Preparing Ancestral Charts for Wholly Genes Printing Service

by David Walker

Presented to the Ottawa TMG Users Group
14 March 2010

Introduction

In this presentation I will describe various options used to create two types of ancestral charts. There will be a Left to Right and Bottom to Top orientation. The pros and cons of each will be described. You may wish to create a Descendant Box Chart, in which case the options will likely be the same as described here. I would suggest that those creating their first chart may wish to save time and accept all of the default settings. Once viewed in Visual Chart Form, you can then decide on changes available in the Options menu. TMG v.7.04 was used for this presentation.

Preparing the Chart

In TMG select **Report** > **Ancestor Box Chart**. A **Report Definition Screen – Ancestor Report** window will appear.

Choose either the **Current Focus Person**, or enter the **TMG ID** in the **Focus Person** window. In the options for **Chart Destination**, select **View in Visual Chartform**.

Click on the **Options** link to open the **Chart Options** menu.

If you are creating a descendant chart you may wish to include the name of the spouse in the **Chart Title**. That entry would look like "Descendants of [F] & Sarah Brown".

For **Orientation** I would suggest **Left to Right** for an ancestral chart for a couple of reasons: (1) this is the orientation commonly used for pedigree charts, (2) less wasted white space on the printed chart, (3) you will be able to fit more generations on a smaller print, thereby reducing the cost of printing as well as postage. A more natural look to some might be Bottom to Top, however I was limited to 18 generations in that orientation, versus 20 generations in the Left to Right orientation.

For **Chart Size**, enter the maximum number of generations required for your chart.

By default, **Title Location** in the upper left corner of the chart.

By default, the **Diagram Location** (ie. Chart) is 50 pixels from the top, and 15 pixels from the left.

The **Gap Between Boxes** options allows you to squeeze more boxes into less space. Experiment with these values, being careful not to cram the boxes too closely together.

Click on the **Boxes** tab.
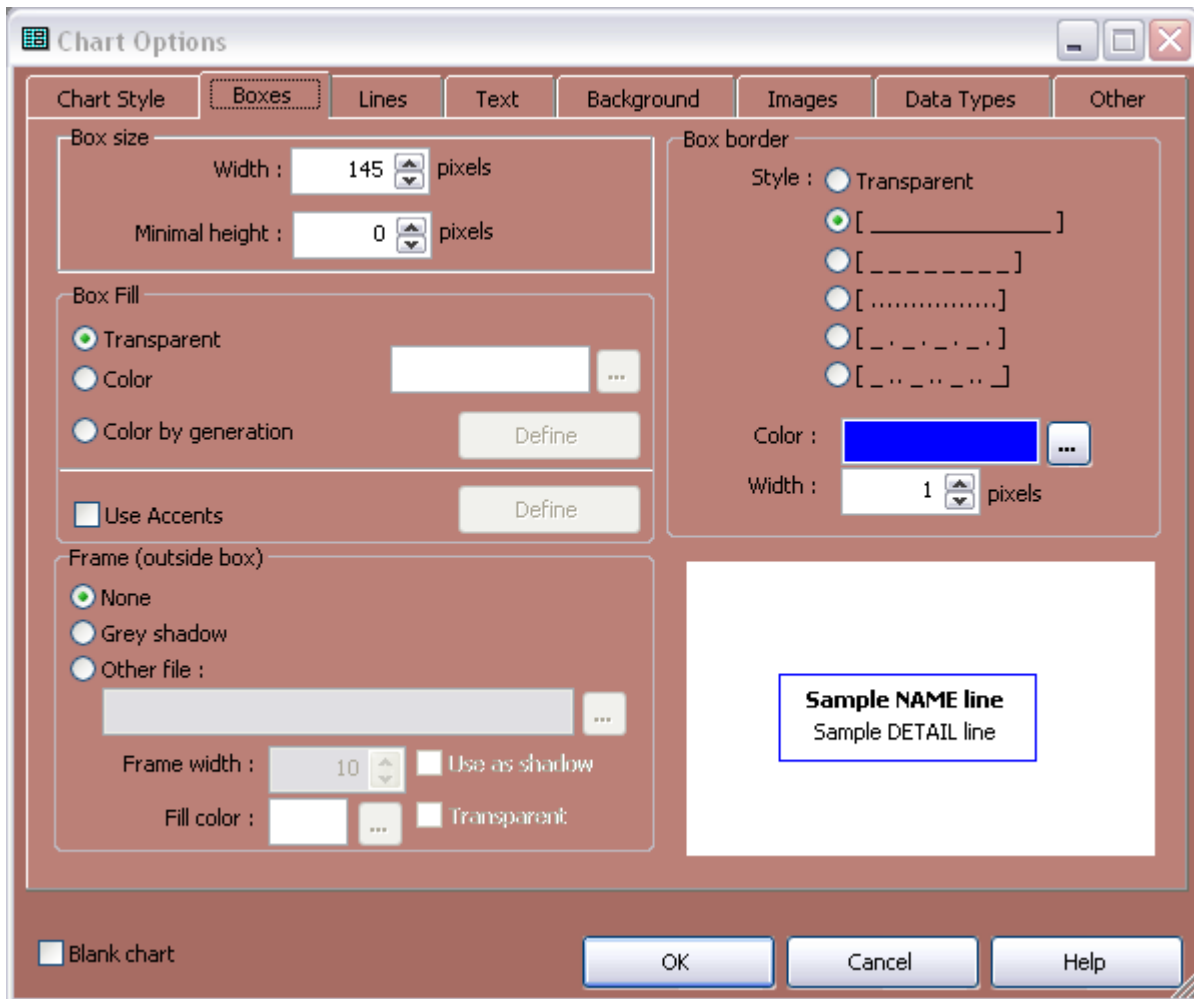
Box Size is adjusted according to the number of tags you are going to include for each person. I chose to include Birth, Marriage, Death and Burial tags. A box width of 145 pixels is suggested. You may wish to include the Baptism tag for those persons lacking a birth date.

The **Box Fill** option allows you to leave them transparent (a clean look), filled with colour, or have the boxes for each generation displayed in a different colour.

The **Frame** allows you to keep the chart clean looking with just the perimeter in colour. You can opt for a Grey Shadow, but this will take more space.

In the **Box Border** options you can select the style of line (I prefer the standard continuous line), colour and width. Although 1 pixel may seem too thin for the box, it looks fine on the printed page.

Click on the **Lines** tab.
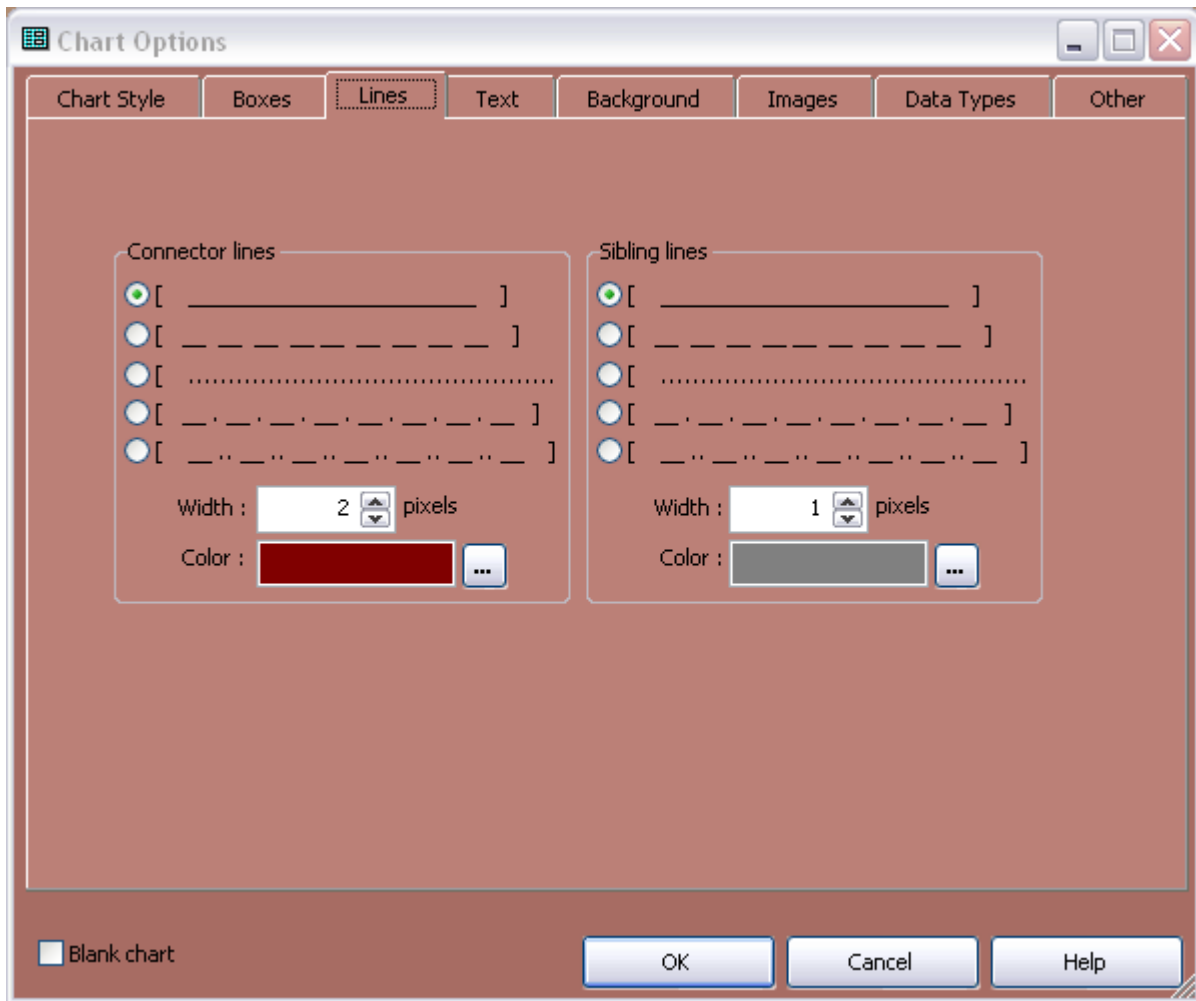
From the **Connector Lines** options, select the solid line, width of 2 pixels and your choice of colour. If you are including siblings, choose your options accordingly from **Sibling Lines**.

Click on the **Text** tab.
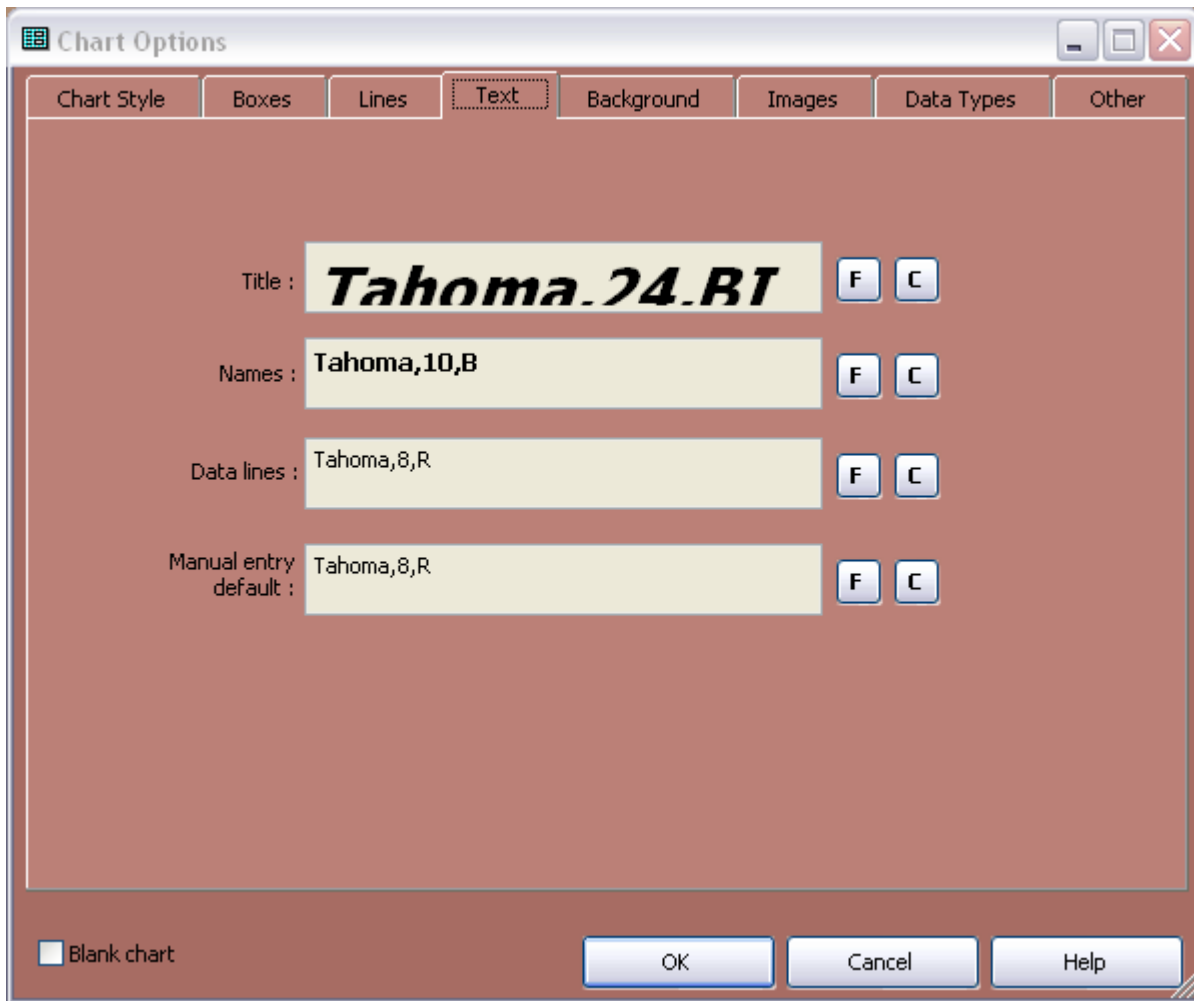
You may wish to alter the default font size, depending upon the overall size of the chart. For a chart containing 20 generations, a font size of 24 looks reasonable for the **Title**, bold and italic. People **names** stand out if they are slightly larger than **data lines**, and bold. Visual Chartform allows you to manually enter text in text boxes. I would suggest that you select the same font size for **manually entered text** as the data lines.

Click on the **Background** tab.
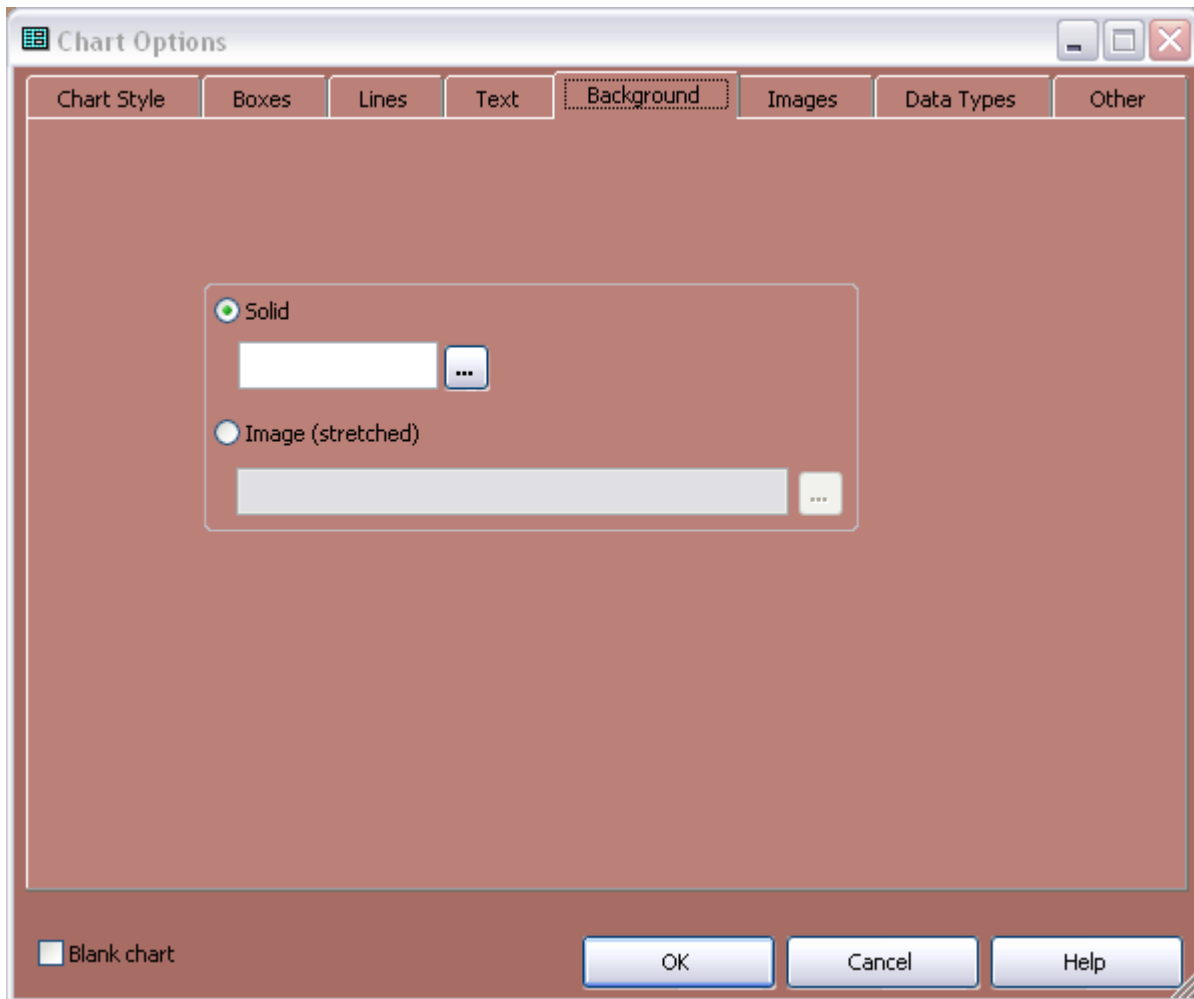
You have a choices on how you would like the background to appear. You may select a **solid colour** or an **image**. I recommend a solid colour white. Selecting an image might sound tempting, but is likely to reduce the legibility of the information within the boxes.

Select the **Images** tab.
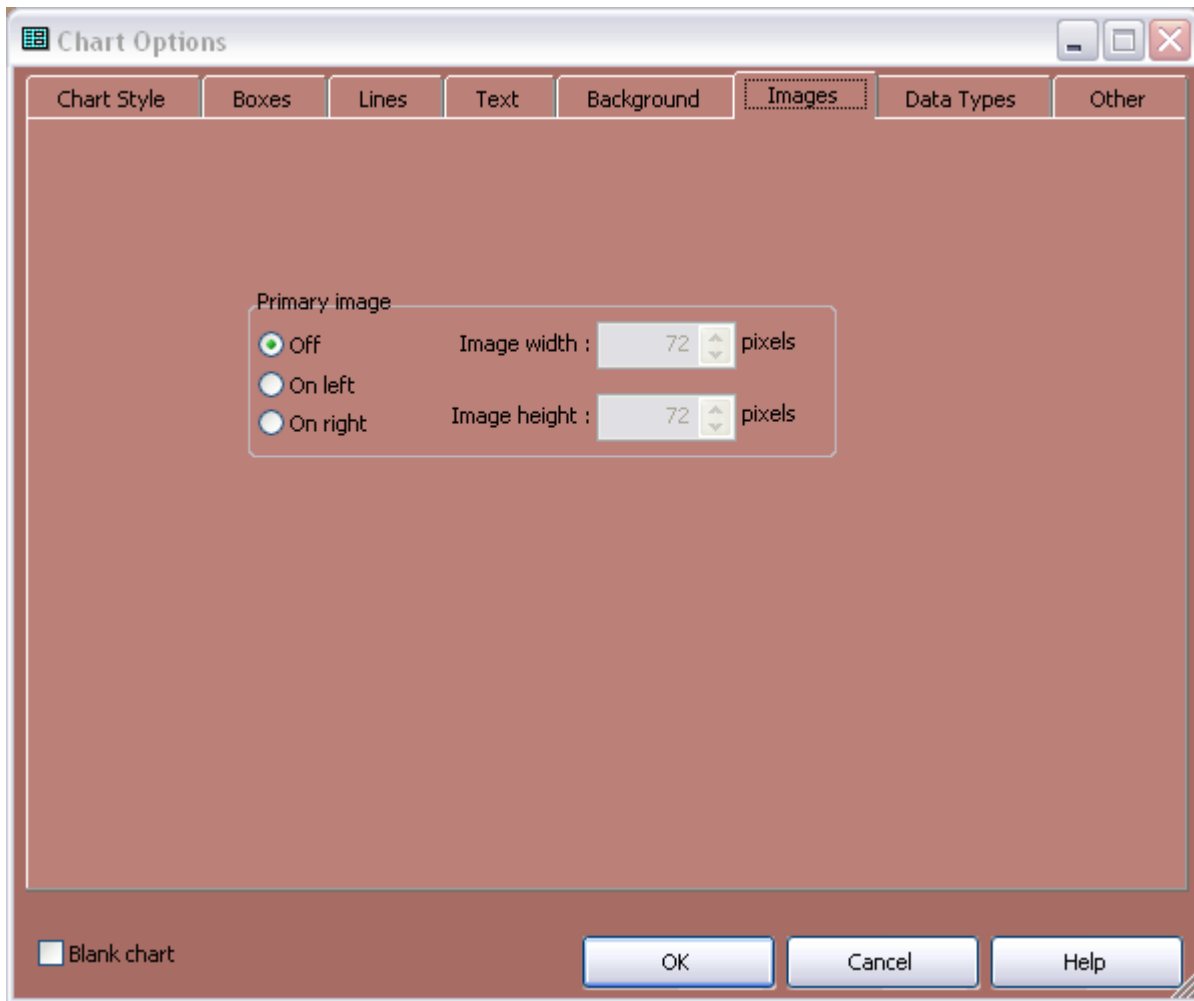
You may select to include **Primary images** in your chart. This is appealing, especially if you have many images. However, keep in mind that adding images to the boxes will increase the overall size of the boxes. You also have the option of choosing the size of the images.

Select the **Data Types** tab.
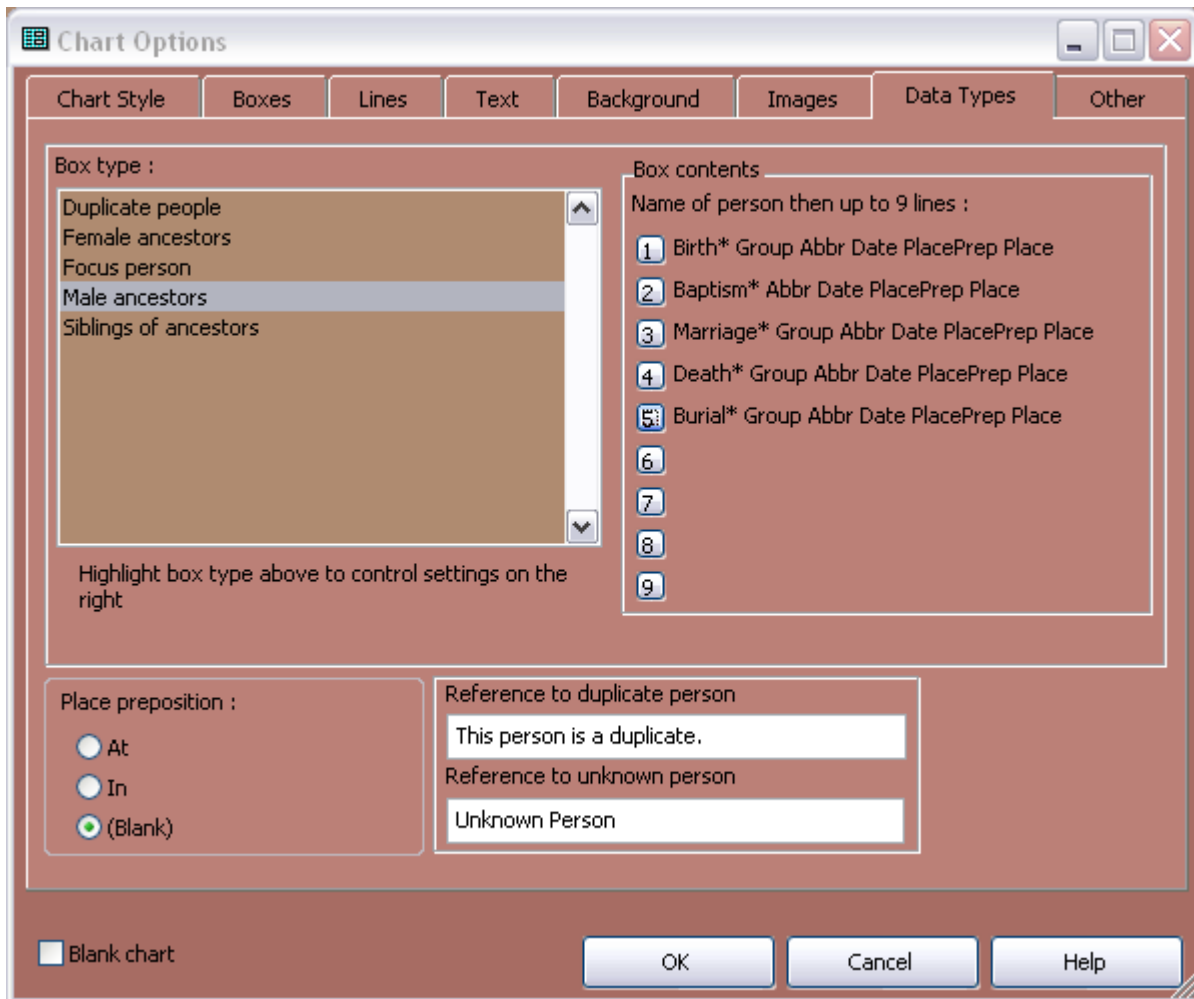
In the **Data Types** you have myriad choices of data to include in the boxes. Usually one would include the standard BMD or BMDB data. I chose to include baptisms as I have many cases where birth data is lacking, but I have baptism data. There is no need to have marriage data include for both spouses, so that information is not included for females. The same goes for descendant charts. When you click on the numbered buttons you will be faced with a seemingly endless list of choices.

Click on the **Other** tab.
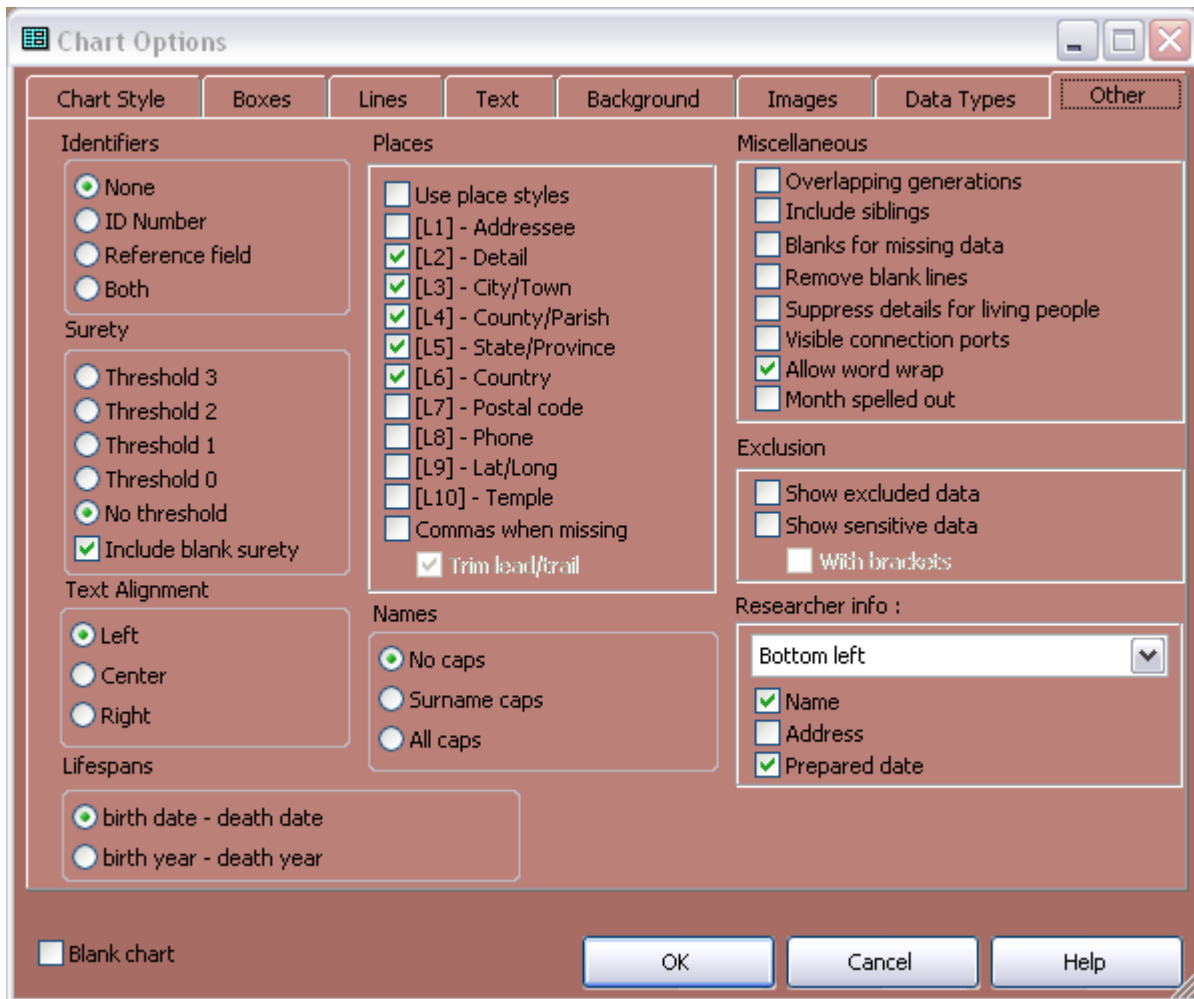
I see no point in having the TMG ID value inserted on a chart. That number has no meaning except to you. Therefore, I recommend selecting **None** from the **Identifier** choices. The same argument applies for **Surety**.

From the **Places** list, I find the most useful information will be from **Detail** to **Country**, inclusive. When creating a Journal Report, I opt for names in caps. However, I prefer **No Caps** for charts.

From the choices under **Miscellaneous**, I chose only **Word Wrap**, to conserve space in the boxes.

Researcher Info. Can be included, and positioned in any corner you wish. I do not feel a need to include my address, so have only **Name** and **Prepared Date**.

Once you are content with your options, select **OK**, then **Create Chart**. The Visual Chartform program will launch. The various steps are shown in the lower left corner, while the progress can be monitored in the lower right corner. If the chart is acceptable, then select **File > Save As**, and enter an appropriate file name. The extension will be vc2.

Uploading Your Chart to Wholly Genes

In TMG select **Report > Chart Printing Service**
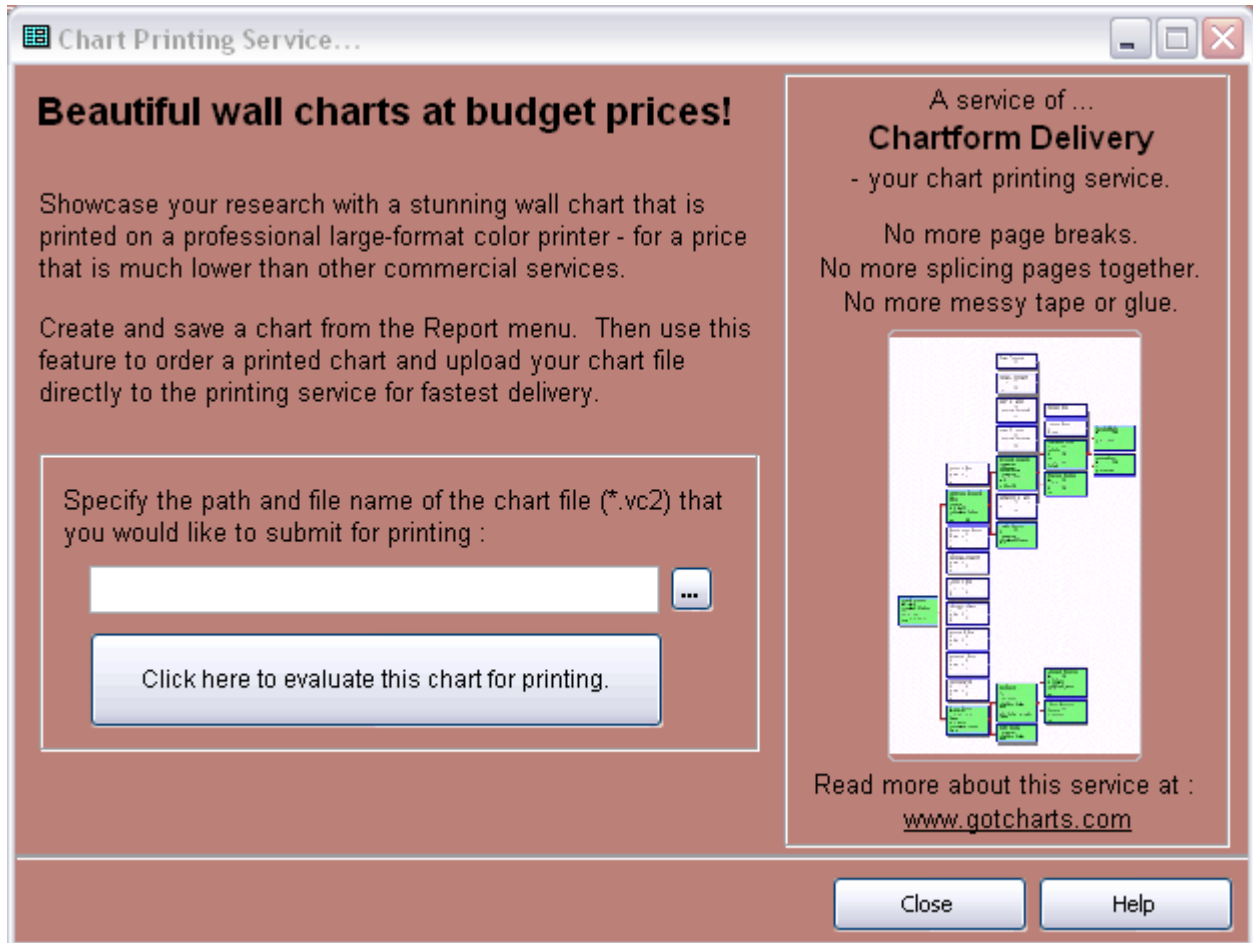
Click on the '**…**' icon to enter the path and file name of your chart. By default, it will be located in the **Report_output** folder within **The Master Genealogist v7** folder.

You may also view the summary of your chart before uploading it to Wholly Genes.

Click on **Click here to evaluate this chart for printing**.
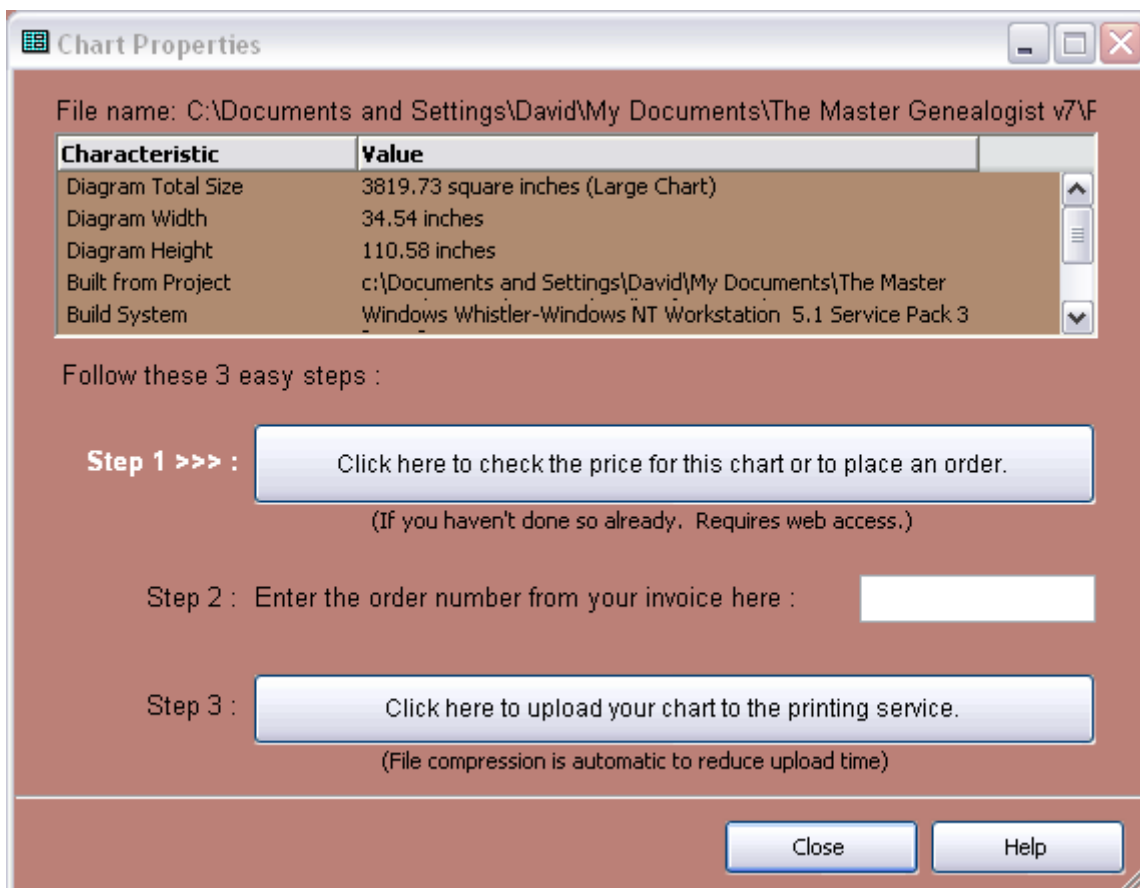
Follow the three steps below the summary.

Step 1. **Click here to check the price for this chart or to place an order**.   This will open your browser and display the page for ordering your chart.

You will want to go the site www.gotcharts.com, where you can read about the process of ordering charts.

Step 2: Once you have placed your order you will receive an order number with your invoice via e-mail. Enter that number.

Step 3: Follow the instructions to upload your chart.

Conclusion:

I hope the above information is of some use. I encourage you to experiment with the many available options.