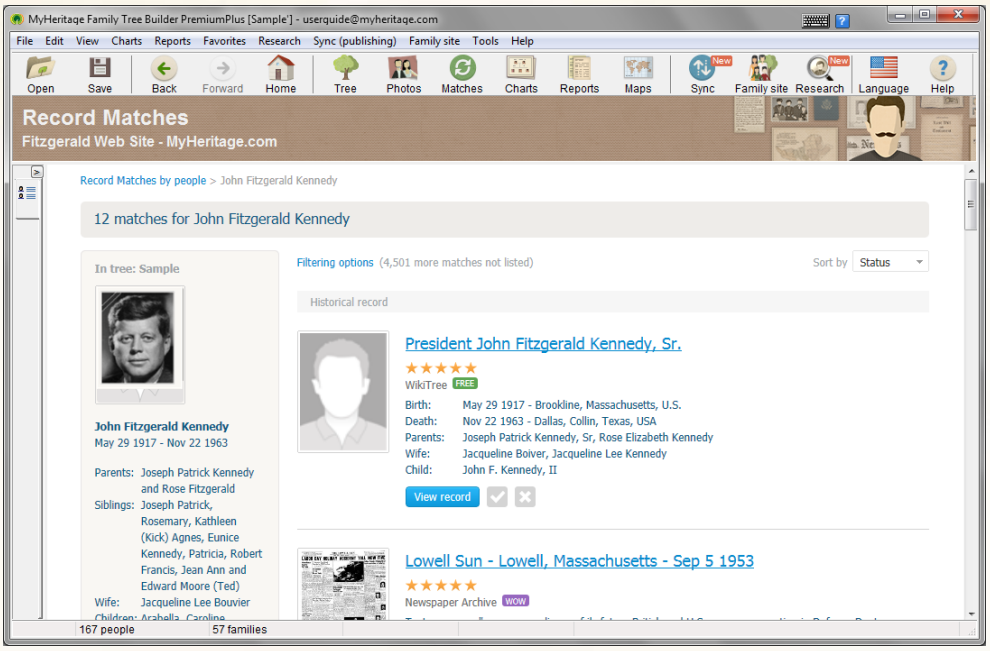


The total number of Record Matches for each collection or person is shown, as well as the number of pending matches for that entry.

For example, in the window below, Rose Kennedy has five record matches, all of which are pending. A pending record match means that the match has not yet been confirmed or rejected.



2 Click the **View X matches** button for the collection or person whose matches you want to view. Details for each Record Match are displayed:



3 At this point, you can review the Record Matches results list and click the green checkmark to confirm a match, or click the red X to reject it.

Alternatively, you can drill down further to view even more detail for a specific Record Match by clicking its **Review match** button. The following window is displayed:



Review the Record Match and then click the **Confirm** button to approve the match or the **Reject** button to delete it.

TIP

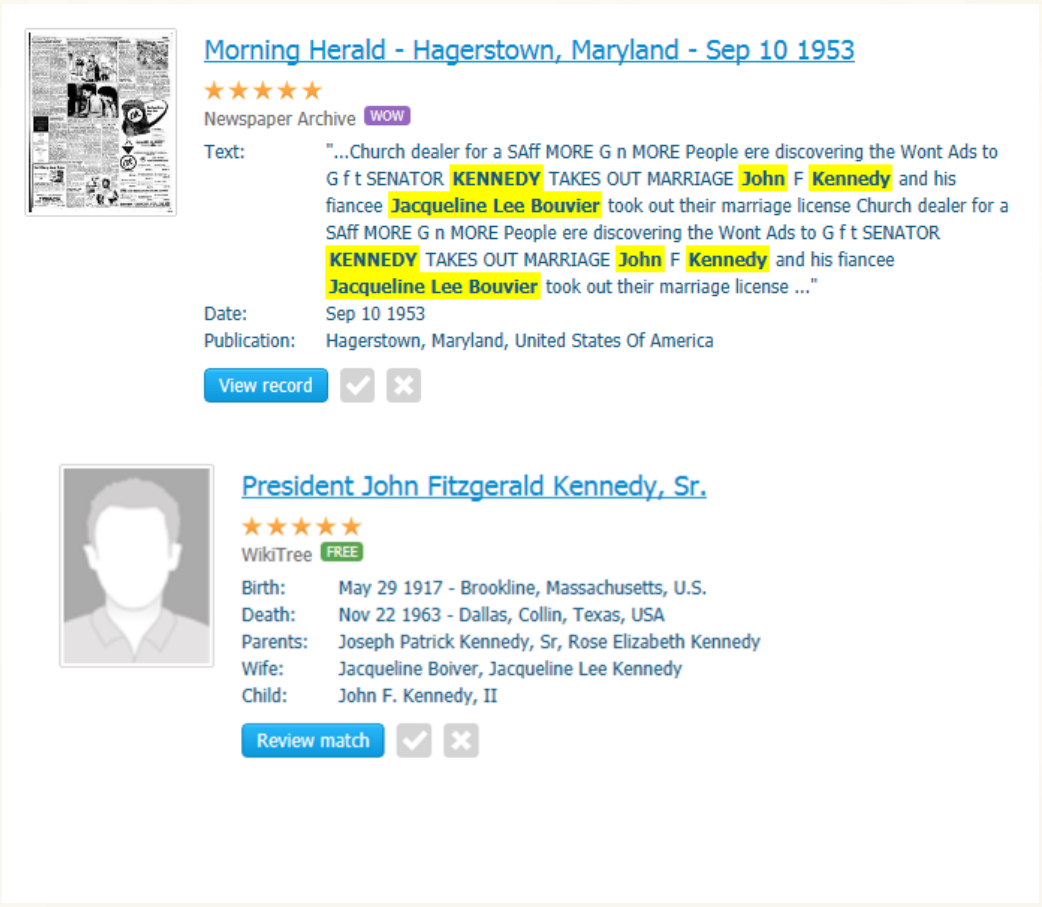
After confirming or rejecting Record Matches, you can refresh the Record Match counts in Family Tree Builder immediately by selecting **Refresh Record Matches** in the **Research** menu.

Data Subscriptions

Some of the records identified by the SuperSearch and Record Matches features are free, but most require a separate data subscription. A data subscription plan can be purchased from My Heritage, and provides unlimited access to billions of historical records and unlimited Record Matches. For example, the following are some of the sources used to locate historical content of interest:

- Birth, marriage and death records
- Census, military, immigration and legal records
- Newspapers, yearbooks, directories and guides
- Family trees, photos, documents and maps

Note that all record matches appear in the Record Matches results list. However, for those records that require a data subscription, only basic information is presented for them and you can only drill down to view details if you have the required data subscription. Record Matches that are free have the word **Free** in green as part of their description. Those that require a data subscription do not.



When you click a free Record Match, you are shown all of its information. If you click a Record Match that is not free, a window is displayed in which you can purchase a data subscription.

NOTE

A data subscription is not the same as a Premium or Premium Plus membership (see Premium Membership).

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CHAPTER 9

Charts



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Charts

About This Chapter:

This chapter describes the types of charts that Family Tree Builder provides and how to create and customize them. It contains the following sections:

- **Displaying a Chart** describes how to display a chart.
- **Configuring Chart Appearance** describes options for defining the appearance of your charts.
- **Printing a Chart** describes options for printing a chart from a standard desktop printer or as a poster.

Family Tree Builder provides the following types of charts:

- **Ancestor Charts,** which show the selected person, his or her parents, grandparents and so on.
- **Descendant Charts,** which show the selected person, children, grandchildren and so on. It also includes the spouse(s) of the person and the descendants.
- **Fan Charts,** which show the selected person and that person's descendants or ancestors in a fan-shaped chart.
- **Close Family Charts,** which show the selected person and close relatives of that person.
- **Hourglass Charts,** which show the selected person and both ancestors and descendants.
- **Bowtie Charts,** which show the selected person and his or her spouses, both of their ancestors and their children.
- **All-in-One Charts,** which show the entire family tree.

Displaying a Chart

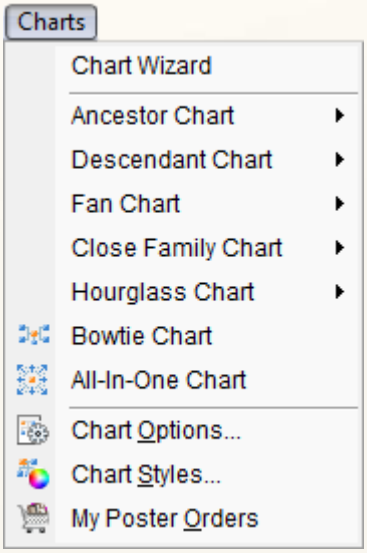
You can easily display a chart, as described below.

To display a chart:

1 Do one of the following to display the **Charts** menu:

- Click the **Charts**  button.
- Select the **Charts** option in the toolbar.
- Select a person in the Tree View, right-click its card and select the **Charts** sub-menu.

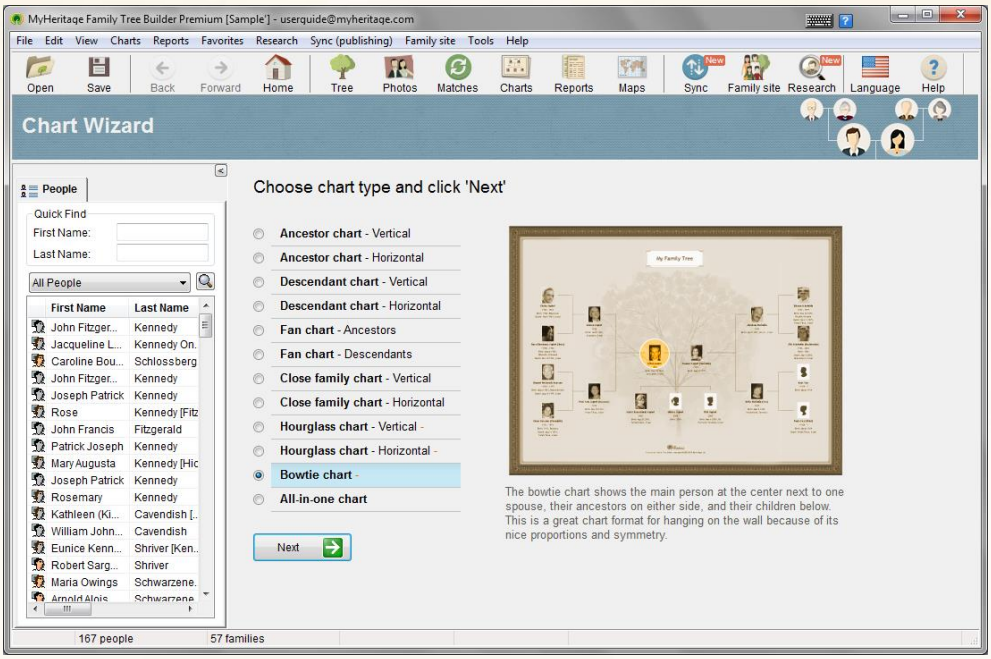
The **Charts** menu is displayed, as shown below:



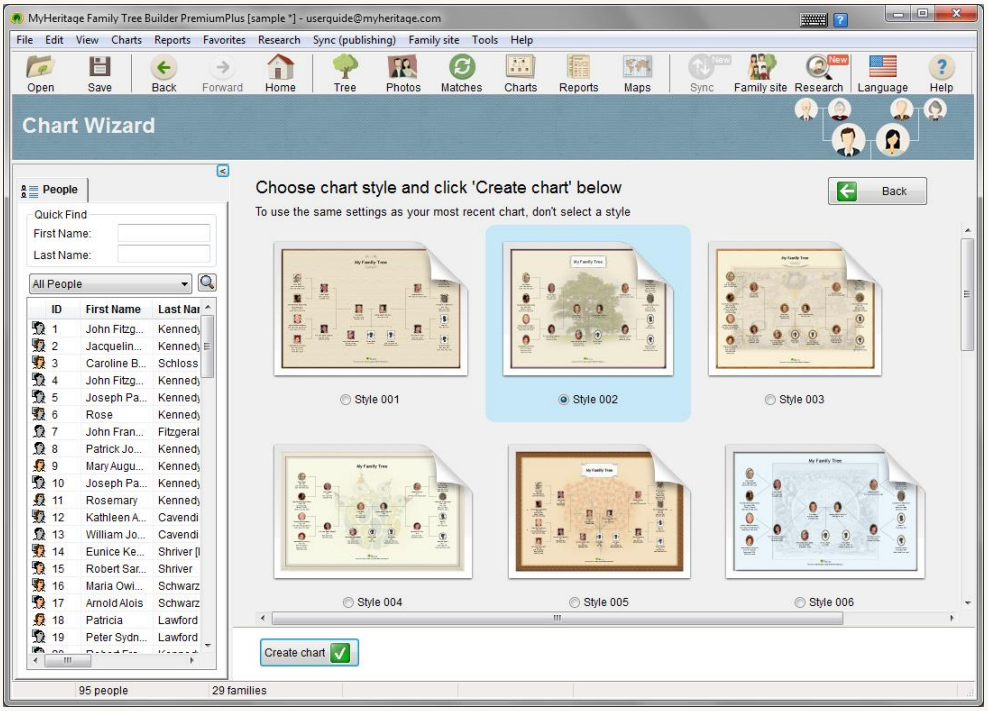
2 You can now select the chart you want to display (and whether to create a horizontal or vertical chart).

Alternatively, you can select the **Chart Wizard** option to display more information about chart types. This wizard is described in the next step.

3 In the Chart Wizard, select the respective radio button for the type of chart you want to display and click **Next**:



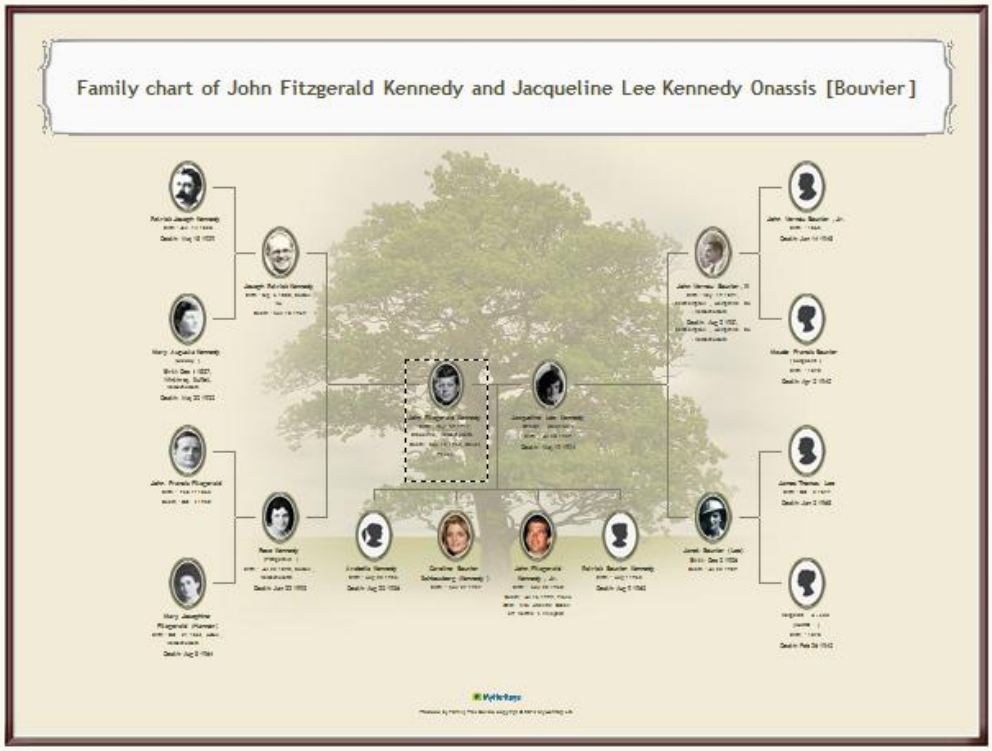
4 Select the radio button to select the chart style.



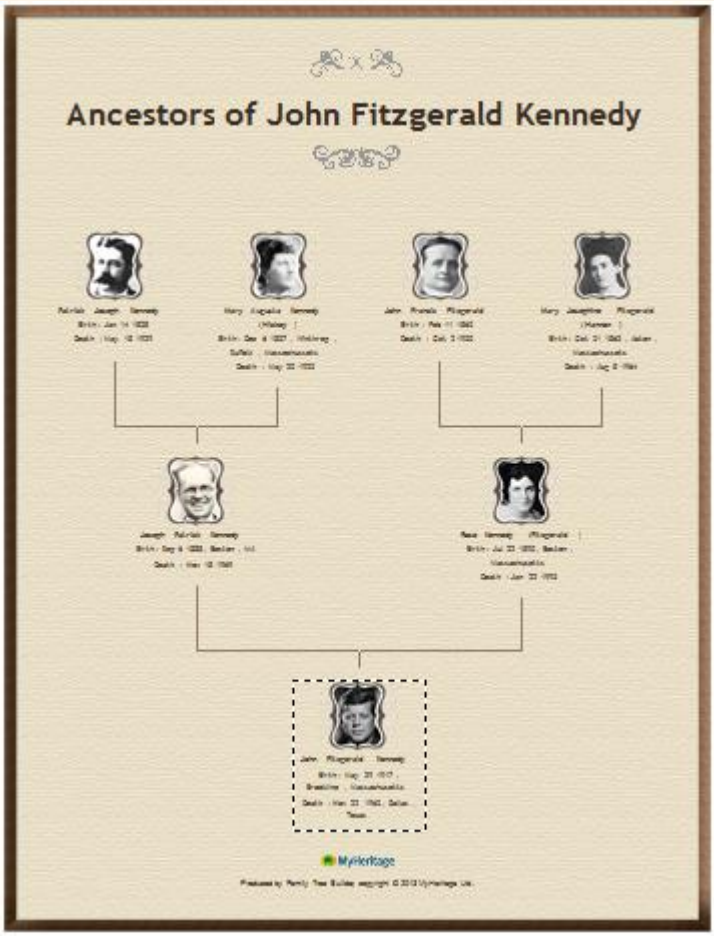
5 Click **Create chart** to create the chart that you selected. The chart is centered around the person who is currently selected in the Tree View.

Examples of different types and styles of charts are presented below:

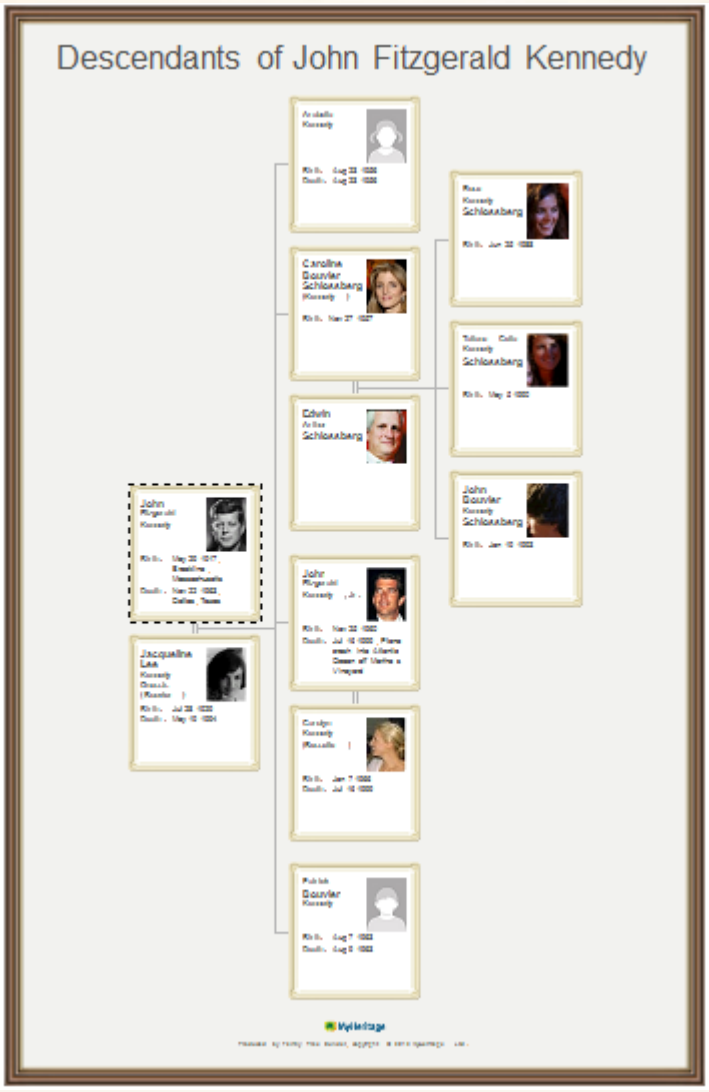
Bowtie Chart



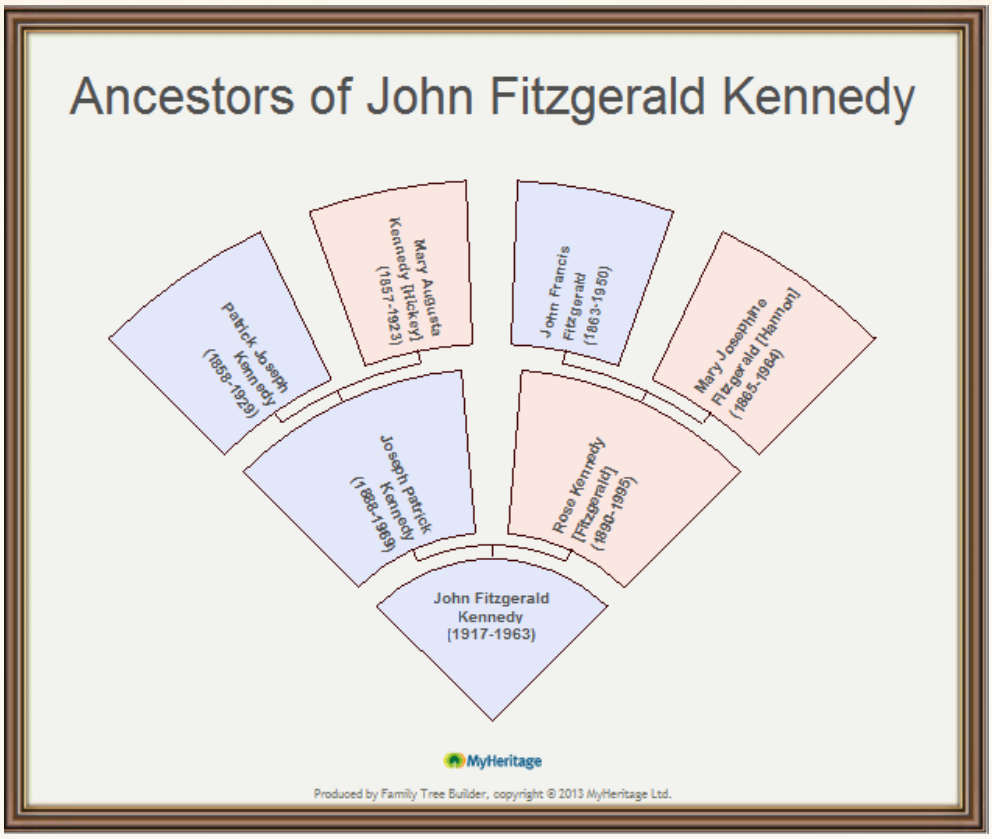
Vertical Ancestor Chart



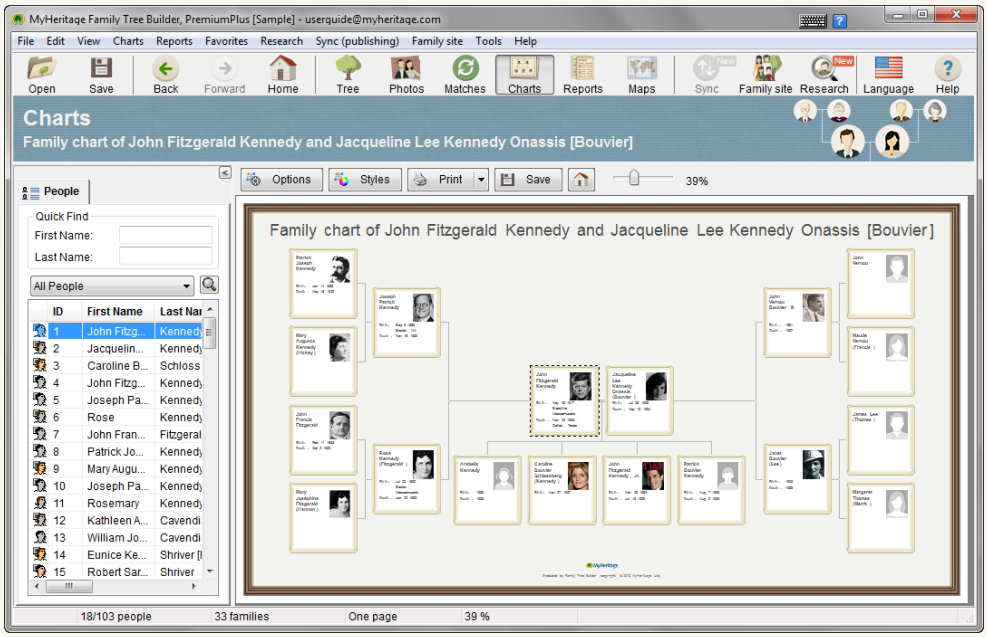
Horizontal Descendants Chart



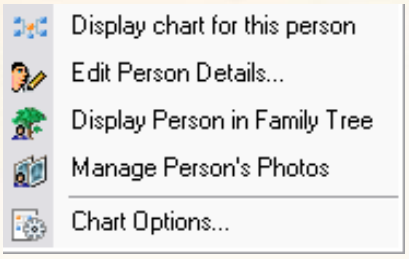
Ancestors Fan Chart



6 To change the main person of the chart, double-click this person in the People List on the left.



7 You can right-click a person's box in the chart to open the following menu:



The options in this menu are:

- **Display chart for this person:** Makes the selected person the main person of the chart.
- **Edit Person Details:** Edits the details of this person.
- **Display Person in Family Tree:** Shows the Tree View for this person.
- **Manage Person's Photos:** Shows the list of all photos of this person in the Photos View.
- **Chart Options:** Changes the chart's options, as described below.

8 You can click and drag any box in the chart to a new position, as required. The line connecting it to its family member adjusts accordingly. Hold down the Ctrl key while dragging the box if you want to move only this box. Otherwise, the box and its dependent boxes move together.

9 Use the Chart toolbar, as needed. The following describes the other options that are available in the toolbar above the chart window:

- **Options:** Enables you to configure the appearance and content of the chart. See Configuring Chart Appearance for more details.
- **Styles:** Provides a variety of attractive styles for your selection and enables you to specify the type of facts that will appear in the boxes. Each style can then be further configured by clicking the **Options** button.
- **Print:** Enables you to print the displayed chart to a standard printer or as a poster. See Printing a Chart for more details.
- **Save:** Opens a wizard that enables you to save this chart as a PDF or JPEG file on your computer.

- **Home**  **Icon:** Moves the main person of the chart to the center of the chart.
- **Zoom:** You can use the zoom slider to enlarge or reduce the display of the chart on the screen.

NOTE

PDF is a standard format provided by Adobe Acrobat. Its reader can be downloaded for free from various sites on the Internet. If you do not have Acrobat reader, simply download it and install it. You can then view and print the PDF files provided by Family Tree Builder or any other PDF file.

Configuring Chart Appearance

Family Tree Builder provides a wide variety of options for defining the appearance of your charts, as follows:

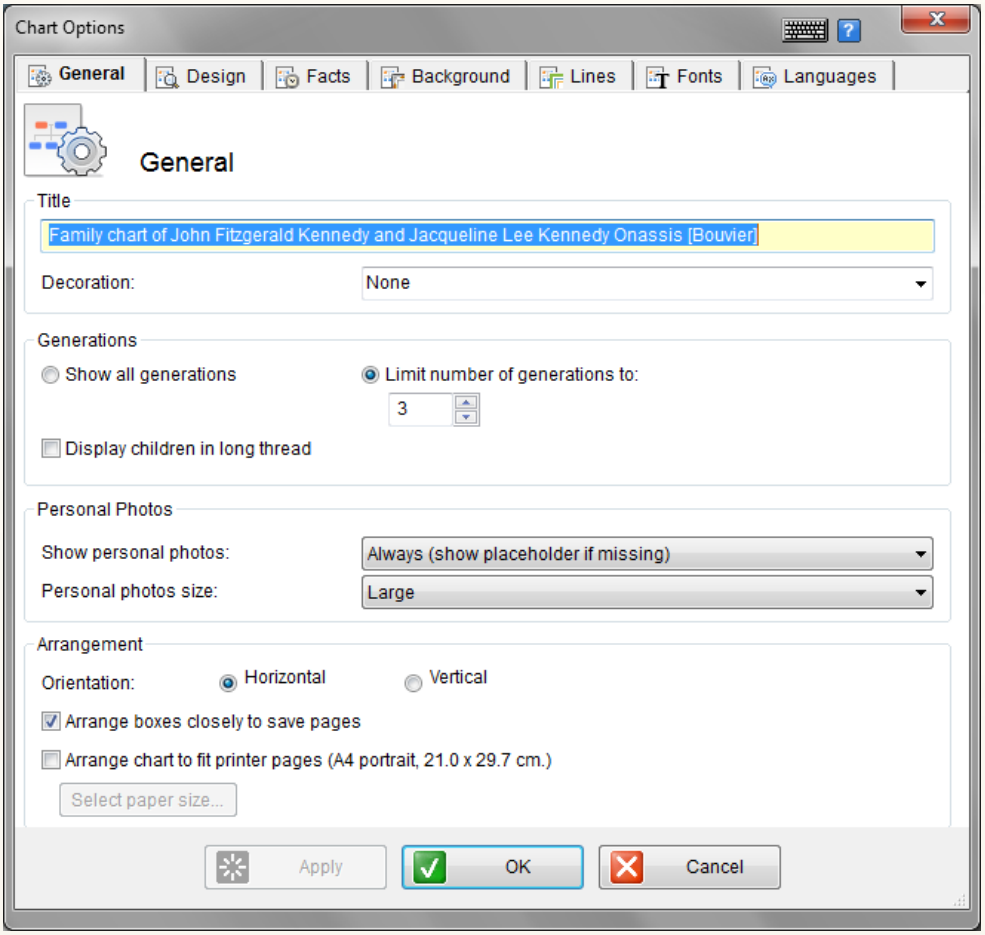
- **Chart Options**
- **Fan Chart Options**
- **Chart Styles**

Chart Options

To configure chart options:

1 Display the chart of your choice (see Displaying a Chart above). The chart will be displayed in the main window.

2 Select **Chart Options** to display the following window:



NOTE For fan charts, the options window differs. See Fan Chart Options.

3 Fill in or modify the information in the various tabs of this window, as described below, and click **OK** to display the chart. This new appearance remains until you change it.

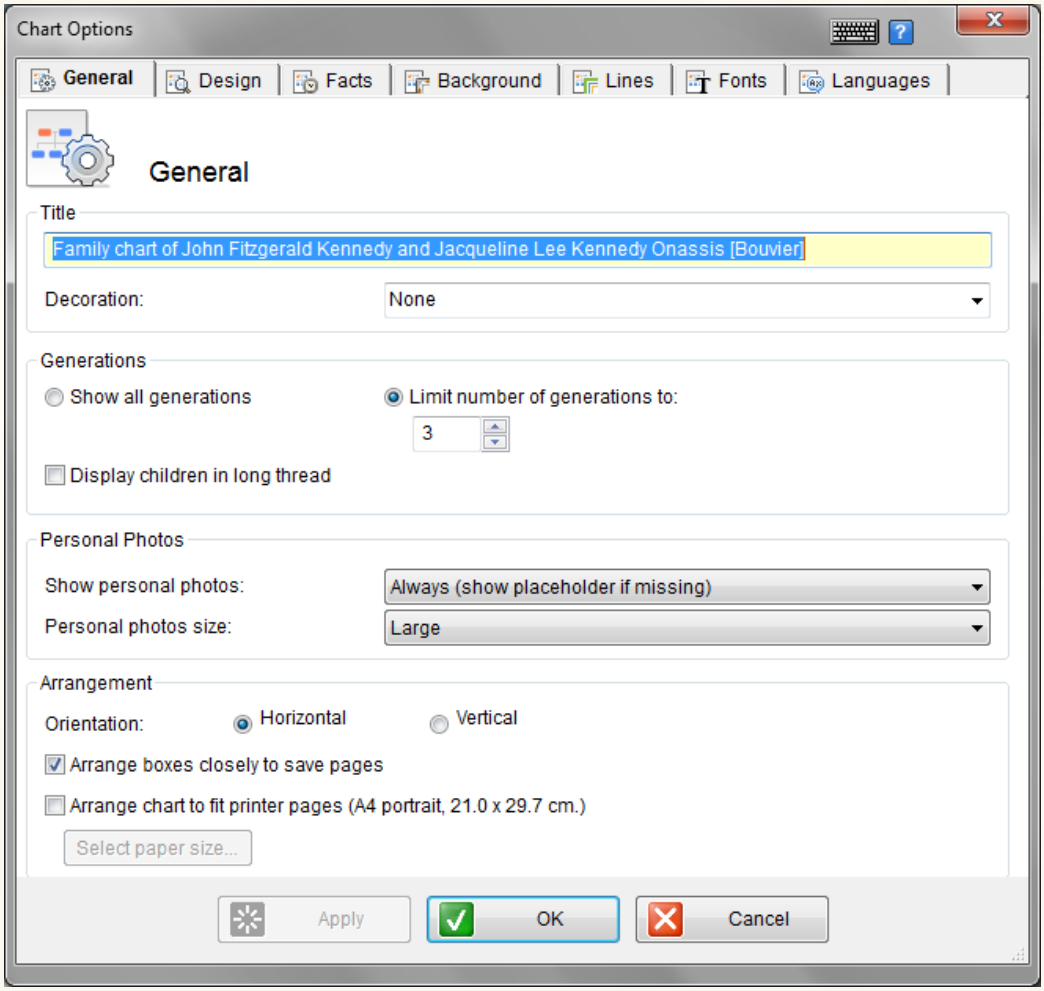
NOTE You can also click **Apply** to save the changes and still leave the window open for more changes.

The following tabs are provided to enable you to define the appearance of your family chart:

- **General Tab**
- **Design Tab**
- **Facts Tab**
- **Background Tab**
- **Lines Tab**
- **Fonts Tab**
- **Languages Tab**

General Tab

The **General** tab allows you to customize the general appearance of the chart, as follows:



The following describes the fields in this window:

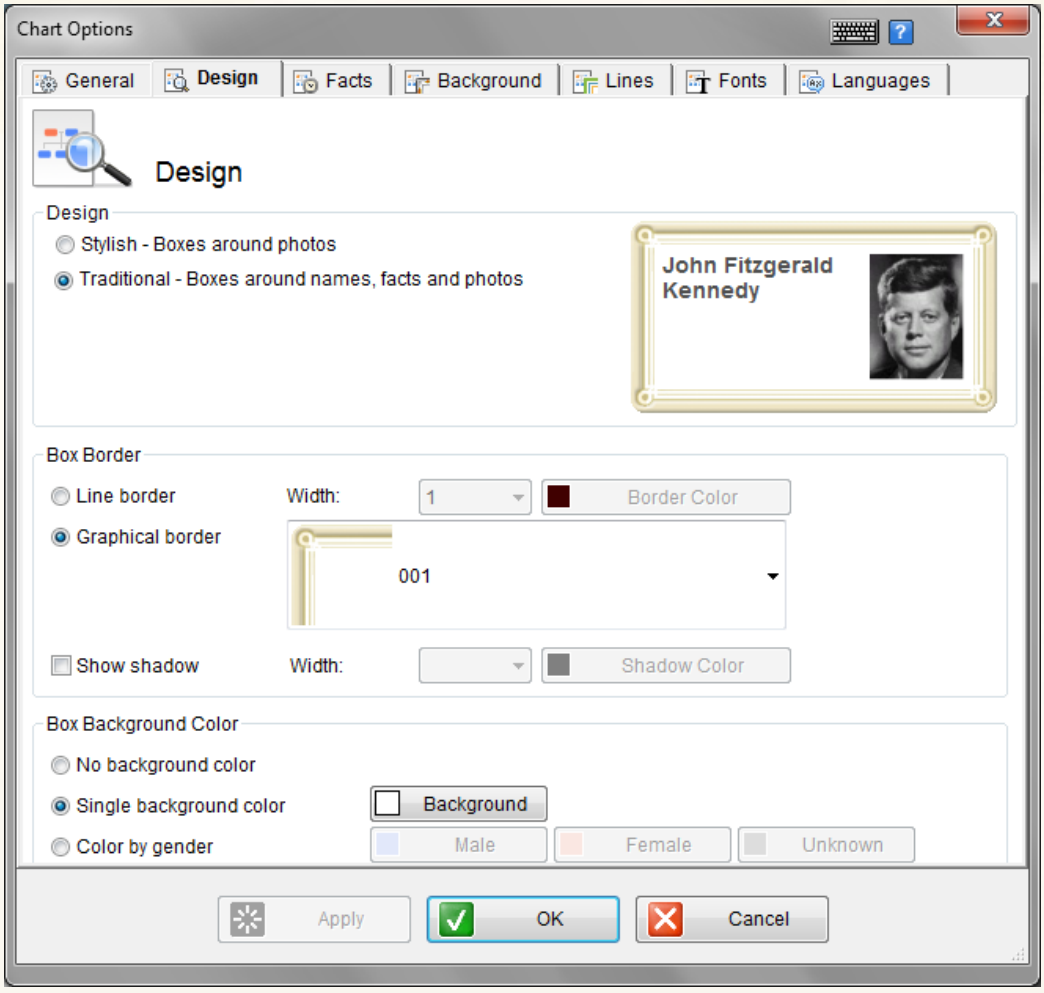
- **Title:**
  - **Title:** Specify a title for the chart. A title is automatically given to a chart by Family Tree Builder, based on the type of chart and the main person or couple of the chart. You can change this title as you want.
  - **Decoration:** Specify the decorative style for the title of the chart. To do so, open the dropdown list to see samples of the various decorations that are available. Select the first option in the list for no decoration.

- **Generations:**
  - Show all generations or specify the number of generations to appear in the chart. The more generations you specify, the more people will appear in the chart and the larger the chart will be.
  - **Display children in a long thread:** This option is available only for Bowtie charts. A Bowtie chart shows the children of a couple below the couple in the chart. Check this option to show the children in a vertical thread, one below the other. Do not check this option to show the children horizontally next to each other.
  - **Closeness of relatives:** This option is only available for Close Family charts and allows you to specify which relatives of the main person to include in the chart.
  - **Include ancestors of spouse(s):** This option is only available for Hourglass charts and allows you to specify whether or not to also include the spouse's ancestors.
- **Personal Photos:**
  - **Show Personal Photos:** Specify how Personal Photos are shown in the chart. If you select the **Stylish** design (see the **Design** tab), then this option is not available, as this design always shows personal photos). The available options are:
    - **Only if Exists:** Personal photos are shown in the chart only for people who have a personal photo. Otherwise, nothing is shown.
    - **Always (show placeholder if missing):** Personal photos are shown in the chart for people who have a personal photo and a silhouette placeholder is shown for people with no personal photo.
    - **Never:** Never show personal photos in the chart.
  - **Personal photos size:** Specify the size of the personal photos in the chart. **Huge** is 90 x 120 pixels, **Large** is 60 x 80 pixels and **Small** is 30 x 40 pixels.

- **Arrangement:**
  - **Orientation:** Specifies whether the chart is displayed vertically or horizontally.
  - **Arrange boxes closely to save pages:** Positions chart boxes close together, reducing the space that they take up on paper. When this option is selected, the chart is smaller, and may be harder to read.
  - **Arrange chart to fit printer pages:** Check this option if you plan to print the chart on your home printer. When this option is selected, Family Tree Builder arranges the chart so that it fits nicely on multiple sheets of paper. Otherwise, the chart does not take into account the size of paper in your printer.
  - **Select paper size:** This button is available only if you selected the **Arrange chart to fit printer pages** option above. Selecting this option opens a standard Print Setup window to change the size and orientation of your printer paper.
  - **Prevent boxes from crossing page boundaries:** This option is only available when selecting the **Arrange chart to fit printer pages** option above. Check this option to prevent a box in the chart from spanning more than one printer page. When you check this option, the chart typically becomes much larger.

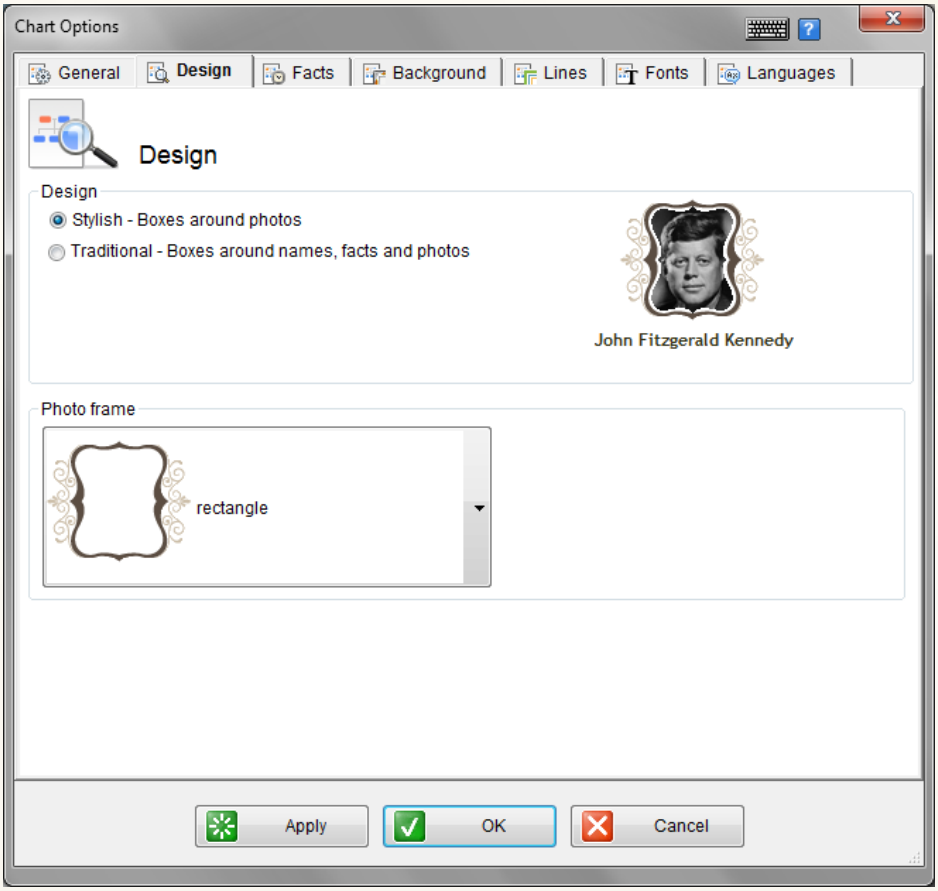
Design Tab

The **Design** tab enables you to define the overall design of each box in the chart.

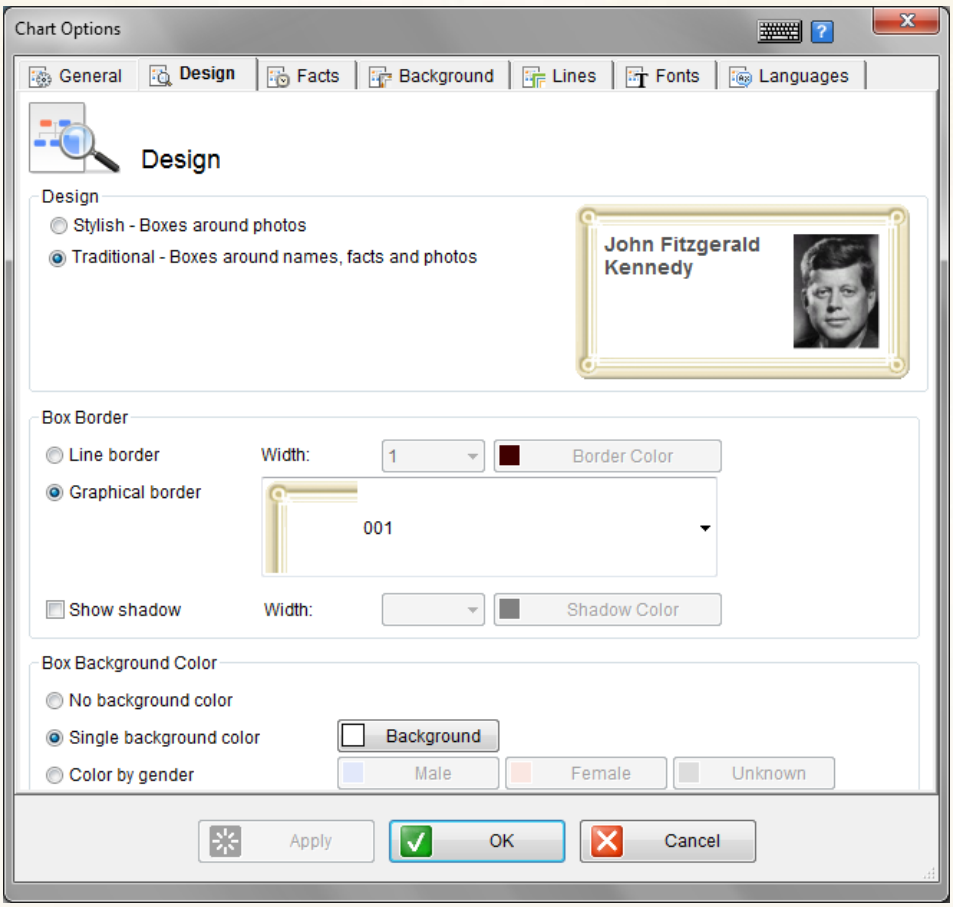


The following describes the fields in this tab:

- **Design:**
  - **Stylish:** In Stylish design, each person's box includes a photo with a frame around it and text about the person appears below the photo.



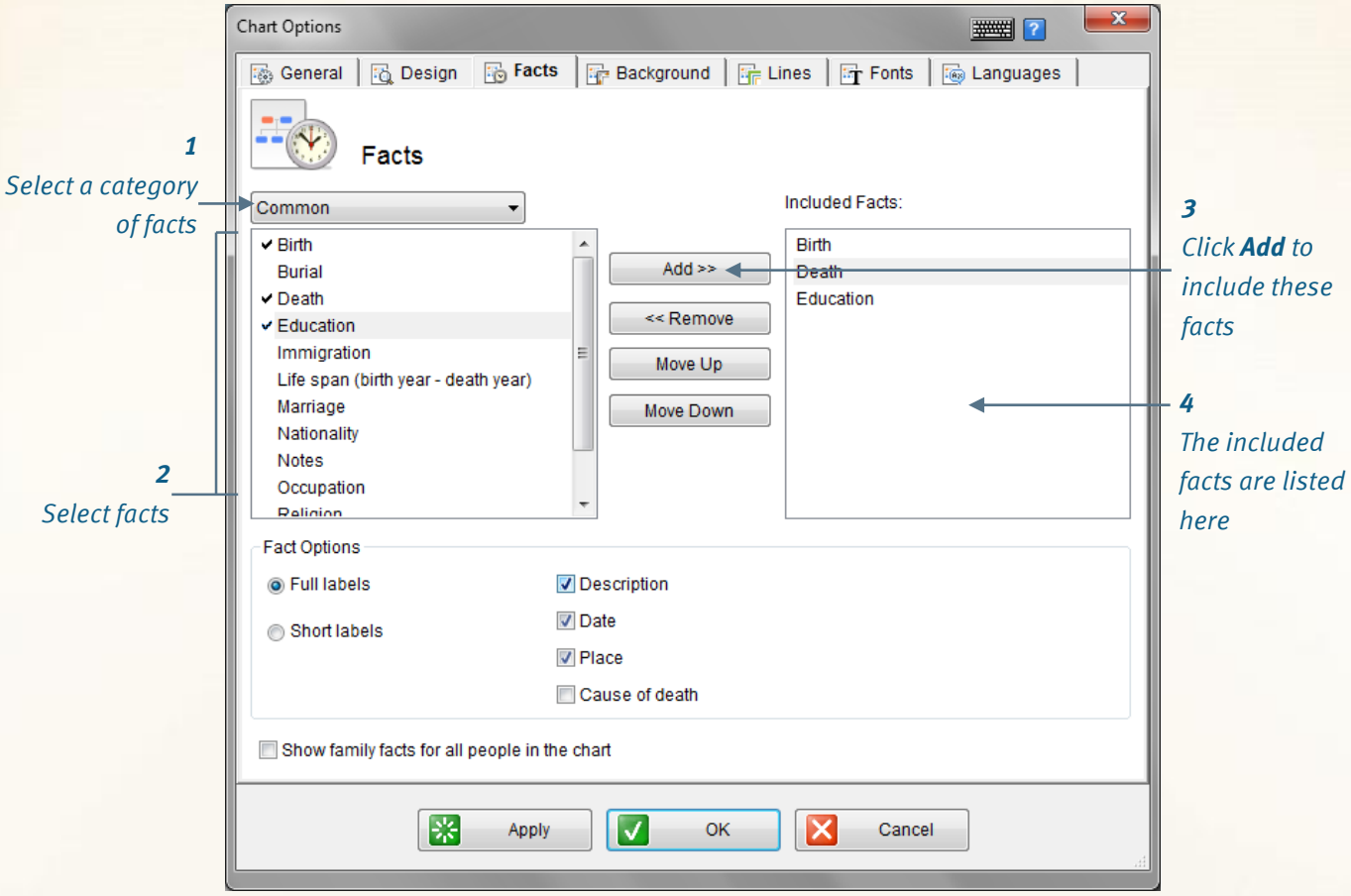
- **Traditional:** In Traditional design, each person's box appears as a rectangle with the photo and text inside the box.



- **Photo frame:** Select the type of frame to show around each photo in the chart. Select the last option in the dropdown if you do not want any frame around the photos.
- **Box Border:** Select the type of border for each box in the chart. You can select a simple line border with your choice of width and color, or you can select from one of the available graphical borders. You can also select whether to show a shadow around each box.
- **Box Background Color:** The inside of each box can have a background color. You can select whether to use a different color based on the gender of the person in the box.

Facts Tab

The **Facts** tab enables you to define and customize the facts that appear in each box in the chart, as follows:



Each chart box represents a person. An example of a box in a chart is shown below:

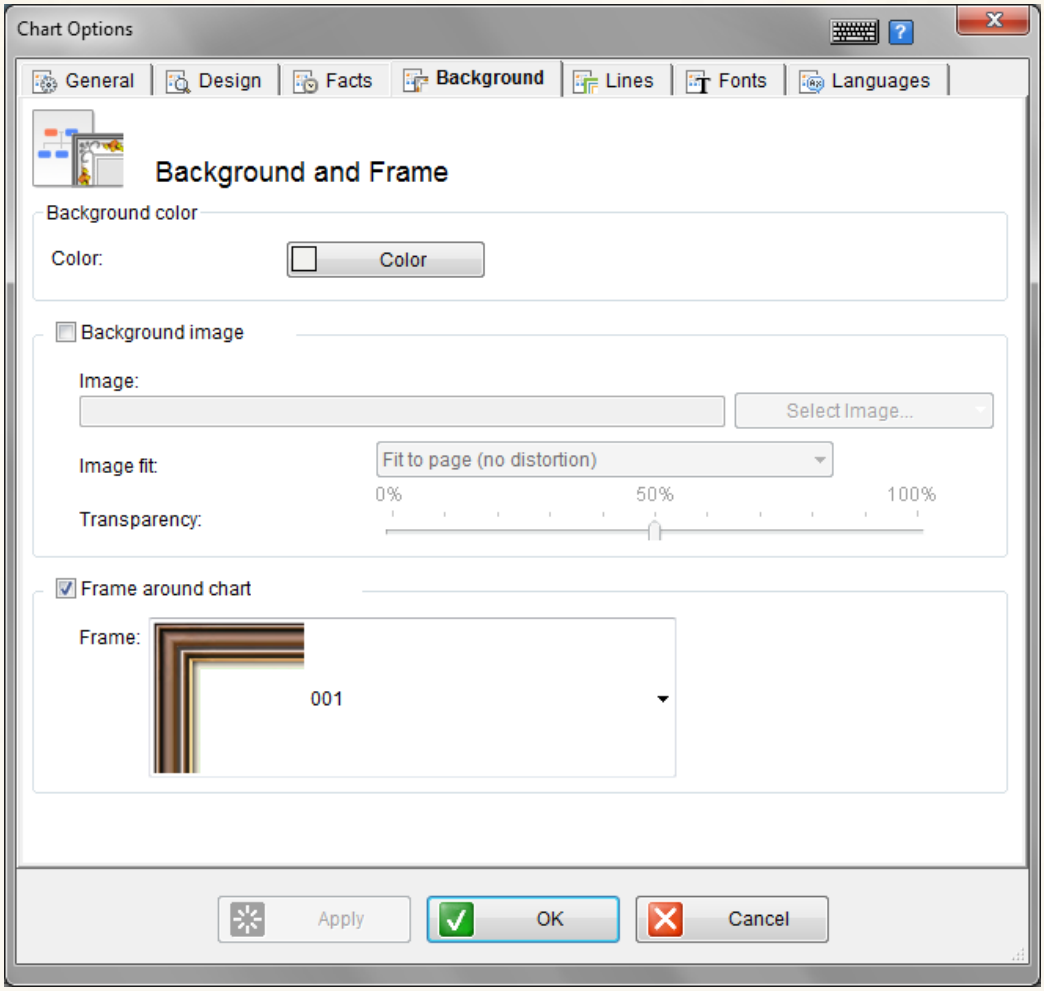


To select the facts to be included:

1. The left side of this window lists the various facts that are available to be shown in a chart profile. The facts that are shown in this list are determined by the selection in the category field that appears above it. Select a category of facts from this dropdown field. These are the facts from which you can choose to include.
2. Click on the facts to be included in a chart box. A checkmark appears to the left of the fields that have already been selected. You may use the **Ctrl** and **Shift** keys on the keyboard to select more than one fact at a time.
3. Click **Add** to include these facts on the list on the right. This list specifies the facts to include in the profile. You can also double-click the fact to add it. Click **Remove** to remove them from this list.
4. Specify the order in which the facts appear on the profile. Select a fact on the right and move it up in the list by clicking **Move Up**, or move it down in the list by clicking **Move Down**.
5. You can specify whether the name of facts in chart boxes have **Full labels** or **Short labels**. When **Full labels** is selected, a fact name might be ***Birth:*** for example, while with **Short labels**, its name might be ***b.***.
6. Select the **Description**, **Date**, **Place** and/or **Cause of death** checkboxes to indicate which information to show for each of the selected facts.
7. Click **Apply** or **OK** to save your changes.

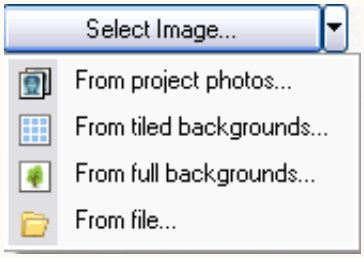
Background Tab

The **Background** tab enables you to customize the background of the chart and the frame around it:



The following describes the fields available in this tab:

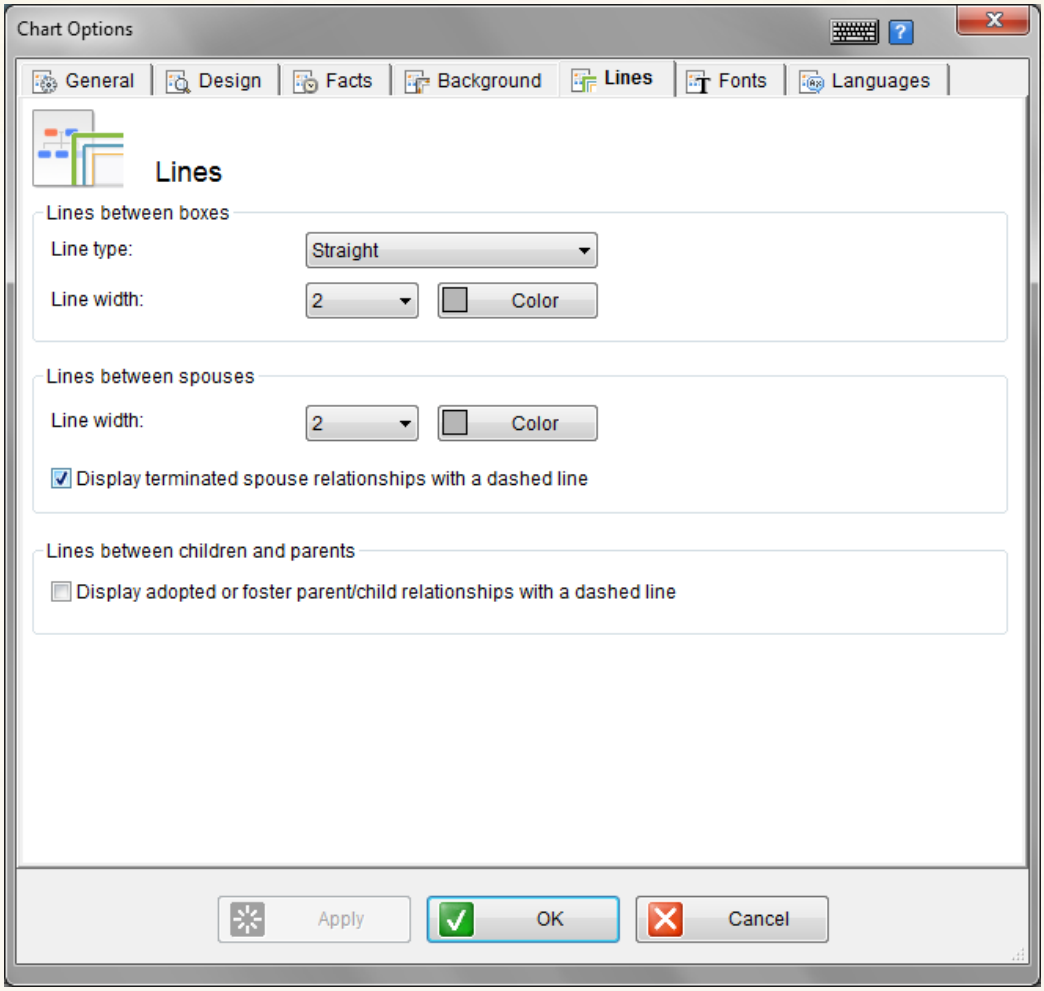
- **Background color:** You can select a background color for the chart. If you are printing this chart on your home printer, you may want to set this color to white.
- **Background image:** You can select a background image for the chart. Click the **Select Image** button to open the following menu:



  - **From project photos:** Select a photo that you have added to your project as the background image for your chart.
  - **From tiled backgrounds:** Select an image from a list of tiled images provided by Family Tree Builder.
  - **From full backgrounds:** Select an image from a list of background images provided by Family Tree Builder.
  - **From file:** Select your own image file as the background image for your chart.
- **Image fit:** If you have selected a background image, specify how to fit this image by selecting one of the following options in the dropdown list:
  - **Fit to page (no distortion):** Enlarge or shrink the image to fit the page, but do not stretch and potentially distort it.
  - **Fit to page (stretch):** Enlarge or shrink the image and stretch the image to fit the exact size of the chart.
  - **Tile image to fit chart:** Tile the image across the chart. This option is automatically selected when you select one of the tiled backgrounds above.
- **Transparency:** If you have selected a background image, you can control the transparency level of this image. The higher the percentage you select, the fainter the image appears.
- **Frame around chart:** You can select a frame to display around the chart by checking the **Frame around chart** option and selecting one of the frames provided by Family Tree Builder.

Lines Tab

The **Lines** tab enables you to customize the lines that link the boxes on a chart.

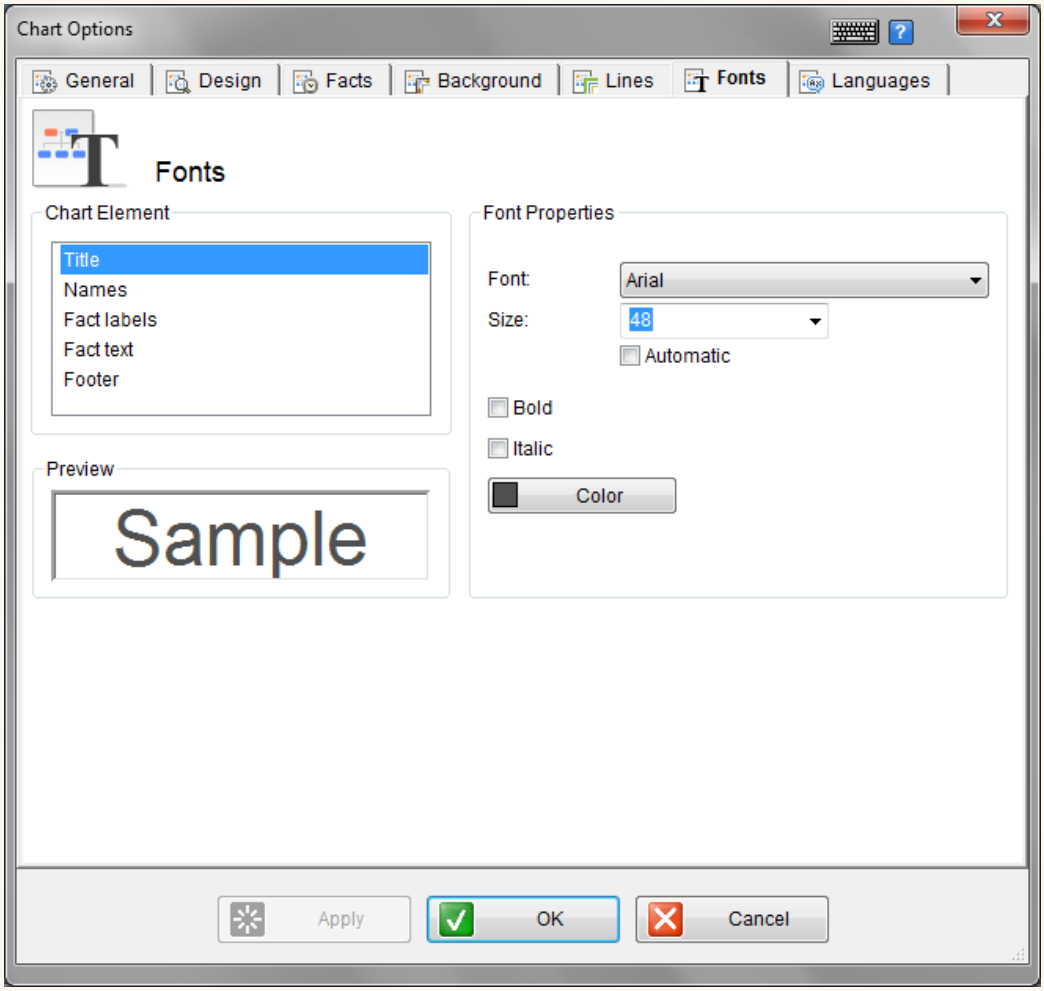


The following fields are available in this tab:

- **Line type:** Select the line type as either **Straight** or **Diagonal**. Straight lines are always vertical and have horizontal connectors with right angles.
- **Line width:** Select the width and color of lines between parents and children.
- **Lines between spouses**: Select the width and color of lines between two spouses.
- **Display terminated spouse relationships with a dashed line:** Select whether to display dashed lines between divorced and separated spouses.
- **Lines between children and parents:** Select whether to display dashed lines from parents to their adopted and foster children.

Fonts Tab

The **Fonts** tab enables you to choose the font of the text of various elements on your chart



Select the chart element on the left and then specify the font and the size of this element. You can also specify whether the text will be bold and/or italics and the color of the text. You can preview your selection in the Preview area.

The text elements of the chart are:

- **Title:** The title at the top of the chart. Select a large font for this element. You can also check the Automatic checkbox for Family Tree Builder to automatically determine the size based on the size of the chart.
- **Names:** The names of people in the chart.

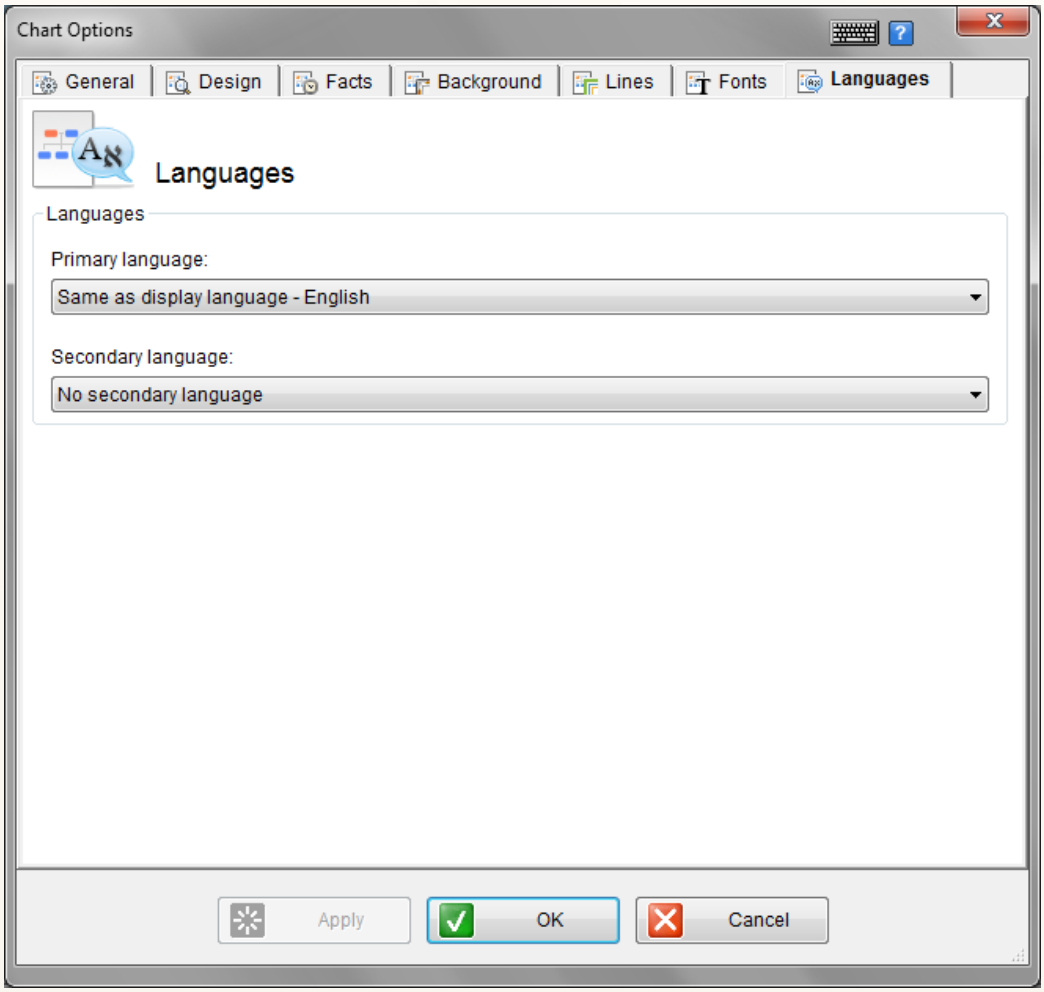
- **Fact labels:** The names of facts in the chart, such as **Birth**.

> **NOTE** Note that the Stylish design does not show fact labels, so this option does not appear in the design.

- **Fact text:** Information about a fact in the chart, such as the date, place and description of this fact.
- **Footer:** The footer text at the bottom of the chart.

Languages Tab

The **Languages** tab enables you to define the primary and secondary language. More details about the primary and secondary language are provided in Primary and Secondary Data Languages.

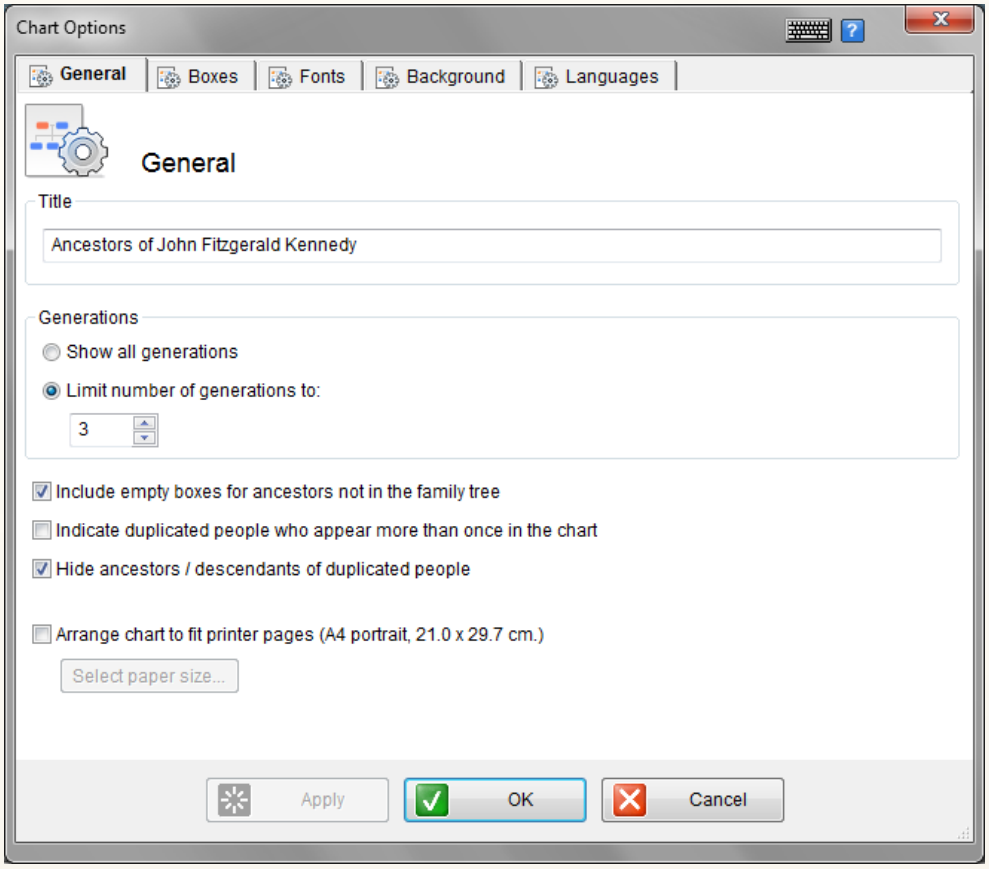


Fan Chart Options

To configure fan chart options:

1 Display the fan chart of your choice (see Displaying a Chart). The chart is displayed in the main window.

2 Select **Chart Options** to display the following window:



3 Fill in or modify the information in the various tabs of this window, as described below, and click **OK** to display the chart. This new appearance remains until you change it.

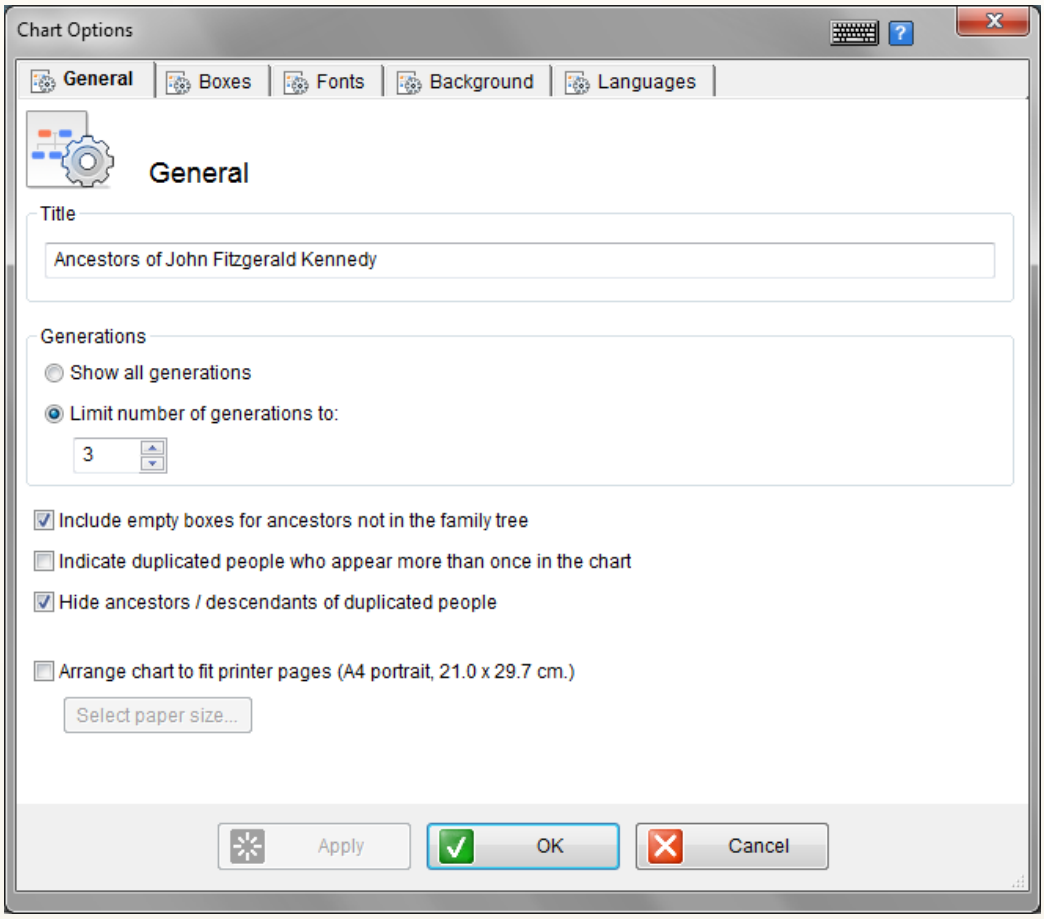
NOTE You can also click **Apply** to save the changes and still leave the window open for more changes.

The following tabs are provided to enable you to define the appearance of your family chart:

- General Tab
- Boxes Tab
- Fonts Tab
- Background Tab
- Languages Tab

General Tab

The **General** tab enables you to customize the general appearance of the chart, as follows:

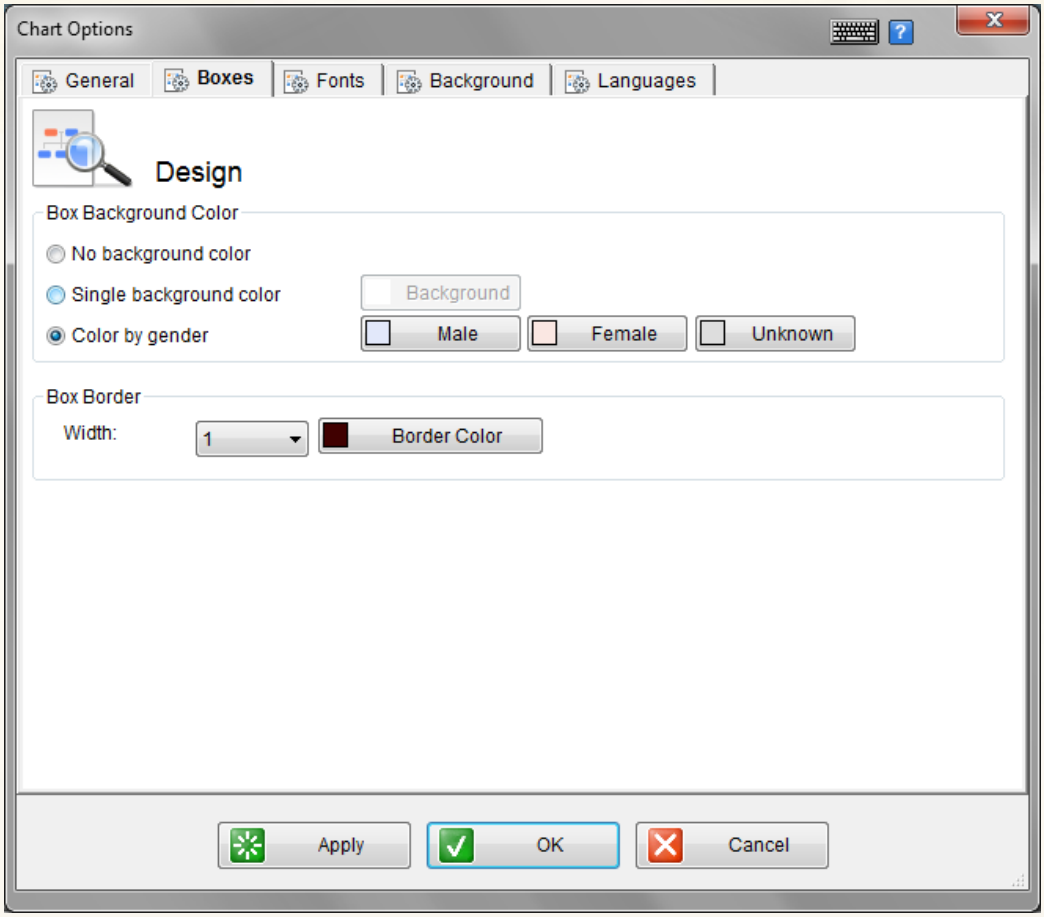


The following describes the fields in this window:

- **Title:** Specify a title for the chart. A title is automatically given to a chart by Family Tree Builder, based on the type of chart and the main person or couple of the chart. You can change this title as you want.
- **Generations:** Show all generations or specify the number of generations to appear in the chart. The more generations you specify, the more people will appear in the chart and the larger the chart.
- **Include empty boxes of ancestors not in the family tree:** This option is only available in Ancestor charts. Check this option to include empty boxes for all ancestors, even those who are not defined in the family tree.
- **Indicate duplicated people who appear more than once in the chart:** Use this option to mark people who appear more than once in the tree with numbers, starting from [1], [2] and so on. This feature is useful if there are marriages within the family, for example a marriage between two cousins.
- **Hide ancestors / descendants of duplicated people:** This option is useful if you have people who appear more than once in the chart, for example, married cousins. Use this option if you do not want ancestors (in an Ancestor Fan chart) or descendants (in a Descendants Fan chart) of these duplicated people to also be duplicated.
- **Arrange chart to fit printer pages:** Check this option if you plan to print the chart on your home printer. When this option is selected, Family Tree Builder arranges the chart so that it fits nicely on multiple sheets of paper. Otherwise, the chart does not take into account the size of paper in your printer.
- **Select paper size:** This button is available only when you select the **Arrange chart to fit printer pages** option above. Selecting this option opens a standard Print Setup window to change the size and orientation of your printer paper.

Boxes Tab

The **Boxes** tab enables you to define the design of each box in the Fan chart.



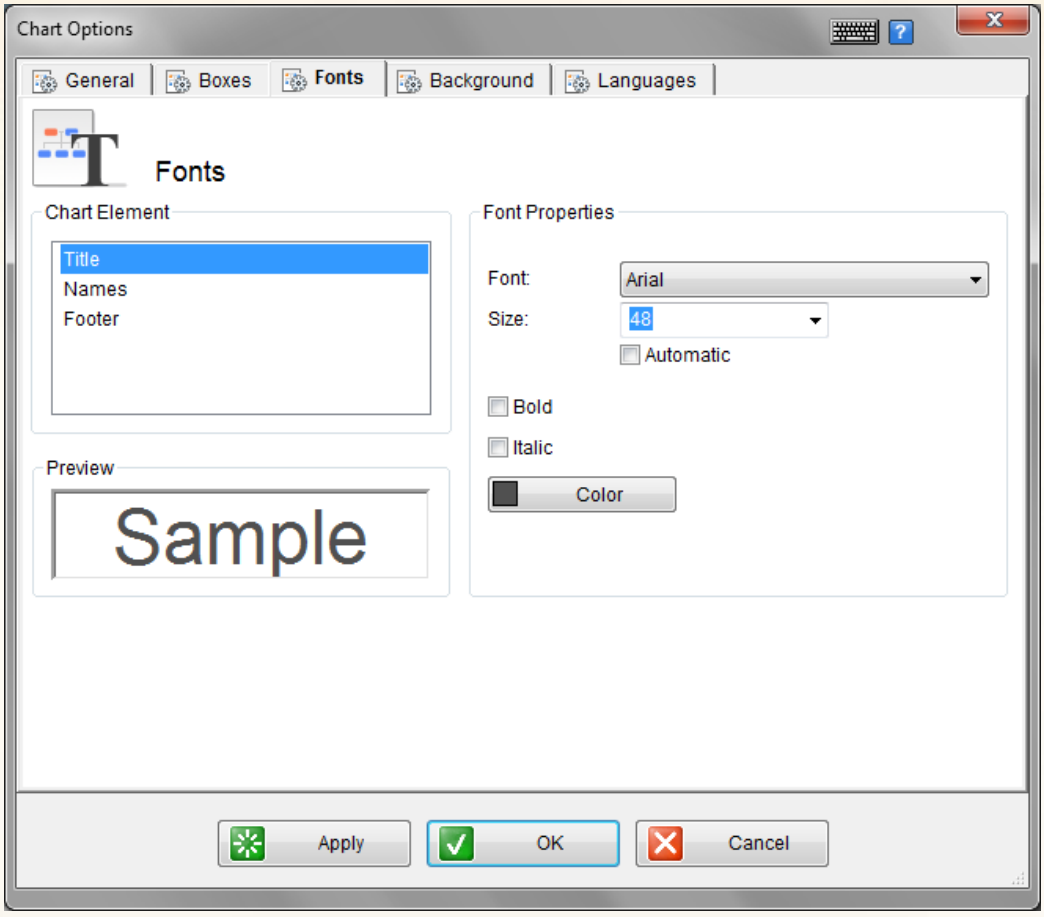
The following describes the fields in this tab:

- **Box Background Color:** The inside of each box can have a background color. You can select whether to use a different color based on the gender of the person in the box.
- **Box Border:** Select the width and color for each box in the chart.

Fonts Tab

The **Fonts** tab enables you to choose the font of the text of various elements on your chart.

Select the chart element on the left and then specify the font and the size of this element. You can also specify whether the text is bold and/or italics and the color of the text. You can preview your selection in the Preview area.

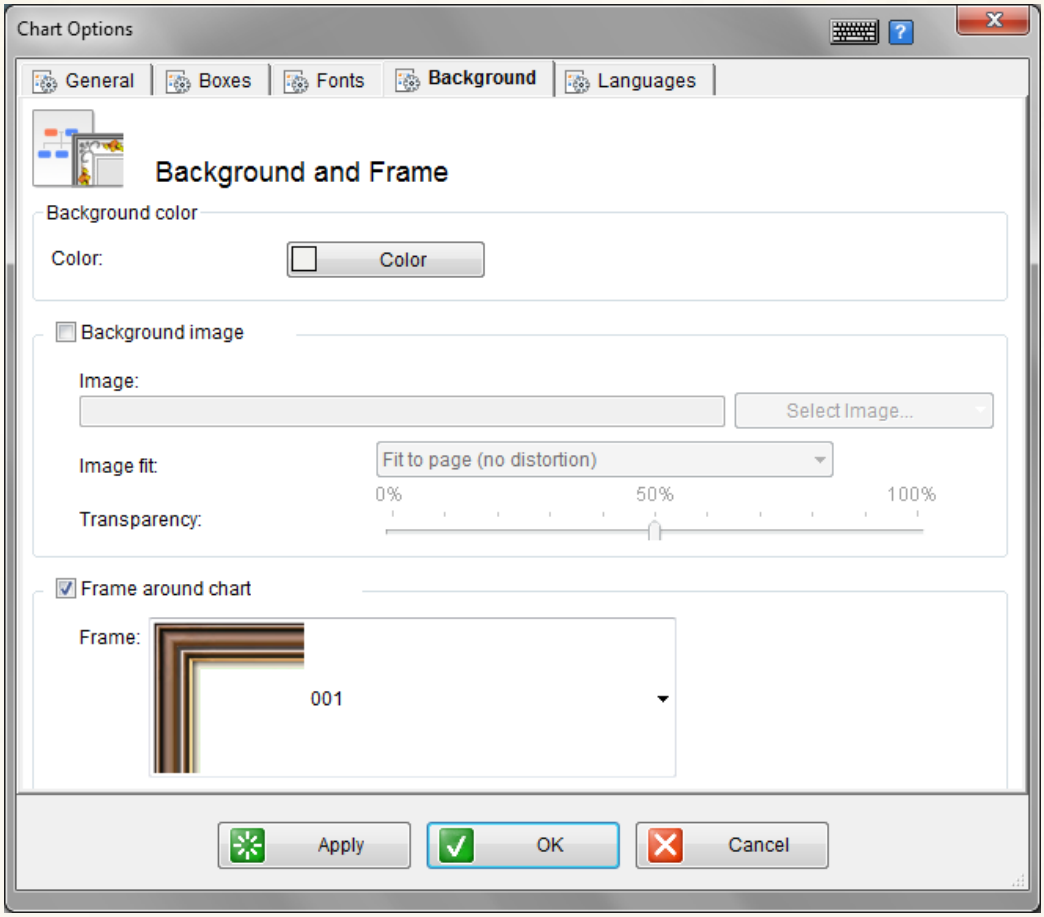


The text elements of the chart are:

- **Title:** The title at the top of the chart. Select a large font for this element. You can also check the **Automatic** checkbox for Family Tree Builder to automatically determine the size based on the size of the chart.
- **Names:** The names of people in the chart.
- **Footer:** The footer text at the bottom of the chart.

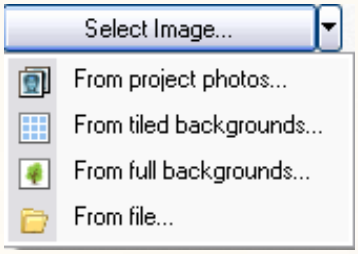
Background Tab

The **Background** tab enables you to customize the background of the chart and the frame around it:



The following describes the fields available in this tab:

- **Background color:** You can select a background color for the chart. If you are printing this chart on your home printer, you may want to set this color to white.
- **Background image:** You can select a background image for the chart. Click the **Select Image** button to open the following menu:



  - **From project photos:** Select a photo that you have added to your project as the background image for your chart.
  - **From tiled backgrounds:** Select an image from a list of tiled images provided by Family Tree Builder.
  - **From full backgrounds:** Select an image from a list of background images provided by Family Tree Builder.
  - **From file:** Select your own image file as the background image for your chart.
- **Image fit:** If you selected a background image, specify how to fit this image by selecting one of the following options in the dropdown list:
  - **Fit to page (no distortion):** Enlarge or shrink the image to fit the page, but do not stretch and potentially distort it.
  - **Fit to page (stretch):** Enlarge or shrink the image and stretch the image to fit the exact size of the chart.
  - **Tile image to fit chart:** Tile the image across the chart. This option is automatically selected when you select one of the tiled backgrounds above.
- **Transparency:** When you select a background image, you can control the transparency level of that image. The higher the percentage you select, the fainter the image appears.
- **Frame around chart:** You can select a frame to display around the chart by checking the **Frame around chart** option and selecting one of the frames provided by Family Tree Builder.

Languages Tab

The **Languages** tab enables you to define the primary and secondary language. More details about the primary and secondary language are provided in Primary and Secondary Data Languages.

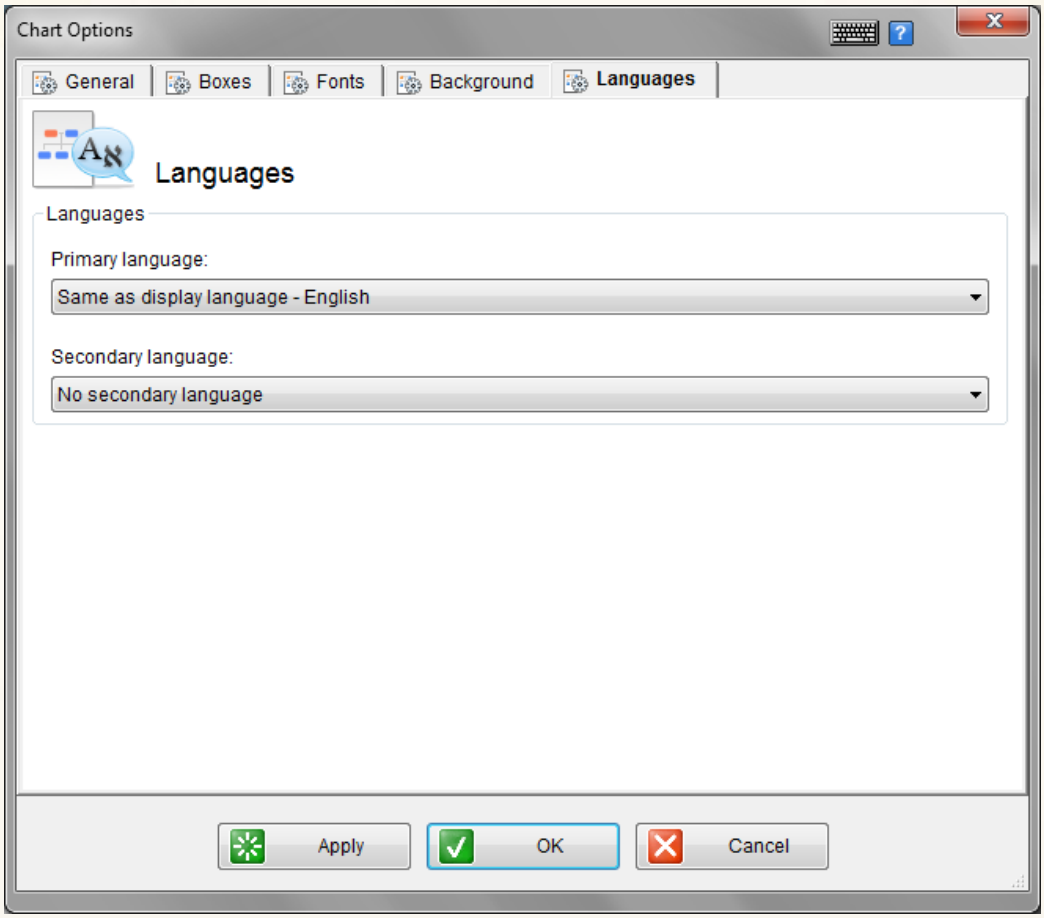


Chart Styles

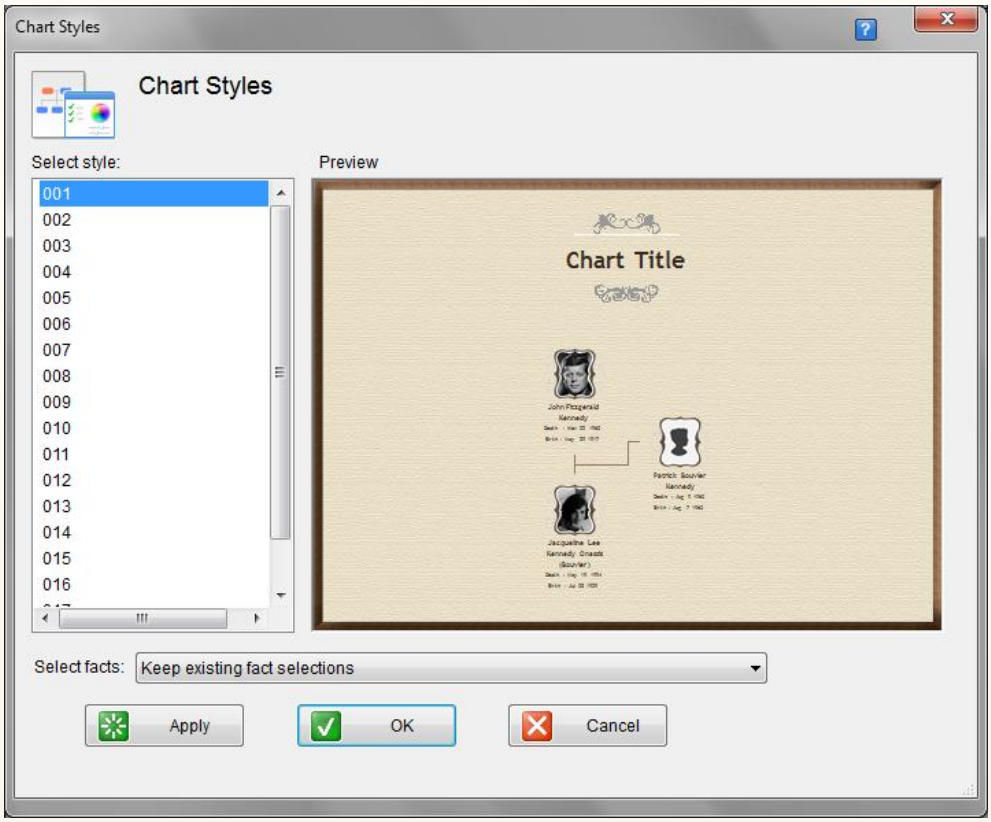
This option enables you to customize the general appearance of a chart and the facts that will be included on it. The Preview area of this window enables you to see what your selection looks like before you apply it. A variety of attractive styles are provided.

To configure Chart styles:

1 Display the chart of your choice (see Displaying a Chart above). The chart is displayed in the main window.

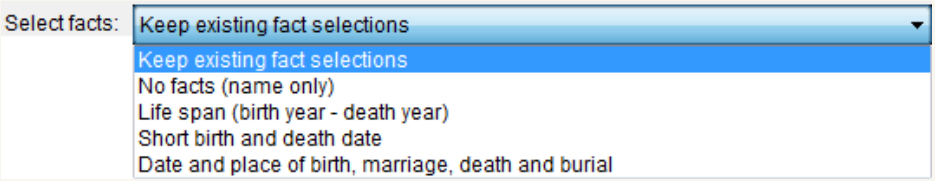
> **NOTE** Chart styles are not available for Fan charts.

2 Select **Chart Styles** to display the following window:



3 Select any of the listed styles on the left.

4 Select one of the options in the **Select facts** field to determine the type and amount of detail to be included. An example of the type of information to be shown can be seen in the Preview area each time you select an option:



5 Click **Apply** or **OK** to save your changes.

Printing a Chart

Family Tree Builder enables you to print a chart in one of the following ways:

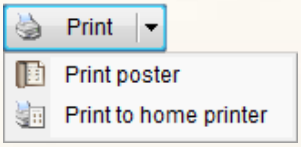
- Printing a Chart from a Home Printer
- Printing a Chart as a Poster

Printing a Chart from a Home Printer

This printing option enables you to print a chart on a standard home printer.

To print a chart from a home printer:

1 In the Chart View, click the **Print** button and select **Print to home printer**.



A standard Print window opens in which you can specify the required print settings.

2 Specify your print settings and click **OK**. The chart is printed in a tiled format.

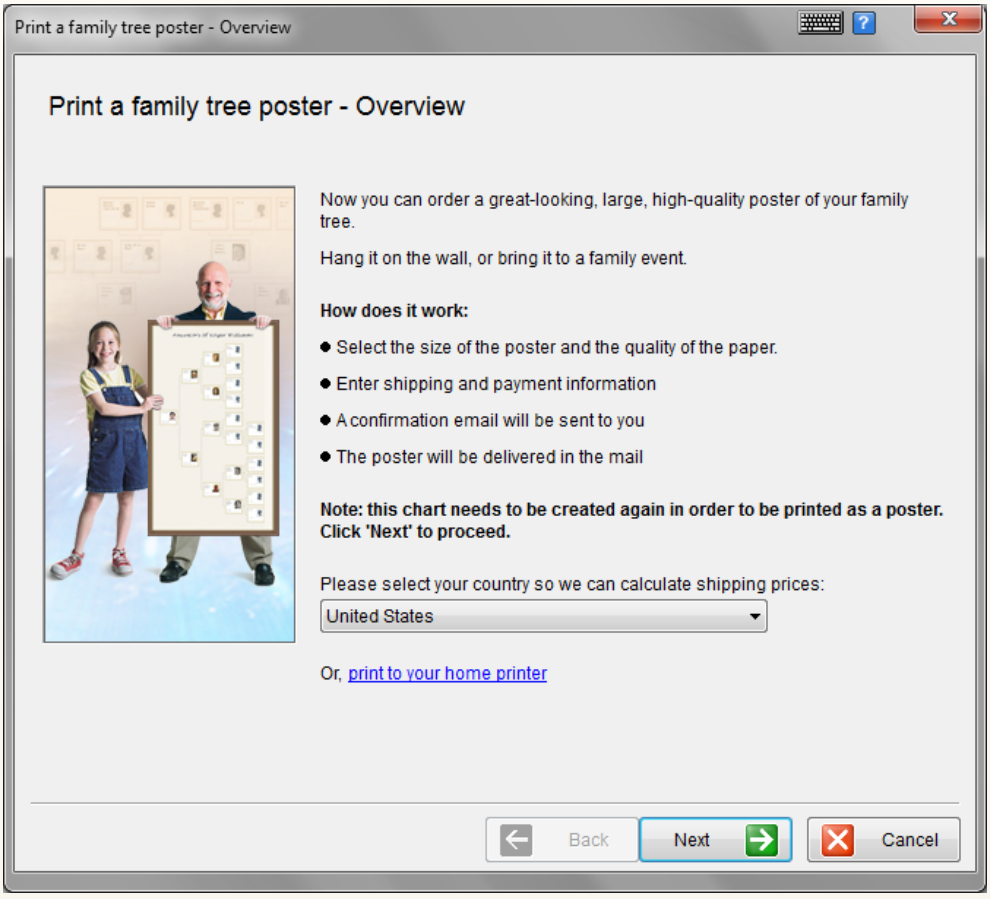
Printing a Chart as a Poster

The **Print poster** printing option enables you to print your family tree chart as a large, high-quality, full-color poster. The chart produced is created using professional plotters on large high-quality paper. Posters can be produced in various sizes and can be laminated for their protection.

MyHeritage provides this printing option as a service to you. Simply specify the details for the poster (size, paper, lamination and so on) and then enter your shipping and payment details. The finished chart is then shipped to you by mail.

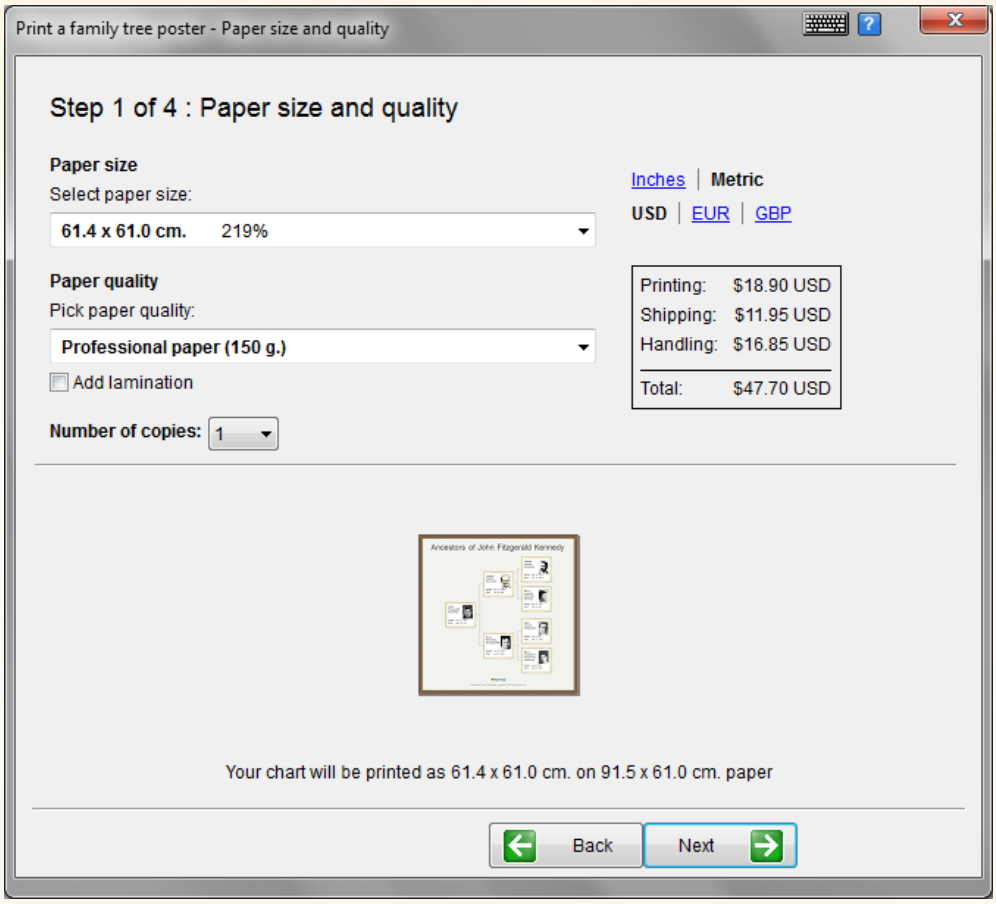
To print a chart as a poster:

1 In the Chart View, click the **Print** button and select **Print poster** to display the following window:



This window describes the general process that will occur to create your poster. If you have not yet selected your country or if you want to ship the poster to a different country, select your country here. Selecting a country determines where MyHeritage will print this poster and the cost of shipping it.

2 Click **Next** to display the following window:



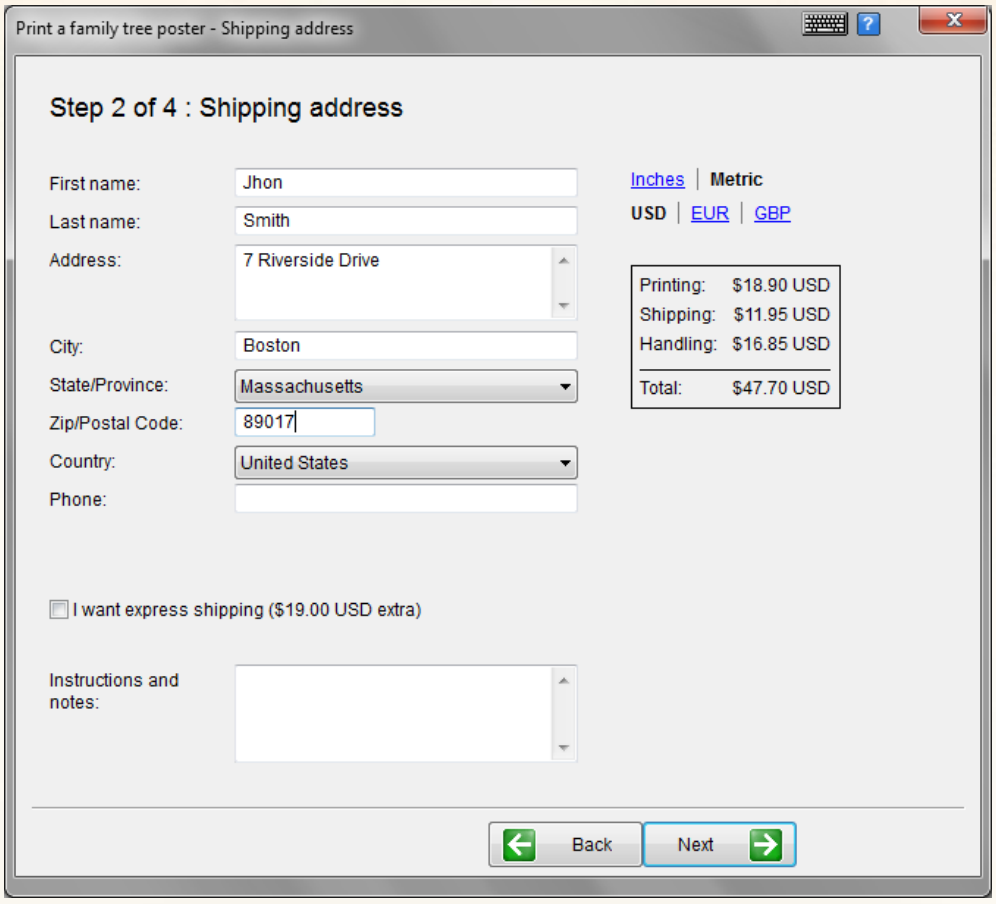
In this window, you specify the paper size and paper quality for the poster. The area at the bottom of the window shows a preview of the chart, based on your specifications. The pricing area at the right shows the cost of preparing and shipping the poster, based on the options you select in the window. You can change from Inches to Metric units and choose the currency you want to use.

3 Specify the paper size in the respective dropdown list. Family Tree Builder calculates several paper sizes based on your chart and the available paper sizes.

4 Specify the type of paper to be used in the **Paper quality** field.

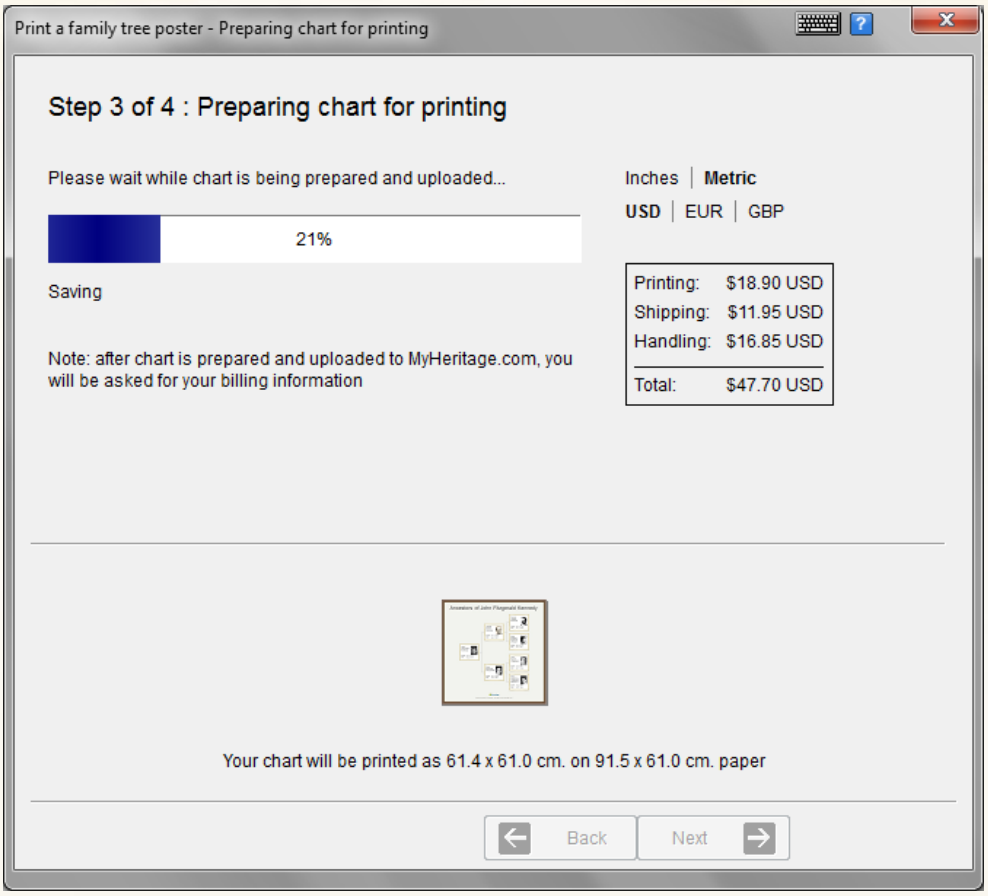
5 Check the **Add lamination** checkbox if you want the chart to be laminated. This is recommended to preserve the poster. Note that some paper types cannot be laminated.

6 Specify the number of copies and click **Next** to display the following window:



In this window, you specify your shipping details.

7 Specify your name and address information. You can choose express shipping and add special notes for the printer. Click **Next** to display the following window:



In this step, your chart is sent to MyHeritage.com along with its order information. You are then directed to a payment screen in which you enter your payment details.

After entering your payment information, a confirmation email is sent to you. Once ready, the poster is shipped to your address.

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CHAPTER 10

Reports



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Reports

About This Chapter:

Family Tree Builder provides a variety of reports, as described in this chapter. It contains the following sections:

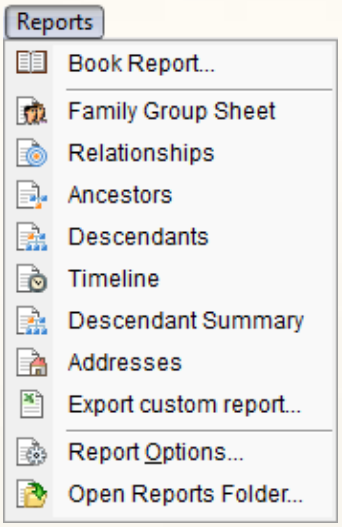
- **Generating a Report** describes how to generate the reports provided by Family Tree Builder.
- **Book Report** describes a simple wizard that walks you through the process of producing a Book Report for a specific person.
- **Family Group Sheet** describes how to generate a report showing the details of the selected person and their immediate family.
- **Relationships Report** describes how to generate a report showing all the relationships of the selected person to all the other people in your project.
- **Ancestors Report** describes how to generate a report showing facts and personal details about a selected person and about each generation that precedes that person, such as parents, grandparents and so on.
- **Descendants Report** describes how to generate a report showing facts and personal details about a selected person and about each generation that follows that person, such as children, grandchildren and so on.
- **Timeline Report** describes how to generate a list showing major events of the family of the selected person in chronological order, such as birth, marriage and death.
- **Descendant Summary** describes how to generate a hierarchical tree showing the descendants of the selected person.
- **Addresses Report** describes how to generate an alphabetical list (in the order of each person's name) of the addresses of all the people in the family tree.
- **Export Custom Report** describes how to create a customized Excel report about the people in your project.

Generating a Report

You can easily generate one of the reports provided by Family Tree Builder as described below.

To generate a report:

1 Click the **Reports** button to display the **Reports** menu, as shown below:



2 Select one of the reports displayed in this menu. This report will then either be generated automatically, or Family Tree Builder will walk you through a simple wizard in which you can specify the options that you would like to be generated in the report. Each report is different, as described in the subsequent sections:

- Book Report
- Family Group Sheet
- Relationships Report
- Ancestors Report
- Descendants Report
- Timeline Report
- Descendant Summary
- Addresses

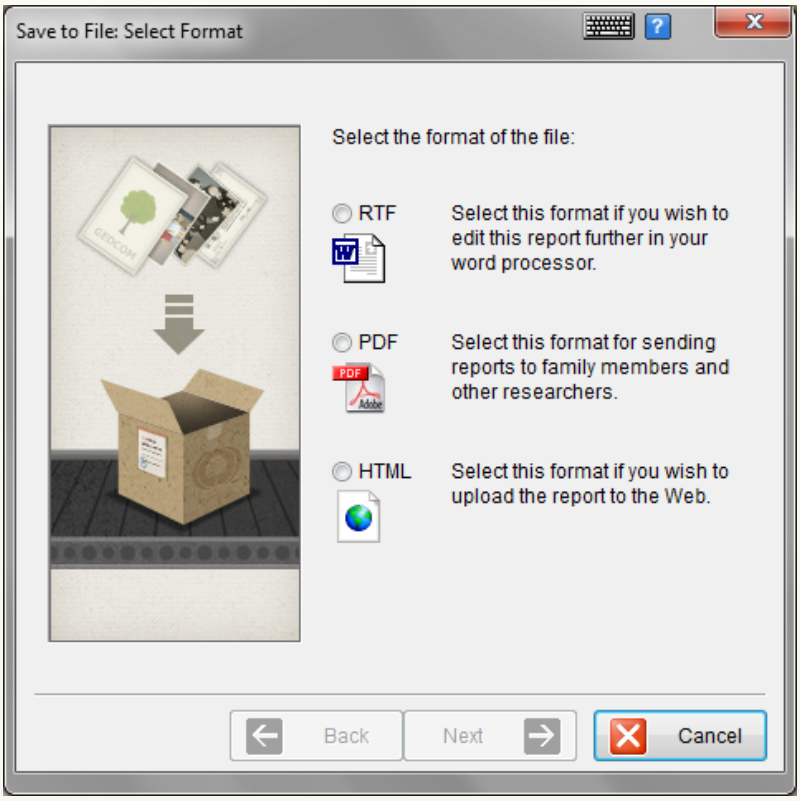
3 Apart from the Book Report, which triggers a wizard that eventually saves the report as a file, the report is shown in the Report View.

By default, the report is generated for the person selected in the Tree View. To change the main person, double-click any person in the People List to regenerate the report for that person.

4 Use the Report toolbar, which is located above the report, as needed. This toolbar contains the following tools



- **Options:** Displays a window in which you can choose the font for various aspects of this report. (see the respective Report Options section for each report type)
- **Save**  **:** Saves this file to the location that you specify. You can save reports in RTF, PDF or HTML formats. Each option is described in the window below:



Reports are saved by default to the project's **Reports** folder. Select the **Open Reports Folder** option from the **Reports** menu to view reports that were previously saved to this folder.

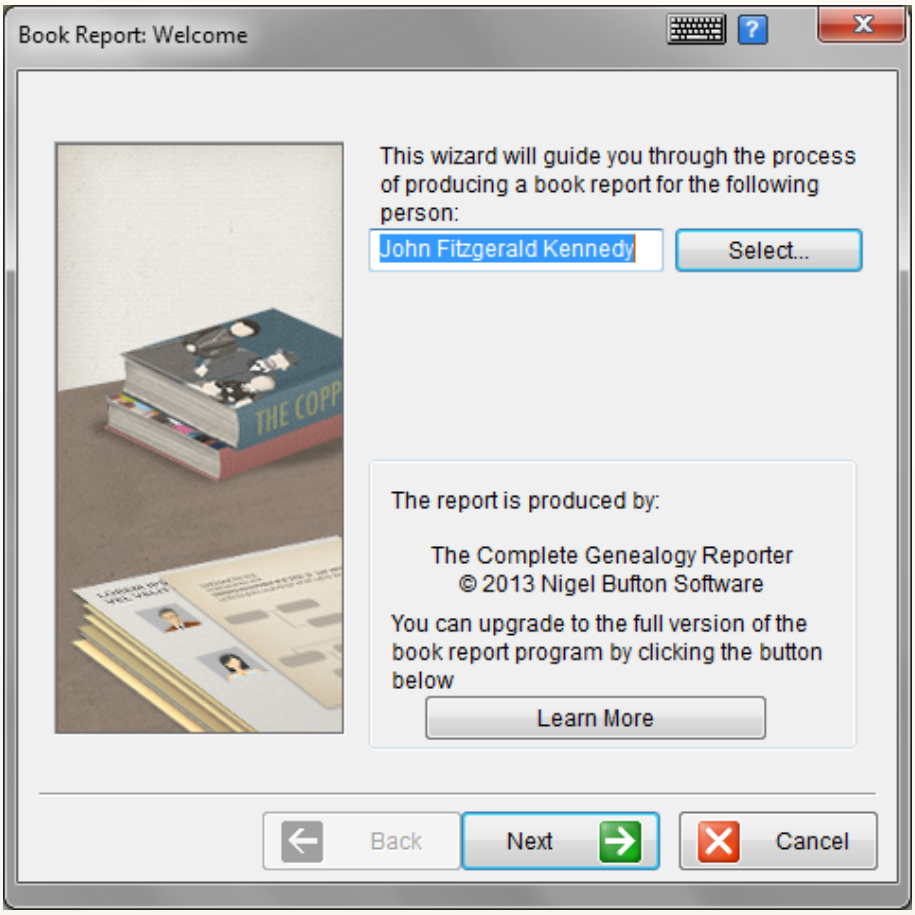
- **Print**  **:** Prints the displayed report to a home printer.
- **Zoom:** You can use the zoom slider to enlarge or reduce the display of the report on the screen.

Book Report

A simple wizard walks you through the process of producing a Book Report for a specific person, as described below.

To generate a Book Report:

1 Click the **Reports** button to display the **Reports** menu, and select **Book Report** to display the following window:

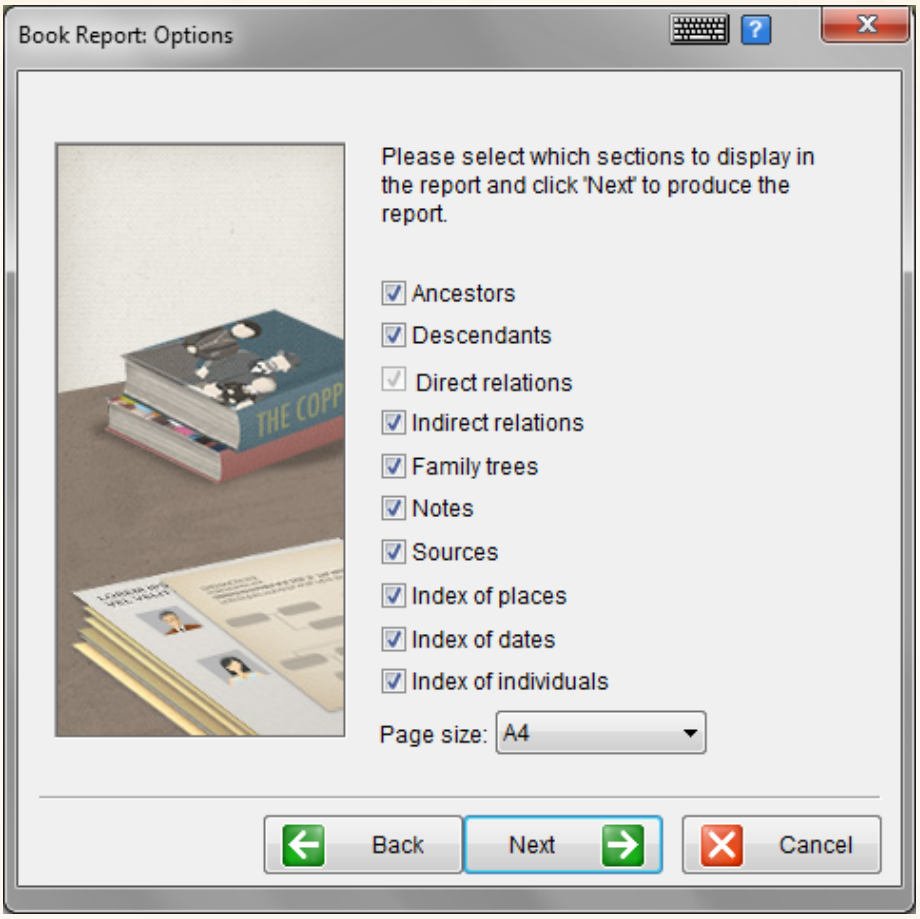


This window enables you to select the primary person for this report.

NOTE

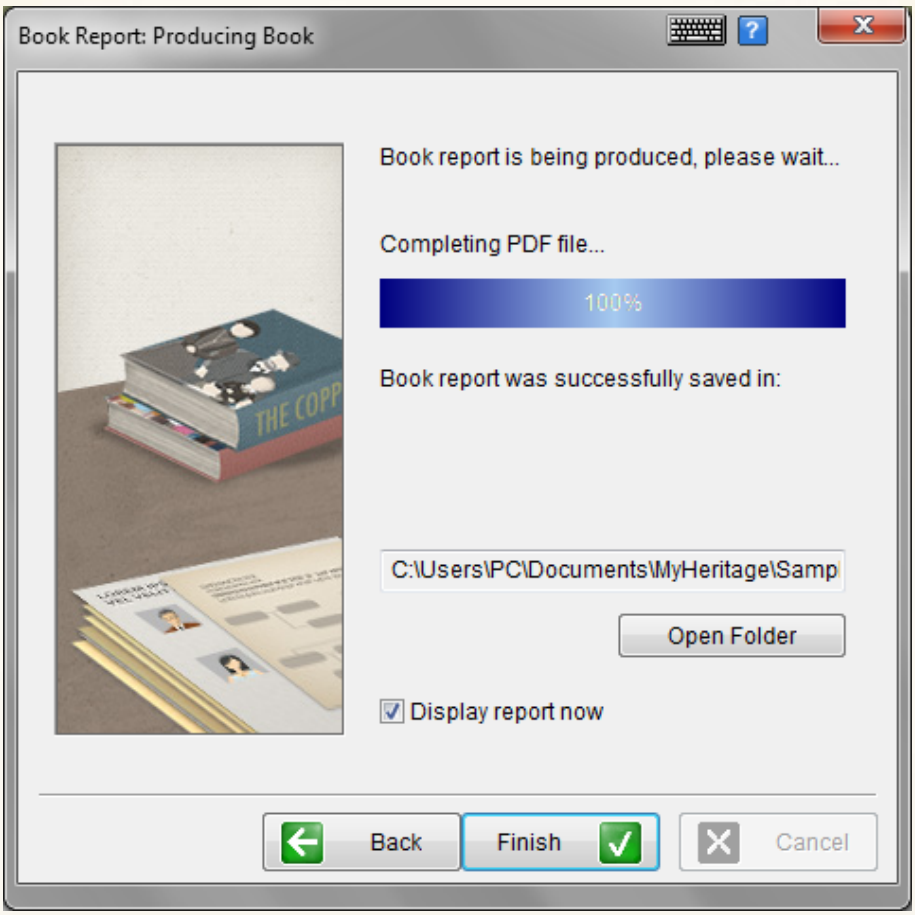
Family Tree Builder uses a third-party tool to generate this report. If you would like to learn more about this third-party tool, click the **Learn More** button.

2 Click **Next** to display the following window:



In this window, select the type of information to be included in the report. You can select as many elements as you like. You can also select the type of printer paper to be used.

3 Click **Next** to start generating the report. A window is displayed showing the progress of this process. When this process is completed, the following window is displayed, specifying the location in which a PDF file of this report has been saved, as shown below:



NOTE

PDF is a standard format provided by Adobe Acrobat. A PDF reader can be downloaded for free from various sites on the Internet. If you do not have Acrobat reader, simply download it and install it and you will then be able to view and print the PDF files provided by Family Tree Builder or any other PDF file.

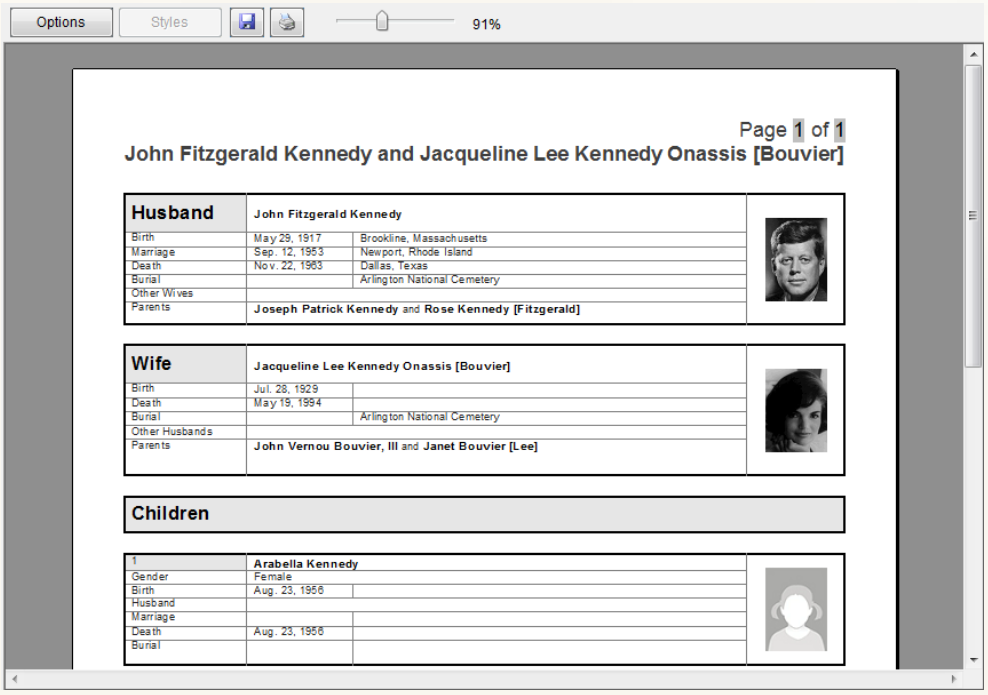
Family Group Sheet

A Family Group Sheet is a report showing the details of the selected person and their immediate family.

This report shows a rubric for the main person, spouse and children. This is a good report to print if you have missing information about a family. Take the report with you and fill out the missing information and then enter it into your project.

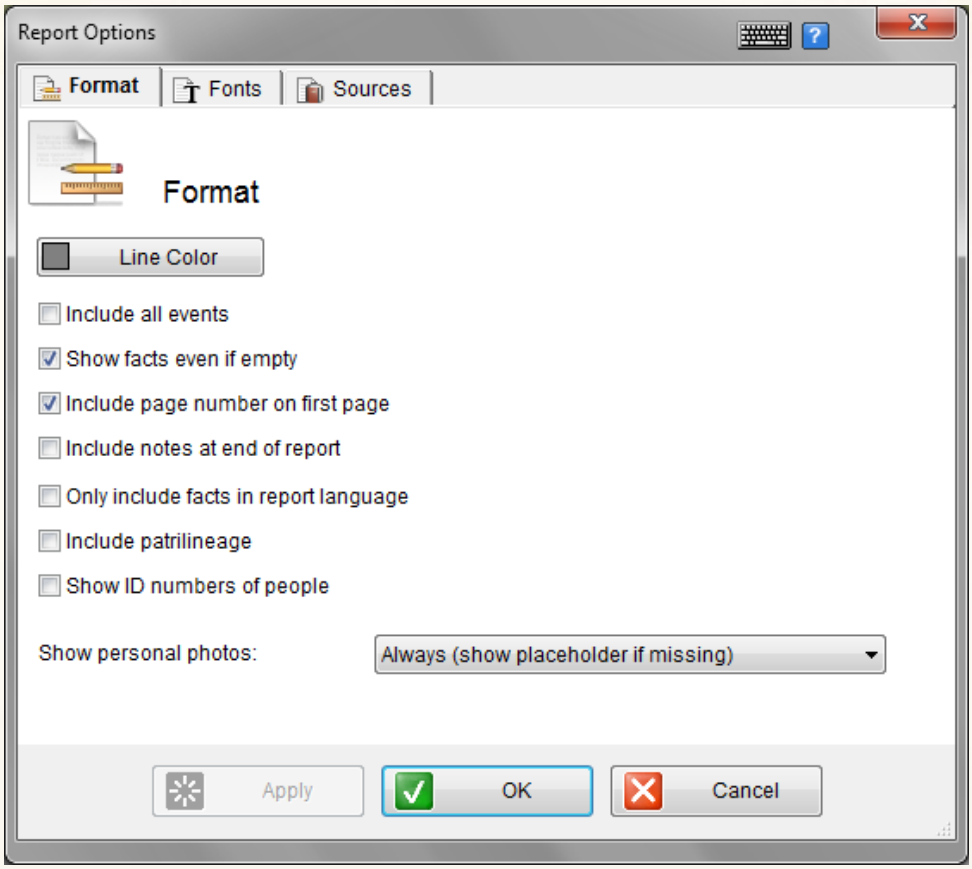
To generate a Family Group Sheet:

- Click the **Reports** button to display the **Reports** menu and select **Family Group Sheet**, or select **Family Group Sheet** from the **Reports** menu on the menu bar. An example of the report that is automatically generated is shown below:



Family Group Sheet Report Options

Click the **Options** button on the **Report** toolbar or from the **Reports** menu to open the Reports Window for this report.

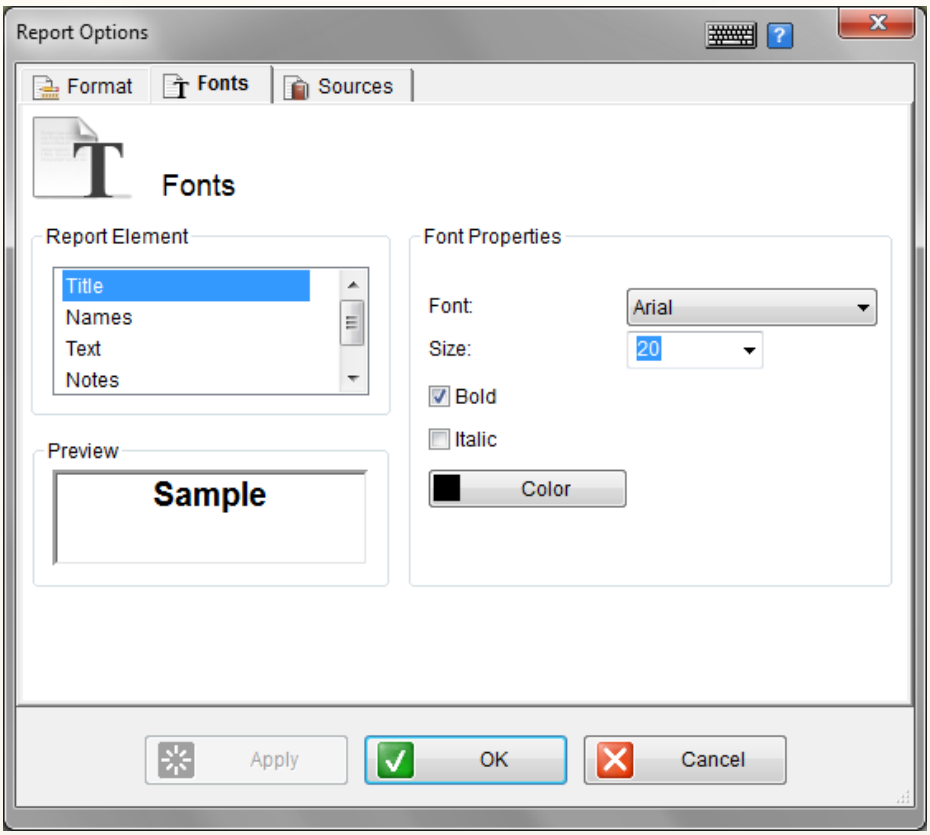


The following options are available for the Family Group Sheet report:

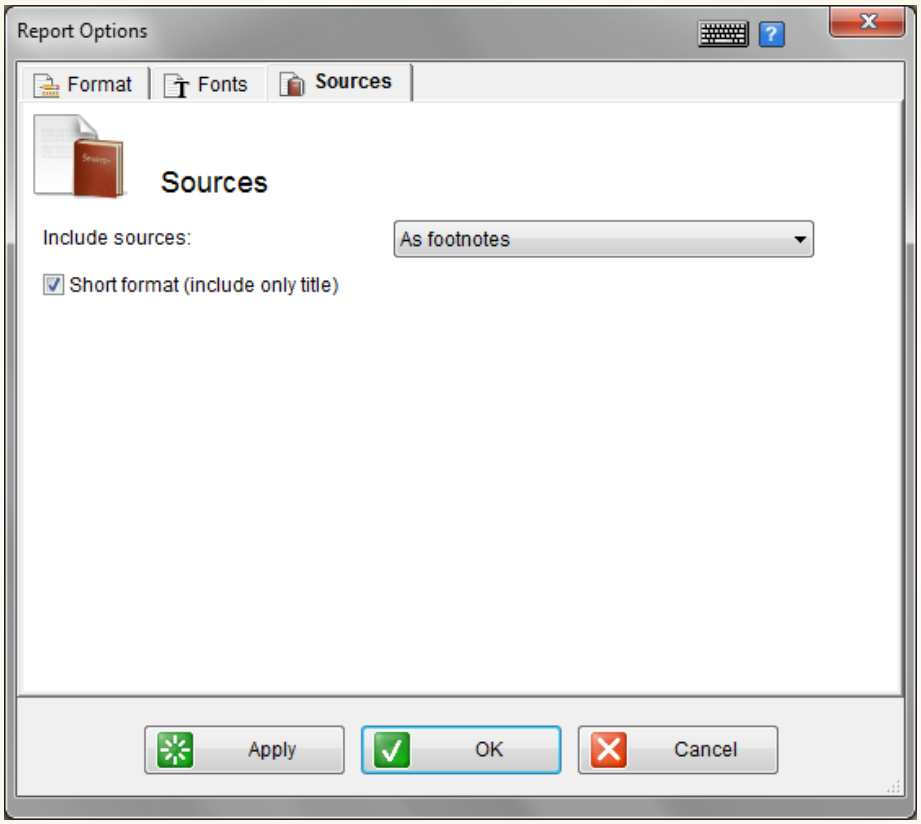
- **Format Tab:**
  - **Line color:** The color of the lines in tables of the report
  - **Include all events:** Indicates whether to include all events (facts) about people in the report or only the important facts.
  - **Show facts even if empty:** Indicates whether to leave an empty rubric for facts that are empty.
  - **Include page number on first page:** Indicates whether to include page numbers for all pages or for all pages except the first one.
  - **Include notes at the end of report:** Indicates whether to include relevant notes in the report.
  - **Only include facts in report language:** This option is useful when your project includes information in more than one language.

- **Include patrilineage:** Shows the first names of male ancestors after the name of a person. For example, let's say that you have a person in your family tree named Albert Smith, whose father is Bert, and Bert's father is Charles. Turning this option on displays **Albert Smith (Bert, Charles)**.
- **Show ID numbers of people**: A convenient option that allows you to easily find the people in the report, when you want to enter information about them into the project.
- **Show personal photos:** Indicates whether and how to show personal photos in the report.

- **Fonts Tab:** The options in this tab control the various fonts to use in the report. Select the report element on the left and then enter its font and size, formatting (bold and italics) and color on the right.



- **Sources Tab:** Use this tab to include source citations in the report, and to specify where and in which format they should use.

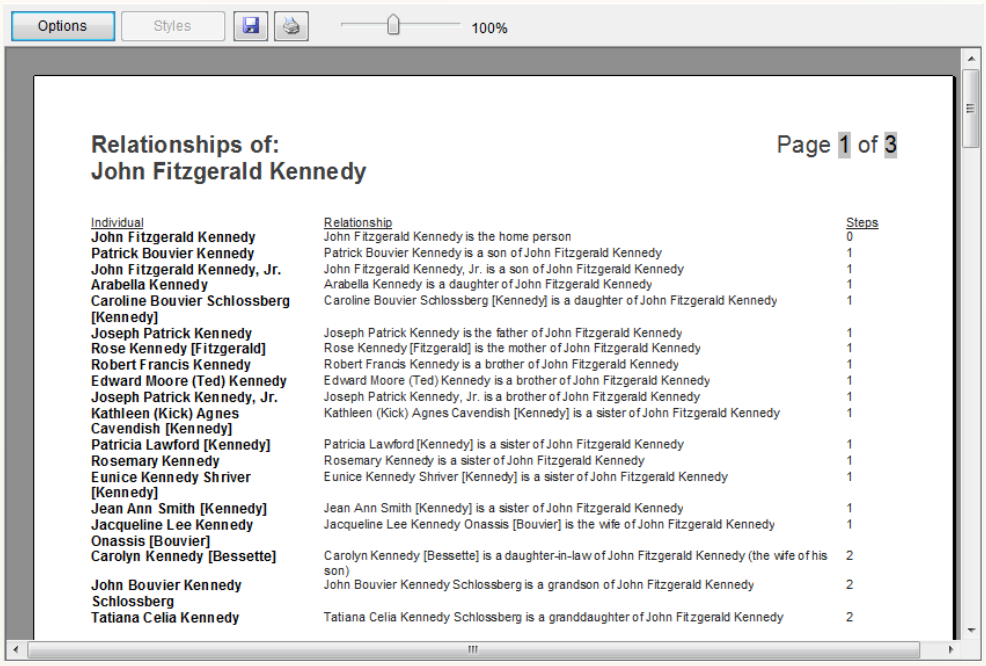


Relationships Report

A Relationships Report shows all the relationship of the selected person to all the other people in your project. This report shows the name of the family member, the relationship to the selected person and how many steps are between the two people. Relationship steps indicate how close the relation is to the selected person. For example, a mother, father, brother or sister is one step away, a grandparent or grandchild is two steps away and so on.

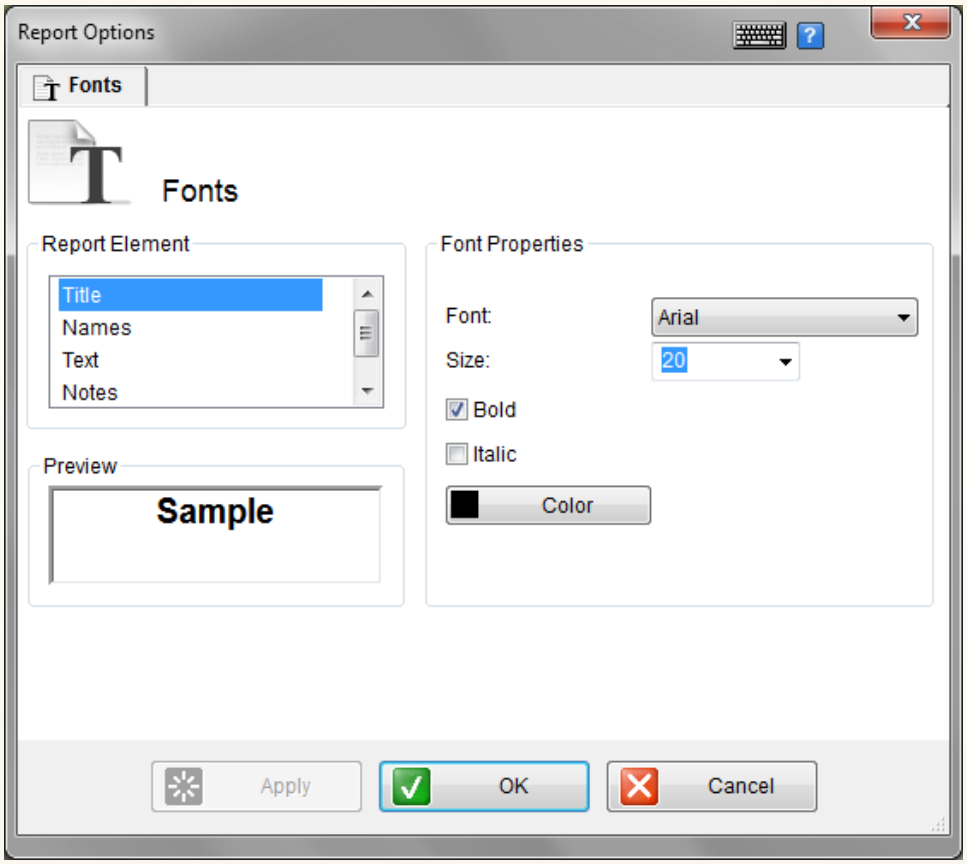
To generate a Relationships Report:

- Click the **Reports** button to display the **Reports** menu and select **Relationships**, or select **Relationships** from the **Reports** menu on the menu bar. An example of the report that is automatically generated is shown below:



Relationships Report Options

Click the **Options** button on the **Report** toolbar or from the **Reports** menu to open the Reports Window for this report.



The following options are available for the Family Group Sheet report:

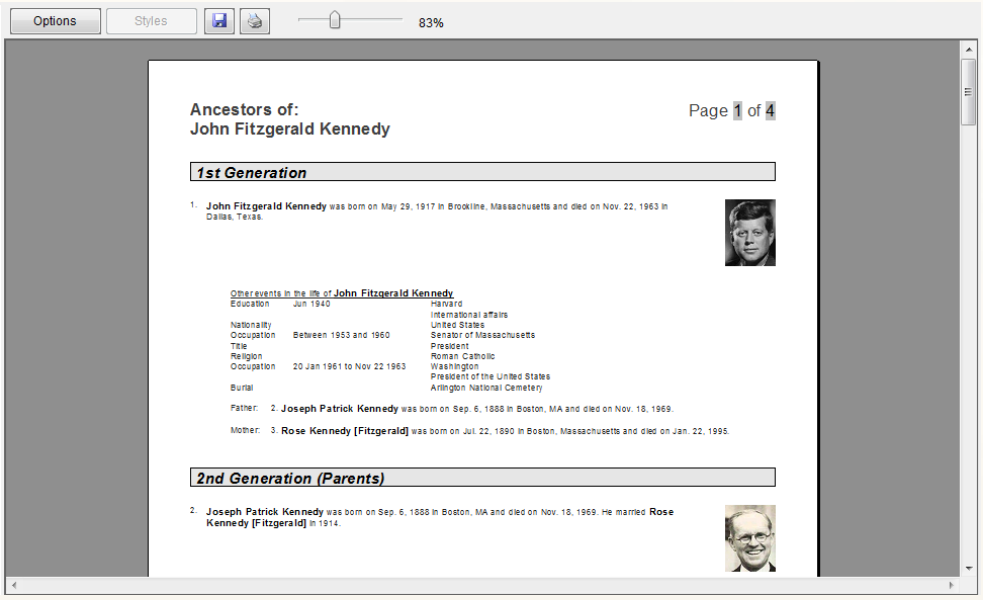
- **Fonts Tab:** The options in this tab control the various fonts to use in the report. Select the report element on the left and then enter its font and size, formatting (bold and italics) and color on the right.

Ancestors Report

An Ancestors Report shows facts and personal details about a selected person and each generation that preceded that person, such as parents, grandparents and so on.

To generate an Ancestors Report:

- Click the **Reports** button to display the **Reports** menu and select **Ancestors**, or select **Ancestors** from the **Reports** menu on the menu bar. An example of the report that is automatically generated is shown below:

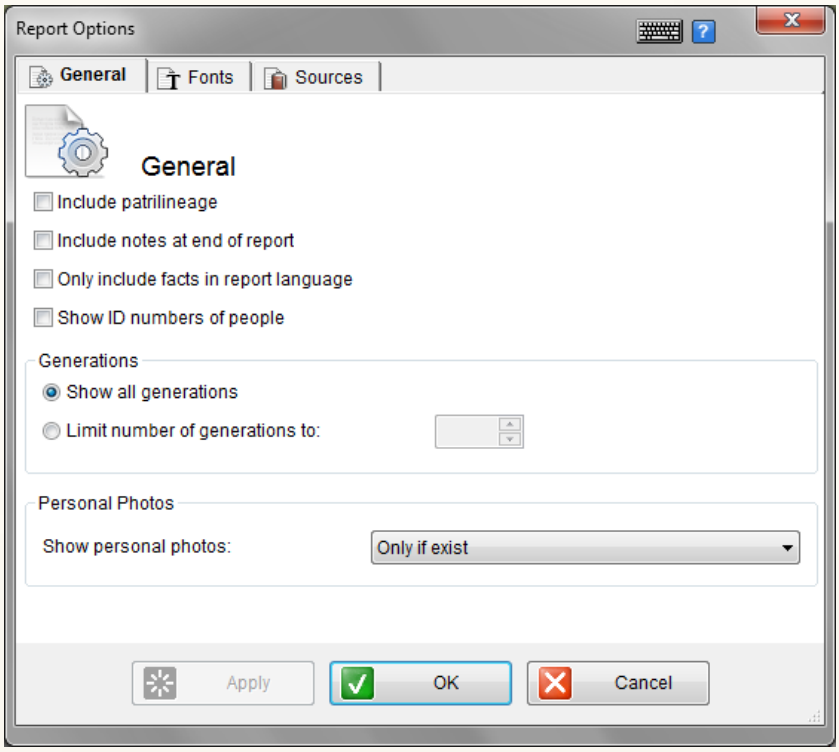


Ancestors Report Options

Click the **Options** button on the **Report** toolbar or from the **Reports** menu to open the Reports Window for this report.

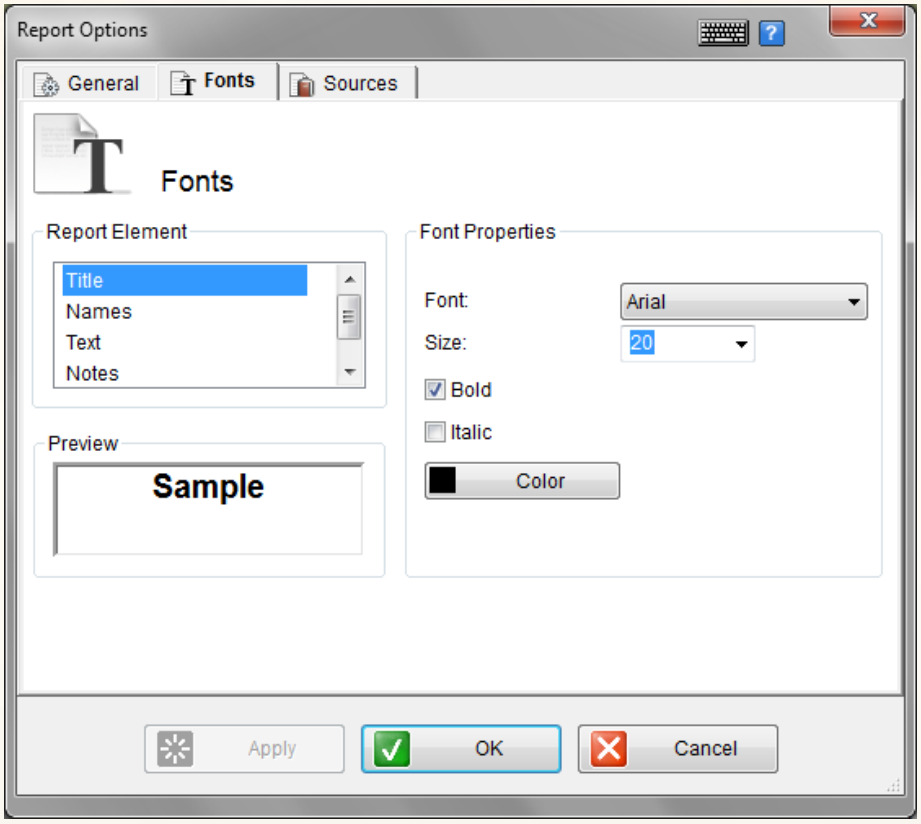
The following options are available for the Family Group Sheet report:

- **General Tab:**

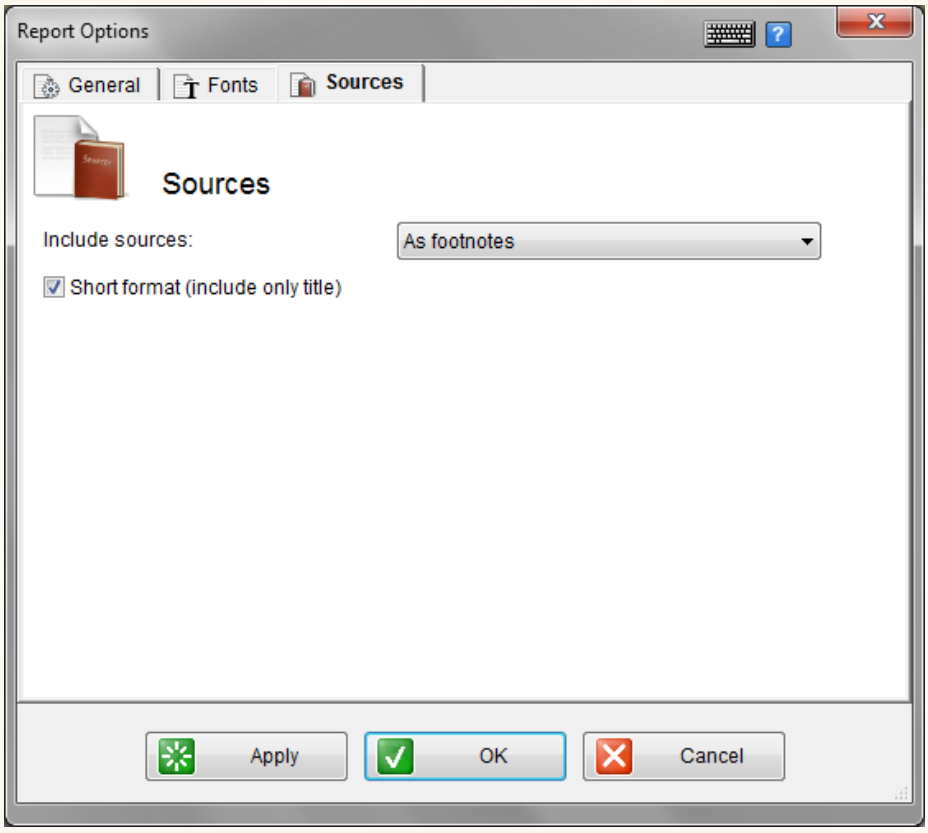


  - **Include patrilineage:** Shows the first names of male ancestors after the name of a person. For example, let's say that you have a person in your family tree named Albert Smith, whose father is Bert, and Bert's father is Charles. Turning this option on displays **Albert Smith (Bert, Charles)**.
  - **Include notes at end of report:** Indicates whether to include relevant notes in the report.
  - **Only include facts in report language:** This option is useful when your project includes information in more than one language.
  - **Show ID numbers for people:** A convenient option that allows you to easily find the people in the report when you want to enter information about them into the project.
  - **Generations:** Specifies how many generations to include in the report.
  - **Show personal photos:** Indicates whether and how to show personal photos in the report.

- **Fonts Tab:** The options in this tab control the various fonts to use in the report. Select the report element on the left and then enter its font and size, formatting (bold and italics) and color on the right.



- **Sources Tab:** Use this tab to include source citations in the report, and to specify where and in which format they should use.

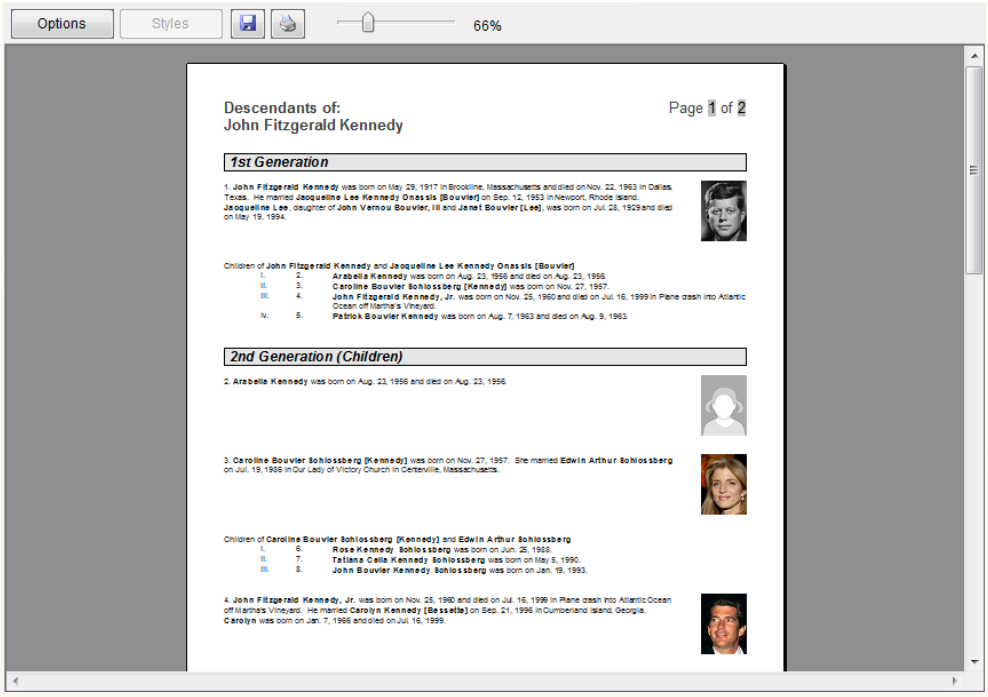


Descendants Report

A Descendants Report shows facts and personal details about a selected person and each generation that follows that person, such as children, grandchildren and so on.

To generate a Descendants Report:

- Click the **Reports** button to display the **Reports** menu and select **Descendants**, or select **Descendants** from the **Reports** menu on the menu bar. An example of the report that is automatically generated is shown below:

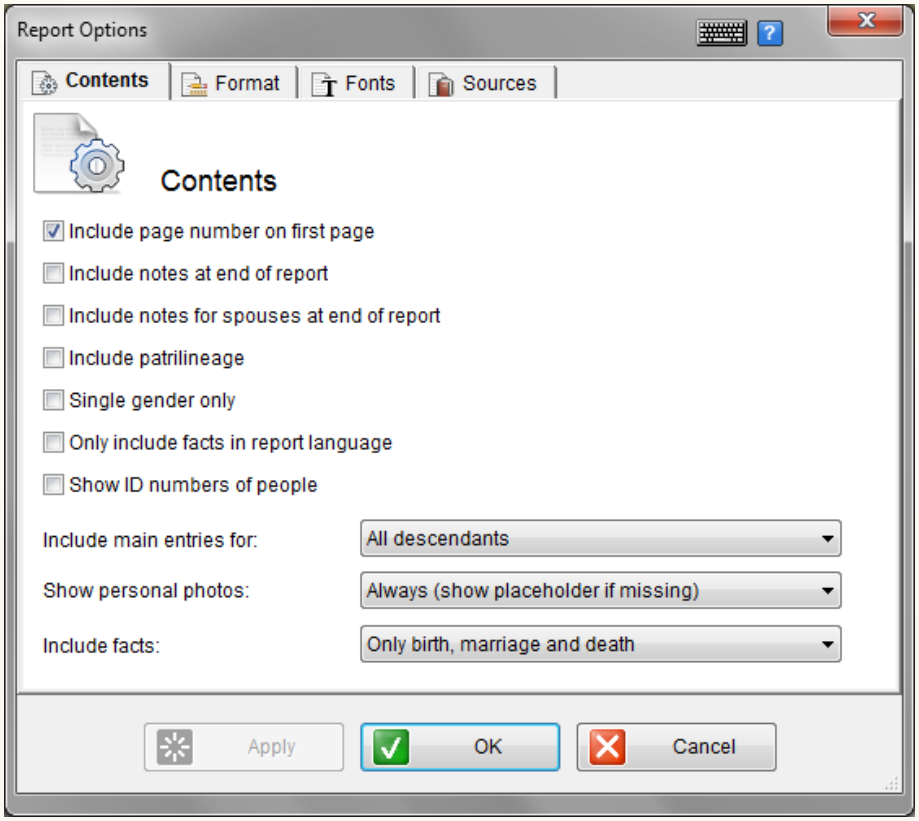


Descendants Report Options

Click the **Options** button on the **Report** toolbar or from the **Reports** menu to open the Reports Window for this report.

The following options are available for the Descendants report:

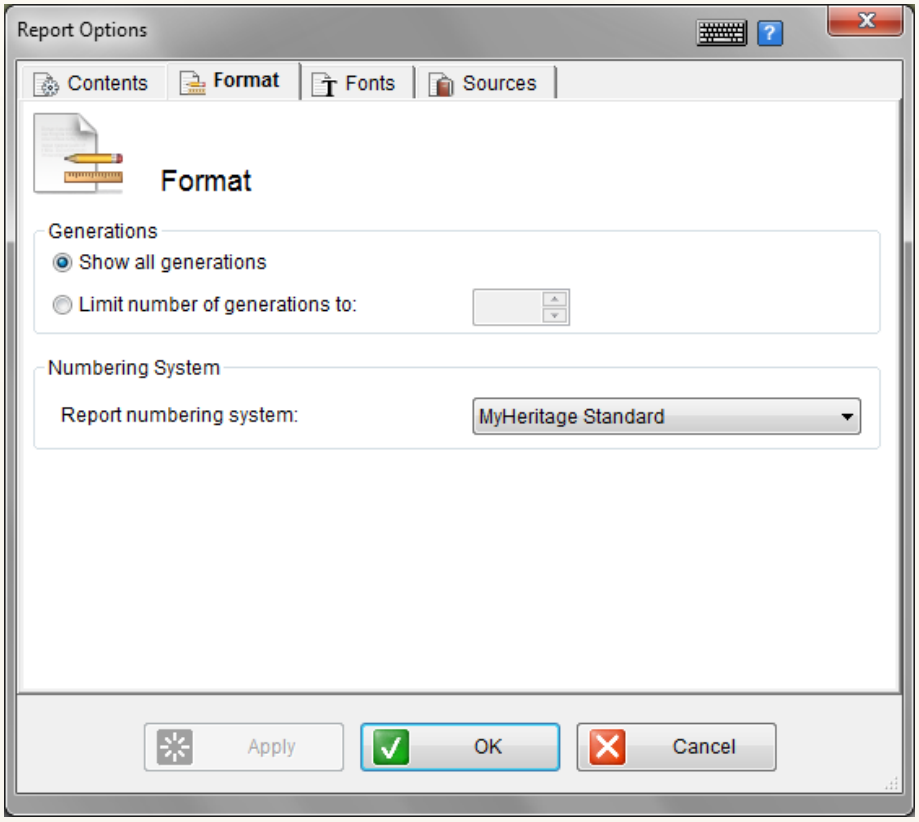
- **Contents Tab:**



  - **Include page number on first page:** Indicates whether to include page numbers for all pages or for all pages except the first one.
  - **Include notes at the end of report:** Indicates whether to include relevant notes in the report.
  - **Include notes for spouses at end of report:** Indicates whether to include relevant notes about spouses in the report.
  - **Include patrilineage:** Shows the first names of male ancestors after the name of a person. For example, let's say that you have a person in your family tree named Albert Smith, whose father is Bert, and Bert's father is Charles. Turning this option on displays **Albert Smith (Bert, Charles)**.

- **Single gender only:** Shows descendants of the same gender as the selected individual. This option is useful, for example, if you are planning a Y-chromosome DNA study, as it lets you see everyone who shares that Y chromosome.
- **Only include facts in report language:** This option is useful when your project includes information in more than one language.
- **Show ID numbers of people:** A convenient option that allows you to easily find the people in the report when you want to enter information about them into the project.
- **Include main entries for:** Indicates whether to show a main entry for all descendants or only for descendants who have information in addition to birth and death, which is already shown in the entry about their parent.
- **Show personal photos:** Indicates whether and how to show personal photos in the report.
- **Include facts:** Enables you to select which facts to include in the report.

- **Format Tab:**



- **Generations:** Specifies how many generations to include in the report.

- **Report numbering system:** Specifies the system for numbering people in the report. Select one of the following numbering systems:
  - MyHeritage Standard
  - Register
  - NGS Quarterly
  - Henry
  - D'Aboville

  Let's look at an example to see the differences between these numbering systems. In the following example for the Smith family, Albert is the father with children Bill, Cynthia and Doris. Bill has a child named Emily. Cynthia does not have a main entry, as there is no additional information beyond birth and death information for her, and you selected to include main entries only for descendants with additional information.
  - **MyHeritage Standard:** Each person that has a main entry in the report is numbered, starting with 1, 2, 3 and so on. Descendants that do not have a main entry are not numbered. Each child in a person's main entry is preceded by a roman numeral, such as i, ii, iii and so on.

    Example:

    1. Albert Smith
       i. 2. Bill Smith
       ii. Cynthia Smith (Not numbered, as she does not have a main entry.)
       iii. 3. Doris Smith
    2. Bill Smith
       i. 4. Emily Smith
    3. Doris Smith
  - **Register:** Similar to the **MyHeritage Standard** system. The only difference is that the roman numerals are shown after the person's number.

    Example:

    1. Albert Smith
       2. i. Bill Smith
          ii. Cynthia Smith (Not numbered, as she does not have a main entry.)
       3. iii. Doris Smith
    2. Bill Smith
       4. i. Emily Smith
    3. Doris Smith

- **NGS Quarterly:** Similar to the **MyHeritage Standard** system. The differences are that people always get a reference number, regardless of whether they have a main entry, and children get a plus sign if they have their own main entry later in the report.

Example:

1. Albert Smith
   + i. 2. Bill Smith
   ii. 3. Cynthia Smith (No plus sign, as she does not have a main entry.)
   + iii. 4. Doris Smith
2. Bill Smith
   + i. 5. Emily Smith
4. Doris Smith

- **Henry:** All people get a reference number, regardless of whether they have a main entry. However, the number for a child consists of the number of his/her parent and then the position of that child in the family. Therefore, if a parent's number is 15, his/her third child is numbered 153. Roman literals are shown after the reference number.

Example:

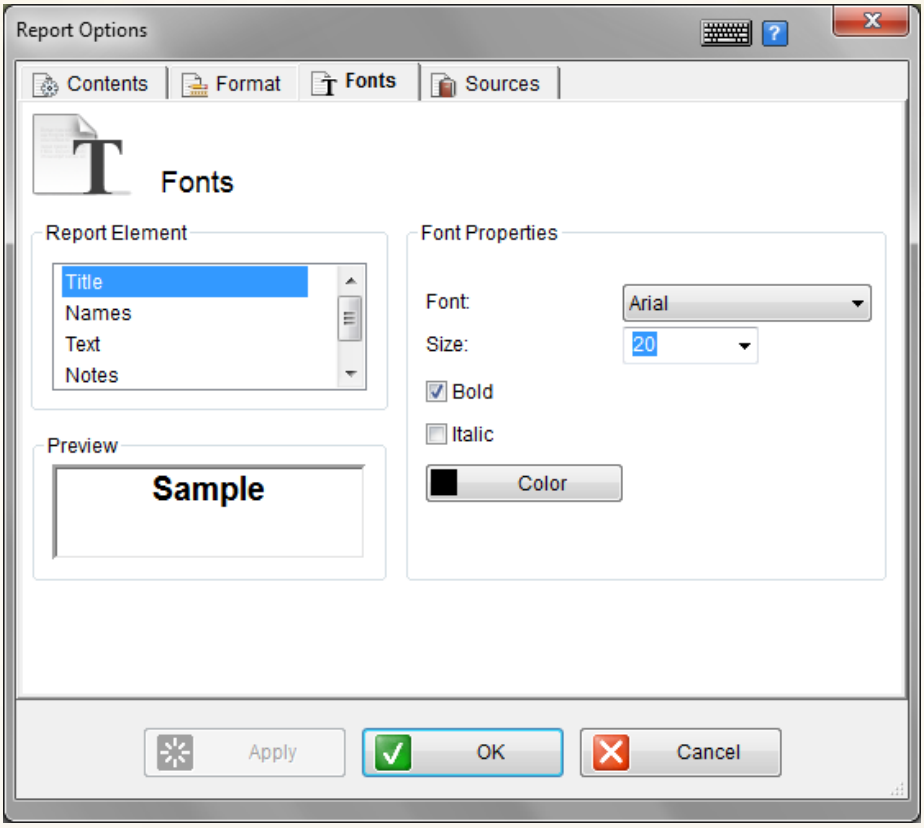
1. Albert Smith
   11. i. Bill Smith
   12. ii. Cynthia Smith
   13. iii. Doris Smith
11. Bill Smith
   111. i. Emily Smith
13. Doris Smith

- **D'Aboville:** Similar to the **Henry** system, but numbers include periods (.). This is helpful when a person has more than nine children.

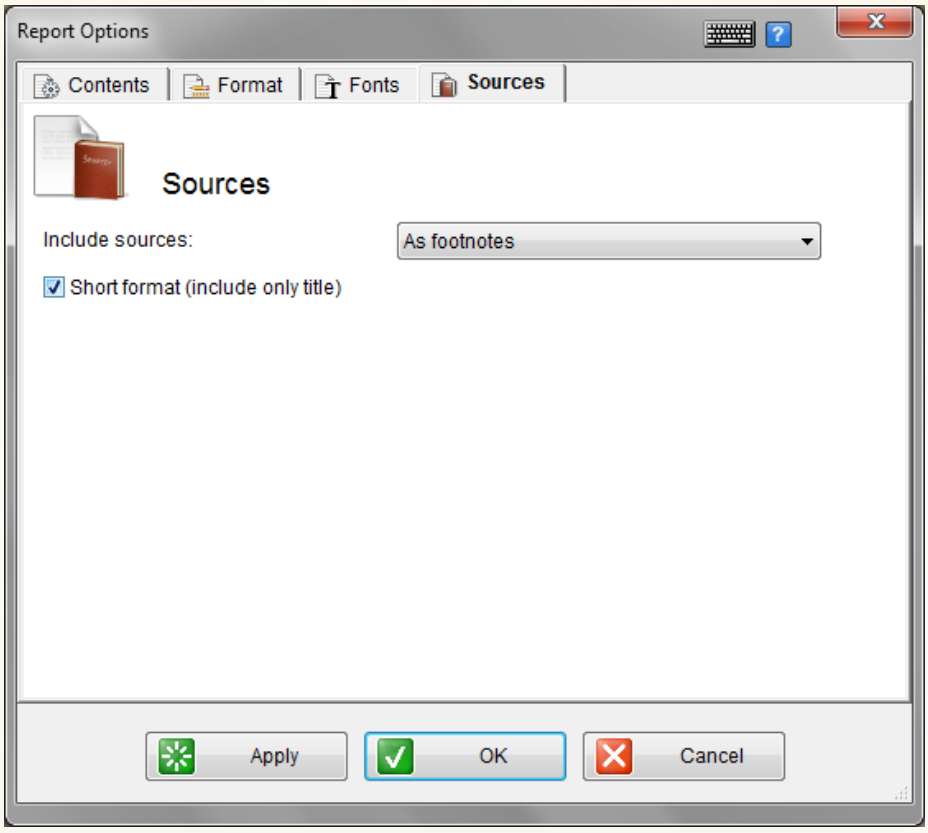
Example:

1. Albert Smith
   1.1. i. Bill Smith
   1.2. ii. Cynthia Smith
   1.3. iii. Doris Smith
1.1. Bill Smith
   1.1.1. i. Emily Smith
1.3. Doris Smith

- **Fonts Tab:** The options in this tab control the various fonts to use in the report. Select the report element on the left and then enter its font and size, formatting (bold and italics) and color on the right.



- **Sources Tab:** Use this tab to include source citations in the report, and to specify where and in which format they should use.

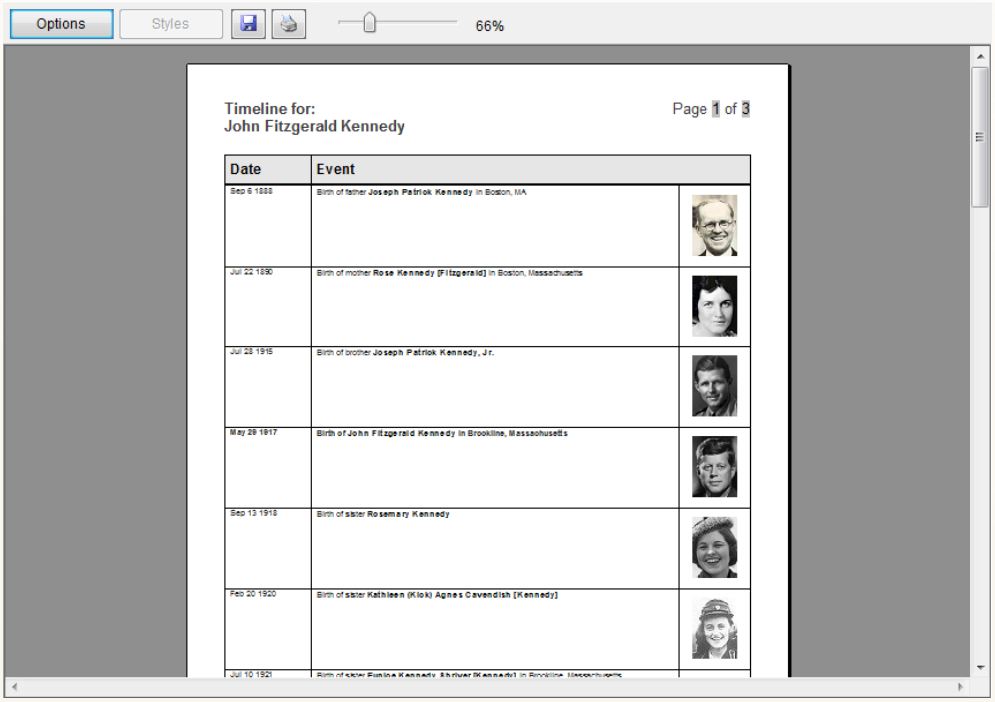


Timeline Report

A Timeline Report is a list showing major events of the family of the selected person in chronological order, such as birth, marriage and death.

To generate a Timeline Report:

- Click the **Reports** button to display the **Reports** menu and select **Timeline**, or select **Timeline** from the **Reports** menu on the menu bar. An example of the report that is automatically generated is shown below:

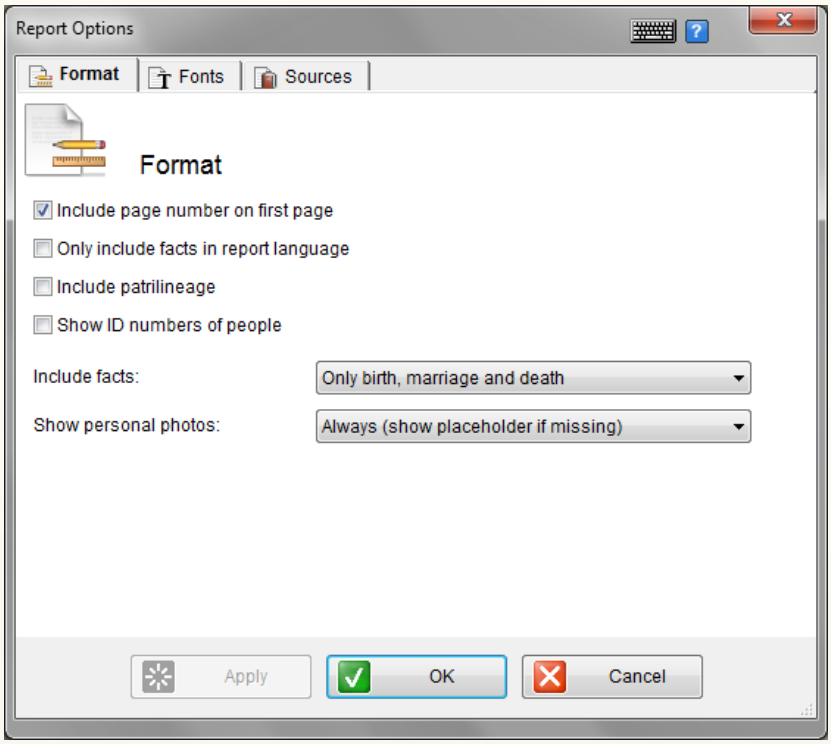


Timeline Report Options

Click the **Options** button on the **Report** toolbar or from the **Reports** menu to open the Reports Window for this report.

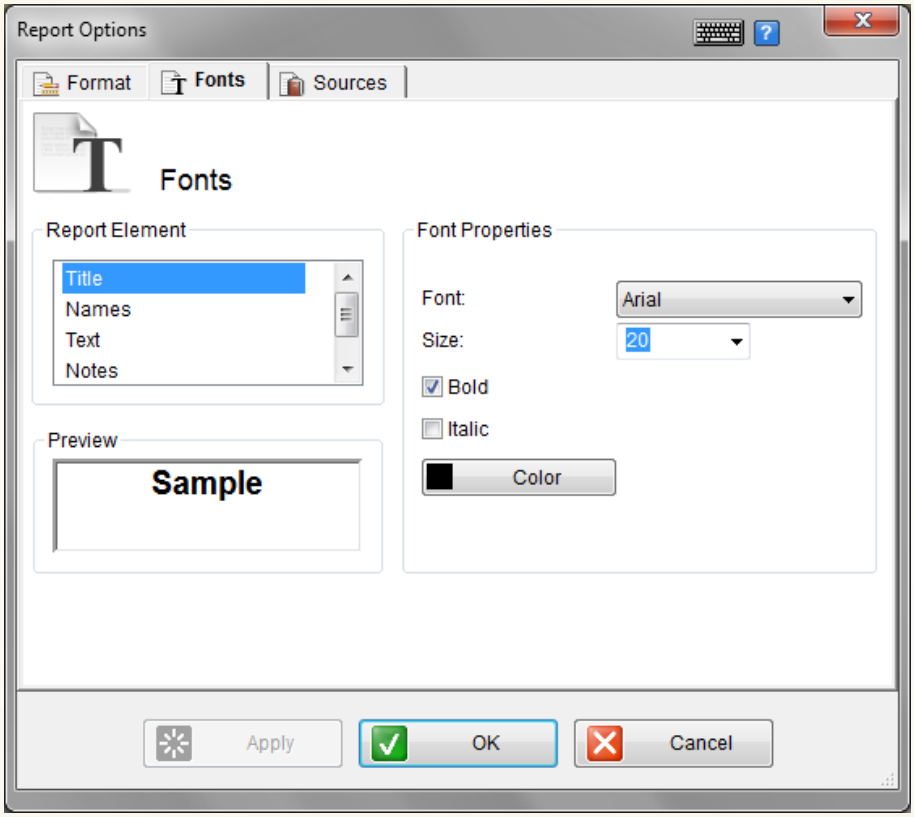
The following options are available for the Timeline report:

- **Format Tab:**

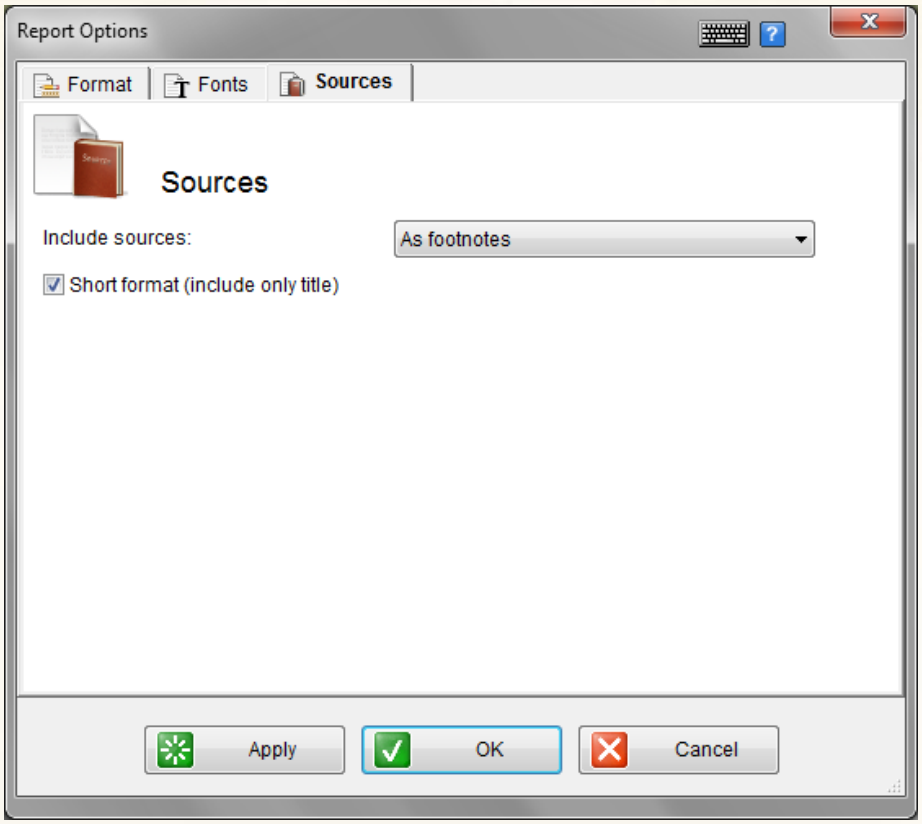


  - **Include page number on first page:** Indicates whether to include page numbers for all pages or for all pages except the first one.
  - **Only include facts in report language:** This option is useful when your project includes information in more than one language.
  - **Include patrilineage:** Shows the first names of male ancestors after the name of a person. For example, let's say that you have a person in your family tree named Albert Smith, whose father is Bert, and Bert's father is Charles. Turning this option on displays **Albert Smith (Bert, Charles)**.
  - **Show ID numbers of people:** A convenient option that allows you to easily find the people in the report when you want to enter information about them into the project.
  - **Include facts:** Enables you to select which facts to include in the report.
  - **Show personal photos:** Indicates whether and how to show personal photos in the report.

- **Fonts Tab:** The options in this tab control the various fonts to use in the report. Select the report element on the left and then enter its font and size, formatting (bold and italics) and color on the right.



- **Sources Tab:** Use this tab to include source citations in the report, and to specify where and in which format they should use.

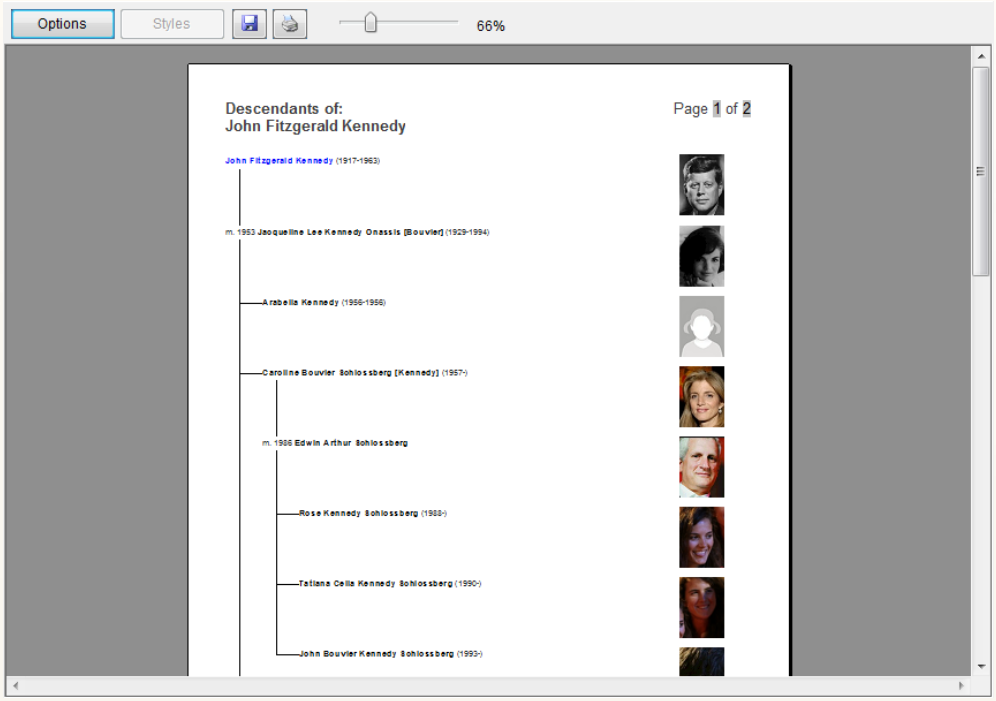


Descendant Summary

A Descendant Summary report shows a hierarchical tree that includes the descendants of the selected person.

To generate a Descendant Summary report:

- Click the **Reports** button to display the **Reports** menu and select **Descendant Summary**, or select **Descendant Summary** from the **Reports** menu on the menu bar. An example of the report that is automatically generated is shown below:

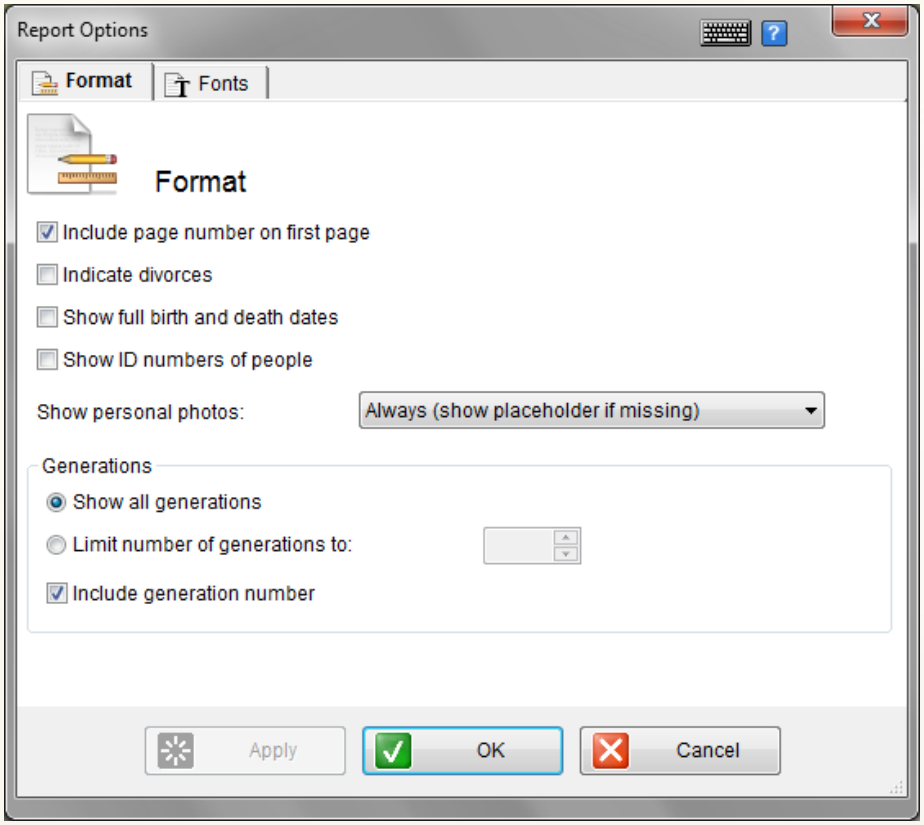


Descendant Summary Report Options

Click the **Options** button on the **Report** toolbar or from the **Reports** menu to open the Reports Window for this report.

The following options are available for the Descendant Summary report:

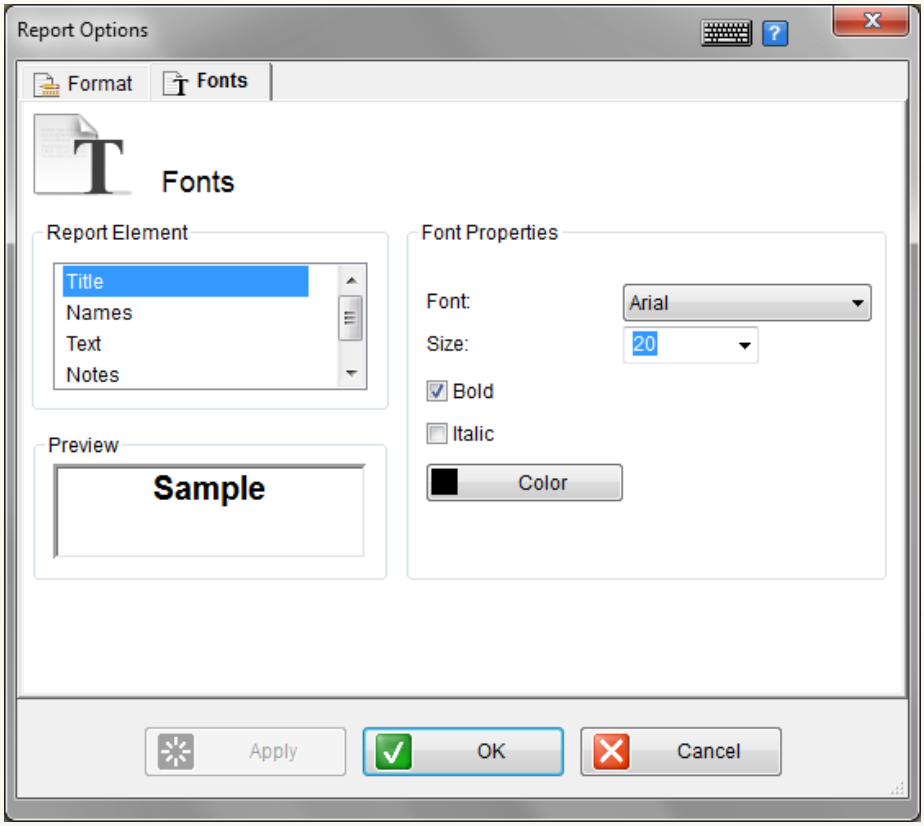
- **Format Tab:**



  - **Include page number on first page:** Indicates whether to include page numbers for all pages or for all pages except the first one.
  - **Indicate divorces:** Indicates whether to add a special indication for divorced spouses.
  - **Show full birth and death dates:** Indicates whether to show full dates of birth and death or whether to include only their years.
  - **Show ID numbers of people:** A convenient option that allows you to easily find the people in the report when you want to enter information about them into the project.
  - **Show personal photos:** Indicates whether and how to show personal photos in the report.

- **Generations:** Specifies how many generations to include in the report.
- **Include generation number:** Indicates whether to specify the generation number of people in the report, starting from 1 for the main person, 2 for children and so on.

- **Fonts Tab:** The options in this tab control the various fonts to use in the report. Select the report element on the left and then enter its font and size, formatting (bold and italics) and color on the right.



Addresses Report

The Addresses report is an alphabetical list (sorted by each person's name) of the addresses of all the people in the family tree.

To generate an Address report:

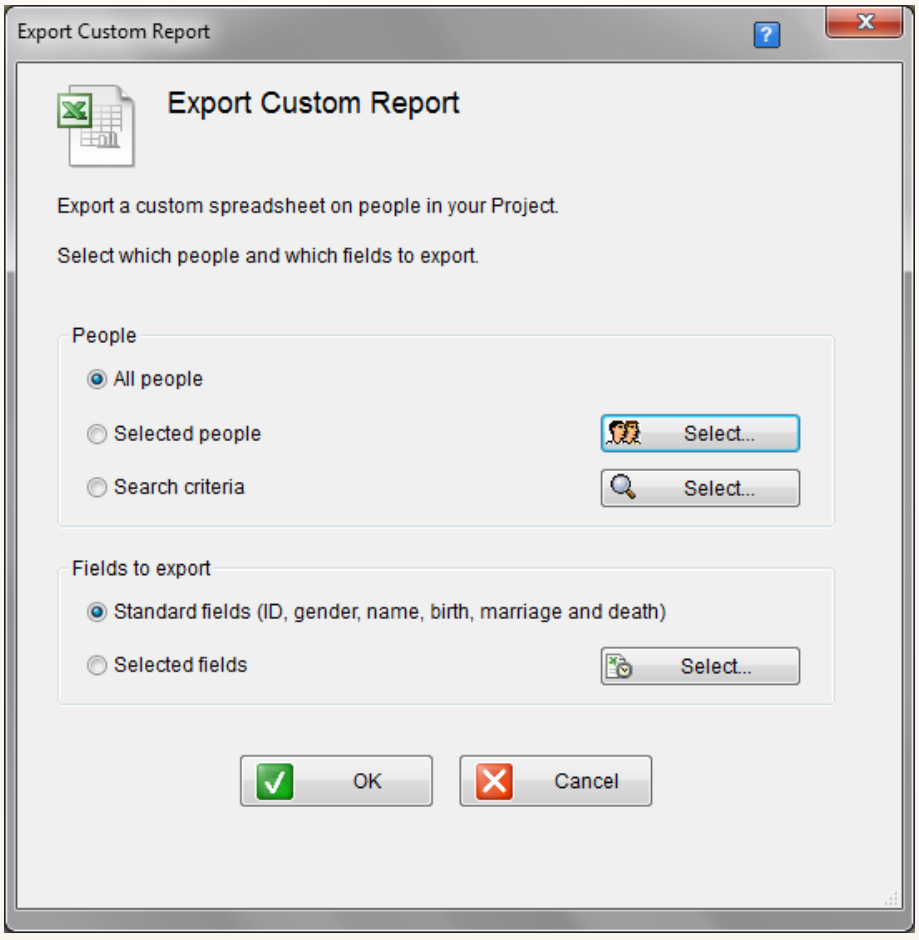
- Click the **Reports**  button to display the **Reports** menu and then select **Addresses**, or select **Addresses** from the **Reports** menu on the menu bar. The options that are available in this window are the same as in all the other reports.

Export Custom Report

The Export Custom report enables you create an Excel report that contains the people with information you want to see.

To create an Export Custom report:

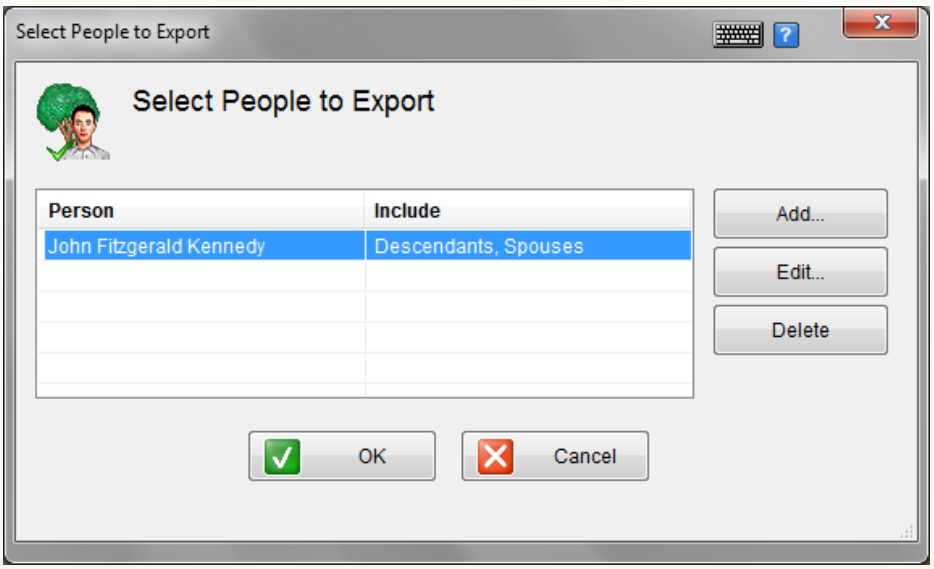
1 Click the **Reports** button to display the **Reports** menu, and then select **Export Custom Report** to display the following window:



Alternatively, you can access this window by selecting **Export to Excel ➔ Export Custom Report** in the **Edit** menu.

2 Select the people to be included in the report by selecting one of the following radio buttons:

- **All people:** Includes all people in the report.
- **Selected people:** Select the specific people (and optionally their ancestors, descendants and spouses). Click the adjacent **Select** button to select these people.
- **Search criteria:** Select people that match your search criteria. Click the adjacent **Select** button to define your search criteria (see Searching for People for more details).



3 Select the fields to be included in the report for those people you specified in step **2**. Select one of the following radio buttons:

- **Standard fields:** Includes common fields in the report.
- **Selected fields:** Enables you to select the list of fields to include for each person in the report. Click the adjacent **Select** button to select these fields.

4 Click **OK** and select the folder where you want to save the report. Microsoft Excel now opens and displays your report.

CHAPTER 11

Syncing Your Family Tree



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Syncing Your Family Tree

About This Chapter:

This chapter describes how to synchronize (sync) your family tree using Family Tree Builder to your family site on MyHeritage.com, so that it is available for viewing on the Internet to anyone that you invite. It contains the following sections:

- **Syncing Your Family Site** describes the concept of syncing your family tree on your family site.
- **Sync Settings** describes how to sync your family tree.
- **User Permissions** describes how to set user permissions to control who can download your tree from the family site, and who can edit it online.
- **Managing Your Family Sites** describes how to access and manage your family sites and to use the options in the **Family Sites** menu.
- **Family Tree Sync** describes the Family Tree Sync application used to sync your family tree projects.

Syncing Your Family Site

Syncing Overview

The word *syncing* (synchronizing) refers to the process of uploading your family tree project to a family site under your account on MyHeritage.com, so that it is available for viewing online. Syncing in this manner provides bidirectional synchronization between your family tree project in Family Tree Builder and your family site. During syncing, two things happen:

- Any changes made in your family site are first downloaded to your Family Tree Builder project family tree.
- Then, any changes made in your family tree project are uploaded to your family tree.

Once a family tree project has been synced, the creator of the tree (you) can also edit it online and on smartphones and tablet applications (see Editing a Family Tree Online). The changes made online are synced back to Family Tree Builder during the next sync cycle.

Syncing a project also creates a backup of the project on your family site. This protects your family tree and photos from accidental damage or computer failure.

Syncing your project copies the family tree, including its photos, to your family site.

Your online family site is only available to whomever you invite, thereby ensuring that the information remains private. Some information about deceased people is also searchable on MyHeritage.com in SuperSearch for members who were not invited to your family site. If you want to completely block access to uninvited members, you can change the privacy level of your family site. In addition, you can mark specific information in your family tree as private (certain people, facts about people, notes and so on) so that it is never synced to your family site.

The syncing itself, which includes transferring the data online, is performed by a Family Tree Builder utility (see Family Tree Sync), which runs in the background. This allows you to continue working while your project is being synced.

Your Family Site

When you become a member of MyHeritage, you create your own user account. You are the administrator of your account.

As a member of MyHeriitage.com, you can manage more than one family site, but for most members, it is recommended that you manage one family site for simplicity.

When you sync a project, you create a connection between your family tree in Family Tree Builder, and your online family site on MyHeritage.com. You can sync a project to one family site.

When you create a new project, you can choose the family site to which the project will be synced. You can change this setting at any time using the Sync Settings window. You can also choose which family site to sync to if you did not choose a site initially (see Sync Settings).

NOTE

If you want to sync a project and you do not have a family site, one will be created for you automatically.

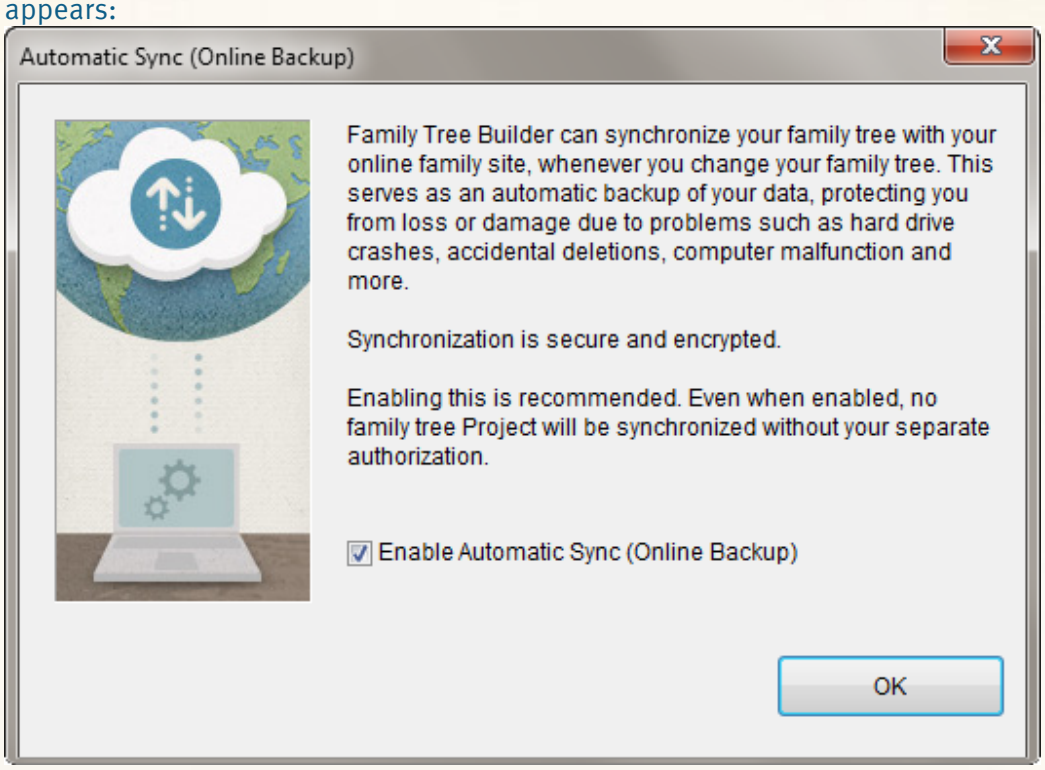
You can sync your family tree to your family site at any time.

After your family tree has been synced, you can continue to work on the project and make changes. You can then re-sync the project so that any new information that you entered will also be available on your family site.

Automatic Syncing

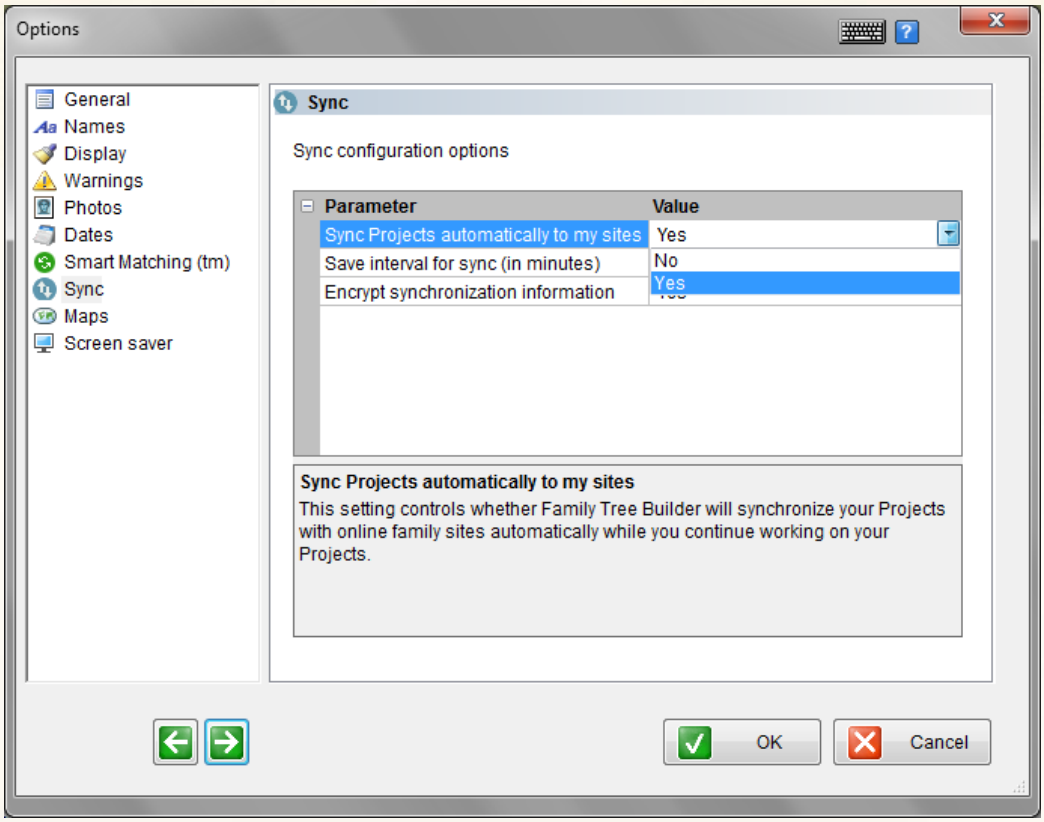
Family Tree Builder lets you sync your projects automatically.

When you open Family Tree Builder for the first time, the following window appears:



Click **OK** to enable automatic syncing. Doing so will automatically sync your projects once a day.

You can turn off automatic syncing at any time. To do so, from the **Tools** menu select **Options,** and under the **Sync** tab enter **No** in the parameter shown below:



Syncing a Project

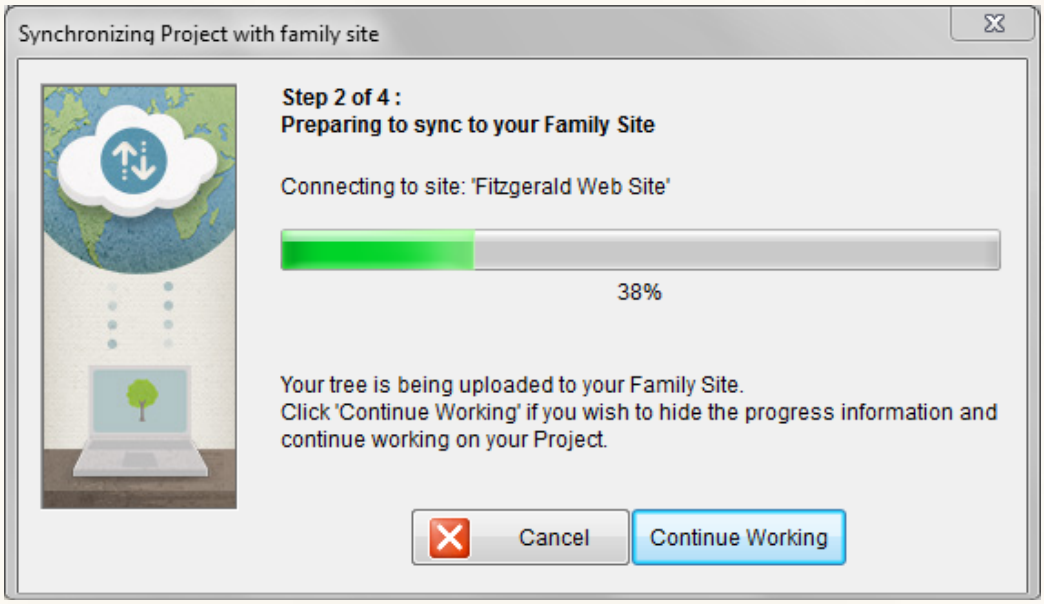
Click the **Sync** button in the toolbar at any time to sync your project. If automatic syncing is enabled, the project is automatically synced once a day. A project that has never been synced will not be synced during automatic syncing.

You will be asked whether you want to save the current changes, if you have not done so already.

The Synchronizing project with family site window appears, enabling you to follow the progress of the syncing process (for details about this window, see Family Tree Sync).

NOTE

You can sync projects to your Family Site at any time by clicking the **Sync** button on the toolbar.



NOTE

Clicking **Cancel** aborts the syncing process.

NOTE

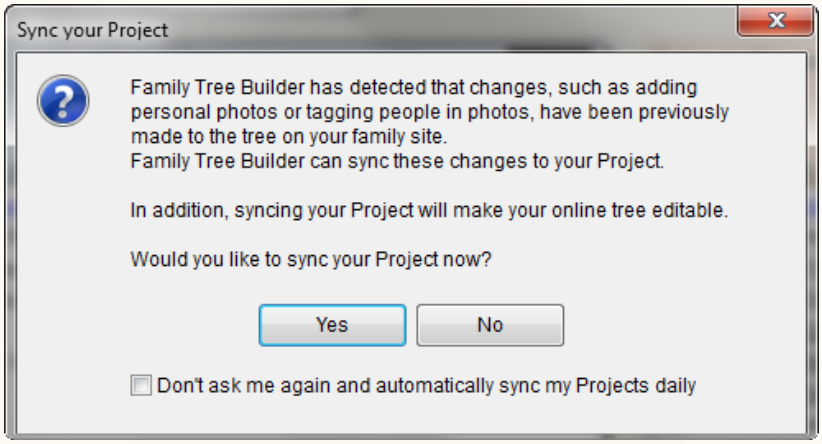
You can minimize the Synchronizing project with family site window and continue working by clicking the **Continue working** button in the window. When you click this button, syncing continues in the background, enabling you to carry on your work in Family Tree Builder. This is useful when syncing large projects.

Editing a Family Tree Online

After a family tree project has been synced, the creator of the tree (you) can edit it online as well. This applies both to family trees created in Family Tree Builder that are synced to a family site, as well as to those family trees created directly on MyHeritage.com. Whatever changes are made online are automatically synced back to Family Tree Builder during the next sync cycle.

NOTE Only the tree creator can edit a family site. Editing can be done online, on iOS or an android-based mobile device.

When you open a project in Family Tree Builder that is synced with a family tree that has been edited online, you are prompted to first sync the project in Family Tree Builder with the online family tree, in order to maintain synchronization between the two.



Sync Settings

In order to sync a project, it must be linked with a family site. This link is set up using the sync settings of the project, which define to which family site to sync. A project can only be synced to a single family site.

Defining the Sync Settings of a Project

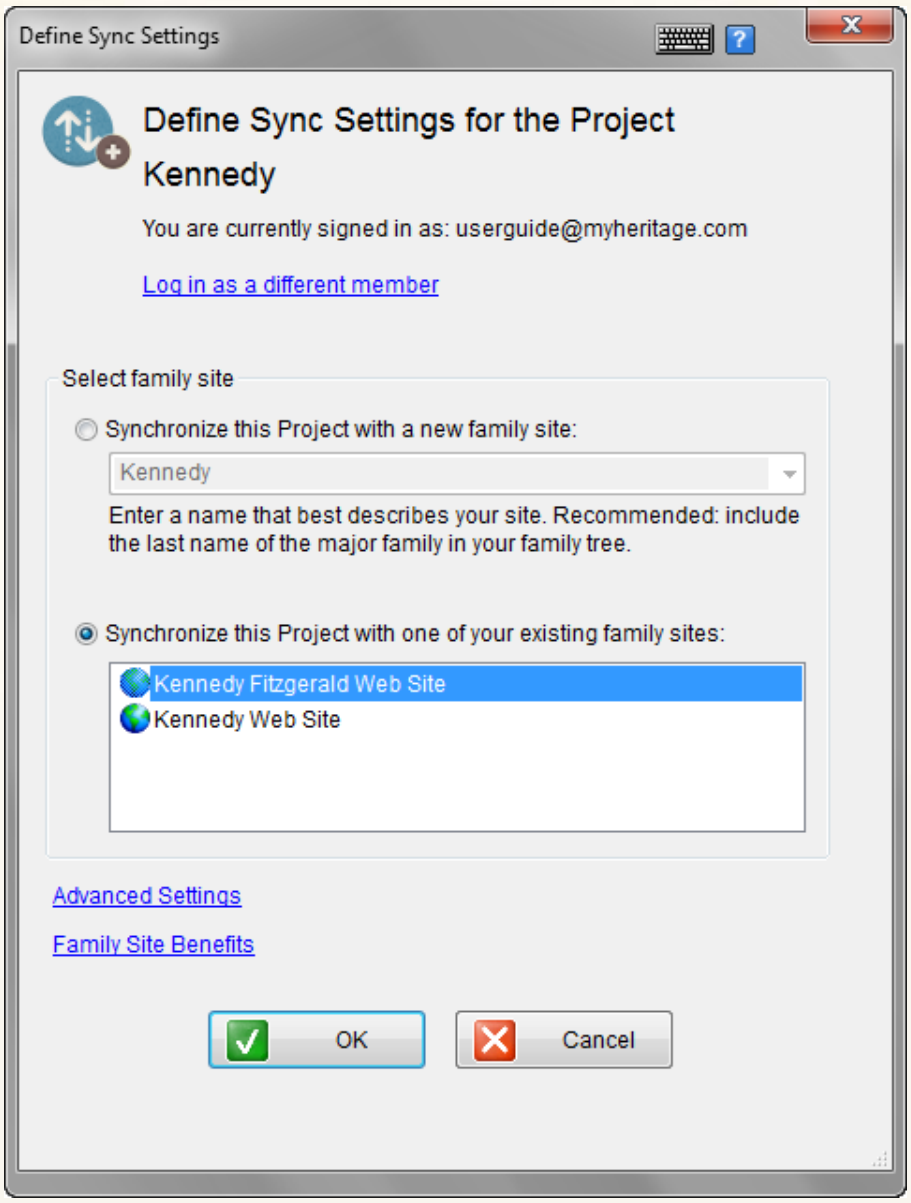
When a new project is created, Family Tree Builder offers you the option of enabling the syncing of this project, and lets you choose the family site to which to sync.

If you choose not to sync your project, you can later enable syncing by defining its sync settings.

You can change the sync settings for the project at any time.

To set sync settings for the first time:

1 In the **Sync (publishing)** menu, select **Sync Settings**. The Sync Settings for [current project name] window is displayed:



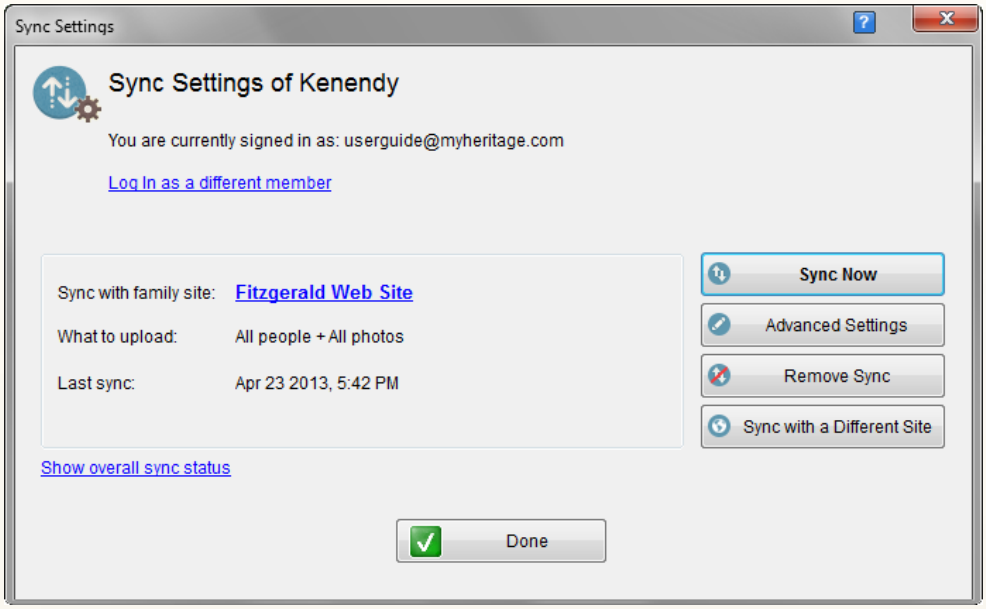
NOTE This window is also displayed if you click the **Sync** button on the main menu, if the project does not have any Sync Settings.

2 Select an existing family site or create a new family site. If you already manage one or more family sites on MyHeritage.com, you can now choose the site to which to sync. You can also create a new family site by entering a new name or selecting one of the suggested names, based on the name of the project and common family names in the project.

3 Click **OK** to create the sync settings and close the window.

To change sync settings:

- In the **Sync (publishing)** menu, select **Sync Settings**. If this project already has sync settings, the Sync Settings window is displayed:



The window displays the sync settings of the current project.

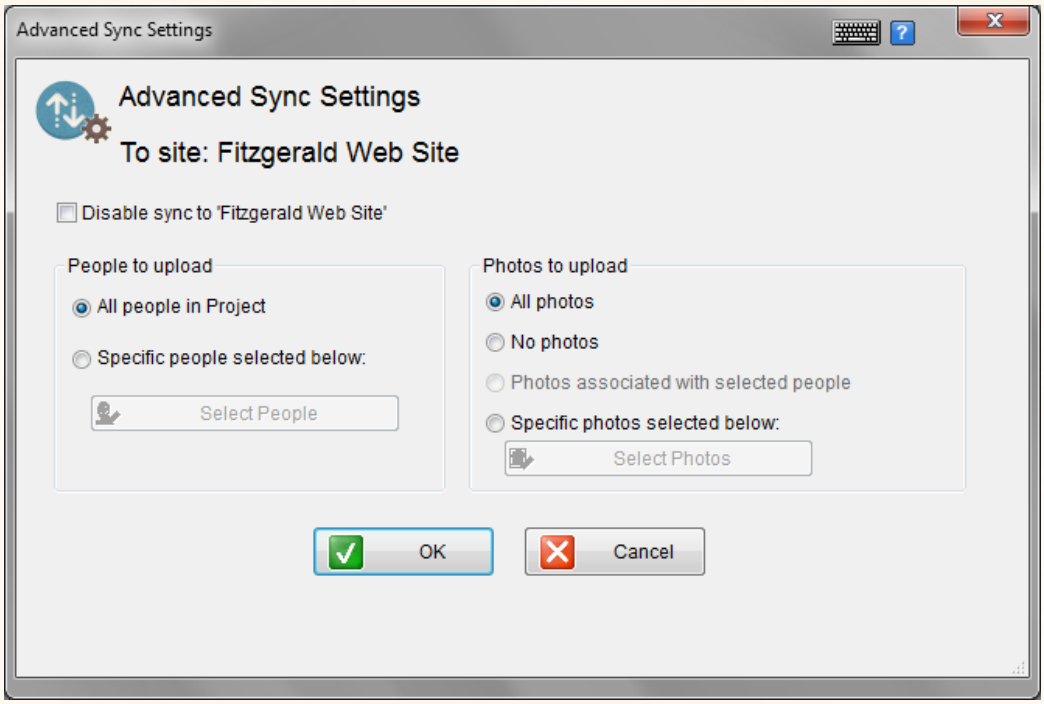
The window shows the sync settings for the family site for this project.

You can perform any of the following actions from this window:

- **Sync Now:** Syncs the current project based on the selected settings.
- **Advanced Settings:** Enables you to perform advanced editing of the sync settings (see Advanced Sync Settings).
- **Remove Sync:** Removes the selected sync settings. The project will no longer be synced to the family site. You can also temporarily disable the syncing from the Advanced Settings.
- **Sync with a Different site:** Enables you to select another of your family sites or create a new site to sync this project to (see Sync with a Different Site).

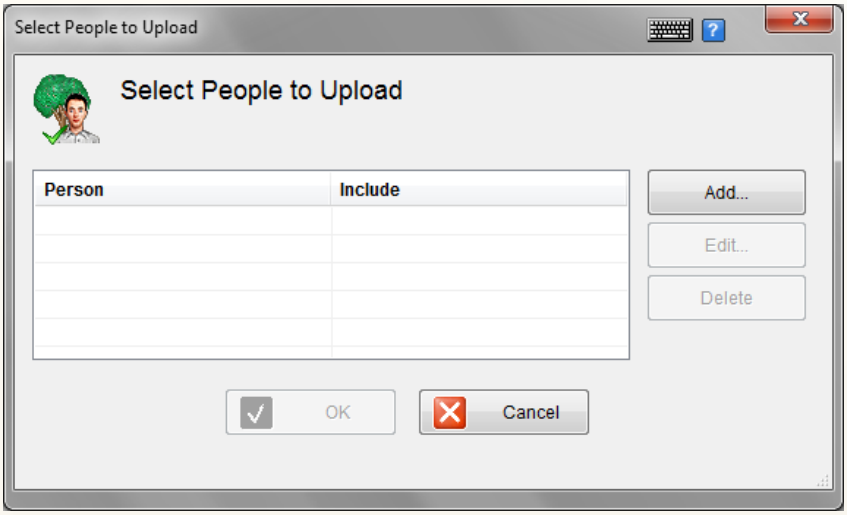
Advanced Sync Settings

The following describes the fields in the Advanced Sync Settings window:

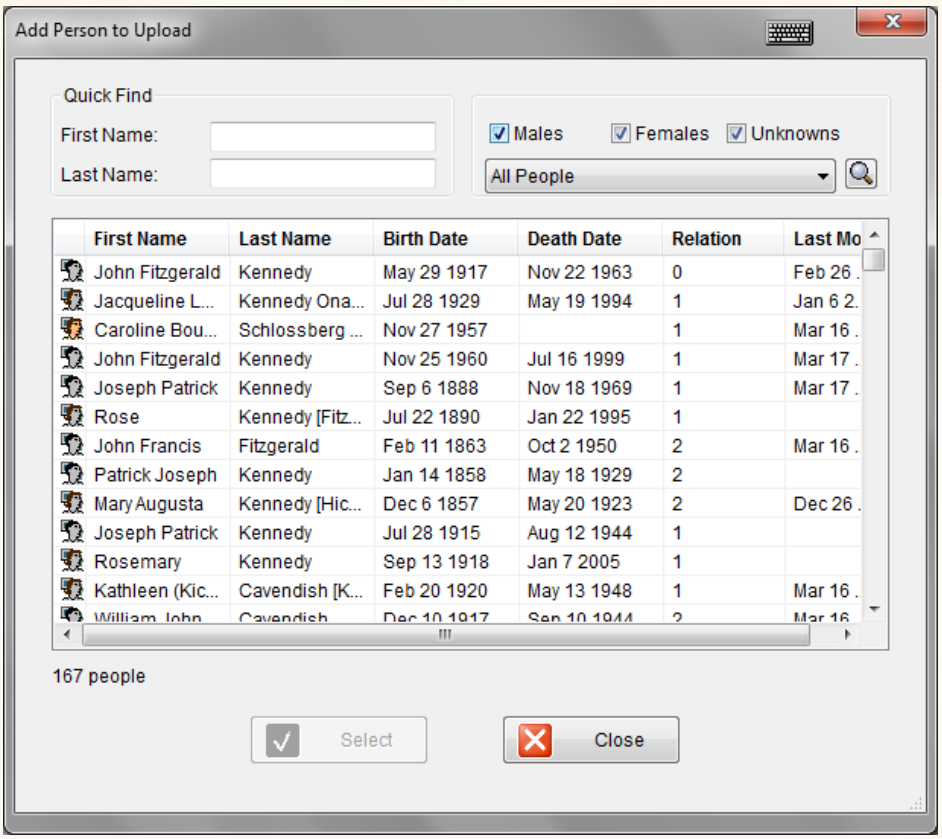


- **Disable sync to [family site name]:** Disconnects the link between the Family Tree Builder project and the online family site. This means that any changes made in Family Tree Builder are not synced to the family site, and any changes made in the family site are not synced to Family Tree Builder. This feature is useful when you have multiple projects for which you have enabled automatic syncing. It allows you to disable syncing to a specific project, without disrupting syncing to all the others.

- **People to upload:** Selects the people in the family tree that you want to be synced. This option is particularly useful when you have a large project that describes multiple families and you would like to create different family sites, with each describing a different family:
  - **All people in Project:** Specifies that all the people in your project will be synced to your family site.
  - **Specific people selected below:** Specifies that only the people who you select will be synced to the family tree on your site. When you click the **Select People** button, a window is displayed enabling you to select any combination of people in your project. This window also gives you the option to specify whether the ancestors, descendants and/or spouses of the people that you select are included.



Click **Add** to display the Add Person to Upload window, which lists people in your project who you can select.



You can use the Quick Find area to locate a person according to first and/or last name. You can also filter the list to display only males, females and/or unknowns.

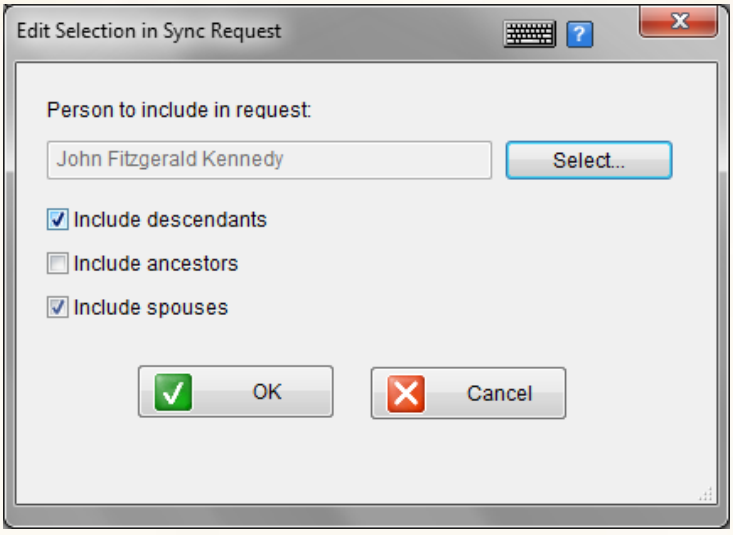
NOTE

Click a column header to sort the list according to this column in ascending order.

When you finish, click **Select**.

By default, a person is added with his/her descendants and spouses. You can add ancestors to the list or remove anyone. You can also change the selection altogether. In the Select People to Upload window, click **Edit** to display the Edit Selection in Sync Request window.

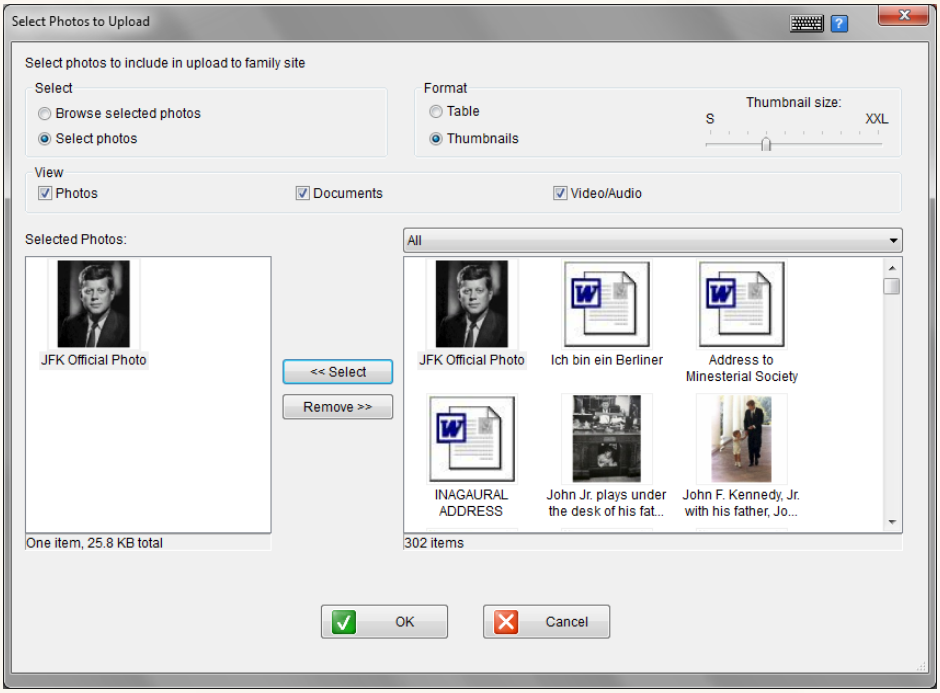
Check any option to include it or click **Select** to display the Select Person in Request window, where you can select a different person for the syncing requests.



When you finish, click **OK** to close the window.

- **Photos to upload:** Select photos in the selected project to be synced to your family site, as follows:
  - **All Photos:** Syncs all the photos in your project to your family site.
  - **No Photos:** Syncs none of the photos in your project to your family site.
  - **Photos associated with selected people:** Syncs all photos for the people specified for syncing, regardless of the **People to Upload** setting.

- **Specific photos selected below:** Syncs only the photos that you select. Click the **Select Photos** button to pick which photos you want to sync. When you click the **Select Photos** button, the following window is displayed, enabling you to select photos in your project:



The Select area in the Select Photos to Upload window contains two options, as follows:

- **Select photos:** This option displays photos for your selection. You can use the dropdown menu above this box to display **All** photos, **Photos not selected to be uploaded** or the **Home person's photos only**. Once you have displayed the requested photos in this list box, you can click on them, and then press the **Select** button to move them to the Selected Photos area on the left. This list box indicates which photos will be synced to your site.
- **Browse selected photos:** Select this option to browse the photos listed in the Selected Photos area on the left. You can use the arrow keys on your keyboard to move up and down the list.

The Format and View areas enable you to specify how photos appear when you select the **Browse selected photos** option. The options in these areas are described in detail in Photos Display Options.

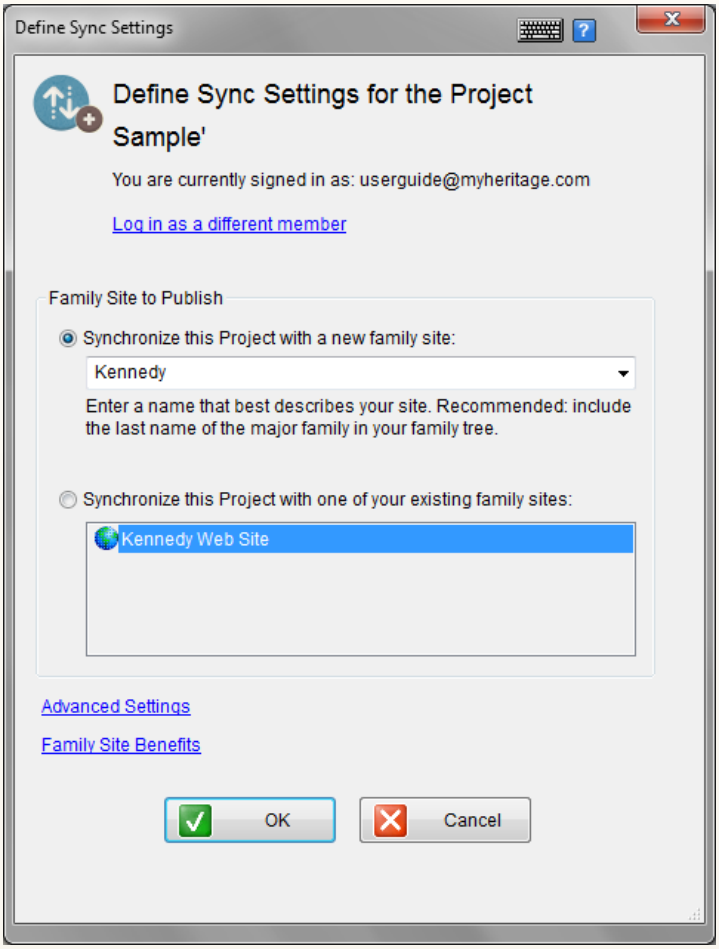
Click **OK** after you have selected all the photos you want synced to your family site.

Sync with a Different Site

The default site for syncing a project is selected when you create a new project. You can set your project to be synced to a different site at any time.

To sync with a different site:

1 In the Sync Settings window, click **Sync with a different site** to display the Define Sync Settings window.



2 Perform one of the following actions:

- Select the **Synchronize this Project with a new family site** radio button to enter the name for the new family site or select a name from the dropdown list of suggestions.
- Select the Synchronize this Project to one of your existing family sites radio button and then select one of the sites in the panel.
- Click the **Advanced Settings** link to open the Advanced Sync Settings window and change the sync settings.

- Click the **Family Sites Benefits** link to learn about the benefits of syncing. This window describes all the Family Tree Builder features that work only when syncing a family tree project to a family site, as well as the benefits of having a family site.

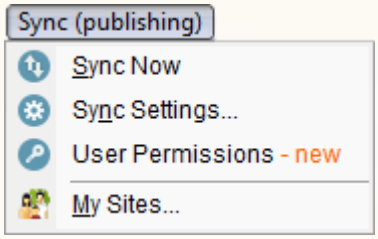


3 When you finish, click **OK** to close the window.

User Permissions

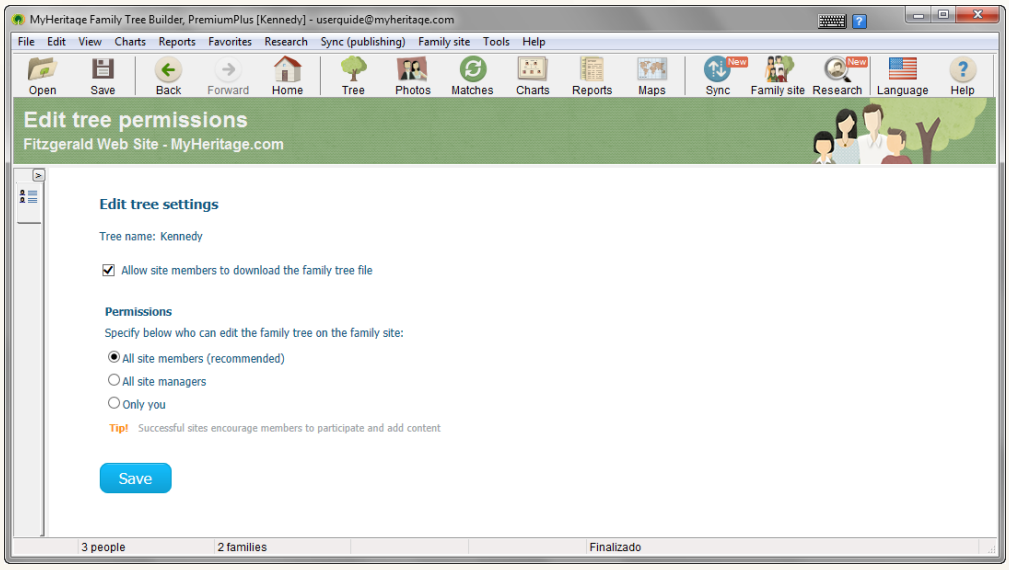
Once you have synced your project to a family site, you can edit the user permissions, and control who can download your tree from the family site, and who can edit it online.

You can change these settings at any time:



To set user permissions:

1 In the **Sync (publishing)** menu, select **User Permissions**. The Edit tree permissions window is displayed:



2 Choose whether you want other site members to be allowed to download the tree file.

3 Specify who can edit the tree online: all site members, all site managers or only you.

4 Click the **Save** button to save changes.

Managing Your Family Sites

As a MyHeritage member, you can create one or more family sites on MyHeritage.com.

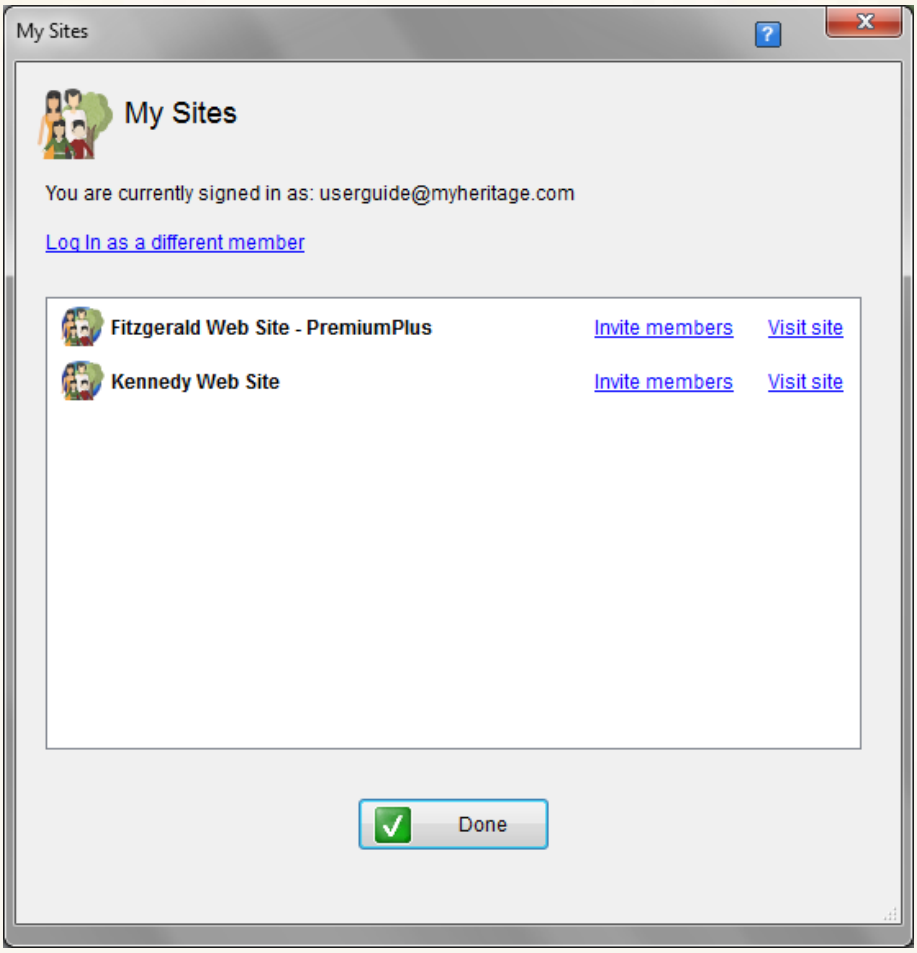
The process of creating a family site only allocates a name and a space for your family tree. The syncing process can be used later to upload your project to the family site.

A member of MyHeritage is identified by an email address entered during the registration process.

The My Sites window displays the details of the MyHeritage member name you used when signing up for membership, after you installed Family Tree Builder. You can sign in as a different member if you are registered under more than one email address or if you changed your email address in your member profile page in the MyHeritage.com website.

To see your family sites:

- Select the **My Sites** option in the **Sync (publishing)** menu to show your list of family sites, as shown below:



When you select a family site, its details are displayed at the bottom of the window.

To sign in as a different member:

1 In the My Sites window, click **Log In in as a different member** to open the Log into MyHeritage.com window.

2 Enter the email address and password you used when you registered with MyHeritage.com.



3 Click **Log in**. The My Sites window now displays the sites for your new account.

NOTE

If you do not remember the password of your MyHeritage.com account, click **Forgot password?**. An email will be sent to your email account with instructions about how to reset your password.

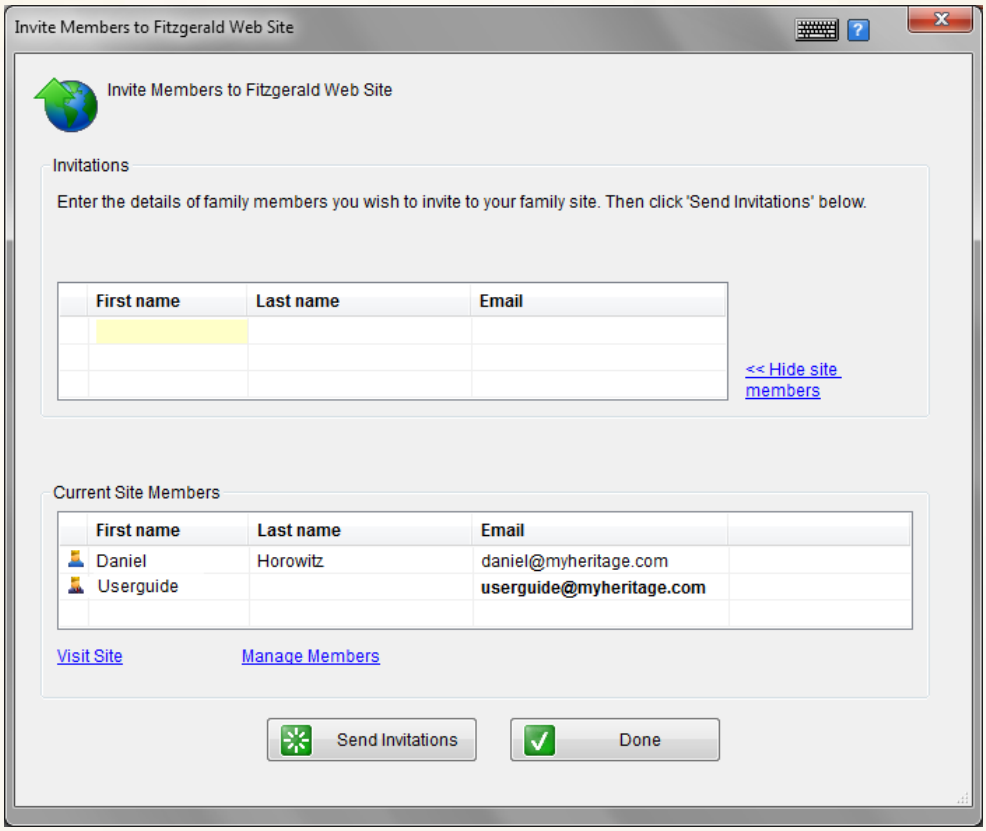
To visit a site:

- You can visit a family site by clicking the **Visit Site** link in the My Sites window.

  Anyone with an email address can be invited to be a member of your family site. Anyone who accepts your invitation automatically becomes a member of MyHeritage.

To invite people to visit your family site:

- You can invite people to visit your family site by clicking the **Invite members** link in the My Sites window. This displays the following window:



The top panel includes a form for new family members who you want to invite to the family site. This panel displays all family people in your family tree for whom you already entered an email address in the Edit Person window, and who are not yet members of the family site. To add new family members, type in their first name, last name and email address. When you click the **Send Invitations** button, all the people listed in this panel are invited to your family site.

The bottom panel (which can be hidden or shown) displays current members of the family site. People you invited previously, but who have never visited the site, have a **Re-invite Member** link next to their email address. Click this link to add these people to the list at the top of the window. This is the list of people who will be invited when you click the **Send Invitations** button.

NOTE

If Your own name is shown in **bold**.

Using the Family Site Menu

Family Tree Builder is seamlessly integrated with your online family site. The **Family site** menu enables you to view parts of your online family site in Family Tree Builder, instead of in an external web browser.

In order to use the options in the **Family site** menu, your project must be synced with your online family site. Once a project has been synced with your family site, the family tree in the project is both viewable and editable on your family site. Any changes made to the family tree on the family site are automatically reflected in the Family Tree Builder project, thereby ensuring and maintaining bidirectional synchronization between Family Tree Builder and the family site.

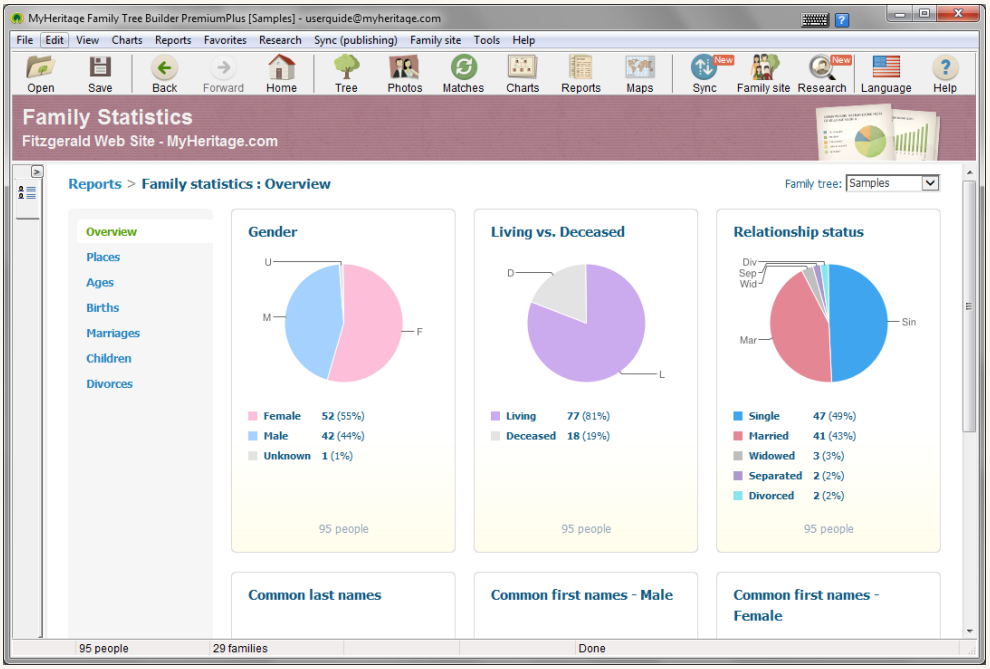
An Internet connection is required to use the **Family site** menu options.

NOTE

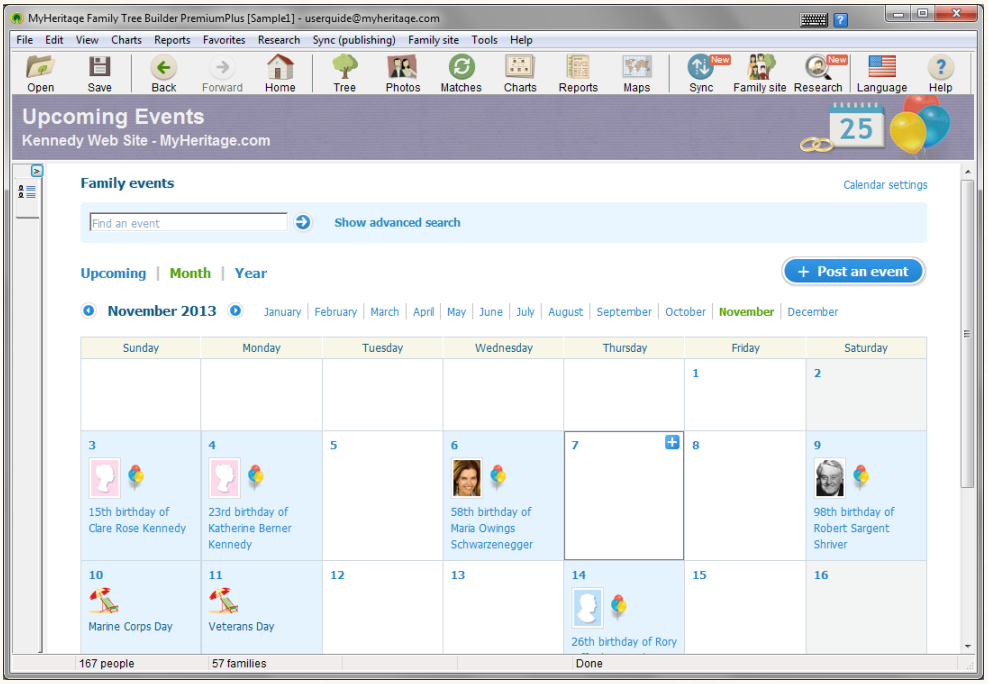
Some **Family site** menu options are only available for Premium or Premium Plus memberships (see Premium Membership).

The following options are available in the **Family site** menu:

- **Family Statistics:** Displays statistics for the entire family tree.



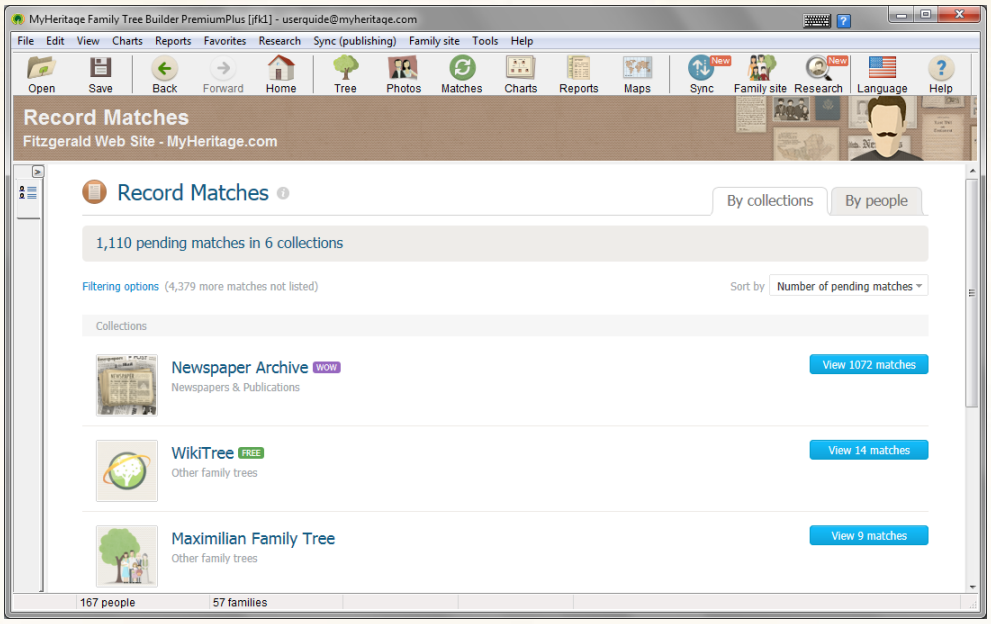
- **Upcoming Events:** Displays all upcoming family events in a list or monthly view. You can order a personalized family calendar in a few clicks, delivered to your home.



- **Profile Page:** Displays the full profile page from the family site for the selected person. When viewing a profile, double-click any person in the list on the left to view that person's profile instantly.



- **Record Matches:** Displays all the matching historical records for the family tree in one centralized list (see Record Matches).



- **Visit Site:** Opens the family site's home page.

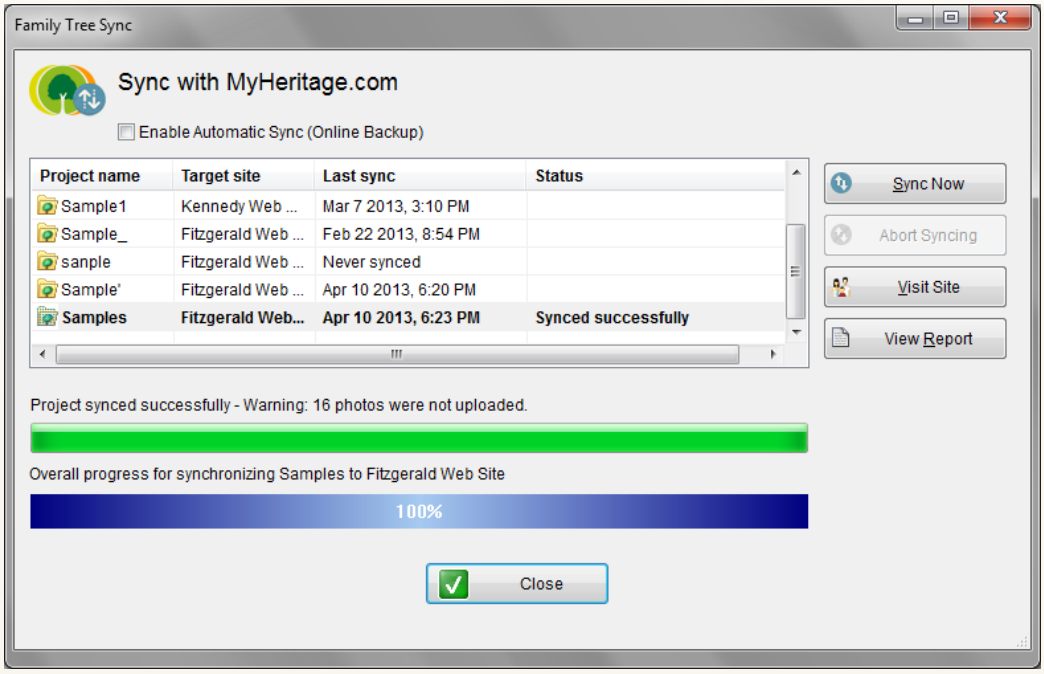
Family Tree Sync

One of the major advantages of Family Tree Builder is its ability to sync your family tree project to a family site for backup purposes and to enable others to view the family tree. The syncing process is performed by a special utility called Family Tree Sync.

Family Tree Sync is a separate application that runs in parallel with Family Tree Builder. It can be accessed by clicking the Family Tree Sync icon in your Windows icon tray and choosing **Show Sync Progress**:



The Family Tree Sync window lists all your projects with their syncing details, where and when they were synced and their status. You can follow the progress of the current syncing in the progress bar of the window. You can also view a report of all syncing activities and link to MyHeritage.com.

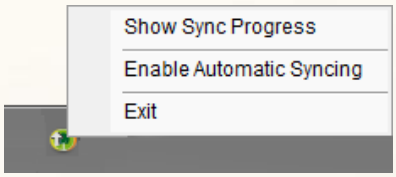


The following options are available in this window:

- Enable or disable automatic syncing (see Automatic Syncing).
- View the progress of the syncing process.
- Click **Synch Now** to start syncing the selected project.
- Click **Abort Syncing** to stop the syncing process.
- Click **Visit Site** to open your web browser to the family site where the selected project is synced.
- Click **View Report** to see a log of all syncing activities.

Closing the window does not interrupt the syncing process.

You can right-click the icon on the Windows toolbar and choose **Exit** to close the Family Tree Sync application.



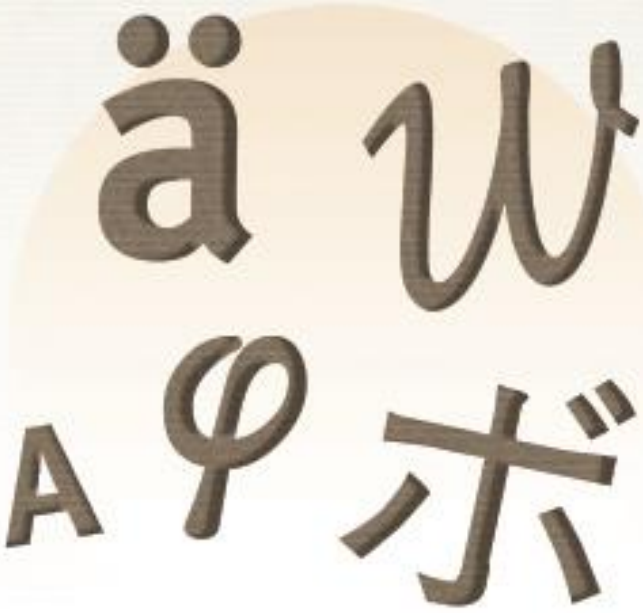
When you exit Family Tree Builder, Family Tree Sync continues syncing if it is in the middle of a syncing process. It closes automatically when syncing is complete.

You can right-click the icon on the Windows toolbar and select **Enable or Disable Automatic Syncing** (see Automatic Syncing).

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CHAPTER 12

Languages and Translation



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Languages and Translation

About This Chapter:

This chapter describes the various language and translation features provided by Family Tree Builder. It contains the following sections:

- **Supporting Multiple Languages** describes the languages that Family Tree Builder supports.
- **Unicode** enables you to enter data in any supported language, regardless of the local language on your computer.
- **The Virtual Keyboard** enables you to enter data in any of the numerous supported languages, even when your computer and its keyboard do not support or provide the letters of that language.
- **Changing the Display Language** describes how to change the display language.
- **Primary and Secondary Data Languages** describes options for changing the data language.
- **Changing the Language** describes how to change the language data is entered in.
- **Translating in Family Tree Builder** describes the various translation options in Family Tree Builder.

Supporting Multiple Languages

Family Tree Builder supports 40 languages: Afrikaans, Albanian, Arabic, Bosnian, Bulgarian, Catalan, Chinese (Simplified and Traditional), Croatian, Czech, Danish, Dutch, English (US and UK), Estonian, Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Latvian, Lithuanian, Norwegian, Persian, Polish, Portuguese (Brazil), Portuguese (Portugal), Romanian, Russian, Serbian, Slovak, Slovenian, Spanish, Swedish, Turkish, Ukrainian and Yiddish.

A list of the supported languages is shown below:

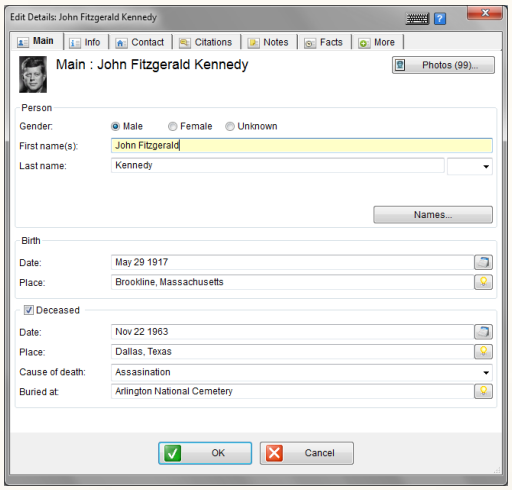


Family Tree Builder supports these languages for the following:

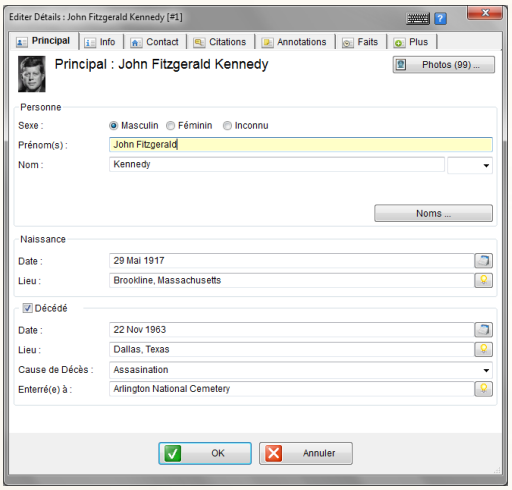
- **Display Language**
- **Data Language**

Display Language

The Display Language refers to the text that appears in all the menus, toolbars and windows in Family Tree Builder. You can select any one of the languages for the display and swap this language at any time without losing your data or closing the program. An example of the same window in English and in French is shown below.



English



French

Data Language

The Data Language refers to the language in which the actual data in your project is entered and displayed. Family Tree Builder allows you to create a family tree in more than one Data Language. Specific facts must be entered in each language separately, such as the names of people and places, while the relationships between the individuals and the various dates need only be entered once. This is because relationships and dates do not depend on a language.

Entering data in more than language is especially useful when these languages do not use the same alphabet, and therefore the data (names, places and so on) is different between the two languages. For example, if you have many Russian relatives or ancestors, it may be useful to also enter names in Russian.

TIP

The Display Language and the Data Language are independent and can be combined in almost any way you like. For example, you can view a family tree that was sent to you by a relative that contains all Russian data (meaning peoples' names and places), while the Family Tree Builder display (meaning menu and field names) is displayed in English.

NOTE

The only limitation is that the display language and the data language must both be in the same direction (right-to-left or left-to right).

TIP

You can use any of the supported languages even without installing them on your PC, including even more obscure languages such as Greek. However, your Windows operating system must support a feature called Mirroring, which is available as a default in most recent versions of Windows, except the old Windows NT 4.0 and some older versions of Windows 98.

TIP

The Display Language and the Data Language are independent and can Multi-lingual family trees are great for family reunions! You can create and print multi-lingual charts that showcase the same family tree in more than one language.

Unicode

Family Tree Builder supports Unicode, which is a computing industry standard for the consistent encoding, representation and handling of text expressed in most of the world's writing systems. Family Tree Builder's Unicode support enables you to enter data in any of the application's supported languages, regardless of the local language on your computer's operating system. Such data can be saved and displayed in Family Tree Builder, including special characters and accents.

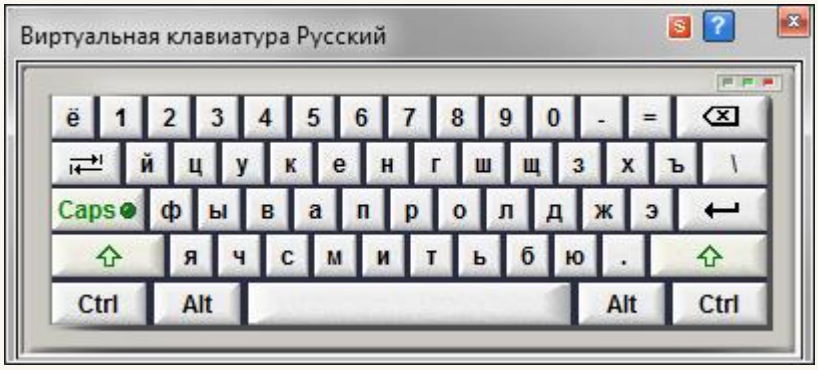
The Virtual Keyboard

Family Tree Builder provides a Virtual Keyboard that allows you to enter data in any supported language even when your computer and keyboard do not support or provide the letters of that language.

To use the Virtual Keyboard:

7 Launch the Virtual Keyboard by clicking the **Keyboard** icon at the top of any page. The Virtual Keyboard of the current data language is displayed as a floating window, on top of the other windows.

As an example, the Russian Virtual Keyboard is shown below:



The Virtual Keyboard self-adjusts automatically, according to the current data language settings.

8 Click a letter on the Virtual Keyboard to enter that letter in the current field in the window in which you are working. The letter or character will appear in the field in which you were typing.

Changing the Display Language

This section describes how you can quickly change the Display Language of the text that appears in all the menus, toolbars and windows.

To change the Display Language using the toolbar:

1 Click the flag of the current language that appears on the toolbar.



The following window is displayed:



2 Select your language in the window. Family Tree Builder changes the language of the program according to your selection.

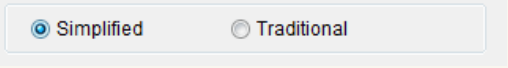
3 You can click **Advanced language options** to display the Languages window (see Changing the Language), where you can also set the Primary and Secondary Data Languages.

NOTE

If you select **English** as the display language, an additional option appears enabling you to select **English (US)** or **English (UK)** as the display language (see figure above).

NOTE

If you select **Chinese** as the display language, an additional option appears enabling you to select **Simplified** or **Traditional**.

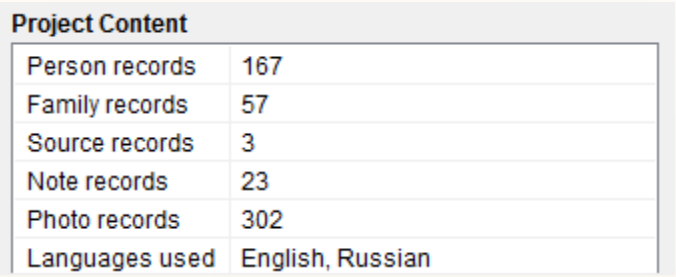


Primary and Secondary Data Languages

While the Family Tree Builder database supports multiple supported languages at any given time, you can only add data in one language (single-language mode) or two languages (dual-data language mode). Once you enter data in a specific language the data is saved in this language.

NOTE

When you open a project, the languages in which the data is saved in the database are listed in the **Languages used** field.



Project Content

Person records	167
Family records	57
Source records	3
Note records	23
Photo records	302
Languages used	English, Russian

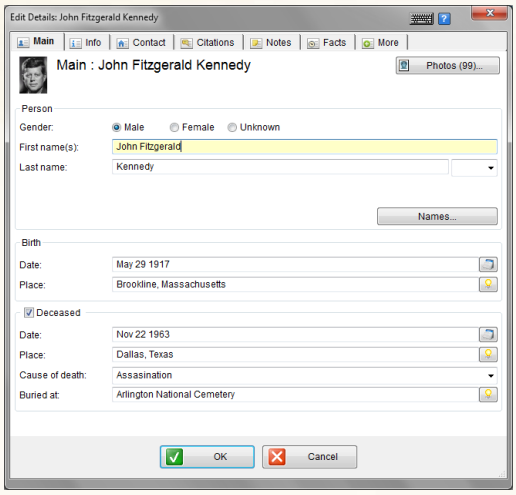
When you create a new project, you can choose to work in single-data language mode or in dual-data language mode with two data languages: a *primary data language* and a *secondary data language*. The primary data language determines the default language for entering data. The secondary data language is your alternative data-entry language and is optional.

NOTE

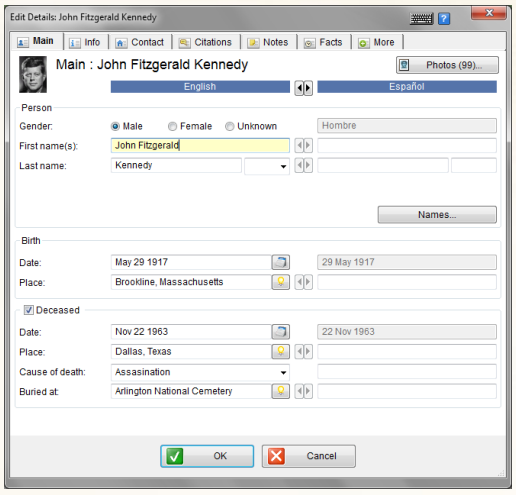
You may change these settings at any time. However, it is recommended that you use English as one of the data entry languages, especially if you are publishing your project to a family site.

At any time, you can change the display language as well as the Primary and Secondary Data Languages. The Primary Data Language is the language in which you want to enter data like names of people and places, notes and so on. If you define a Secondary Data Language, then Family Tree Builder works in dual-language mode and data entry pages are bi-lingual. If you do not define a Secondary Data Language, then the program works in single-data language mode and all pages only accept data in the Primary Language.

The following shows an example of single-data language mode and dual-data language mode, where English is the primary data language and Spanish is the secondary data language:



Single Data Language Mode



Dual Data Language Mode

By default, Family Tree Builder works in single-data language mode. If you want to work in dual-data language mode, select **Languages** from the Tools menu on the toolbar and check **Use Secondary Language**.

TIP

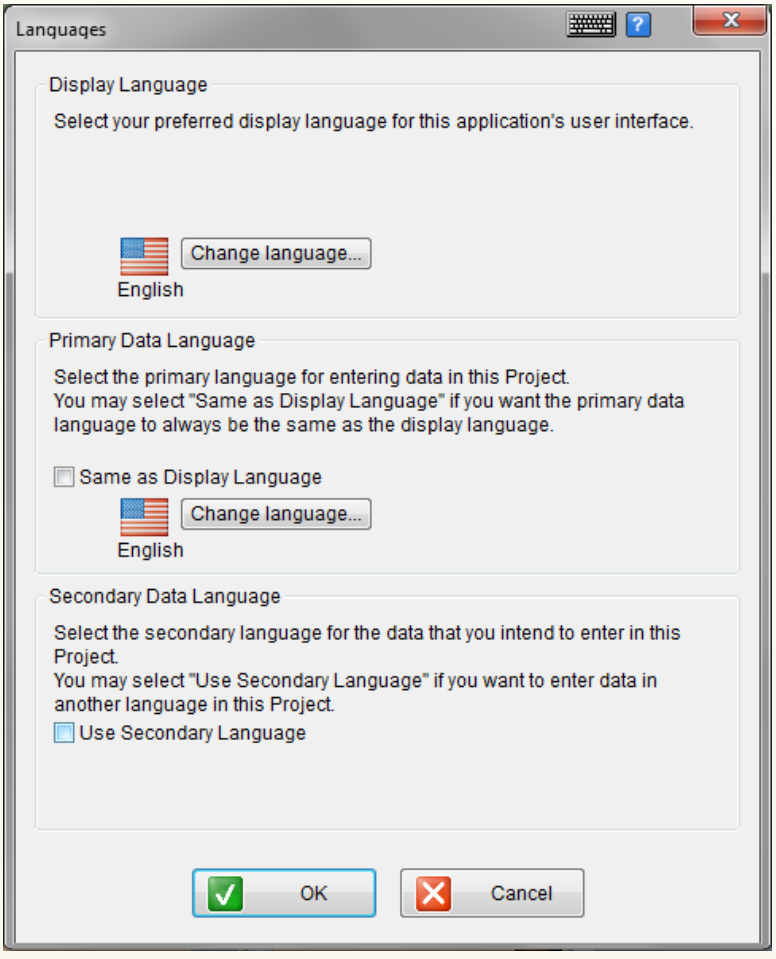
By default, Family Tree Builder is configured so that the Primary Data Language is the same as the Display Language. This means that upon changing the Display Language, you are also instructing the program to change the Data Language to match it. It is recommended that you open the **Languages** window and make sure that the languages you want are configured to your liking.

Changing the Language

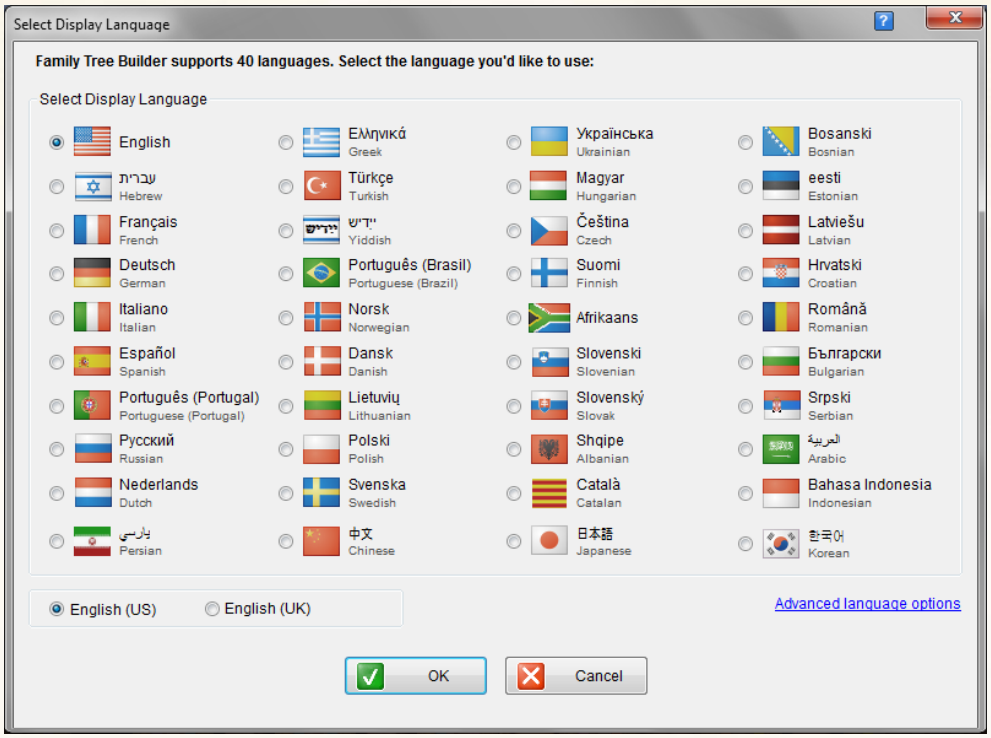
The following procedure describes how to change the Display Language and how to modify the Primary and Secondary Data Languages.

To change the language settings:

9 From the **Tools** menu on the toolbar, select **Languages**. The Languages window appears:



10 To change the Display Language, in the Display Language panel, click **Change Language**. The Select Display Language window appears:



3 Select the display language. Note that if you select English, an additional selection enables you to choose between **English (US)** and **English (UK)**. If you select Chinese, an additional selection enables you to choose between **Simplified** and **Traditional**. Click **OK** to confirm and close the window.

4 If you want the Primary Data Language to be different from the Display Language, uncheck **Same as Display Language**, and in the Primary Data Language panel, click **Change Language** to select the primary data language.

5 If you want to work in dual-language mode, check **Use Secondary Language**, and in the Secondary Data panel click **Change Language** to select the secondary data language.

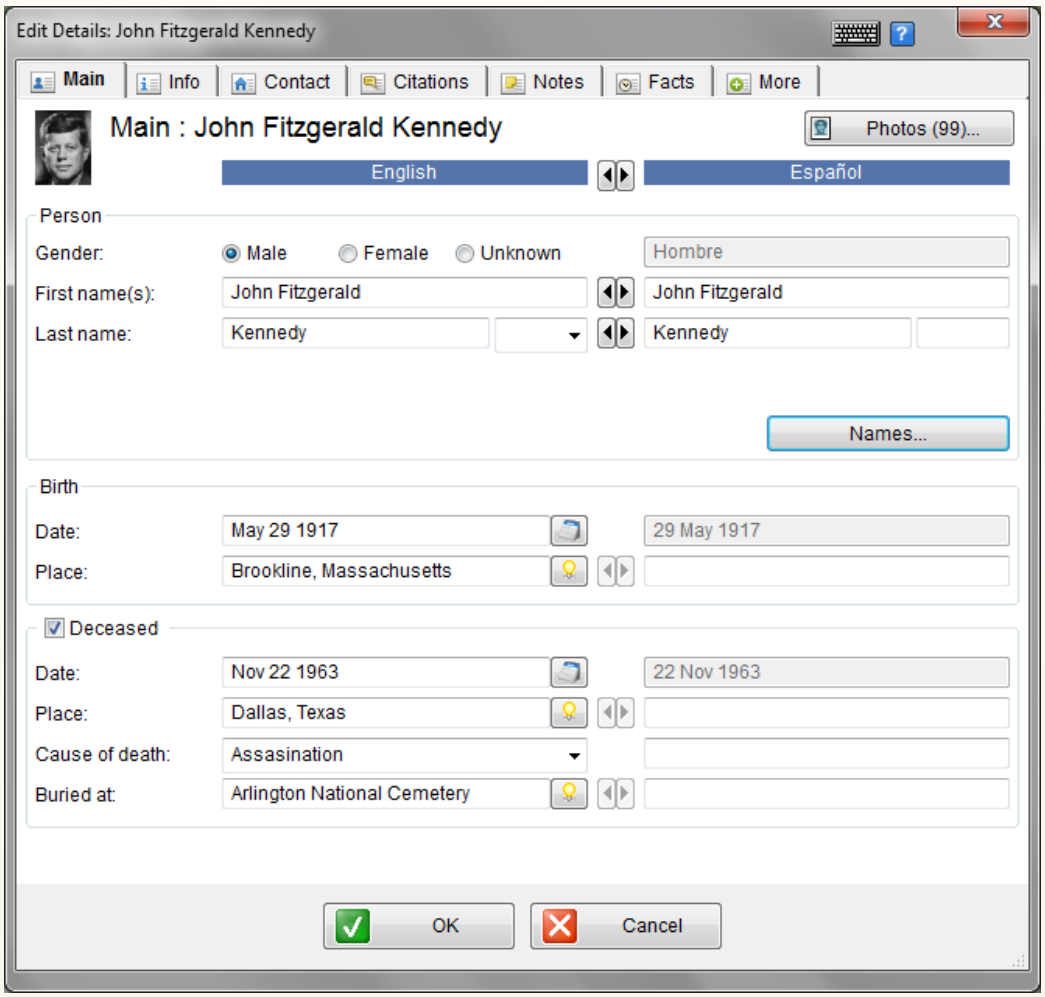
6 Click **OK** to confirm and close the window.

TIP

If you change the Primary Data Language of an existing project, then the words **Unknown** or **Empty** may appear in place of the data that you have already entered.

Translating in Family Tree Builder

If you are working in dual-data language mode, you can enter data directly in both languages in the easy-to-use dual-language interface, which provides the fields in one language on the right and in the other language on the left, as shown in the example below:



Family Tree Builder has a database of common translations of names. This enables automatic name translation for places and people in the various entry windows. Family Tree Builder also gathers information as you edit your project and accumulates all your manual translations into its database so that in the future it can translate these same words automatically, as described below.

Family Tree Builder enables you to translate:

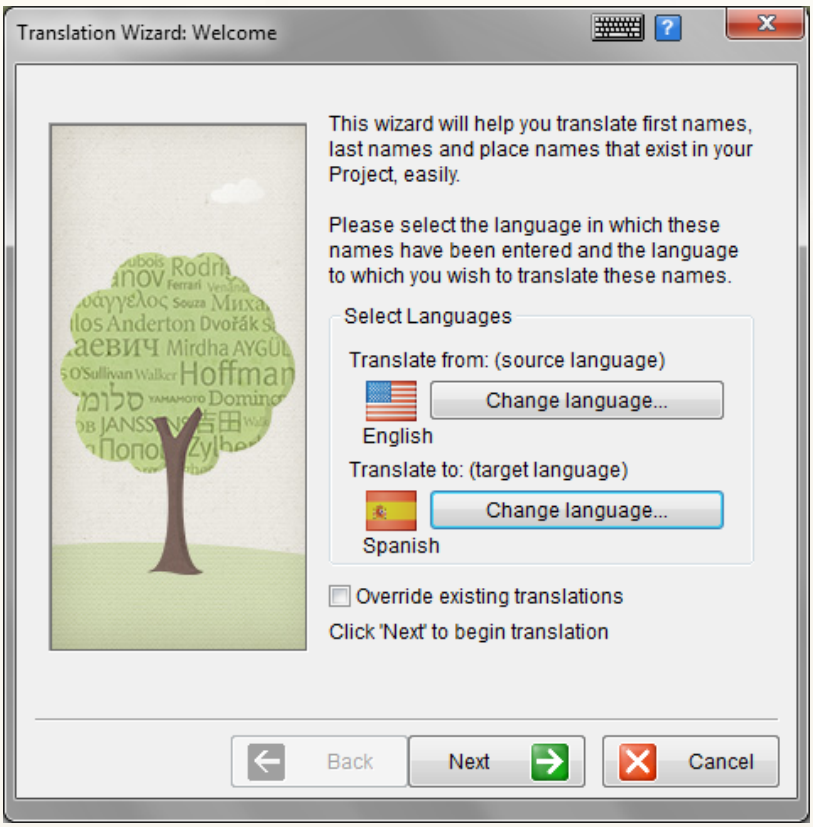
- All project data.
- All the data in the current window.
- The data in a specific field.

Translating All Project Data

By default, Family Tree Builder asks if you want to translate the data from the Primary Language to the Secondary Language.

To translate all project data:

11 In the **Tools** menu, select **Translation Wizard**. The following window is displayed:



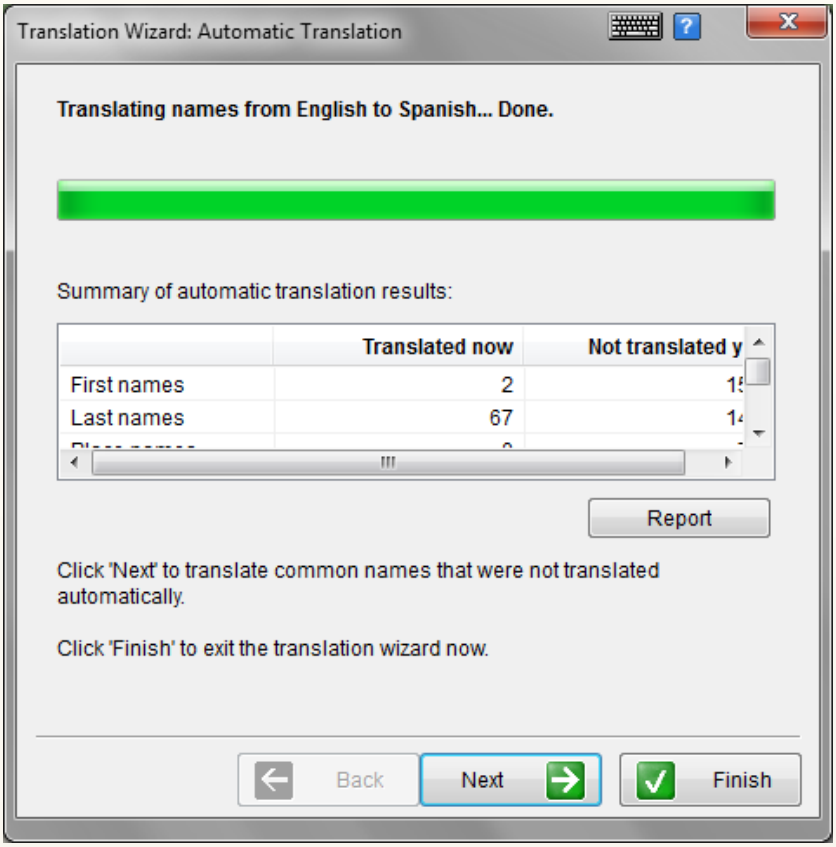
12 Under **Translate from: (source language)**, click **Change language** and select the source language. Data will be translated from this language.

3 Under **Translate to: (target language)**, click **Change language** and select the language to which data will be translated.

4 When you are done, select the source and target languages (in the example above, from English to Spanish), and click **OK**.

5 Check the **Override existing translations** checkbox it you want data that has already been entered in your project in the target language to be overwritten by translations of the data in the source language.

6 Click **Next** to begin the translation. After the translation is complete, the following window is displayed:



This window shows the number of first names, last names and place names that have been translated from the source to the target language and the number of fields that remain untranslated in the target language. You may click the **Report** button to store these translation results in a file for your review.

7 Click **Next** to display a window that lists the names and places that have not been translated, which allows you to manually translate them.

8 Click any field to type in the translation.

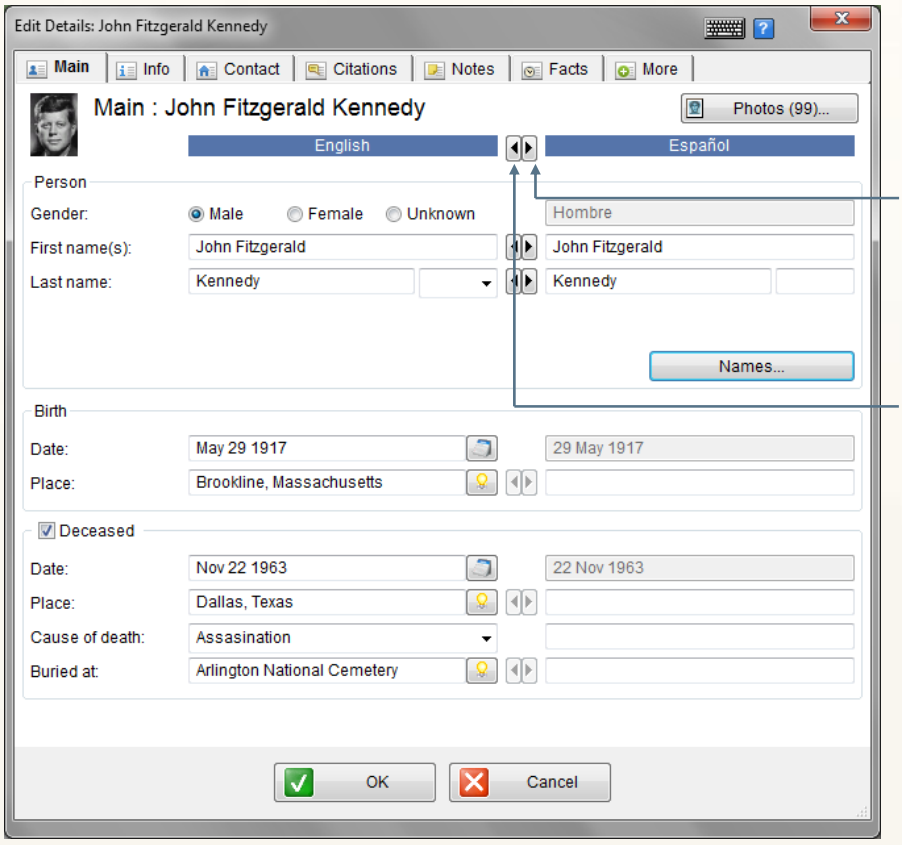
9 Click **Next** to apply your manual translations to your project.

Translating the Current Window's Data

Family Tree Builder can translate all the data in the current window from the Primary Language to the Secondary Language, or vice versa.

To translate all the data in the current window:

- In the Dual Interface window, click the arrow button that is pointing to the language into which it should be translated. It appears between the two language headers, as shown below:



Click here to translate the entire window from English to Spanish.

Click here to translate the entire window from Spanish to English.

The arrow buttons are enabled when Family Tree Builder recognizes that it knows how to translate data in this window. If Family Tree Builder knows how to translate any data in this window, the arrow is disabled, meaning that it is gray and you cannot click it. After you manually translate untranslated fields, Family Tree Builder remembers your translation and can perform automatic translations in the future.

NOTE The direction of the arrow button that you click determines the direction of the translation.

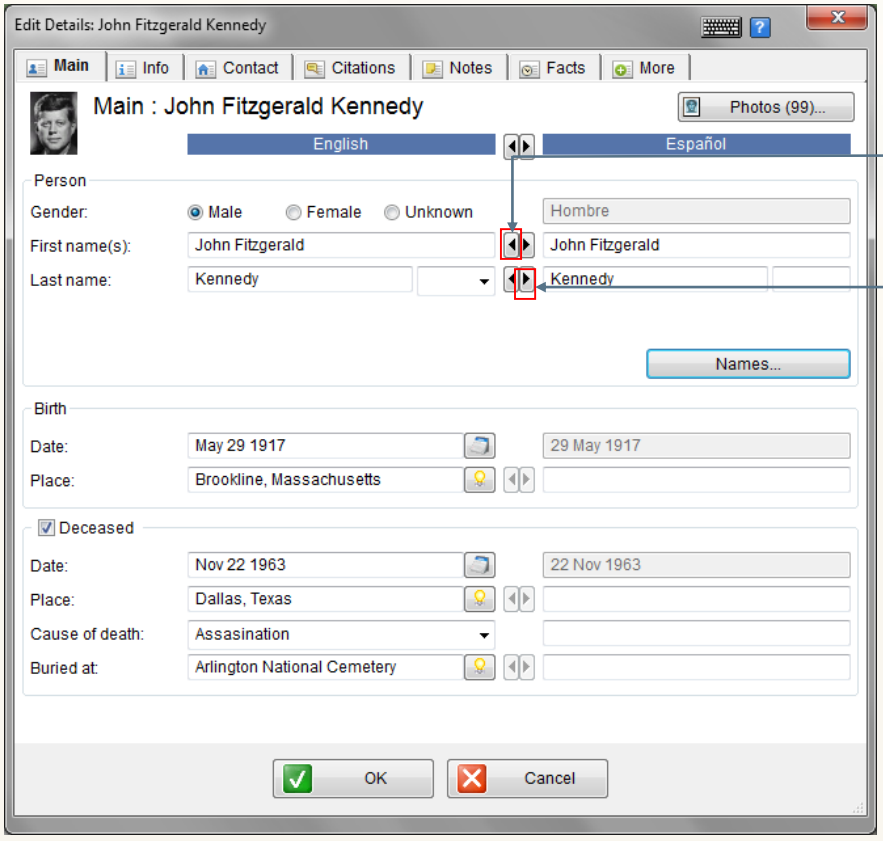
Translating a Specific Data Field

Family Tree Builder can attempt to translate a specific field in the window that is currently displayed.

To translate data in a specific field:

- In the Dual Interface window, click the arrow button that is pointing to the language into which it should be translated. It appears between the two fields, as shown below:

NOTE The direction of the arrow button that you click determines the direction of the translation.



Click here to translate the field from English to Spanish.

Click here to translate the field from Spanish to English.

This example shows how the name John has been translated into Spanish.

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CHAPTER 13

Advanced Tools



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Advanced Tools

About This Chapter:

This chapter describes the advanced tools available in Family Tree Builder. It contains the following sections:

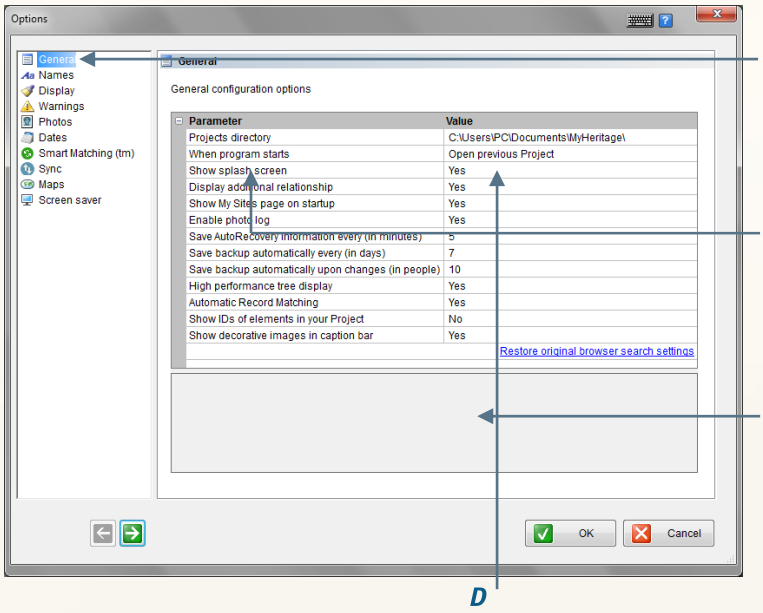
- **Configuring Family Tree Builder** provides a variety of configurable options.
- **Managing Sources and Repositories** describes the tools for managing genealogical sources and repositories.
- **Importing/Exporting Family Tree Builder Data** describes importing and exporting data from Family Tree Builder to an Excel spreadsheet and back again.
- **Backing Up a Project** describes how to create a backup copy of a Family Tree Builder project.
- **Restoring a Project** describes various methods for restoring a project in Family Tree Builder.
- **Checking for Deceased People** describes the Family Tree Builder tool that can search for deceased people in your project, who are not marked as such in the project.
- **Finding Duplicates in the Family Tree** describes how to identify duplicated people in your family tree.
- **Privacy Settings** describes how to privatize information in your project so that it is not synced to a family site.

Configuring Family Tree Builder

Family Tree Builder provides a variety of configurable options. Each of these options is described in the window shown below. This section provides a general explanation of how to customize your settings.

To configure Family Tree Builder:

1 Click **Options** in the **Tools** menu to display the following window:



A
Select a general category of configurable options

B
Look for the name of the option that you would like to change

C
Click on a row to see a description of how this option affects the behavior of MyHeritage

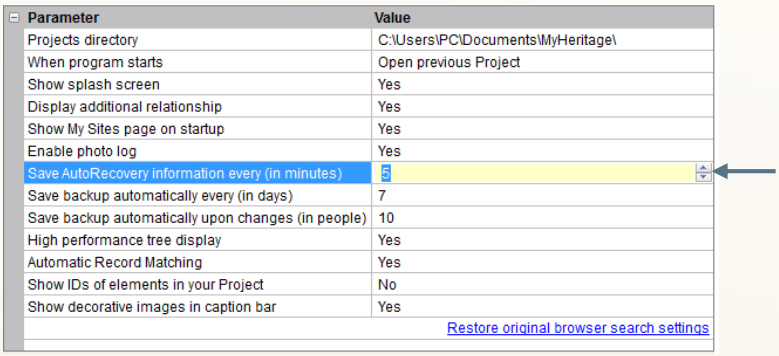
D
Click on a setting to modify it

2 Simply click an option in the list on the left to display a list of configurable options on the right.

3 Each row on the right enables you to customize a different option. The left column is the name of the option and the right column is the setting. Clicking a row shows a description of the setting at the bottom of the window. It also may add a small icon to the right of the settings column, as shown in the examples below. See Configuration Options for more details about each of the options in the left column of the window.

AutoRecovery

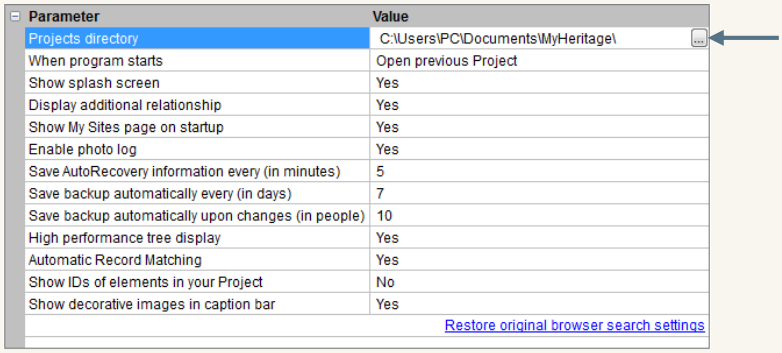
You can customize how often your project is automatically saved. Select **Save AutoRecovery information** to display the icon. Click the **up arrow** to save less often, or click the **down arrow** to save more often. You can also enter any number with your keyboard.



Parameter	Value
Projects directory	C:\Users\PC\Documents\MyHeritage\
When program starts	Open previous Project
Show splash screen	Yes
Display additional relationship	Yes
Show My Sites page on startup	Yes
Enable photo log	Yes
Save AutoRecovery information every (in minutes)	5
Save backup automatically every (in days)	7
Save backup automatically upon changes (in people)	10
High performance tree display	Yes
Automatic Record Matching	Yes
Show IDs of elements in your Project	No
Show decorative images in caption bar	Yes
	Restore original browser search settings

Projects Directory

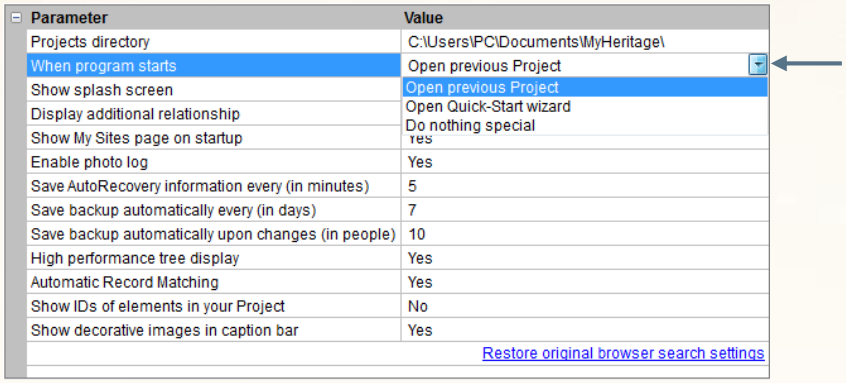
When you click **Projects directory**, the **Browser** button appears. Click it to open a window from which you can select a folder. This folder is where all of your projects are stored on your computer.



Parameter	Value
Projects directory	C:\Users\PC\Documents\MyHeritage\
When program starts	Open previous Project
Show splash screen	Yes
Display additional relationship	Yes
Show My Sites page on startup	Yes
Enable photo log	Yes
Save AutoRecovery information every (in minutes)	5
Save backup automatically every (in days)	7
Save backup automatically upon changes (in people)	10
High performance tree display	Yes
Automatic Record Matching	Yes
Show IDs of elements in your Project	No
Show decorative images in caption bar	Yes
	Restore original browser search settings

Program Startup

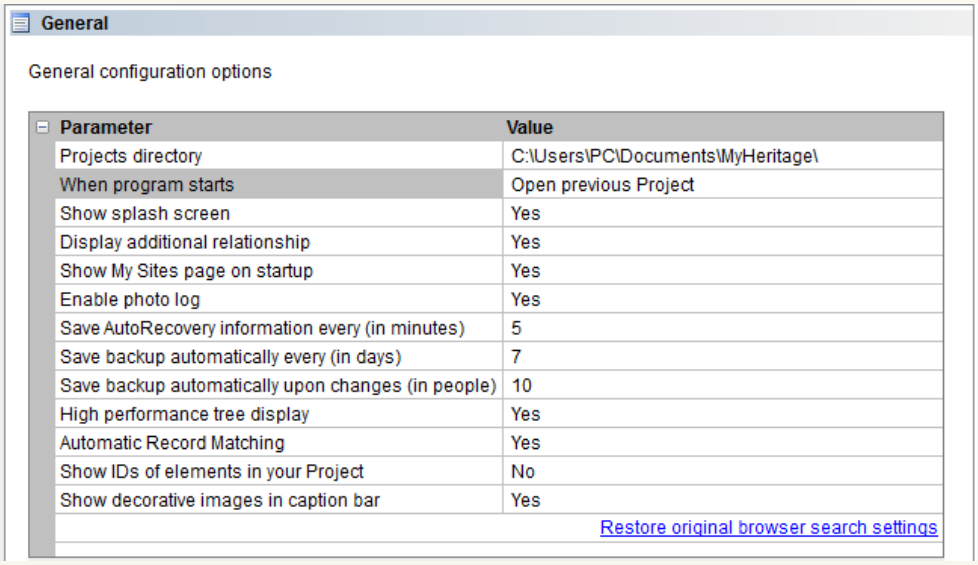
When you click **When program starts**, a dropdown menu appears from which you can select an option. This enables you to choose what happens when you start Family Tree Builder.



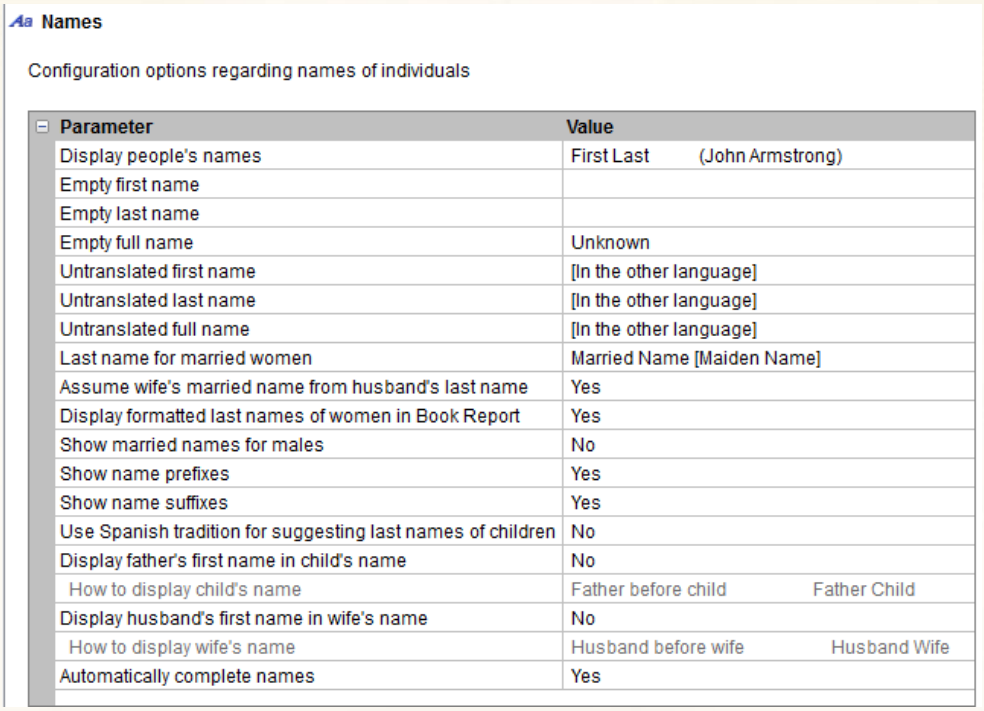
Configuration Options

The following branches and their settings can be configured in the Options window:

- **General:** Configures general options that affect the behavior of Family Tree Builder.



- **Names:** Configures various options for showing names in your project, as well as how to create and format new names for people in your project.

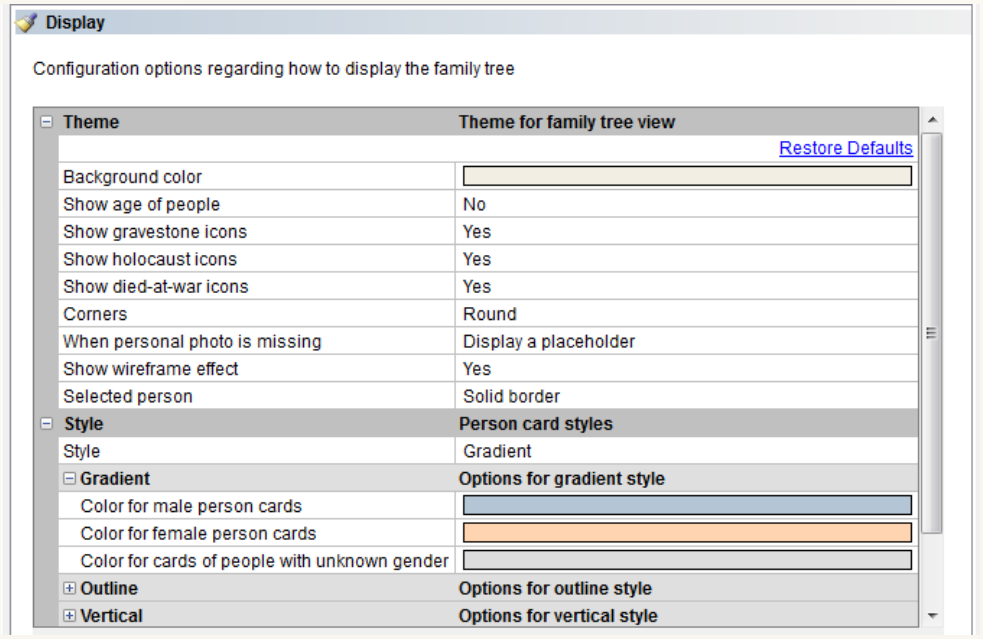


Names

Configuration options regarding names of individuals

Parameter	Value
Display people's names	First Last (John Armstrong)
Empty first name	
Empty last name	
Empty full name	Unknown
Untranslated first name	[In the other language]
Untranslated last name	[In the other language]
Untranslated full name	[In the other language]
Last name for married women	Married Name [Maiden Name]
Assume wife's married name from husband's last name	Yes
Display formatted last names of women in Book Report	Yes
Show married names for males	No
Show name prefixes	Yes
Show name suffixes	Yes
Use Spanish tradition for suggesting last names of children	No
Display father's first name in child's name	No
How to display child's name	Father before child Father Child
Display husband's first name in wife's name	No
How to display wife's name	Husband before wife Husband Wife
Automatically complete names	Yes

- **Display:** Configures various options for the way that Family Tree Builder looks, such as colors, graphics and so on.

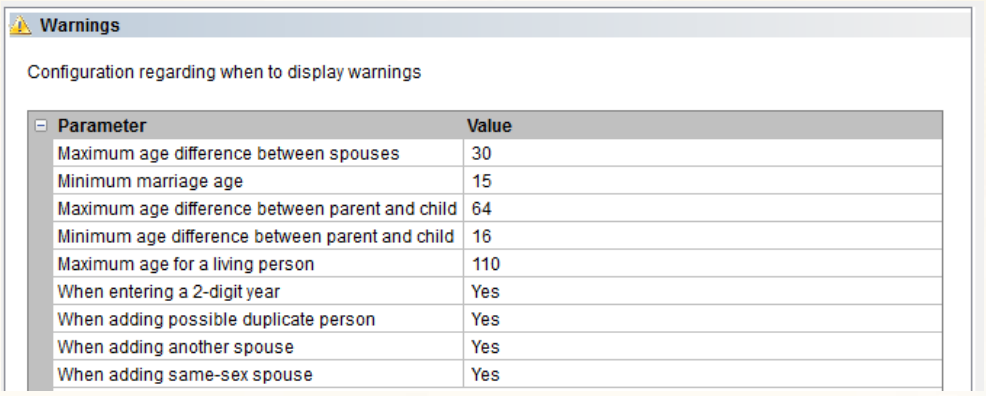


Display

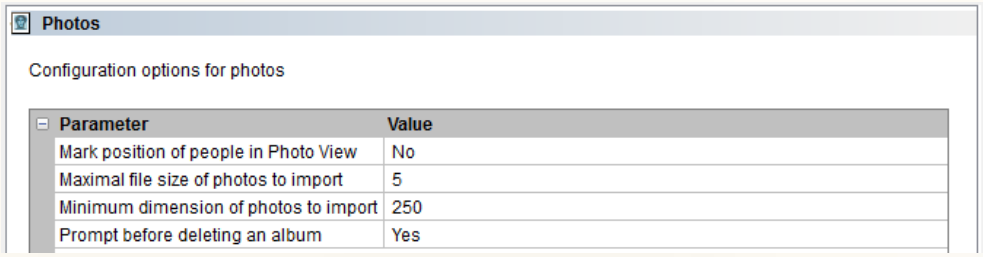
Configuration options regarding how to display the family tree

Theme	Theme for family tree view
	Restore Defaults
Background color	
Show age of people	No
Show gravestone icons	Yes
Show holocaust icons	Yes
Show died-at-war icons	Yes
Corners	Round
When personal photo is missing	Display a placeholder
Show wireframe effect	Yes
Selected person	Solid border
Style	**Person card styles**
Style	Gradient
Gradient	**Options for gradient style**
Color for male person cards	
Color for female person cards	
Color for cards of people with unknown gender	
Outline	**Options for outline style**
Vertical	**Options for vertical style**

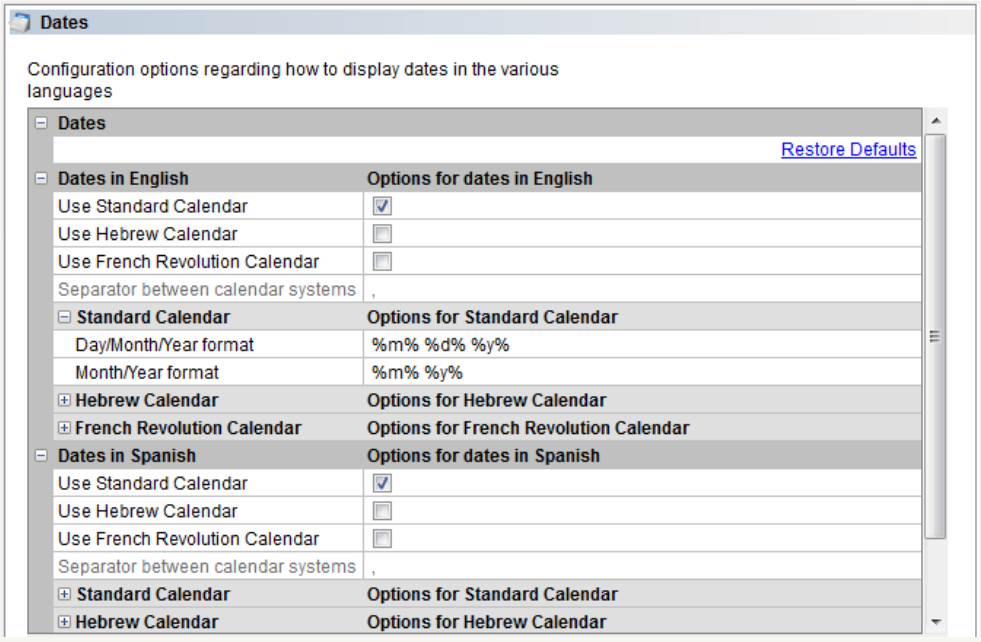
- **Warnings:** Configures different thresholds for warnings that are issued by Family Tree Builder when the threshold is violated.



- **Photos:** Configures various options for handling photos in Family Tree Builder.



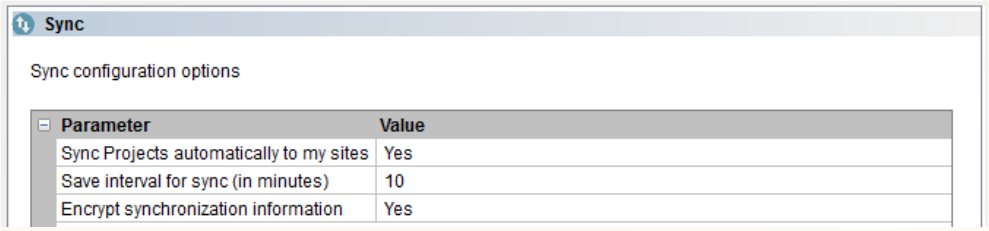
- **Dates:** Configures various options for formatting dates in Family Tree Builder.



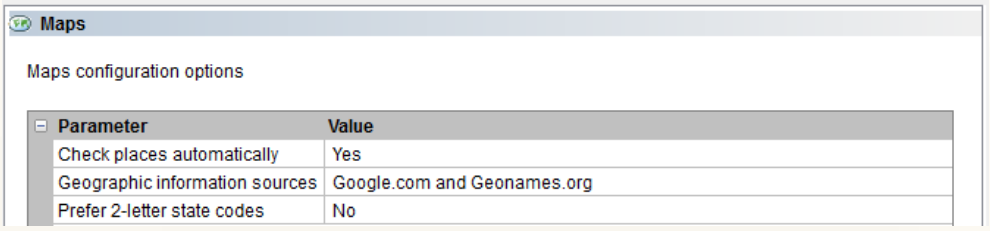
- **Smart Matching:** Configures various options for Smart Matching in Family Tree Builder.



- **Sync:** Configures various options for syncing in Family Tree Builder.



- **Maps:** Configures various options for handling maps in Family Tree Builder.



Managing Sources and Repositories

Family Tree Builder supports the full GEDCOM specification relating to sources, repositories, notes and citations. A source is the initial or original material from which information was obtained. Sources can be a variety of entities, such as a Bible, a book, a newspaper clipping, a tombstone photo, a transcript of an interview, a letter and so on.

A source can also be a specific family site on MyHeritage.com. The citation is the reference to the specific place in that source that verifies the relevant information in the family tree. Citations can include specific clarification notes that can be synced together with the information or not.

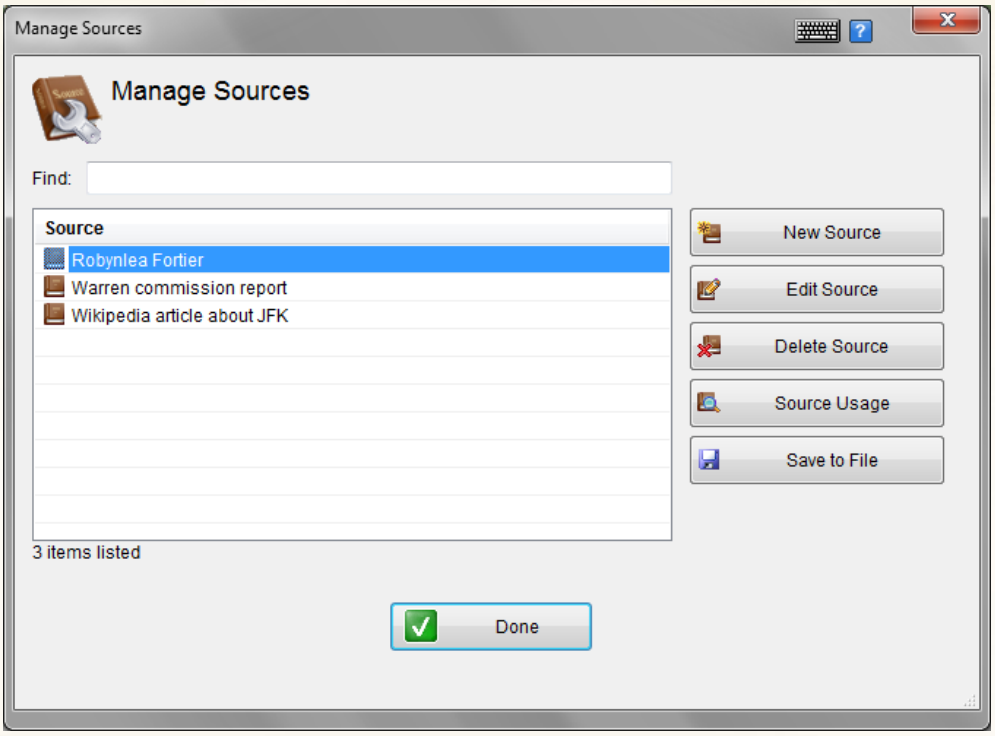
Sources can be stored in repositories. A repository is an institution (library, private collection, database and so on) or person that has the specified source as part of their collection. Attributing a source to a repository tells you how to access the source that the original researcher used, or reminds you where you found a source.

Managing Sources

Through the Manage Sources window, you can view a list of all sources referenced in your project, add or remove sources from a project and edit source information. You can also add source notes that can be private or synced to your family site (see Notes Tab – Defining Notes).

To display the Manage Sources window:

1 In the **View** menu, select **Sources** to display the Manage Sources window:



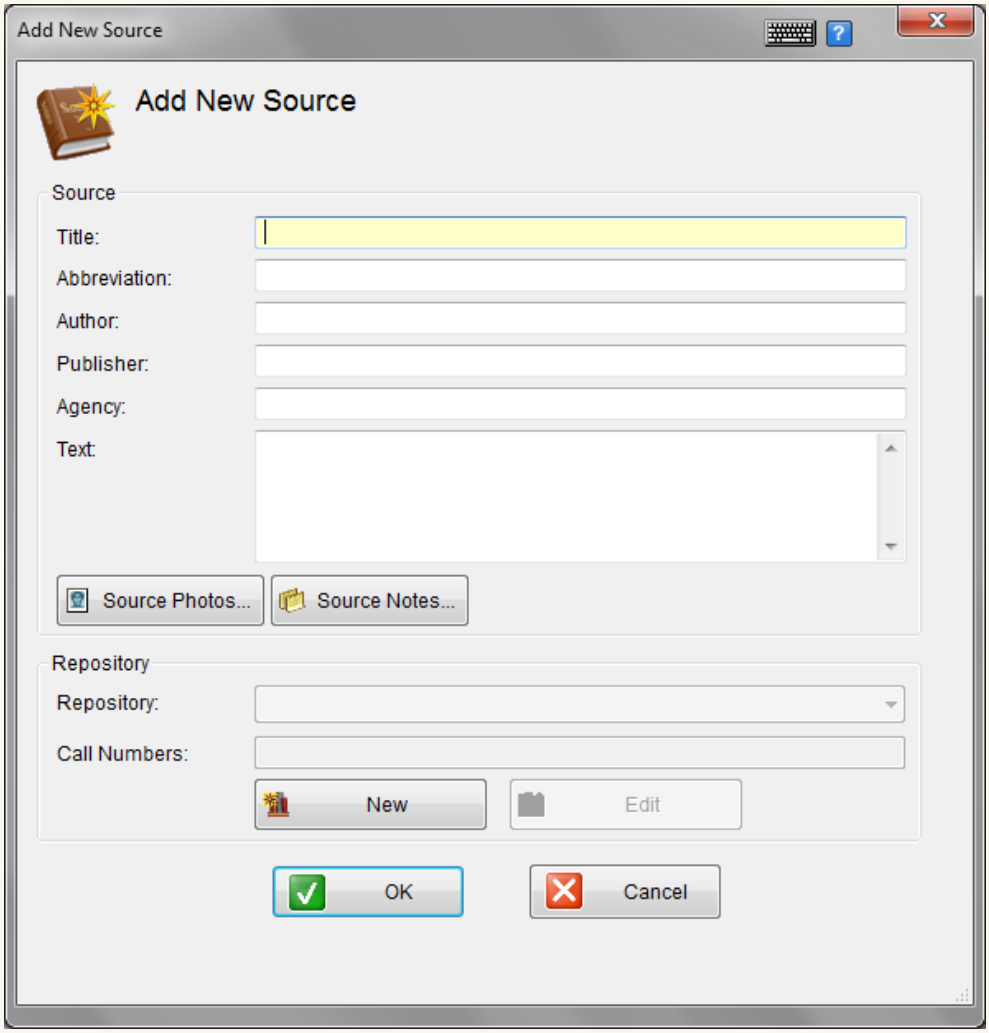
2 Here, you can manage your sources, as described below. When you are finished, click **Done** to close the window.

Adding a Source

The first step when creating a new citation is to specify the source that this citation references. If the source has not yet been added to this project, you need to add the source.

To add a new source:

1 In the Manage Sources window, click **New Source** to display the Add New Source window:



2 In the **Title** box, type a name for the new source.

3 In the other boxes, add relevant source information, such as the abbreviation, author, publisher and so on.

4 Click **Source Notes** to add source notes, which can be synced or kept private (see Notes Tab – Defining Notes).

5 Click **Source Photos** to open the Manage Photos of Source window in which you can define the photos and media for the source.

6 You can also add repository information. Select the relevant repository from the **Repository** dropdown list. If the repository you want to attribute the source to is not in the project, you need to add it (see Adding a Repository). Once you add a repository, you can also add a library call number for it.

7 When you finish entering your information, click **OK**.

8 Click **Done** to close the Manage Sources window.

NOTE

You can change the source information at any time by selecting the source in the Manage Sources window and clicking **Edit Source**. You can also click **Delete Source** to delete the source from the project.

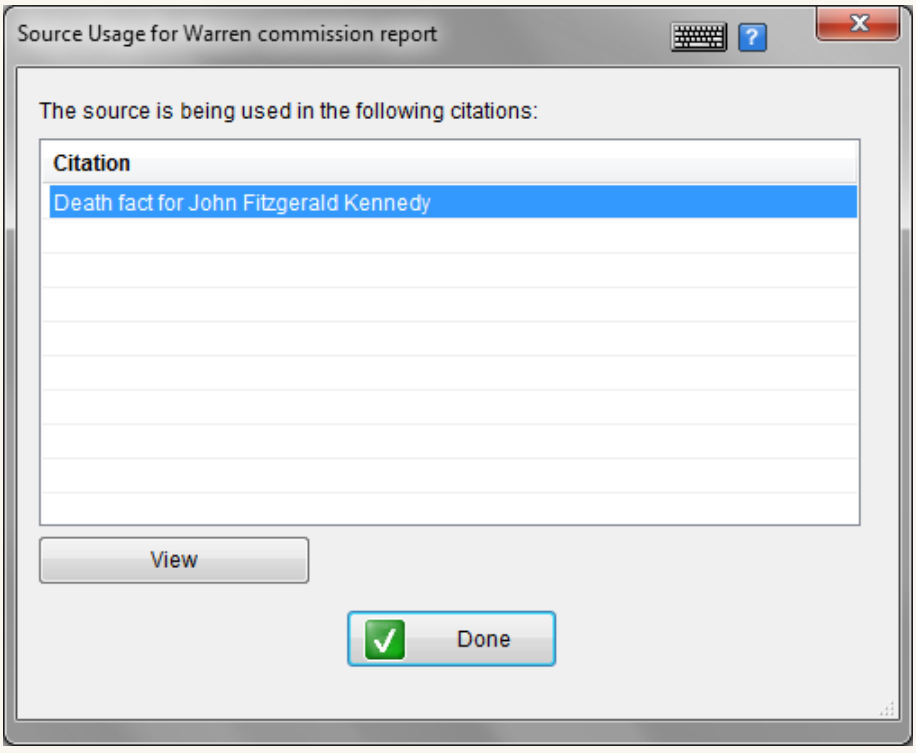
Viewing Source Usage

You can view a list of all the citations that reference a specific source.

To list citations that reference a specific source:

1 In the Manage Sources window, select the source for which you want to list citations.

2 Click **Source Usage** to display the Source Usage window, which lists all of the source citations:



3 Click **View** to display the citation.

4 Click **Done** to close the window.

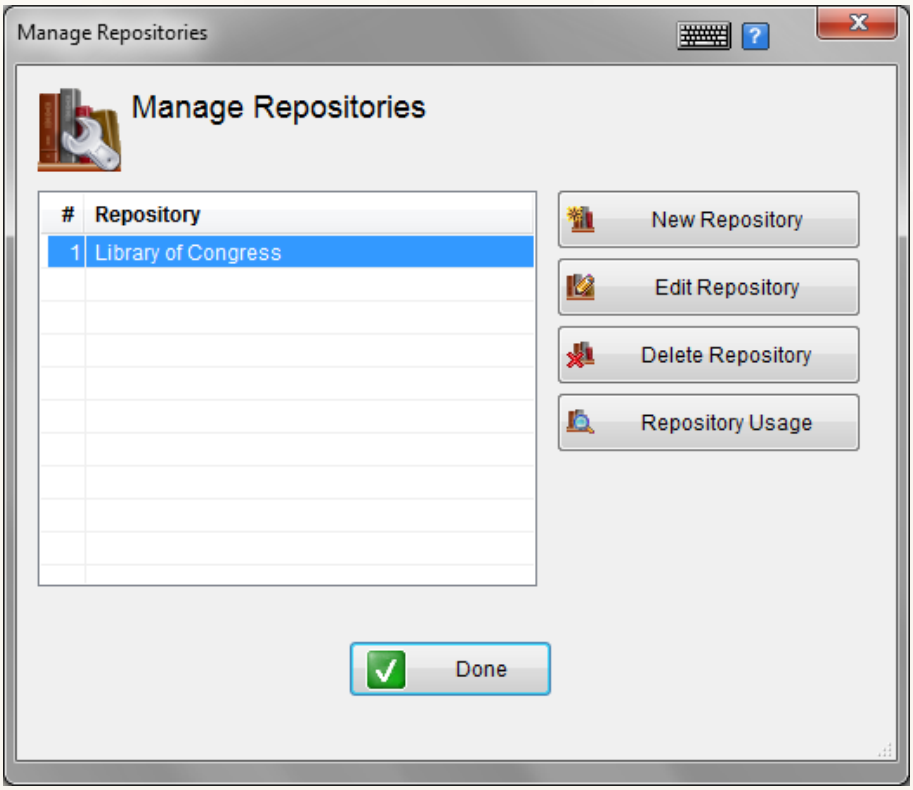
You can also save the list of sources in your project as an Excel file by clicking **Save to File**.

Managing Repositories

When entering information describing a source, you can specify the repository (such as the name of a library or database) where the source is located. If the repository has not yet been added to this project, you need to add it. You can view a list of all the repositories in a project, add or remove repositories and edit repository information.

To display the Manage Repositories window:

1 In the **View** menu, select **Repositories** to display the Manage Repositories window:



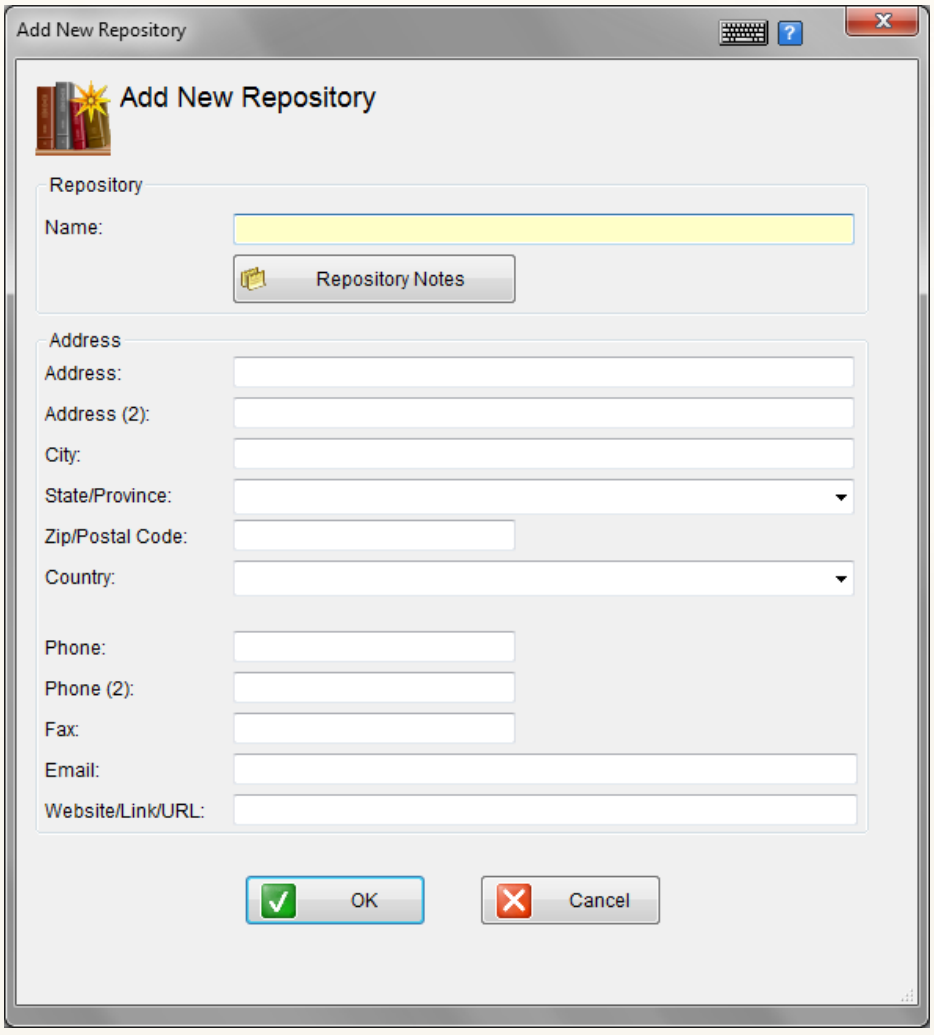
2 Make any necessary changes, and when you are finished, click **Done** to close the window.

Adding a Repository

When adding a repository, you can add information such as addresses and contact information. You can also add notes that can be private or synced to your family site (see Notes Tab – Defining Notes).

To add a new repository:

1 In the Manage Repositories window, click **New Repository** to display the Add New Repository window:



2 In the **Name** box, type a name for the new repository.

3 Click **Repository Notes** to add repository notes, which can be synced or private (see Notes Tab – Defining Notes).

4 In the other boxes, add relevant repository information, such as addresses, contact information and so on.

5 When you finish, click **OK**.

NOTE

You can change the repository information at any time by selecting the repository in the Manage Repositories window and clicking **Edit Repository**. You can also click **Delete Repository** to delete the repository from the project.

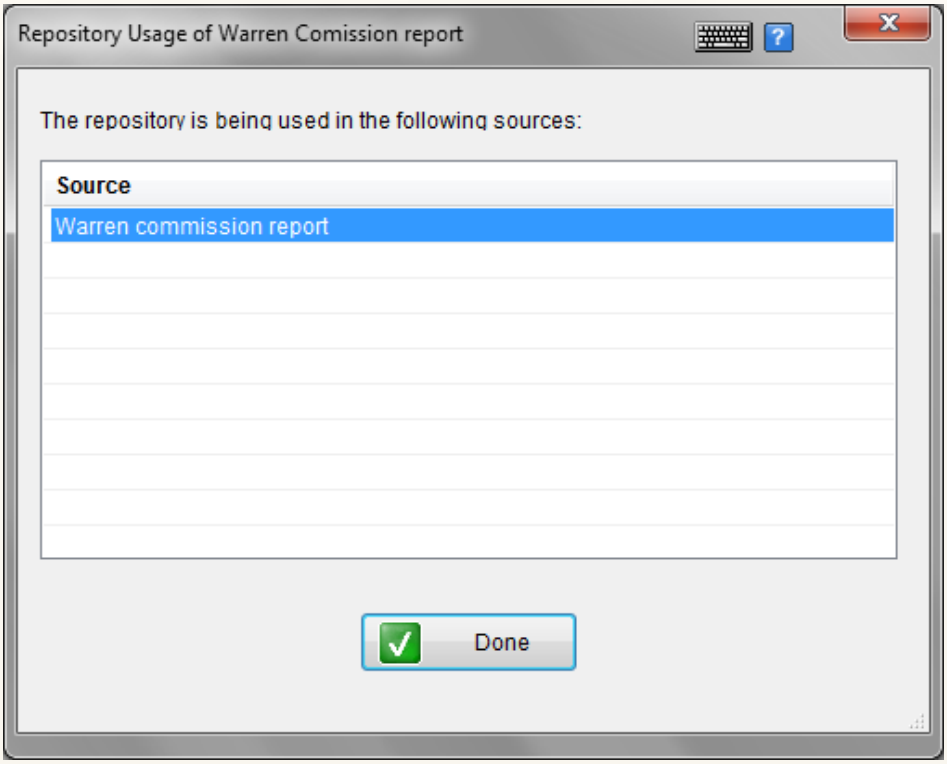
Viewing Repository Usage

You can see a list of all the sources of a specific repository in the project.

To list the sources of a specific repository:

1 In the Manage Repositories window, select the repository for which you want to list sources.

2 Click **Repository Usage** to display the Repository Usage for [Repository Name] window, which lists all the sources for that repository:



3 Click **Done** to close the window.

Importing/Exporting Family Tree Builder Data

Family Tree Builder enables you to export specific data to an Excel spreadsheet. You can export the following lists:

- **A list of all people in the project.**

  This includes the following information for each person (if available): Gender (male/female/unknown), first name, last name, married name, date of birth, place of birth, date of death (? if not known), place of death, cause of death, place of burial, occupation and notes.

- **A list of all families in the project.**

  This includes the following information for each family (if available): Husband's ID, husband's first name, husband's last name, wife's ID, wife's first name, wife's maiden name, wife's married name, date of marriage, place of marriage, marriage status and notes.

- **A list of photos in the project.**

  This includes the following information for each photo (if available): Title, date, place, file name and notes.

- **A list of sources in the project.**

  This includes the following information for each source (if available): Title, abbreviation, author, publisher, agency and text.

- **A list of tasks in the project.**

  This includes the following information for each task (if available): Title, description, priority, location and status.

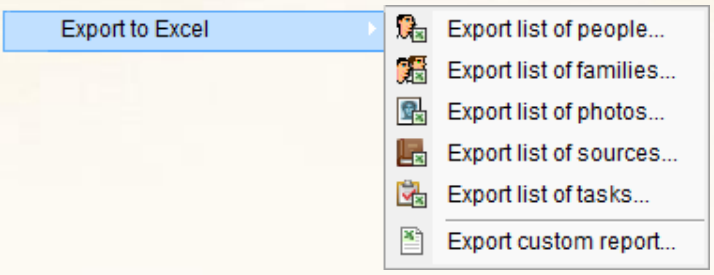
- **A custom report.**

  This includes selected people and information about these people to report.

After you export the list, you can use Excel's convenient table format to edit the information and import it back into your project. The new information overwrites the existing information.

To export to Excel:

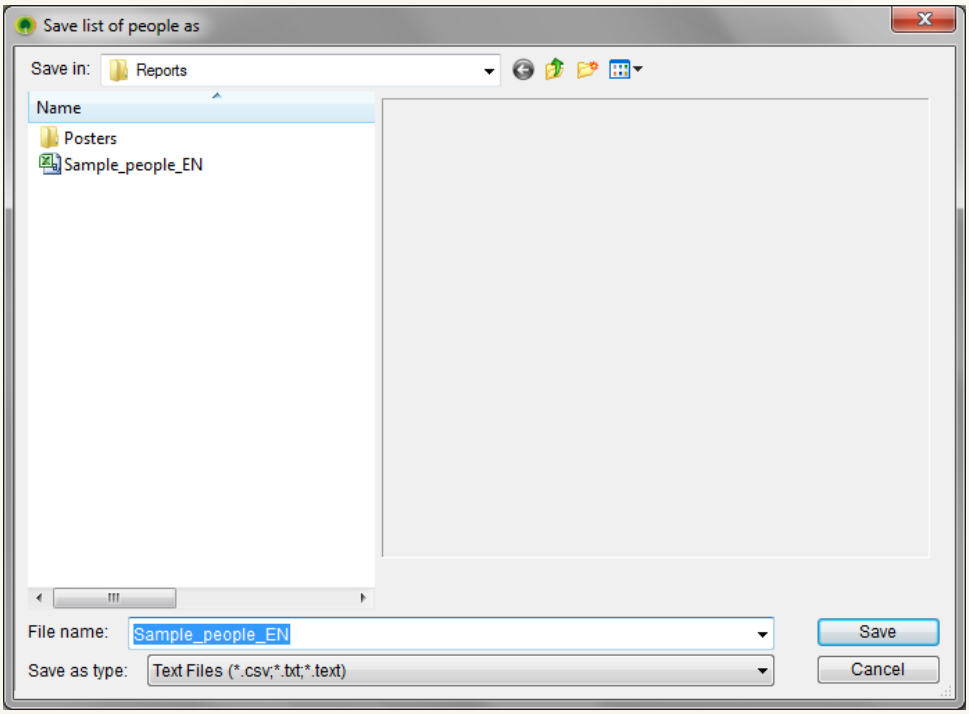
1 In the **Edit** menu, select **Export to Excel**.



2 From the sub-menu, choose the list or item you want to export:

- **List of people:** Exports personal information about the people in the project.
- **List of families:** Exports information about families in the project.
- **List of photos:** Exports the list of photos in the project.
- **List of sources:** Exports the list of sources for the project.
- **List of tasks:** Exports the list of tasks for the project. See To-Do Tasks.
- **Custom report:** Exports a custom report about people in the project. See Export Custom Report.

The Save window is displayed:



3 By default, the report is saved in the Reports folder of your project. If you want to change that, find the location where you want to save the file and click **Save**. A Family Tree Builder message window appears, notifying you that a CSV file has been created.

4 Click **OK** to confirm. Microsoft Excel opens with the newly created file.

5 You can now store the file for your records or make any required changes. When you edit the file, you may get a message that the file may contain features that are not compatible with CSV. Click **Yes** to keep the format.

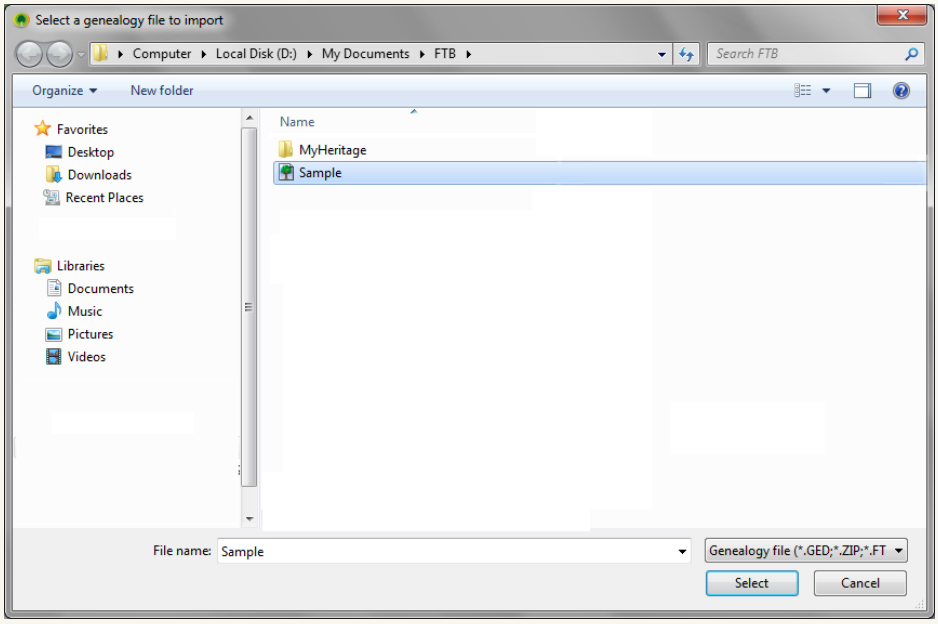
6 When you finish, save the CSV file.

To import a CSV file to Family Tree Builder:

NOTE

You can only modify the people, family and photos report that was created by an **Export to Excel** operation and import it back into the project. Sources, tasks and custom reports cannot be imported by Family Tree Builder.

1 In the **Edit** menu, select **Import from Excel**. The Select file to import window is displayed:



2 Find the CSV file you want to import and click **Select**. A Family Tree Builder message window opens, informing you of the number of items (people/families/photos) that were successfully imported.

3 Click **OK** to confirm and close the window. Family Tree Builder now includes the information from the CSV file.

Backing Up a Project

You can back up a Family Tree Builder project for safe keeping. A project backup file can later be used to restore a project in Family Tree Builder.

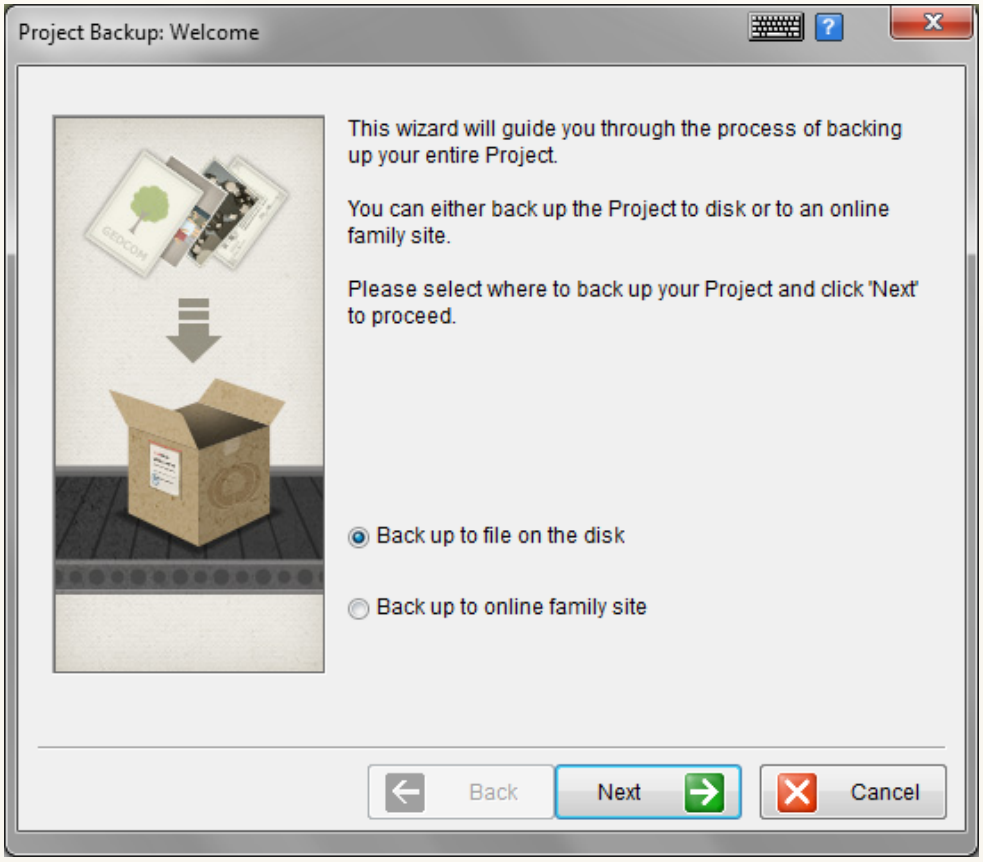
It is highly recommended that you back up your projects regularly.

NOTE

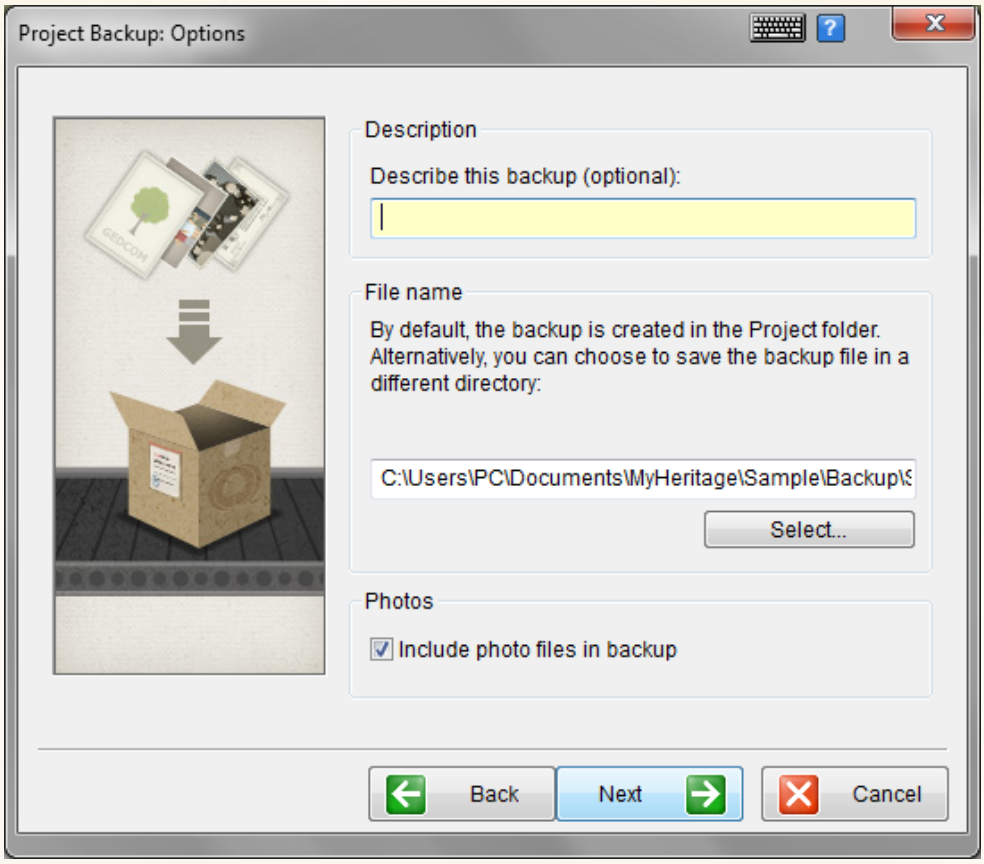
Family Tree Builder also automatically creates a backup of your project whenever it detects a need to do so, such as when you are making a significant change from a previously saved project version or before performing a restore operation.

To back up a project:

1 In the **File** menu, select **Back Up Project** to display the following window:



2 Select the **Back up to file on the disk** radio button and click **Next** to display the following window:

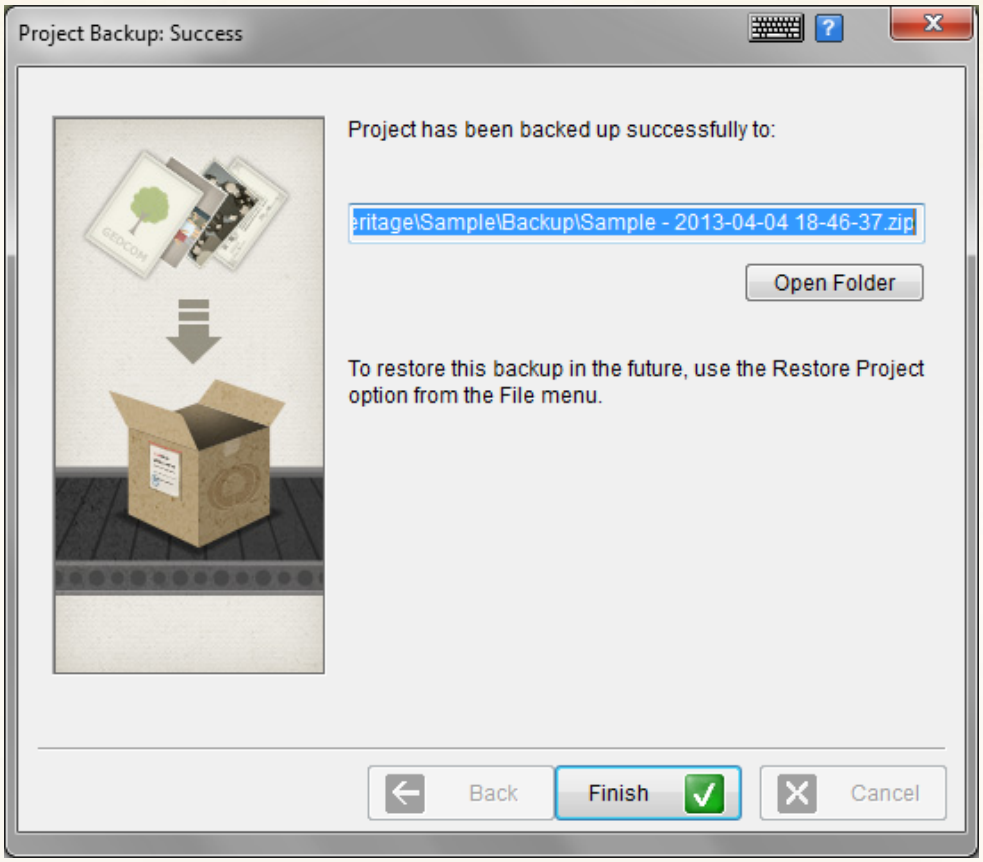


3 [Optional] Enter a description for the backup file.

4 By default, the backup is created in the Backup folder of your project. If you want change this location, specify the path where the backup is to be stored.

5 Check the **Include photo files in backup** checkbox if you want the project's photos to be part of the backup. If you have many photos, the backup takes longer and creates a larger backup file.

6 Click **Next**. The following window opens, displaying the location of the project backup:



You can click the **Open Folder** button to view the folder where the backup was saved.

7 Click the **Finish** button to complete the backup process.

Restoring a Project

You can restore a project in Family Tree Builder using one of the following methods:

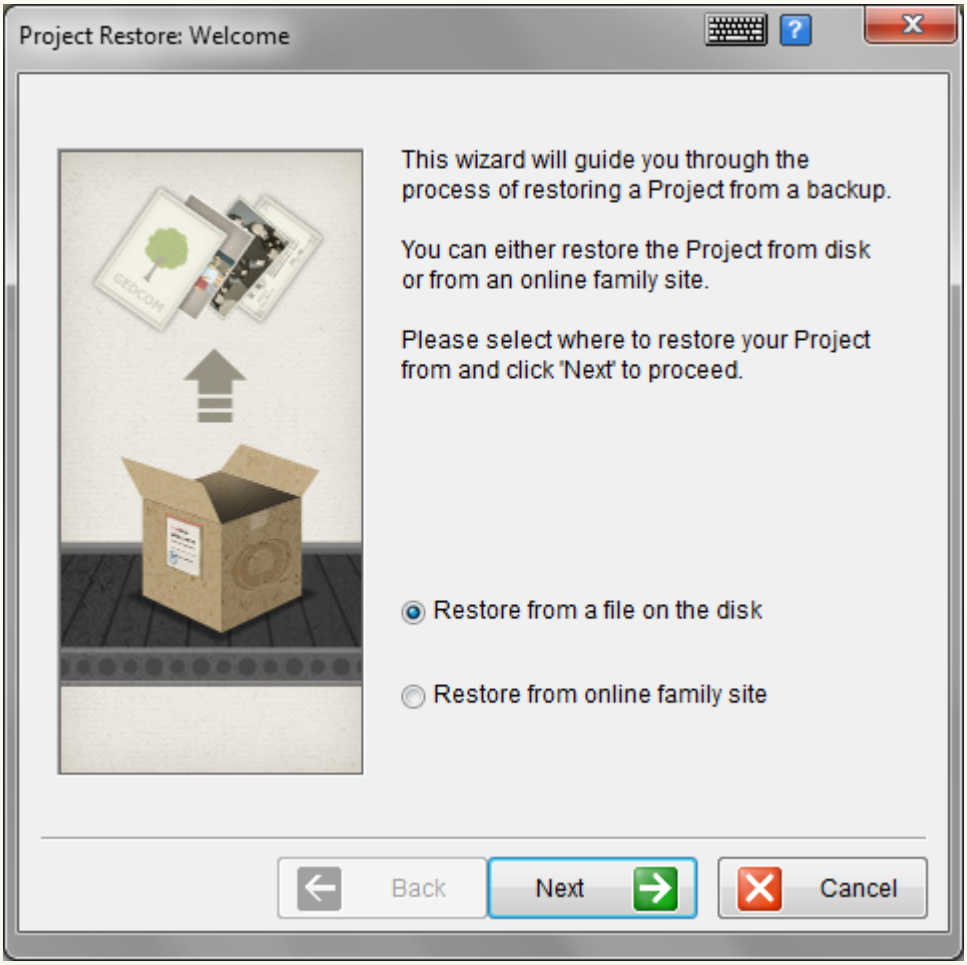
- **Restoring from a Project Backup File**
- **Restoring from an Online Family Site**

Restoring from a Project Backup File

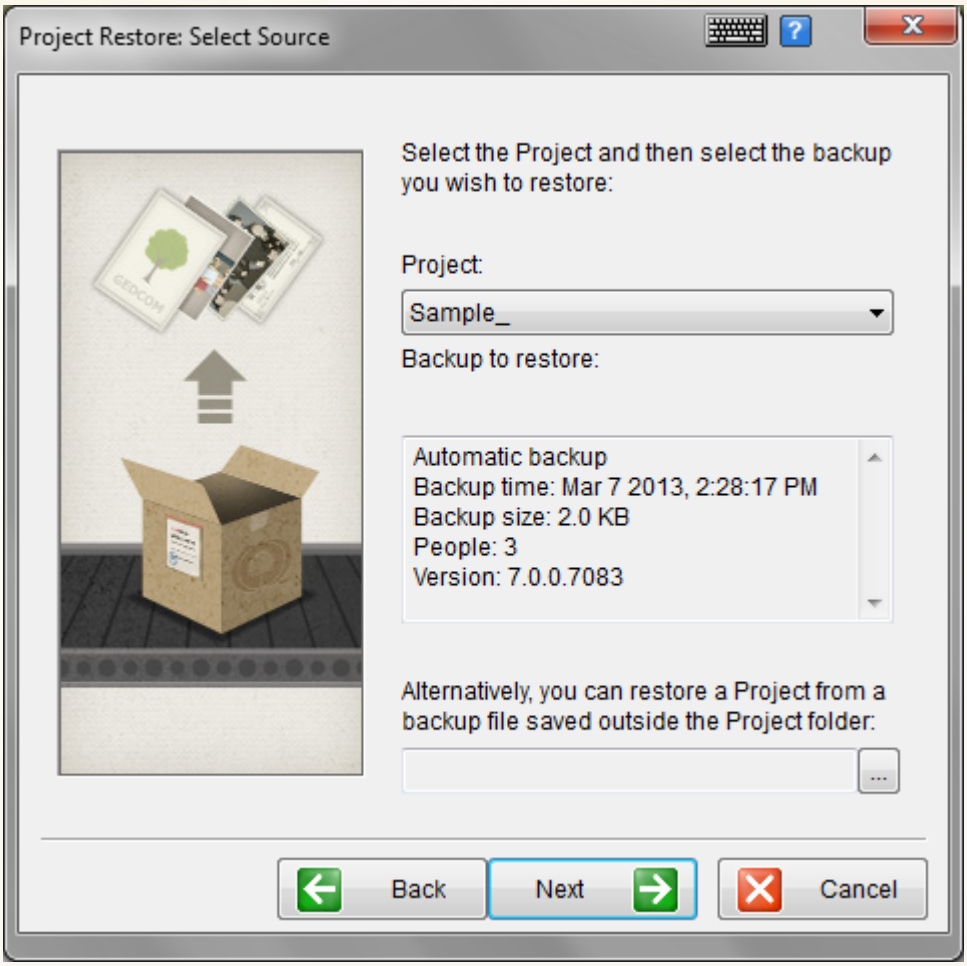
This restore operation restores a project from a backup file created for the project. Family Tree Builder automatically creates project backups when appropriate, and you can also create a backup manually, as described in Backing Up a Project.

To restore a project:

1 In the **File** menu, select **Restore Project** to display the following window:



2 Select the **Restore from a file on the disk** site radio button and click **Next** to display the following window:

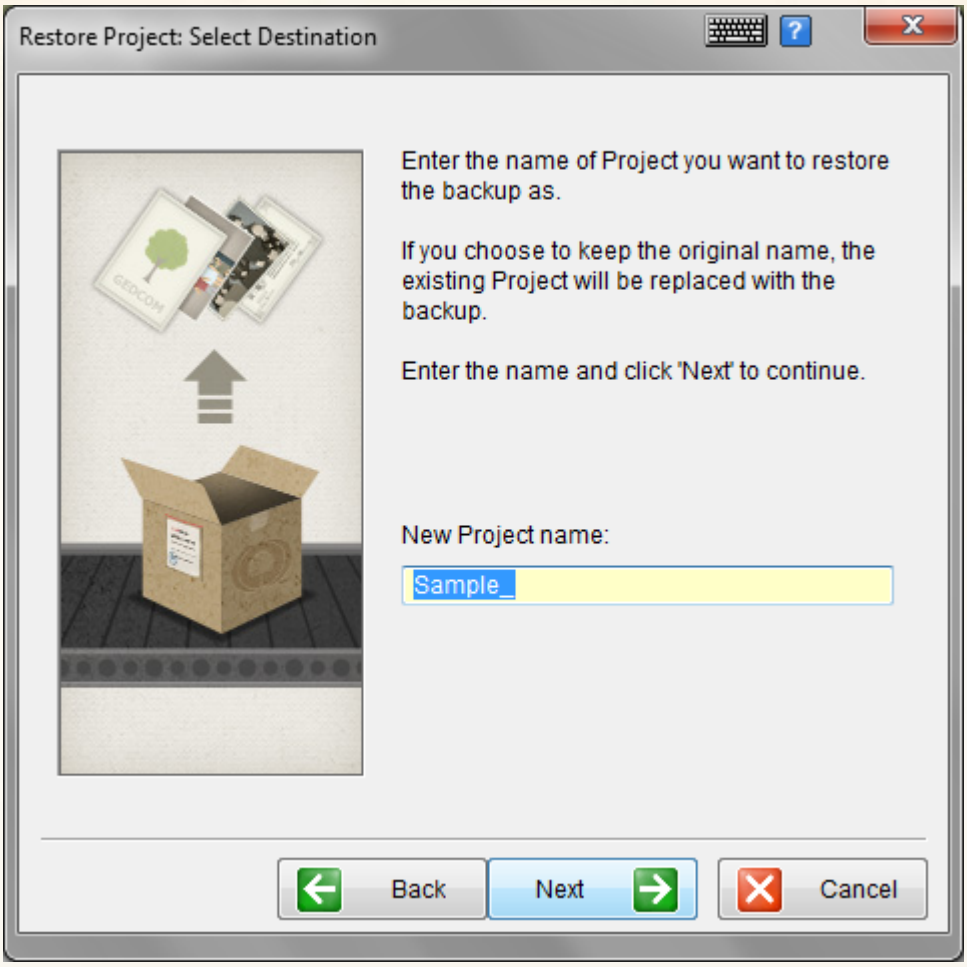


This window lists all your projects along with the available backup files that can be used to restore each project.

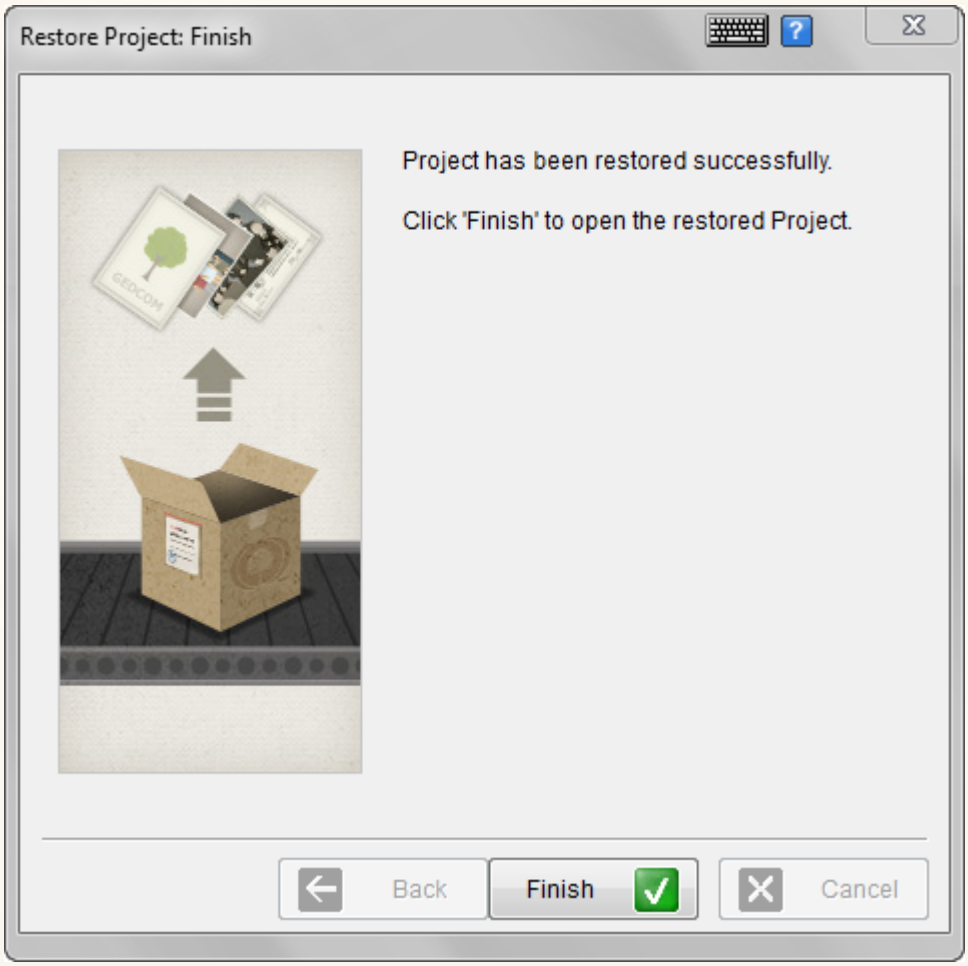
3 Select the project you want to restore in the **Project** dropdown list.

4 Select the backup file of this project you want to use in the **Backup to restore** dropdown list. Alternatively, you can click the **...** button to browse to a backup file that is stored outside the standard project's Backup folder.

5 Click **Next** to display the following window:



6 If you want to restore the backup into the same project, keep the existing name in the **New project name** field. Otherwise, enter a name for the new project. If you keep the same name, the current project is backed up before it is restored from the selected backup file. Click **Next** to display the following window:



7 Click **Finish** to complete the restore process.

Restoring from an Online Family Site

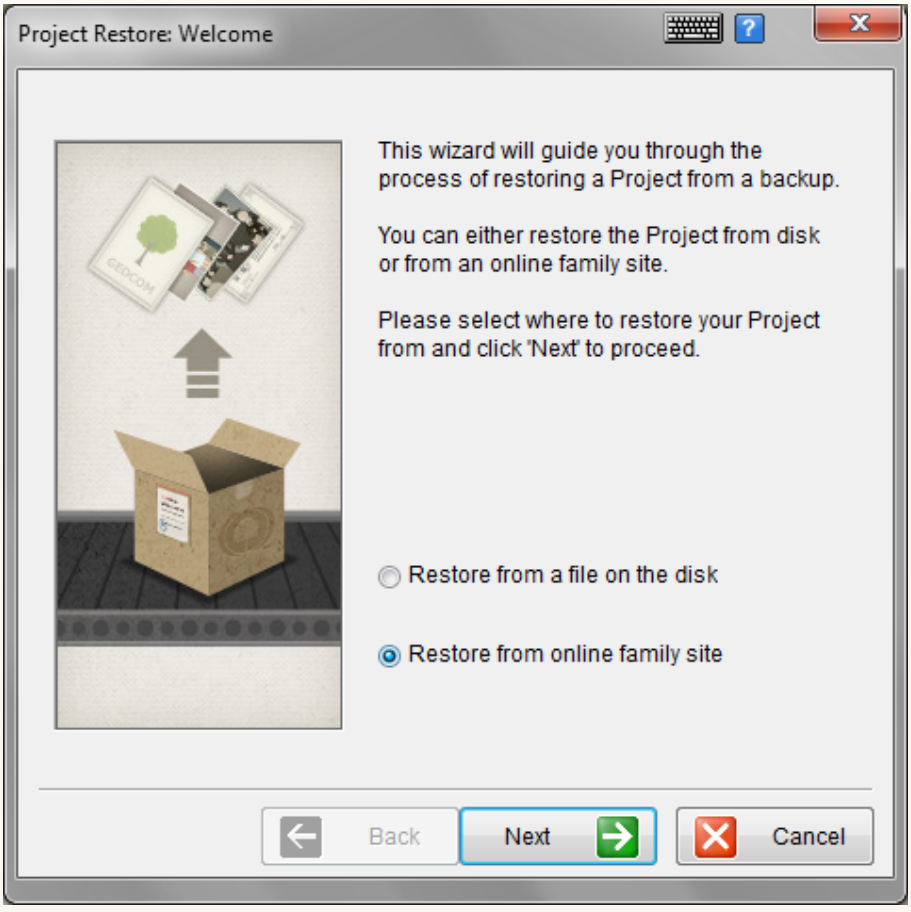
This restore option enables you to import data from your MyHeritage.com family site directly into Family Tree Builder. This restore feature is ideal when you get a new computer and want to move your family tree to it or when you build a family tree online and later want to import it to Family Tree Builder.

NOTE

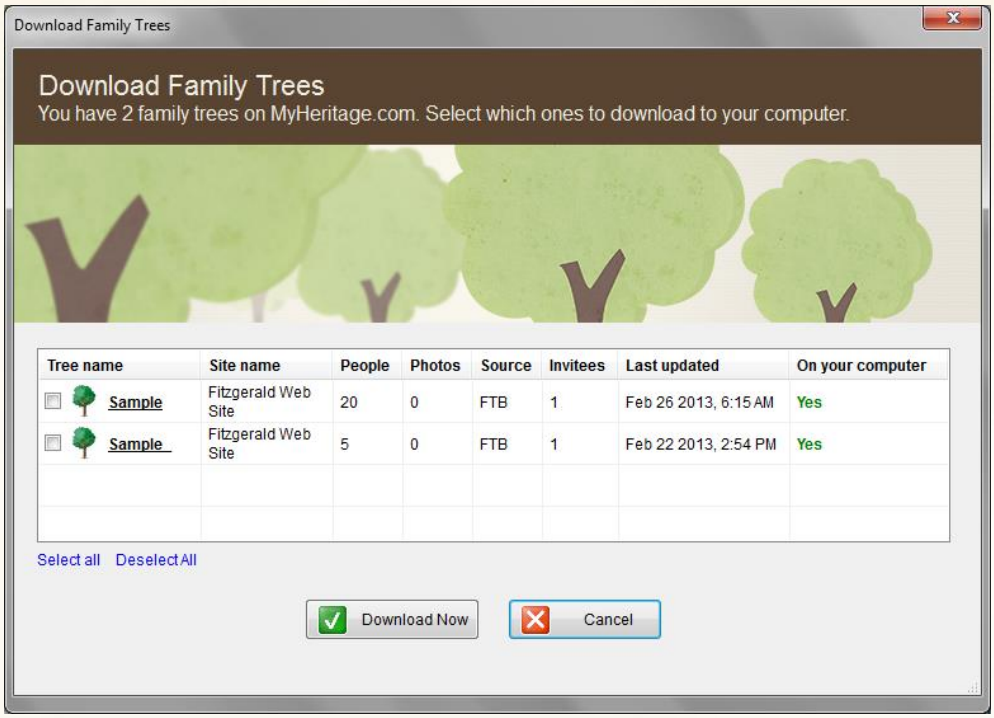
When you install a new version of Family Tree Builder, the application automatically searches for your online family trees that are not on your computer. If any are detected, then it recommends that you restore them into Family Tree Builder. This recommendation is not mandatory. You can always import such family trees to Family Tree Builder at a later time.

To import an online family tree to Family Tree Builder:

1 In the **File** menu, select **Restore Project** to display the following window:



2 Select the **Restore from online family** site radio button and click **Next**. The Download Family Trees window is displayed:



This window lists all the online family trees that you manage that were either synced from Family Tree Builder or created online in the MyHeritage.com website. The following information is shown for each family tree:

- The name of the family tree.
- The family site name.
- The number of people in the family tree.
- The number of photos in the family tree.
- The creation source for the family tree: FTB (Family Tree Builder) or online.
- The number of people invited to participate in the family site.
- The date and time when the family tree was last updated.
- Whether or not the family tree exists on your local computer. **Yes** indicates that the family tree exists in Family Tree Builder on your computer.

The Restore from online family site mechanism enables you to download a family tree that was initially created online at MyHeritage.com directly to Family Tree Builder. After an online tree has been downloaded to Family Tree Builder in this manner, it is immediately synced. In this way, both the family tree project in Family Tree Builder and the family site can be synced.

3 Select the checkbox for the family tree you want to import to Family Tree Builder and then click the **Download Now** button. You can select several checkboxes to download multiple family trees at once. Click the **Select all** link to select all family trees for downloading.

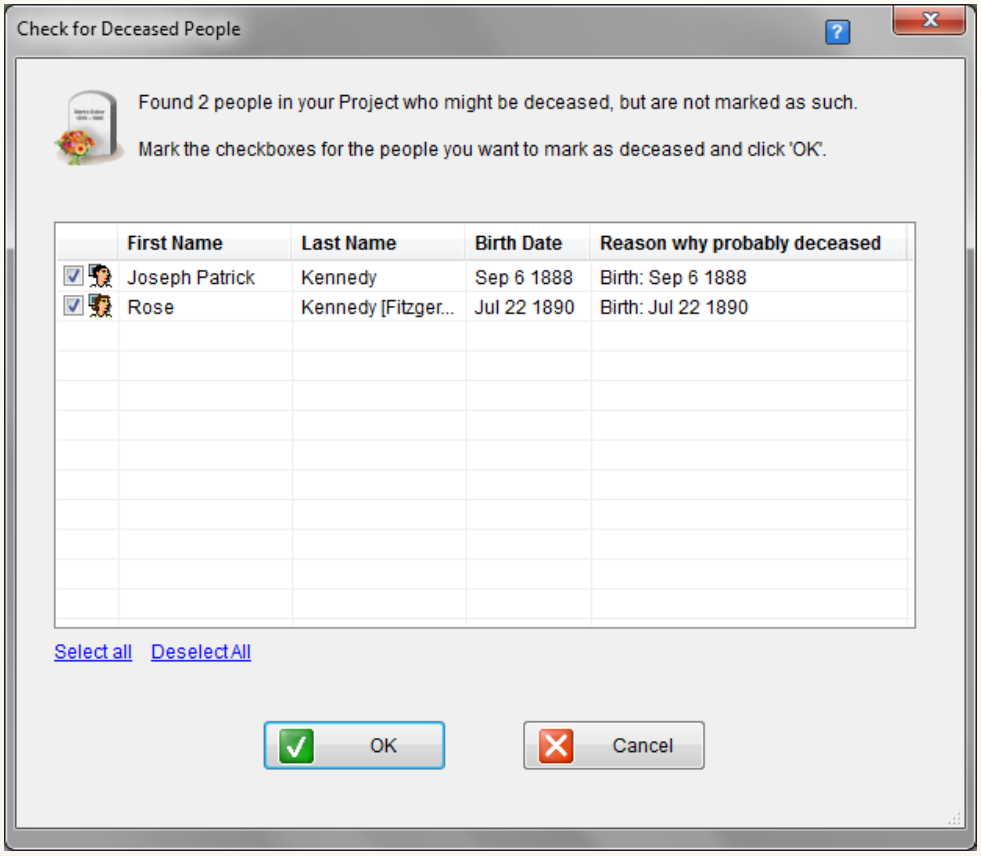
A progress bar is displayed once the download process begins.

Checking for Deceased People

Family Tree Builder provides a tool that enables you to check your project for people who are deceased, but who are not marked as such in the project. This operation uses a sophisticated algorithm to seek out such individuals. Once identified, you can change the status of a person to deceased, if appropriate.

To check for deceased people:

1 In the **Tools** menu, select **Check for deceased people**. The following window opens at the end of the search process:



This window displays identifying information for the people found in your project who may be deceased, as well as Family Tree Builder's reason for making such a determination.

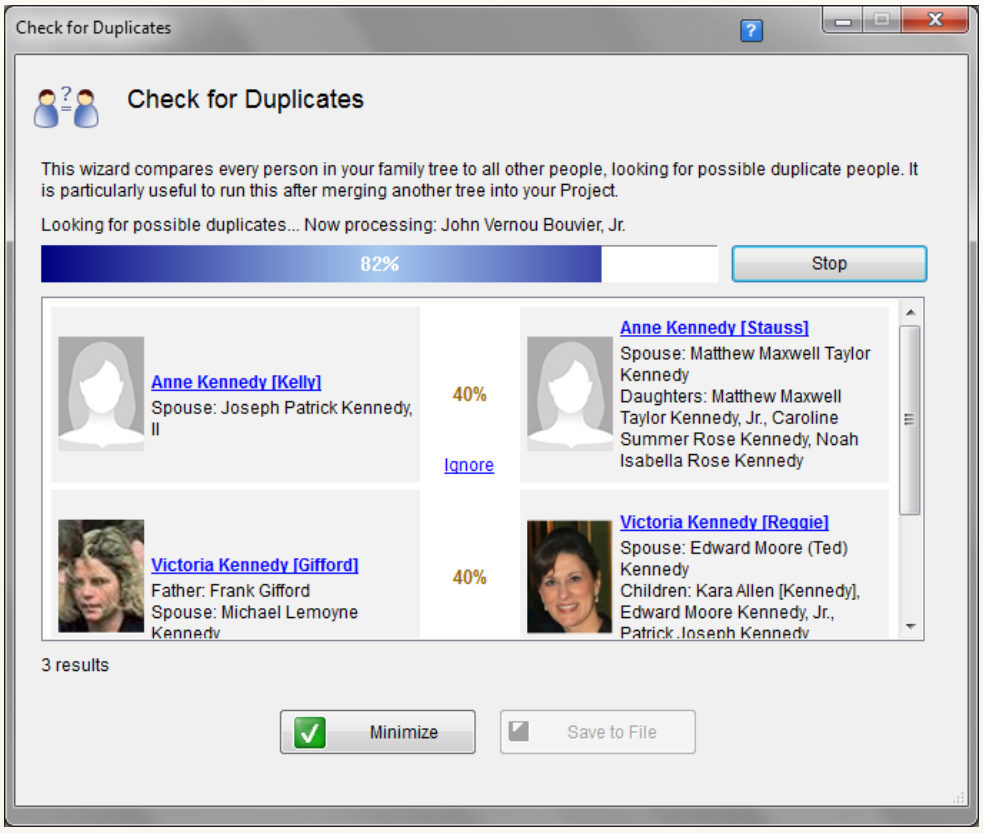
2 Check the checkbox the person that you want to mark as deceased in your project and click **OK**. The person's status is updated accordingly in his/her profile.

Finding Duplicates in the Family Tree

Family Tree Builder provides a tool that enables you to check your project for duplicated people. The search operation searches for all kinds of possible duplications of people in the family tree with similar names and dates. Once identified, a report is displayed, which you can use to determine the appropriate action to take for each of the people found.

To find duplicates in the family tree:

1 In the **Tools** menu, select **Check for Duplications** to display the following window:



This window displays a list of people suspected of being duplicated in your project.

As Family Tree Builder scans your project, it may find people suspected of being duplicated. A progress bar at the top of the window displays the progress of the scanning process. You may click **Stop** to stop the scanning, as it may take a long time for a very large project.

After the scanning completes, the window shows all people suspected of being duplicates.



The percent in the middle of each row specifies the certainty Family Tree Builder calculated for the duplication. The more that data is the same between the two people, the higher the certainty.

2. Click a person's name to view that person's profile.
3. Click the **Restart** button to perform the search operation again.
4. Click the **Save to File** button to save the duplications report to a CSV file.
5. Click **Done** to exit the window.

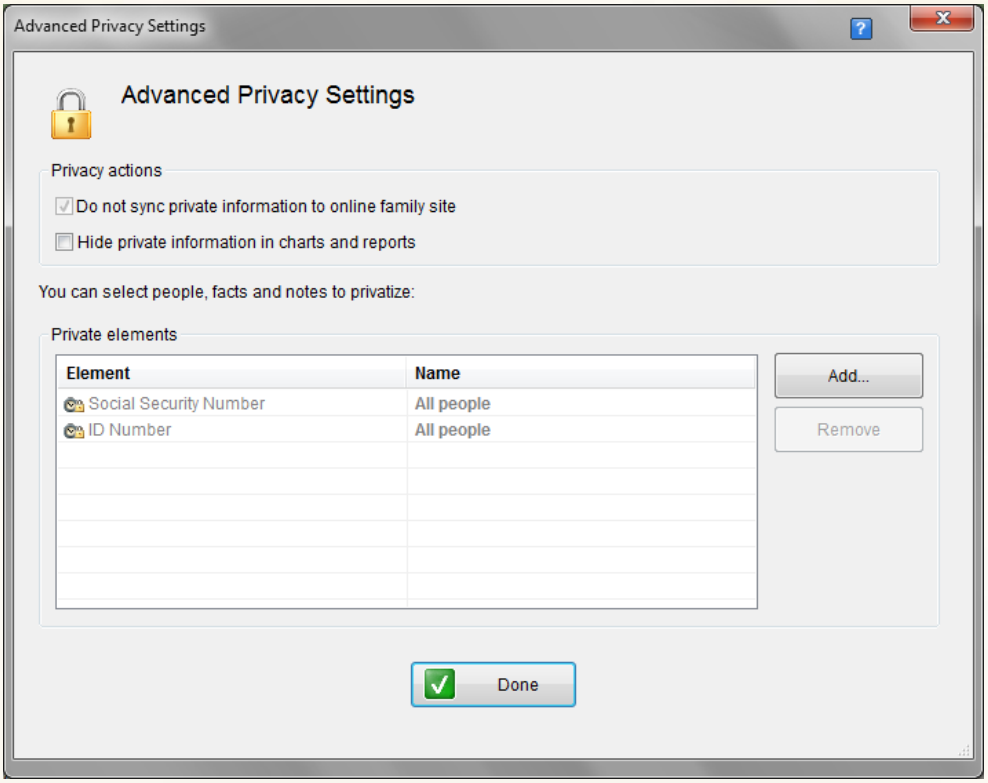
Privacy Settings

In Family Tree Builder, you can privatize various types of information in your project, such as people, notes and facts. You can mark a specific person with a privacy flag, which means that information about this person is not synced to a family site. You can also mark certain types of information as private, such as notes, facts and citations. Any information marked as Private is not synced to a family site.

When editing a piece of information, you can mark it as private. For example, in the **More** tab of the Edit Person window, you can mark a person as private, in the Edit Fact window you can mark a fact as private and in the Edit Note window you can mark a note as private. In addition, the **Advanced Privacy Settings** tool provides a centralized place where you can see all the information that is marked as private, thus giving you greater control in the project. This tool also enables you to define fact types that are private throughout the project, so that this type of fact is never synced for anyone who has such a fact of this type.

To privatize information in your project:

1 In the **Tools** menu, select **Advanced Privacy Settings** to display the Advanced Privacy Settings window:

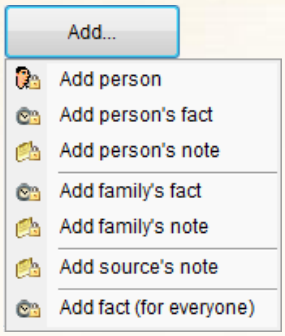


The Advanced Privacy Settings window provides a summary of all information that is marked as private in your project. Each privatized item is listed in a separate row, and shows the type of element involved and to what it relates.

NOTE

The **Do not sync private information to online family site** checkbox is checked by default, which means that information marked as Private is never published to a Family Site. This setting cannot be changed.

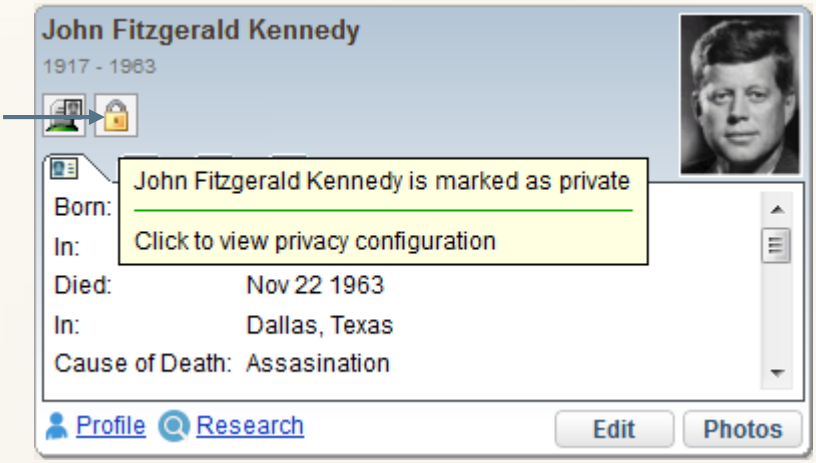
You can use this window to mark the following types of information as private in your project:



NOTE

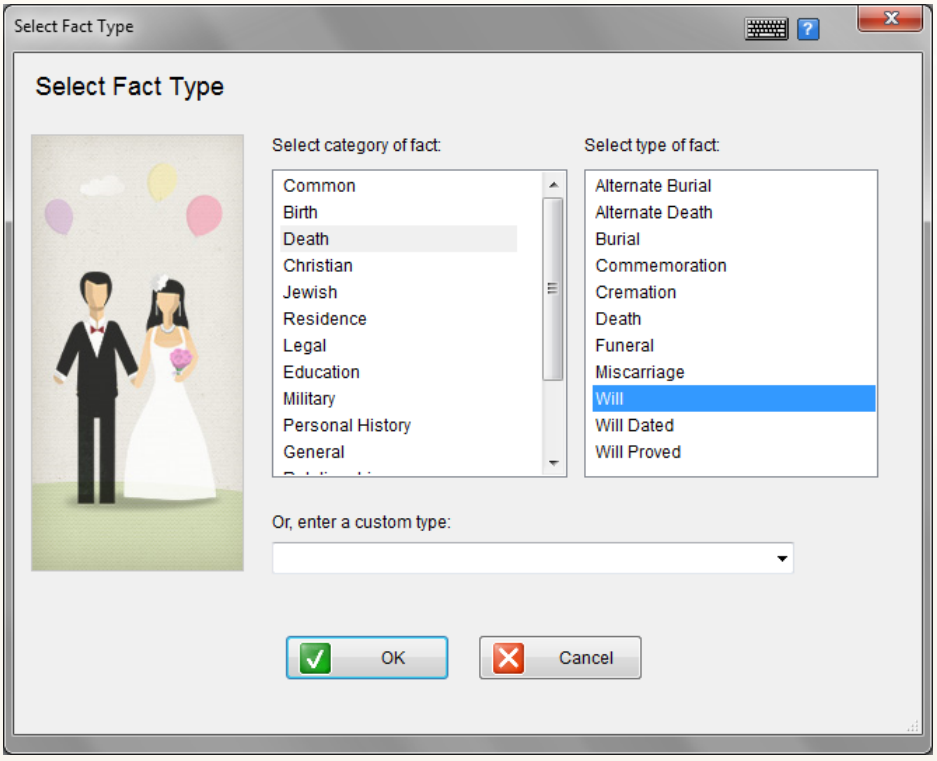
Privacy can also be marked as Private from other places in Family Tree Builder, such as notes from the **Notes** tab of a person's card, citations from the **Citations** tab of a person's card and so on.

- **Person:** Click the **Add** button, select **Add person** in the dropdown list and then select the person to be marked as Private. When the person is marked as private, a lock icon is shown in the person's card, indicating that the person's information is private.

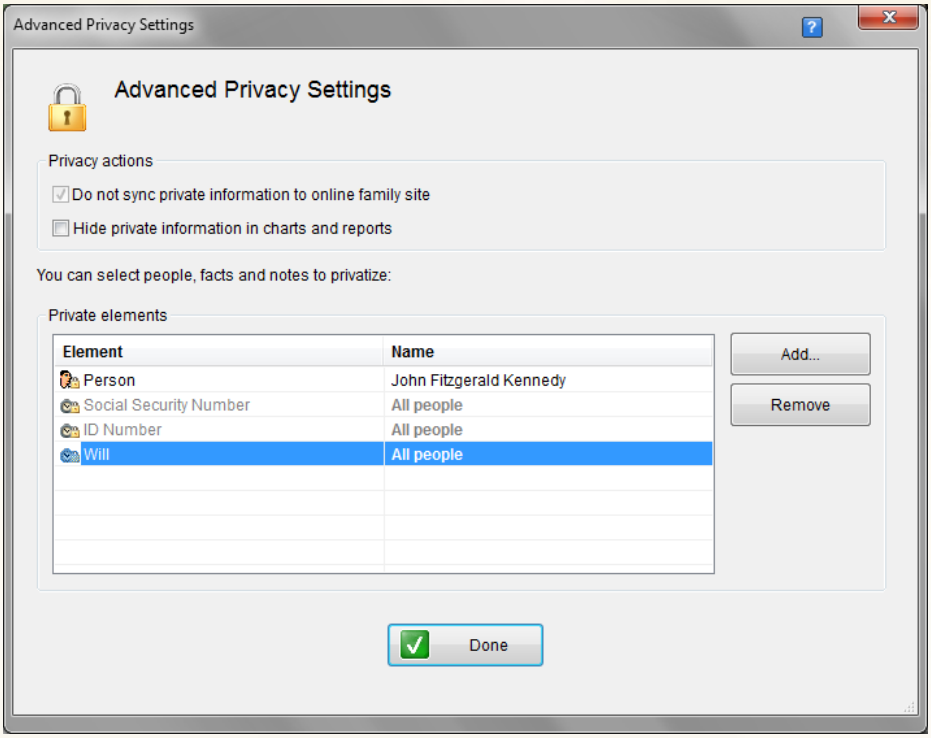


- **A fact about a person:** Click the **Add** button and select **Add person's fact** in the dropdown list. In the window that opens, select the person and then select the fact to be marked as Private for the person. In this case, when syncing, information for the person is synced to the family site, but not this fact.
- **A note about a person:** Click the **Add** button and select **Add person's note** in the dropdown list. In the window that opens, select the person and then select the note to be marked as Private for the person. In this case, when syncing, information for the person is synced to the family site, but not this note.

- **A fact about a family:** Click the **Add** button and select **Add family's fact** in the dropdown list. In the window that opens, select the family and then select the fact to be marked as Private for the family.
- **A note about a family:** Click the **Add** button and select **Add family's note** in the dropdown list. In the window that opens, select the family and then select the note to be marked as Private for the family.
- **A note about a source:** Click the **Add** button and select **Add source's note** in the dropdown list. In the window that opens, select the source and then select the note to be marked as Private for the source.
- **A fact that applies to everyone in** your project**:** Click the **Add** button and select **Add fact for everyone** in the dropdown list. The following window is displayed in which you select the fact to mark as Private:



Select the fact type and click **OK**. In the example below, the Will fact was marked as private for everyone, so it is never synced to the family site.



NOTE

Social Security Number and ID Number are always marked as Private. This setting cannot be changed.

2 [Optional] Select the **Hide privatized information in charts and reports** checkbox if you do not want Private information displayed in charts and reports. Check this option if you want to create a chart or a report that hides private information.

3 Click the **Done** button to save your privacy settings and exit the window.

Performing Data Consistency Checks

The Family Tree Builder Consistency Wizard enables you to search for and identify potential consistency issues in your data, in order to perform a sanity check on your data. When the wizard finds an issue, relevant information is provided to aid you in correcting the detected inconsistency. You can run the Consistency Wizard as many times as needed. The goal is to handle all inconsistencies so that your data is clean and error-free.

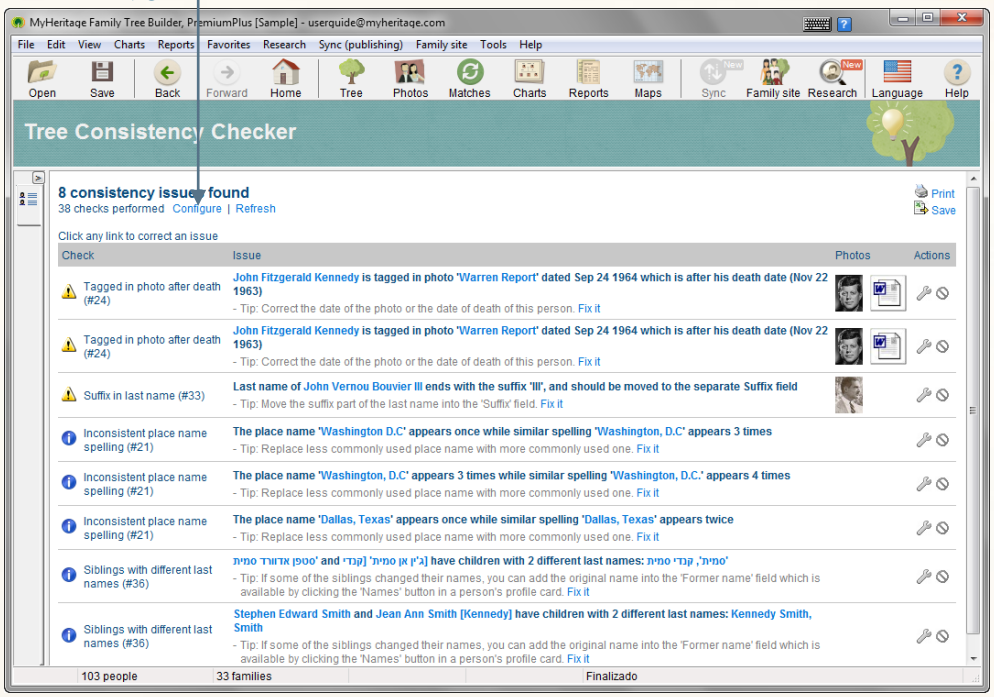
For example, consistency checks are performed by the wizard to check for issues such as the following:

- Consistent spelling of names (for places and people).
- The minimum age difference between parents and children.
- The minimum age difference between siblings. For example, an age difference of less than nine months between siblings shows as a warning.

To perform a data consistency check:

- In the **Tools** menu, select **Tree Consistency Checker**. Family Tree Builder scans your data for consistency issues, during which a progress window is shown. At the end of this process, the following window is displayed:

Configuration Links



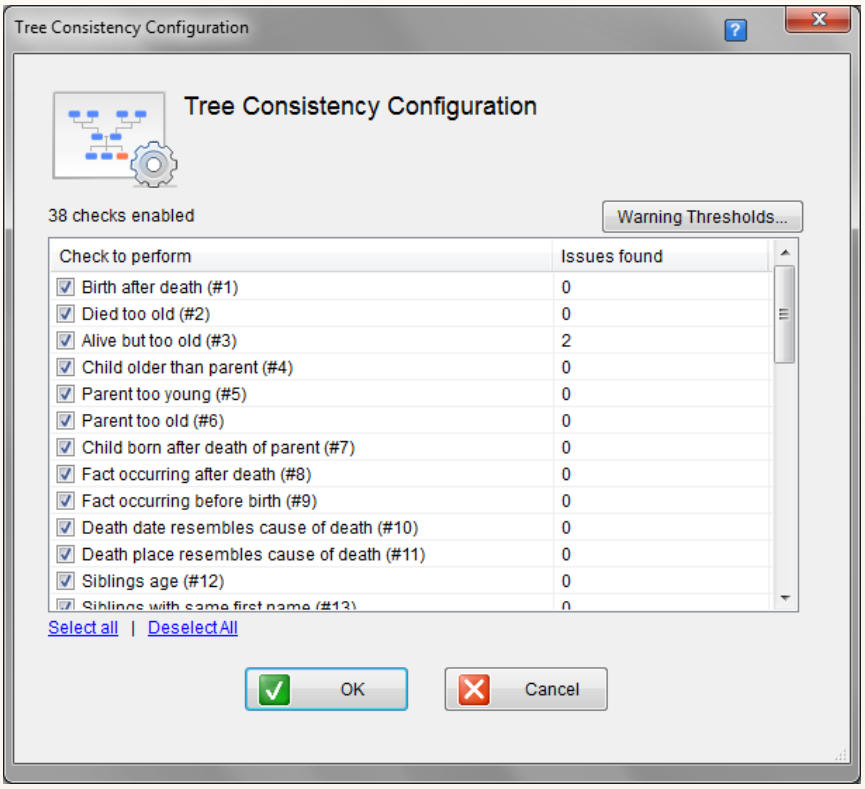
Each identified consistency issue is shown in a separate row in the window. Each row contains an indication of the inconsistency severity (Error, Warning or Notice), the type of the check (and number), the logic or reason for identifying the issue as a potential problem, the person(s) involved and any relevant photos.

The severity of an issue can be any of the following:

- **Error:** Indicates that the issue is obviously incorrect. Errors are shown with a red icon.
- **Warning:** Indicates a problem where data is probably incorrect.
- **Notice:** Indicates a potential problem that you may want to check further to determine the data's correctness.

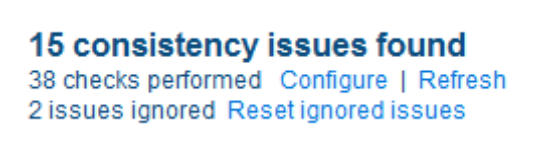
In the Tree Consistency Checker window, you can perform the following actions:

- **Fix issue:** Click the **Fix it** link or the icon for each issue in the list to open the relevant window in Family Tree Builder, in which you can fix the issue that was found.
- **Ignore issue:** Click the **Ignore** icon to mark that this issue is not an error. Family Tree Builder then asks if you want to ignore this specific issue or all issues of this type.
- **Configure:** Click the **Configure** link at the top of the window to open the Tree Consistency Configuration window, in which you can enable/disable the various checks performed during the consistency check.



The Tree Consistency Configuration window lists all the types of checks that Family Tree Builder performs on your data. You can uncheck the ones that you do not want to perform and then click **OK**. Click **Warning Thresholds** to configure the threshold for some of the warnings. For example, you can set the maximum age difference between spouses.

- **Refresh:** Click the **Refresh** link at the top of the window to run the Consistency Wizard again. Use this option after you have made some changes to your data.
- **Reset ignored issues:** Click the **Reset ignored issues** link at the top of the window If you have previously ignored issues and you want to reset then to appear in the list:



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