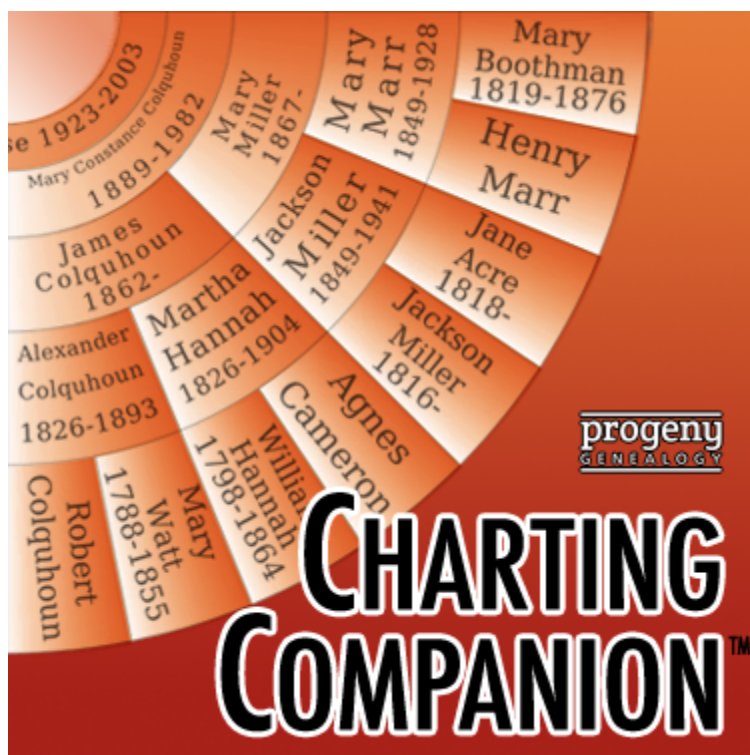


Charting Companion

8



User Guide

Notice

The information contained in this document is subject to change without notice.

Progeny Genealogy makes no warranty of any kind with regard to this material, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose.

In no event shall Progeny Genealogy nor its licensors be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance, or use of this material.

This document contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by means for any purpose other than user's personal use without the prior written consent of Progeny Genealogy Inc.

This edition applies to version 6 of the Charting Companion product, and to all subsequent releases and modifications until otherwise indicated in new editions.

Corrections and suggestions for future revisions of this document are appreciated. Please e-mail your comments to customersupport@progenygenealogy.com

Printed: June 2021

Trademarks

Progeny Genealogy is a trademark of Progeny Genealogy Incorporated.

Charting Companion is a trademark of Progeny Genealogy Inc.

All other trademarks are the property of their respective owners.



Table of Contents

Introduction	1
Quick Start Guide (First time)	1
Product Overview	2
What's New	5
Files and Records	12
Where to Get Help	13
Computer System Requirements	14
Open a File	15
Opening Family Files	15
Assigning Names to Your Files	18
Finding People	19
How to... ..	19
Name List	19
Go to	20
Views	21
How to... ..	21
Family Group View	22
Status Bar Preference	25
Charts & Reports	25
Overview	25
Date Format	26
U.S. vs. Metric measurement	28
Event Type Selection	28
Colors - how to pick	30
Color schemes	30
Photos	44
Background images	46
Rounded corners	47
Ornamental Borders	48
Ancestor Book	50

Ancestor Book Explanation	53
Ancestor Book Options	54
Ancestor Chart	56
Ancestor Chart Options	59
Ancestor Fan Chart	63
Ancestor Fan Chart Options	66
Printer Drivers	69
Using Command Line Copy to Print Fan	69
Bowtie Chart	70
Bowtie Chart Options	73
Dandelion Chart	76
Dandelion Chart Options	77
Descendant Book	79
Descendant Book Explanation	83
Descendant Book Options	86
Descendant Chart	87
Descendant Chart Options	90
DNA Matrix	94
DNA Simulation	101
Troubleshooting	103
How to enter the "DNA kit" event in FTM	104
How to enter the "DNA Kit" event in Legacy	106
How to enter the "DNA kit" event in Ancestry	112
How to enter the "DNA Kit" event in Family Historian	115
How to download your DNA from Ancestry	115
How to download your data from 23andMe	116
GEDmatch: how to download CSV match file	119
MyHeritage: how to download CSV match file	123
DNA Matrix - Quick Start Guide	123
The Genetic Genealogist	133
DNA Matches	134
Descendant Fan Chart	136
Descendant Fan Chart Options	138
DNA Matrix	141
Family Group Record	141
Family Group Record Options	144
Hourglass Chart	146

Hourglass Chart Options	149
Kinship Report	153
Kinship Report Options	155
Outline Descendant Report	157
Outline Descendant Report Options	159
Pedigree Chart	162
Pedigree Chart Options	164
Scrolling & zooming	166
Standard Family Group Record	166
Standard Family Group Options	169
Tree Pruning	171
Trellis® Chart	174
Trellis® Chart Options	177
Browsing the Trellis	179
Printing, Previewing & Publishing	182
Printing	182
Print Preview	182
Publishing	183
Printing Tips for Box Charts	184
Using the Print Setup Window	185
SVG and HTML	187
RTF (Rich Text Format)	189
DXF (Data eXchange format)	190
Excel spreadsheets (XLS)	190
Wall Charts	191
Wall Chart Overview	191
Printing Wall Charts	192
Special Features	193
Saving a Copy of Your View Screen	193
Resetting preferences	193
Special symbols for events	193
Automatic scripts	194
User Preferences	195
Children Sort Order	195

Date Format	195
Font	196
Ibid	196
LDS Events	196
Restoring Defaults	197
Setting Your Preferences	197
Author	198
Substitutions	199
Surnames	199
Treatment of Notes	200
Word Processor	201
Glossary	202

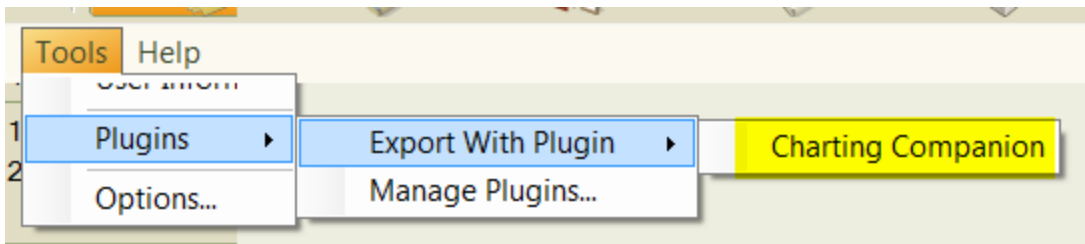
Introduction

Quick Start Guide (First time)

Getting started with Charting Companion is simple:

[1] Open your genealogy file.

[1.1] If you are a Family Tree Maker user, in the FTM menu click on "**Tools → Plugins → Export → Charting Companion**".



[1.2] For all other genealogy programs, click on the Charting Companion menu: "**File → Open**". Browse to your file. If you don't know where your file is located, click on "**Scan disk**", and Charting Companion will find all your genealogy files.

[2] Find a person

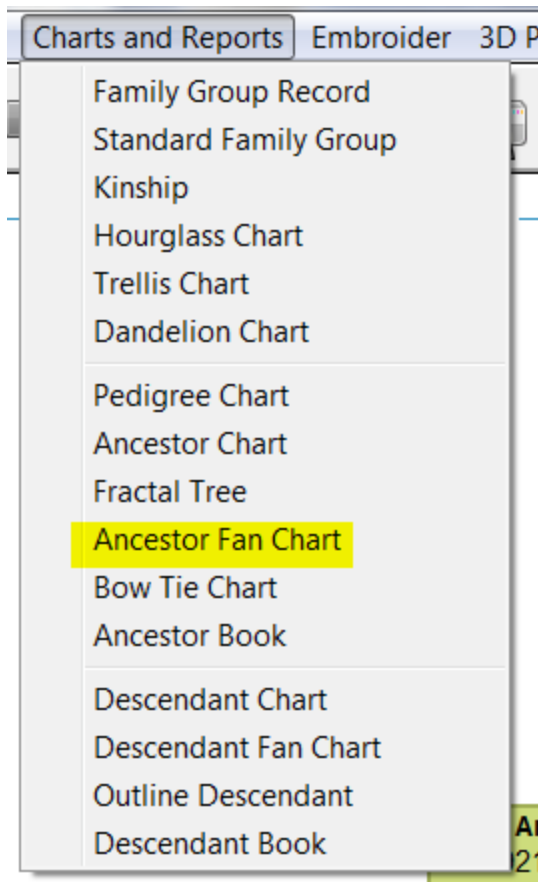


Click on the Name List icon, or click on the menu "**View → Name List**". Enter a surname and optionally a given name, click on "**Go to**" and "**View**".

Smith	John	Go to
Surname or RIN	Given name or initial	

[3] Create a chart

Click on "**Charts & Reports → Ancestor Fan chart**" for example, then click on "**Preview**".



[4] Print or Publish the chart



After previewing the chart, click on the Printer icon, then Publish or Print. Choose the file type in the drop-down list.

Product Overview

Charting Companion is an advanced charting program, that makes it easy for you to view, publish and print high quality genealogy charts and reports directly from your genealogy file.

Whether your database contains a handful of people or thousands, Charting Companion gives you the tools to quickly find individuals, view their family information, and navigate through their tree.

You can create the following reports with Charting Companion:

Family Reports

- [Family Group Record](#) Printed version of family group view in LDS format.
- [Standard Family Group](#) A variable format that will print all user-defined events.
- [Kinship](#) Print all relatives of an individual with their relationship(s).
- [Hourglass Chart](#) A box chart that prints both ancestors and descendants for an individual.
- [Trellis® Chart](#) A chart that shows everyone in your family.
- [Dandelion Chart](#) A chart that shows everyone in your family

Ancestor Reports

- [Pedigree Chart](#) Traditional LDS pedigree chart of an individual's ancestors.
- [Ancestor Chart](#) A box chart of an individual's ancestors, with an optional variation to include siblings.
- [Ancestor Fan Chart](#) A unique "fan" presentation of an individual's ancestors. You can also print a full circle or quarter circle chart.
- [Bowtie Chart](#) A box chart showing an individual's paternal line (ancestors) to the left and the maternal line to the right.
- [Ancestor Book](#) An individual's ancestors prepared in a book format together with an index. Different from the other charts and reports, the Ancestor Book is output directly to your word processor for further editing and printing.

Descendant reports

- [Descendant Chart](#) A box chart of an individual's descendants. Choose from top to bottom or left to right formats.
- [Descendant Fan Chart](#) A unique "fan" presentation of an individual's descendants. You can also print a full circle or quarter circle chart.
- [Outline Descendant](#) An outline report of an individual's descendants indented by generation. This is a useful summary report because only one line per person is printed.
- [Descendant Book](#) An individual's descendants prepared in a book format together with an index. Like the Ancestor Book, the Descendant Book is output directly to your word processor for further editing and printing.
- [DNA Matrix](#)
- [DNA Simulation](#)
- [DNA Matches](#)

Many options are available for customizing these reports to suit your particular needs, including [colors](#) and [photos](#). Another special option is "Cousin Smart", which ensures that common ancestors

or descendants for two distant cousins who marry are not repeated on the same chart or report, thereby saving valuable space and paper.

Charting Companion allows you to print on any size of paper. Large charts can be created by tiling many pages together or by printing on a large-scale plotter. These charts and reports can be produced on printers supported by Windows, including ink jet, laser, and even dot matrix printers. The Fan chart has special requirements that are available only on laser and ink jet printers.

The Descendant and Ancestor books are automatically output to the word processor of your choice. From there you can perform additional editing such as adding graphics to your report before printing. Currently supported word processors include WordPerfect, Microsoft Word, Microsoft Works, Open Office, Lotus Ami Pro, and Microsoft WordPad.

In addition, Charting Companion allows you to [preview your charts](#) in reports before printing, allowing you to save on printing costs. Fast "go to" and search functions are also provided to make locating individual records easier. This is especially useful for large files.

Other useful features

[Save Screen Image](#). Save an ancestor, descendant, or hourglass view (when displayed on screen) to an image file (JPG, GIF, PNG and BMP) to use with other programs, paste into a document, or simply print in color.

[Publish to PDF](#). With Charting Companion, you can easily save the charts and reports you create in [PDF format](#), making it easy to share them with others.

Using Charting Companion with your genealogy files will make your genealogy research more exciting and rewarding. We welcome any comments or suggestions you might have about our products.

Please contact us at:

Progeny Genealogy Inc.

10037 - 20 Silver Fox Ave.
New Minas, Nova Scotia
Canada B4N 5K1

Web <http://progenygenealogy.com>
Site:

Progeny Publishing is a division of Progeny Genealogy, Inc.
Charting Companion is a trademark of Progeny Genealogy Inc.

All other trademarks are the property of their respective owners.

Trellis® based on GeneaQuilts: A System for Exploring Large Genealogies, A. Bezerianos, P. Dragicevic, J.-D. Fekete, J. Bae, B. Watson, Visualization and Computer Graphics, IEEE Transactions on, vol.16, no.6, pp.1073-1081, Nov.-Dec. 2010

What's New

8 - Apr 2021

New user interface. Wizard dialogs.

7.3 - Nov 2020

macOS version

7 -

Rectangle [rounded corners](#). [Background images](#).

[DNA Matches](#).

7 - 22 Apr 2018

Descendant chart Top-down, spouse on same level as subject or bloodline

7 - 18 Apr 2018

[DNA Simulation](#)

6.7.10 - 30 Jan 2018

[DNA Matrix](#)

6.7 - 13 Dec 2017

New "driver-free" PDF

6.6 - 31 Oct 2017

FTM 2017 v. 23.1.0.4XX

6.5.7 - 26 Mar 2017

FTM 2017 colors.

"Fit to page"

6.5.1 - 2 Mar 2017

FTM 2017.

FTM Weblinks

Descendant X-chromosome

6.4.28 - 21 Sep. 2016

Improved Ancestor, Descendant embroidery.

6.4.23 - 7 Aug. 2016

Add Sort Date to search results CSV.

Descendant charts: "No spouse" option.

6.4.13 - 12 July 2016

Descendant Left-to-right: align box tops

Descendant Bottom-up

Search: preserve all events in CSV for chronological analysis

6.4 - 8 May 2016

Reads Family Tree Maker files through FTM Plugin menu.

Uses RootsMagic colors.

Substitute your choice of words for "Unknown" (see [Surnames](#)).

6.3 - 8 May 2016

Display images in new improved way with Windows GDI+

6.2.19 - 22 Mar 2016

Enhanced [event type selection](#).

6.2.8 - 24 Feb 2016

Compatible with new [Software MacKiev](#) version of Family Tree Maker.

6.2.6 - 13 Feb 2016

Save Ancestor & Descendant chart content as [Excel spreadsheet](#).

6.2.4 - 10 Feb 2016

Ancestor Bottom-up (vertical).

6.2 - 16 Jan 2016

Publish chart in STL (Stereo LiThography) for 3D Printing of Fan charts.

6.1.3 - 26 Dec 2015

Publish chart in [DXF](#) (Data eXchange Format) for compatibility with most graphics software, including AutoCAD.

6.1 - 5 Nov 2015

Rich Text Format ([RTF](#)) charts. Option to include spouses in last generation. Drop-down list of paper sizes.

6.0.24 - 9 Sep 2015

Tabbed Dialogs converted to native Windows Property Sheets. Eliminates dependency on a third-party package.

6.0.22 - 12 Aug 2015

Windows 10 compatible.

["%d%" in footer replaced with today's date.](#)

Save/Restore all options automatically.

6.0.11 - 17 Jul 2015

[Save Fan charts as HTML, SVG](#)

6.0 - 24 Jun 2015

[Dandelion Chart](#)

5.4.28 - 2 May 2015

[Loading custom colors:](#) You can define custom colors and load them from a file.

5.4.24 - 19 Apr 2015

Title Font: You can change the font face & size of the Title.

5.4.20 - 15 Apr 2015

Load/Save Options: You can save a set of chart or report options, and restore it later.

When a given name or surname is unknown, you can substitute a string other than "(---)". See "User Preferences, [Surnames](#)".

5.3.35 - 24 Jan 2015

[SVG/HTML](#)

5.3.32 - 17 Jan 2015

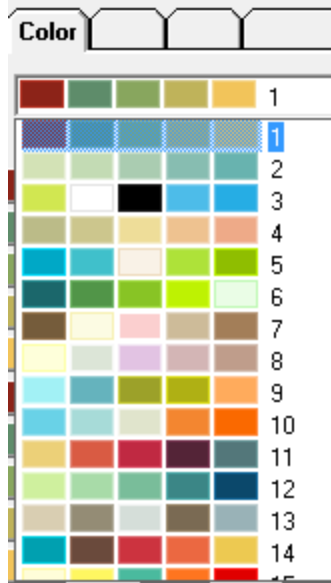
"Check for updates": Click "Help, Check for updates" to verify if a newer version is available.

5.3.21 - 26 Dec 2014

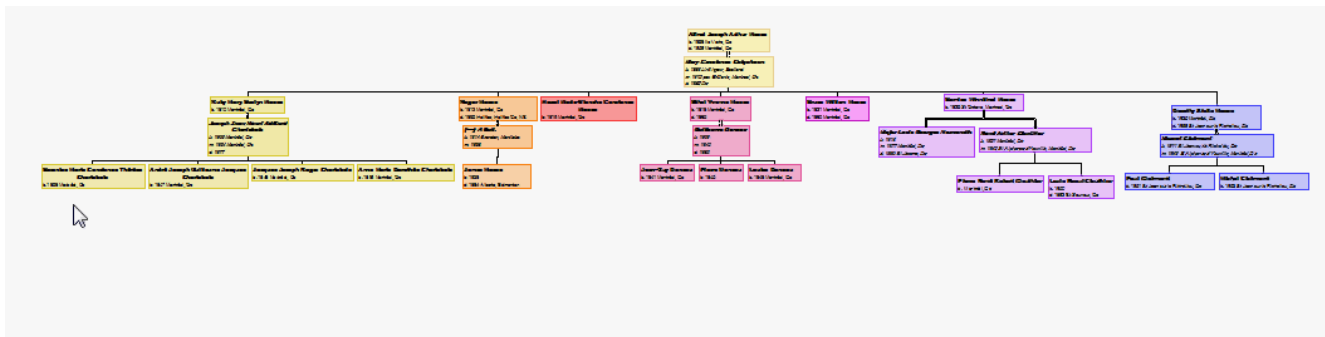
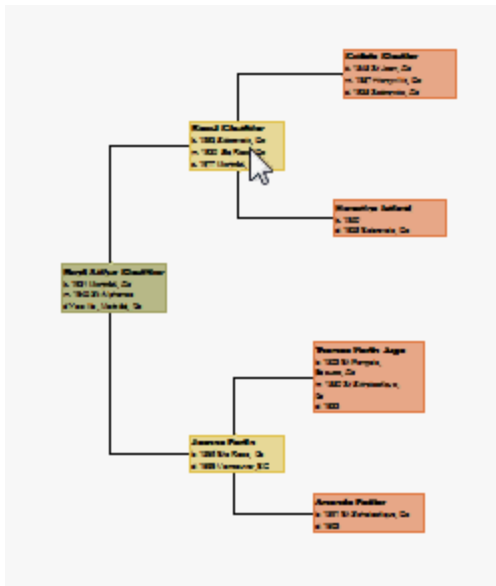
[Special symbols for events.](#)

5.3.20 - 24 Dec 2014

Pre-defined colors: You can pick from over twenty pre-selected combinations of tasteful colors.

**5.3.7 - 21 Nov 2014**

Direct Edit: You can move rectangles around in the Ancestor, Descendant, Hourglass and Bowtie charts.



5.3.0 - 24 Oct 2014

Internationalization: Chinese (Simplified and Traditional), Danish, Dutch, Finnish, French, German, Hebrew, Italian, Japanese, Korean, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish.

If you see a translation that could be improved, we welcome your suggestions.

5.2.10 - 7 Oct 2014

Ahnentafel numbering

In Ancestor chart, option to use use [Ahnentafel system](#).

5.2.6 - 26 Sep 2014

Direct Preview

You can preview the charts directly in the main window. [Zoom & scroll](#) to adjust the chart so it will fit in exactly the number of pages you need. [Prune](#) the tree and print the result.

The Fan charts can tile over several pages.

Saving Fan charts as image files

The Fan charts can now be saved as image files (PNG, JPG, etc.), and can also be tiled over several pages.

5.1.11 - 4 Nov 2013

X-chromosome coloring

Ancestors will be colored depending on whether they contributed an X-chromosome or not. For benefits & applications, see [Roberta Estes' Blog](#).

5.0.21 - 9 Sep 2013

Ornamental

Borders are a new option that can be added to the Ancestor, Descendant, Bowtie, Hourglass and Fan charts.

There are four types of borders:

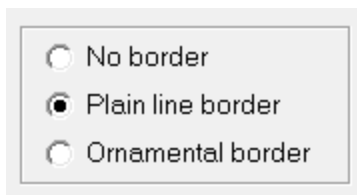
- **Corner** (file names start with 'C'), that go into the four corners of the chart.
- **Garland** (G) that go in the top center, bottom center, left & right center of the chart.
- **Frame** (F) that surround every page of the chart.
- **Rope** (R) that are repeated around the whole chart.

The Corner, Garland and Rope patterns can be Shrunk/Expanded. These three patterns only appear on the "outer" pages of a tiled chart.

The Frame pattern will be stretched to fit the page size. It surrounds every page of a chart.

Using the Ornamental Borders

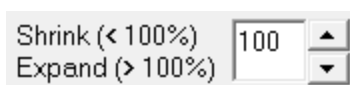
Click on the **Border** tab of the Options Dialog.



- **Plain line border** is a simple line around the chart.
- **Ornamental border** requires you to choose an image file that describes the border style.



- **Line Width** is the thickness of the line used to draw the border.



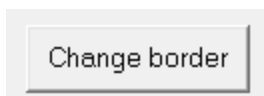
- **Shrink/Expand** will change the size of the border artwork. Does not apply to “Frame” type borders.



- The **Color** button will enable you to change the color of the border.



- The **Border Margins** are an independent margin setting that enable you to control the overlap between the chart and the borders. The Chart Margins are set in the “Layout” tab, and can be larger than the Border Margins. If you are using Corner-style borders in a Full-circle Fan chart, both the Chart and Border margins can be the same. If using a full-Frame border, or Garland borders, you will need to make the Chart Margins a bit larger than the Border Margins, in order to increase the distance between the chart boxes and the edge of the paper.



- Click the **Change Border** button to browse through the hundreds of borders available to Charting Companion. The border files are special PNG files. Charting Companion cannot use general PNG files at the present time.



- The preview window shows a thumbnail of the border, drawn with the thickness and size percentage chosen. The name of the file appears at the bottom.

Files and Records

Charting Companion reads the following file formats directly:

- Ancestral Quest (32-bit version of Charting Companion)
- Family Historian
- Family Tree Maker (plugin)
- GEDCOM
- Legacy (32-bit version of Charting Companion)
- Personal Ancestral File
- Roots Magic

These files are composed of records that include individuals, associated events, dates, [photos](#), biographical notes, and sources. These records can be selectively displayed in Charting Companion views and reports.

The first time Charting Companion is opened, it will ask if you would like to search for your genealogy files. If you select yes, the program will automatically scan your computer's hard drive(s) for all your family files. These files are then displayed with their associated path (disk drive and folder location) in the Open dialog. You must [select](#) a file before you can view the records or print reports. Charting Companion will remember the last file you worked on, and all future sessions will start with that file open.

*Tip: If you choose not to scan when first opening the program, you can always do so later by selecting **File, Scan disk for files** on the menu, or by clicking the **Scan Disk** button in the **Open** dialog. You can also re-scan by following the same steps.*

Charting Companion also allows you to assign more meaningful names to your files and rename them later if you wish.

Tip: [Naming](#) your files for the first time and renaming them later are both accomplished in the same way. These functions can be performed from the menu bar.

- If you hold down the Shift key when starting Charting Companion, either by double-clicking the icon or right-clicking and choosing Open, Charting Companion will reset all options to the default, and will not automatically open the previous file. This can be useful when some condition is preventing Charting Companion from opening normally.

Where to Get Help

In this topic: [Program Help](#); [FAQs](#); [User Manual](#); [Wall Chart Printing Tips Manual](#); [Email Support](#)

See also: [Computer System Requirements](#)

Although Charting Companion is a sophisticated charting program, it has been designed to make creating charts and reports a user-friendly and enjoyable experience. Keeping this in mind, we do understand that sometimes questions can arise. Because we care about our customers, we have provided the following tools to help you learn about our program:

Program Help

Program Help provides you with direct access to all the information you need to use this product. Help can be accessed either by clicking the Help button in a dialog box or from the Help selection on the menu bar. You may also display help for a menu option by pressing the <F1> key.

When you select Help from the menu bar, you can either browse through the table of contents or search on a specific word or subject.

Frequently Asked Questions (FAQs)

To access our Frequently Asked Questions (FAQs) list, you must be connected to the Internet. Then, select **Help, FAQs, Frequently Asked Questions** from the Charting Companion menu.

User Manual

The official Charting Companion User Guide is available in PDF format as a free download. The information in the manual is presented in an easy to follow format with additional screen shots and sample charts not included in the help file. Once downloaded you can view the manual on screen or print a copy for your own use. To download the manual you must be connected to the Internet. You can then select **User Guides, User Guide** from the Charting Companion menu. Your default Internet Browser will open the download page with instructions on how to proceed.

Wall Chart Printing Tips Manual

For great tips on how to get the most out of your wall charts and ideas on tweaking how your genealogy is displayed, download the Wall Chart Printing Tips Manual. Chock-full of valuable information for anyone creating large charts, this manual can be downloaded by selecting **User Guides, Wall Chart Printing Tips** from the Charting Companion menu. Your default Internet Browser will open the download page with instructions on how to proceed.

Free Email Support

Sometimes, when all else fails, you just need to ask the experts. Progeny Genealogy Inc. provides free email support to registered users of Charting Companion. Simply click the **Technical Support** option under the **Help** menu. Your default Internet Browser will automatically open the Technical Support email contact page.

Note: You must be connected to the Internet to access this feature.

Computer System Requirements

Your computer system must meet certain requirements to properly install and run Charting Companion. If you encounter any difficulty while installing or running the program, check these minimum hardware and software requirements:

- IBM or 100 percent compatible
- Microsoft Windows® Vista, Windows 7, Windows 8, Windows 10
- 200 MB hard-disk space
- VGA or compatible display with at least a 256-color-capable video card
- Windows compatible printer
- Adobe® Acrobat® Reader® version 4.0 or higher (required for [Publish to PDF](#)), or other PDF viewer.

To display whether you are running the 32-bit or 64-bit version, click on "Help → About" and note the following after the version number:

- "i386" is 32-bit
- "x86_64" is 64-bit

Open a File

Opening Family Files

The first time Charting Companion is opened, it will ask if you would like to search for your genealogy files. If you select yes, the program will automatically scan your computer's hard drive(s) for all genealogy files. The files are then displayed in the Open dialog list box.

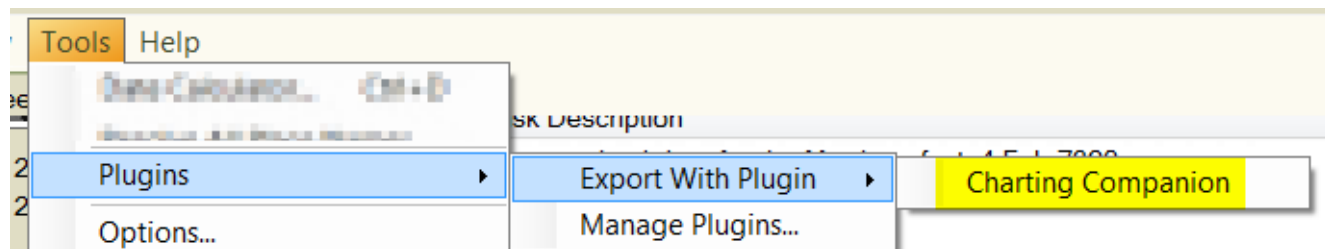
Charting Companion can read files from the following programs:

[1] Ancestral Quest

[2] Family Tree Maker (FTM), 2019 both pre-2008, and 2008-2014. Make sure you have the latest updates from Ancestry. If you have upgraded to a new version of FTM, any files that you open with Charting Companion must have been previously opened, at least once, by the newer version of FTM.

As of FTM Software MacKiev, Charting Companion must be accessed through Plugin menu (in FTM, click on Tools, Export with Plugin, Charting Companion).

See summary at bottom of page.



[3] Family Historian

[4] GEDCOM

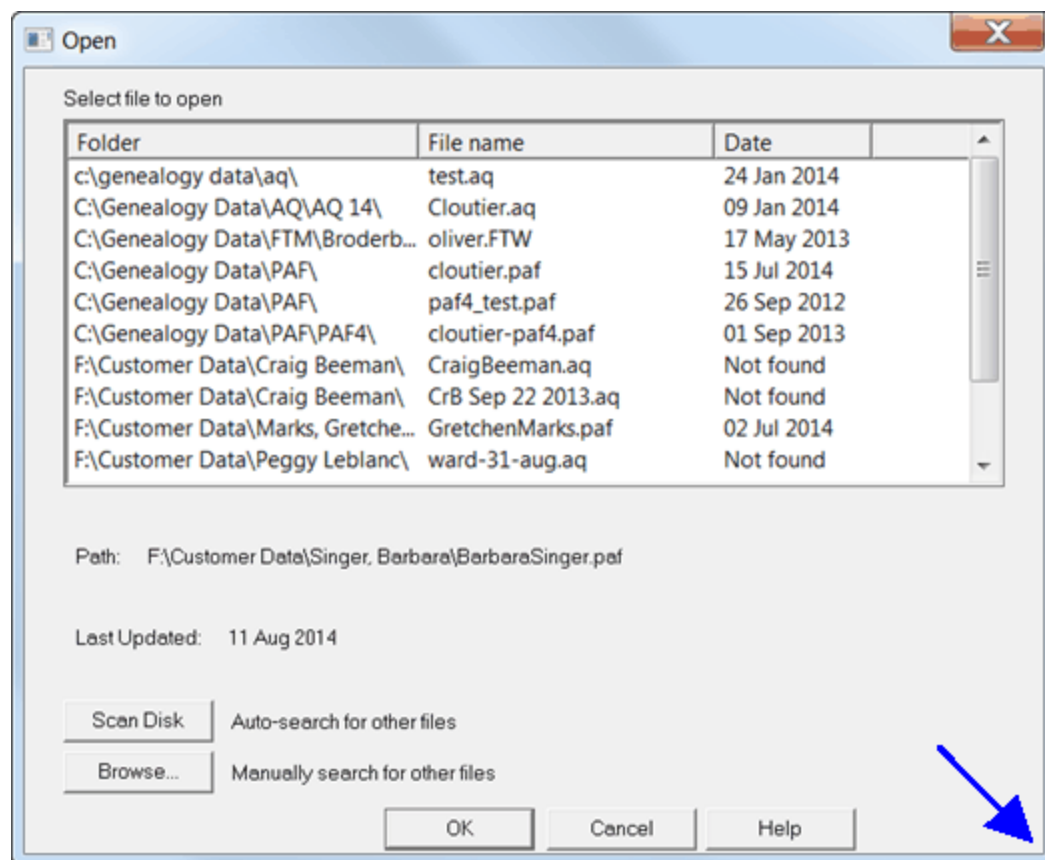
[5] Legacy

[6] Personal Ancestral File (PAF) 3, 4, 5

[7] RootsMagic 7

Tip: If you choose not to scan when first opening the program, you can always do so later by selecting File, Scan disk for files on the menu, or by clicking the Scan Disk button in the Open dialog. You can also re-scan by following the same steps.

When you start Charting Companion you must select a file before you can find an individual, view your records or print reports.



To select (open) a file:

From the menu bar

1. Select **File** and click **Open**.
2. Double-click on a file listed in the File List dialog.

Important: A list of your files will only appear in the Open dialog if you have performed a hard drive scan. If you do not wish to scan, you will need to manually find the file you would like to open by clicking the Browse button.

*Tip: Once you've opened a file, it will appear in the **Recently Used File List**, located under **File** in the menu. To open it again, just click on it in the list. Charting Companion will store up to six files in this list.*

You can expand the dialog box by dragging the bottom right-hand corner.

Click on a column header to sort the list. Click on the date once to sort in descending order (most recent at the top), click again to reverse the order.

Double-click on the folder name to open the file.

Tip: If you create a file with the name "\$PCOMP NO SCAN" (no extension) in a folder, Charting Companion will not search for any files in that folder.

The list of files is stored in:

"C:\Users\your login ID\AppData\Roaming\Progeny\CC\CATALOGG.TXT"

This file can be deleted to reset the catalog.

GEDCOM files

When importing GEDCOM files, Charting Companion creates a temporary working database in a separate directory. If you open a GEDCOM file for which there exists a more recent corresponding working database, Charting Companion will use the database without rebuilding the working copy. If the GEDCOM file is more recent, Charting Companion will rebuild the database.

The database design enabled Family Explorer, a predecessor version of Charting Companion, to build databases of more than 5,000,000 individuals.

If you hold down the Shift key when clicking on OK to open the GEDCOM file, Charting Companion will force a rebuild even if the working database is more recent.

Family Tree Maker files

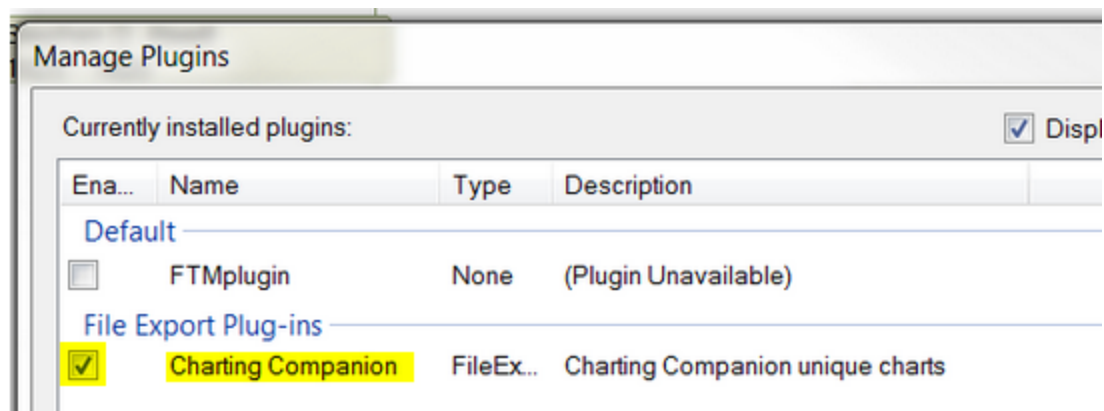
If you hold down the Shift key when clicking on the Open button, Charting Companion will force the FTM DLLs to be copied regardless of whether they are older or more recent than the DLLs in the Charting Companion directory.

Here is a summary of how to open Family Tree Maker files.

FTM version	CC File/Open	FTM Tools/Plugin
2008	Y	N
2009	Y	N
2010	Y	N
2011	Y	N
2012	Y	Y
2014 Ancestry	Y	Y
2014.1 MacKiev	N	Y

2017	N	Y
2019	N	Y

If you don't see Charting Companion as an option when clicking on the FTM menu "Tools, Plugins, Export", then click on "Manage Plugins", and check "Charting Companion".



Assigning Names to Your Files

From the menu bar

1. Select **File** and click on **Name Genealogy files**.
2. Double-click on the file you wish to name (or rename).
3. Type the name you wish to assign the file.
4. Click **OK** to accept the new name.

The newly assigned name now appears in the list of files. Note that this operation does not select the newly named file.

*Important: A list of your files will only appear in the dialog if you have performed a hard drive scan. If you have not performed a scan, or would like to re-scan, you can do so by selecting **File, Scan disk for files** on the menu, or by clicking the **Scan Disk** button in the **Open** dialog.*

Finding People

How to...

Charting Companion provides convenient methods for finding individuals in your genealogy file:

- [Name List](#). Use this option to browse all names in the file or go to a specific individual.
- [Go To](#). Go directly to an individual record by entering a name or reference number (RIN, PIN, AFN, User ID or ID number, PID, as determined by the file type you have open or system you are signed into).

Name List

The Name List presents the entire list of individuals contained in the genealogy file you currently have open. From the Name List you can search for specific individuals by surname and given name (optional) or by reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open).

TIP: If you enter a given name with no surname, the first person with that given name and no surname will be displayed.

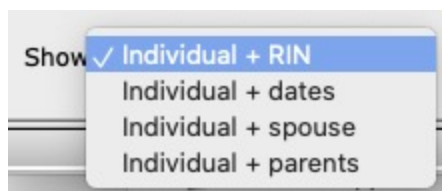
For ease of browsing, the names are always displayed in alphabetical order beginning with the "Home person" specified in your genealogy program.

You can choose to show individuals (that is, names) with reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open), birth and death dates, spouse, or parents. Place-names, where available, will also be displayed with birth and death dates. The dates, spouses, and parents will be displayed only if the information is recorded in the file for the individual.

To display the Name List:

- From the menu bar, select **Browse** and click **Name List**.
- From the toolbar, click on the **Name List** button.
- In any view, press the **F2** button on your keyboard.

To select what to show in the Name List:



Click on the **Show** list box, and select a content option.

To find individuals in the Name List, you can:

- **Browse.** Use **Page Up** and **Page Down**, the **scroll bar**, or the **up** and **down arrows** on the keyboard to browse through the list. Note: Browsing is faster if display is set to Individual + reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open).
- **Go To.** Enter a name or reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) to go directly to the individual you want. Then click the **Go To** button. This is the fastest way to find someone in the Name List.

Go To Name:

1. Enter the surname in the first GO TO box and the given name(s) or initials in the second box

OR

Type the surname and the first letter of the individual's first name

OR

Type only a surname with no given names or initials

OR

Type the first few letters of the surname.

2. Click **OK** or press **Enter**.

The Name List will jump to the person you are seeking and highlight the individual in **blue**. If the name is not found, the next closest person (in alphabetical order) will be displayed. If you entered only a surname, the first person with that surname will be highlighted.

TIP 1: Entering a single letter in the surname box will take you to the first surname that begins with that letter. For example, enter T to jump to the surnames that begin with T.

TIP 2: Enter nothing in the Go To boxes to take you to the very top of the Name List.

TIP 3: Click on the Clear button to reset the Go To boxes.

To select an individual from the list:

1. Make sure the individual is highlighted.
2. Double-click on the name or click **OK** or press **Enter**.

The [Family Group View](#) for the selected individual will be displayed.

Go to

Similar to the "go to" in the [Name List](#), you can use this "go to" function to find an individual using his or her full name, first initial and surname, or simply a surname. You can also find someone with a reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open).

To access the Go To dialog box, select one of the following:

- From the menu bar, select **Find**; then click on **Go To**.
OR
- From the toolbar, click on the **Go To** button.

The Go To dialog box will now be displayed.

Go to Name:

1. In the top box, enter the full name (this must be spelled exactly as it appears in the database)
OR
Type the individual's first initial and surname (for example, D Vernest)
OR
Type only a surname.
2. Click **OK**.

The [Name List](#) will display with the person you are seeking highlighted in [blue](#). If the name is not found, the next closest person (in alphabetical order) will be displayed. If you entered only a surname, the first person with that surname will be highlighted.

TIP 1: Entering a single letter in the name box will take you to the first surname that begins with that letter. For example, enter T to jump to the surnames that begin with T in the Name List.

TIP 2: Enter nothing in the Go To dialog box to take you to the top (beginning) of the Name List.

Go to Reference Number:

1. In the top box, enter the individual's reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open).
2. Click **OK**.

If you are in the Name List, the person you are seeking will be highlighted in [blue](#). In any other view, you will be brought directly to the individual's Family Group View. A message saying "Not found" will be displayed if there is no one in the database with that number.

Views

How to...

When you open your file in Charting Companion the first person in the file will be displayed in the [Family Group View](#). This view is designed to display complete information about an individual's immediate family on one screen.

Once you have found an individual, each of these views is available from the toolbar or the menu bar.

To select a view:

- From the menu bar, select **View** and click on your choice of view.
- Zoom In, Zoom Out and Page Grid are used in Preview mode. When clicking on Zoom, hold down the Shift key for smoother scrolling. Click [here](#) for more info.

Family Group View

The Family Group View is designed to display complete information about an individual's immediate family on one screen. This includes all spouses with their respective children, the subject's father and mother, the recorded events in his or her life, and where available, all recorded notes and sources. The individual's "default" [photo](#) will also always be displayed in this view. (If you have a GEDCOM file open, you will not have photos displayed.) There are no user-defined options for this view. Convenient browse buttons allow you to display family groups in the order they appear in the Name List.

Charting Companion - OFFICIAL FINAL merged FTM+LegacyGM (_PHOTO)_2020-09-01.ftm

Name: **Calixte Cloutier**

Gender: **Male** Reference No. :

Spouses and children:

Honorine Lafond

Clara Ménard
 Berthe
 Angela
 Eliza
 Amédée
 Raoul Clouthier
 Alice
 Gertrude
 René
 Marthe

Father: **Joseph Cloutier**

Mother: **Emilie Roy**

Event	Date	Place, Description
Birth	9 Jan 1848	St Jean, Qc
Marriage	17 Feb 1887	Henryville, Qc
_TAG		
_TAG2		
color		aqua black blue
COLOR_FTM		red green blue
COLOR_FTM		66,124,197
Death	9 Apr 1938	Sabrevois, Qc

General Notes:

Calixte Cloutier fut un homme exemplaire, à qui il n'aurait pas été facile d'attribuer des défauts. Il possédait d'abord une puissance de travail manuel extraordinaire. Généralement levé à la pointe du jour, il oeuvrait sur sa ferme sans perdre un instant jusqu'à la tombée de la nuit. Il ne se reposait que le dimanche et encore souvent à contrecœur quand la besogne commandait. Il avait bon caractère, était tolérant pour les autres, dévoué pour sa famille et exigeait peu pour lui-même. Il était d'une sobriété absolue quant à la boisson et au tabac et, toute sa vie, sa conduite fut à peu près impeccable. Il ne se mêlait pas beaucoup à ses concitoyens, peut-être à cause d'une certaine timidité naturelle, et n'était vraiment heureux que sur sa terre et avec les siens. Pas très ambitieux et peu porté pour les affaires, il en laissait plutôt la direction à son épouse, en qui il avait grande confiance.

Family of Calixte Cloutier



General Information

- The reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) for the individual is shown to the right, preceded by a #.
- Long text dates may be truncated in the events box, however the entire date will print in the reports.
- Long place-names will be displayed on as many lines as necessary (i.e. they will not be truncated).
- The event Description, if one exists for a given event in your genealogy file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).
- When the contents of any list box exceeds the capacity of the box, it becomes a scroll list.
- The Notes list box is limited to displaying approximately 50,000 characters. If more notes exist, you will see the message <<MORE NOTES THAN CAN BE DISPLAYED>>. To see all notes, print a [Family Group Record](#) report, where this limitation does not exist. See [Treatment of Notes](#) for more information about how notes are displayed on this screen.
- Spouses are left justified; children are indented under each spouse.

TIP: Simply double-click on any individual in the family group to see that individual's family view.

"How To" Information

To display source citations:

1. Click on the **Source** button. This button appears only when there are one or more source citations for the individual or his or her events.
2. Select a tab for the source citation you want to examine. The citation details will be displayed.

Note: The tabs are labeled with the event name if the source is for an event; otherwise the tab is labeled "Life" for sources attached to the individual whose name appears at the top of the screen.

TIP: Source citations exist if a superscript number is displayed on the individual's name or on any event.

To change the current subject, select one of the following:

Choose from one of the following options:

- Double-click on a spouse, child, father, or mother.
- Click on the Matches arrows (if you have done a search previously).
- Perform a new [Go To](#) command.

To view the subject's ancestors or descendants, select one of the following:

- Click the Charts & Reports button on the toolbar

- Click on Ancestors, Descendants, Hourglass, or Bowtie, Ancestor or Descendant Fan chart

To browse by family group:

- Click the **Back** or **Forward** browse button located in the lower right side of the Family Group View screen.

Family groups will be displayed for individuals in the same order as they appear in the [Name List](#).

Status Bar Preference

The status bar can be turned off so that more of the screen is available for viewing information.

To turn the status bar on or off:

- From the menu bar, select **View**, and click on **Status Bar**.

A check mark next to Status Bar indicates this option is on.

Charts & Reports

Overview

There are three categories of reports that can be printed with Charting Companion.

Family Reports

- [Family Group Record](#) Printed version of family group view in LDS format.
- [Standard Family Group](#) A variable format that will print all user-defined events.
- [Kinship](#) Print all relatives of an individual with their relationship(s).
- [Hourglass Chart](#) A box chart that prints both ancestors and descendants for an individual.
- [Trellis Chart](#) A tabular chart that shows everyone in your family tree.
- [Dandelion Chart](#) A chart that shows everyone in your family

Ancestor Reports

- [Pedigree Chart](#) Traditional LDS pedigree chart of an individual's ancestors.
- [Ancestor Chart](#) A box chart of an individual's ancestors, with an optional variation to include siblings.
- [Ancestor Fan Chart](#) A Fan chart of an individual's ancestors, with an optional variation to include siblings.

- [Bowtie Chart](#) A box chart showing an individual's paternal line (ancestors) to the left and the maternal line to the right.
- [Fan Chart](#) A unique "fan" presentation of an individual's ancestors. You can also print a full circle or quarter circle chart.
- [Ancestor Book](#) An individual's ancestors prepared in a book format together with an index. Different from the other charts and reports, the Ancestor is output directly to your word processor for further editing and printing.

Descendant reports

- [Descendant Chart](#) A box chart of an individual's descendants. Choose from top to bottom or left to right formats.
- [Descendant Fan Chart](#) A unique "fan" presentation of an individual's descendants. You can also print a full circle or quarter circle chart.
- [Outline Descendant](#) An outline report of an individual's descendants indented by generation. This is a useful summary report because only one line per person is printed.
- [Descendant Book](#) An individual's descendants prepared in a book format together with an index. Like the Ancestor, the Descendant Book is output directly to your word processor for further editing and printing.

The options are stored as XML files. When Charting Companion starts, it restores the options from the XML files.

Date Format

The dates are formatted according to the format of the Short date as defined by you in Windows.

In **Windows XP**, the format is set by clicking Start > Control Panel > Regional & Language Options > Regional Options > Customize > Date.

In **Windows Vista and 7**: Start > Control Panel > Clock, Language and Region > Change date, time or number format > Additional Settings > Date > Short date.

Set the date format to "dd MMM yyyy".

Note: You can override the date format by typing it directly. You are not limited to the choices in the drop-down list.

In Windows 8:

Hit the Windows key

Click on the down arrow at the bottom left

Click PC settings

Click Control Panel at the bottom

Then you can do Clock, Language and Region > Change date, time or number format > Additional Settings > Date > Short date: dd MMM yyyy

Note: You can override the date format by typing it directly. You are not limited to the choices in the drop-down list.

In **Windows 10**:

Click on the Windows icon (bottom left)

Settings

Time & Language

Change Date & Time format

Short Date

If you don't find the choice you're looking for, click on:

Related Settings / Additional date, time & regional settings

Region / Change date, time or number formats

Additional settings

Date

Enter Short Date format directly, ex: "dd MMM yyyy"

Note: You can override the date format by typing it directly. You are not limited to the choices in the drop-down list.

If you have explicitly selected a different language than the default, you need to set the Short Date format for that language, in Windows.

Re-start Charting Companion after changing the date format.

Sometimes Windows gets "stuck" and does not seem to respect the settings made by the user through the Control Panel. In this case, there is a more drastic solution: edit the Registry directly and set the following key to the desired format (ex: "dd MMM yyyy"):

HKEY_CURRENT_USER\Control Panel\International\sShortDate

To edit the Windows Registry, click on the Start button, enter "regedit", hit Enter. Be careful when editing the Registry.

U.S. vs. Metric measurement

Charting Companion uses the measurement system which is the default for your computer.

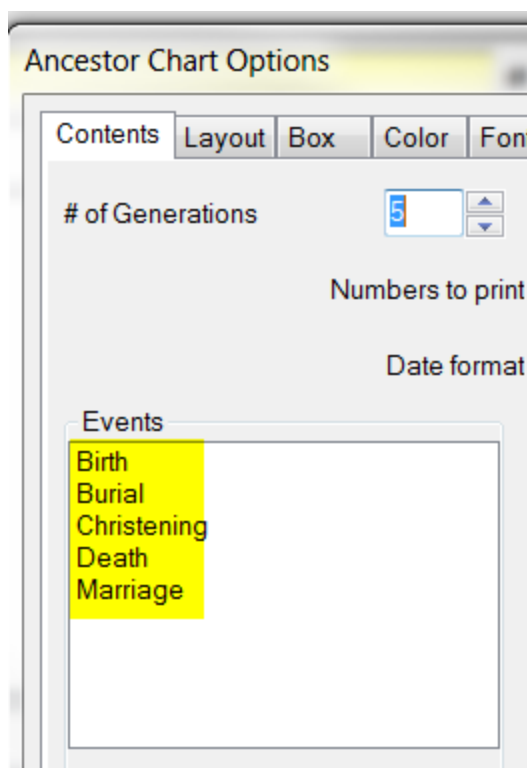
To select which type of measurement system to use, in the Control Panel click on:

- Clock & Region
- Region
- Additional settings
- Measurement system
- Choose U.S. or Metric

Event Type Selection

Some database types allow the selection of specific event types.

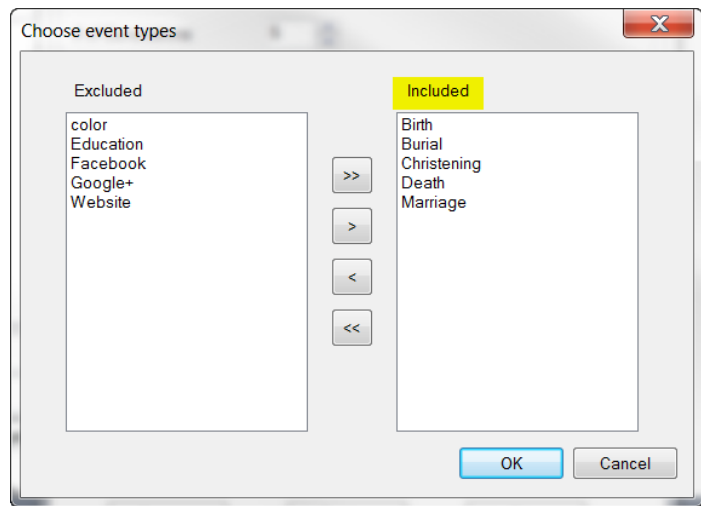
The list box in the chart Options dialog, displays which events have been selected to be included in the chart or report:



If you click anywhere in the list box, the following dialog enables you to select which events you want to include.

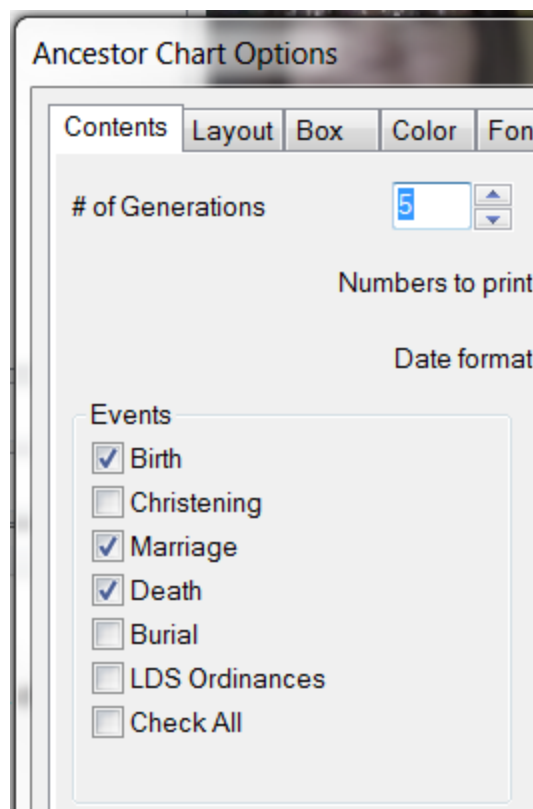
Click on any events, click on **>** to transfer from 'Excluded' to 'Included', and **<** to transfer from 'Included' to 'Excluded'.

The list box is multiple-selection: hold down the Ctrl key to select multiple event types. Hold down the Shift key to select a range of event types.



Some database types do not provide for an enumeration of all event types that are used. The event selection box allows for selecting of five basic events, LDS Ordinances, or all events:

Select one or more of the following events to include in your report: **Birth, Christening, Marriage, Death, Burial, LDS Ordinances** or **Check All** to print every available event, including user-defined events

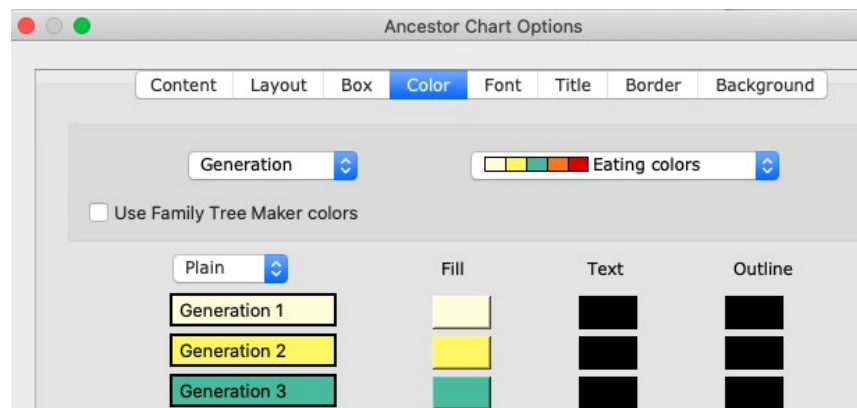


Colors - how to pick

- Color style. Choose from four color options: Gender, Generation, Lineage or X-chromosome. Or, select "None" to create a standard black and white chart. See [Color Charts](#) for samples of each option.

Tip: Charting Companion can now use custom color events created in your genealogy program to assign specific Fill, Text and Outline colors to individuals on your charts. See [Individual Custom Colors](#) for more details.

- Gradient. Select this to have the color of each box in the chart fade from the color you choose on the left to white on the right. Click [here](#) for a sample chart.
- X-Chromosome: who inherited X-chromosome from who.
- Fill, Text & Outline colors. To change the fill, text or outline color within a style, click on the corresponding box and choose the color of your choice.



Note that the Custom Colors in the Windows Color Dialog are pre-filled with the ten colors from the Color tab.

The Gradient column is the second color when the Gradient option is chosen.

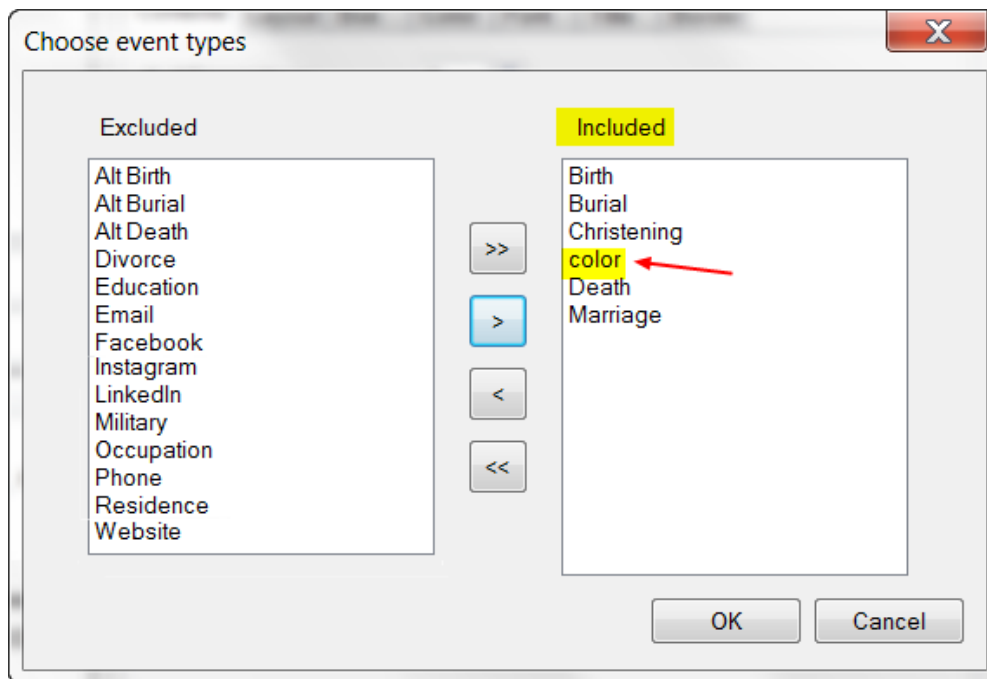
- Family Tree Maker Colors: Check to display the colors assigned in FTM 2017 and later.
- Default colors. To return to the program's default colors for all color styles within a chart dialog click the **Default colors** button.

Color schemes

Charting Companion offers three color styles for your [Ancestor](#), [Fan](#), [Bowtie](#), [Descendant](#) and [Hourglass](#) charts; choose to color by [gender](#), [generation](#), or [lineage](#). Use our professionally selected default colors or choose your own - it's up to you! For extra pizzazz, a [gradient](#) option can also be applied to any color chart. Of course, we still offer our traditional black & white (No Color) option as well. Colors can also be applied to chart views. For help applying colors to your charts see the Options topic for the chart of your choice.

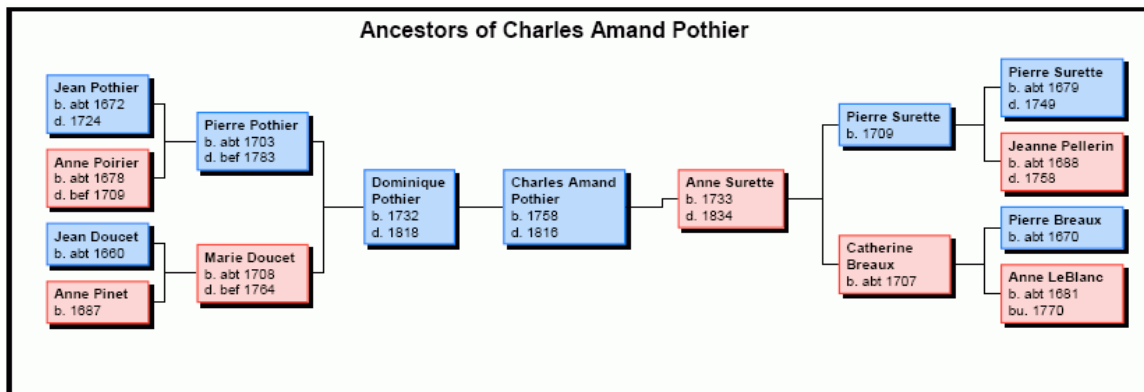
As an added bonus, you can assign custom colors to [individuals](#) in your genealogy database so that they always print with your specified outline, fill and text colors, unless the No Color option is selected.

To make the custom colors appear, make sure that you have included the "Color" event type in the list of selected events (Option dialog):



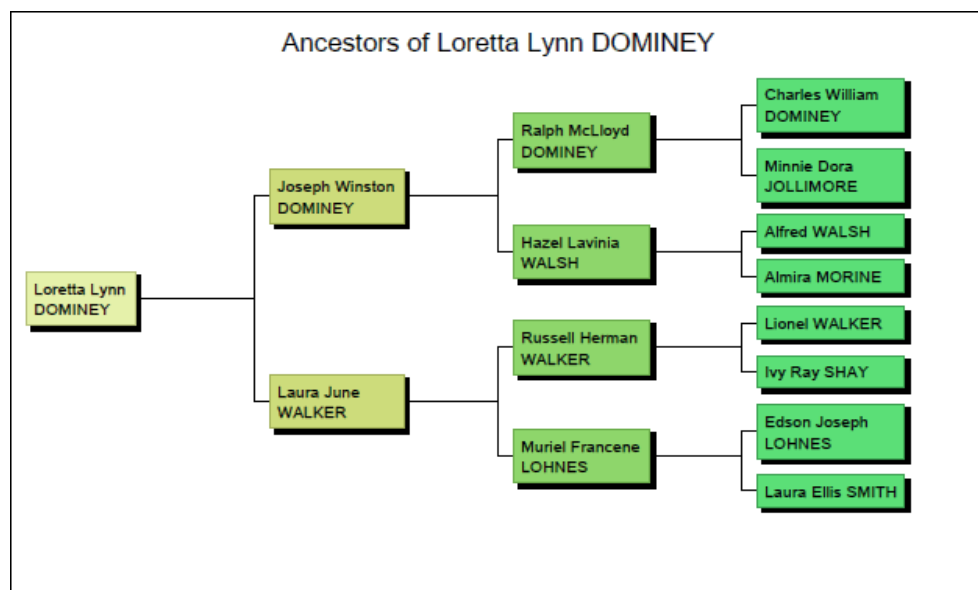
Color by Gender

Choose this option to color each box according to the gender of the individual.



Color by Generation

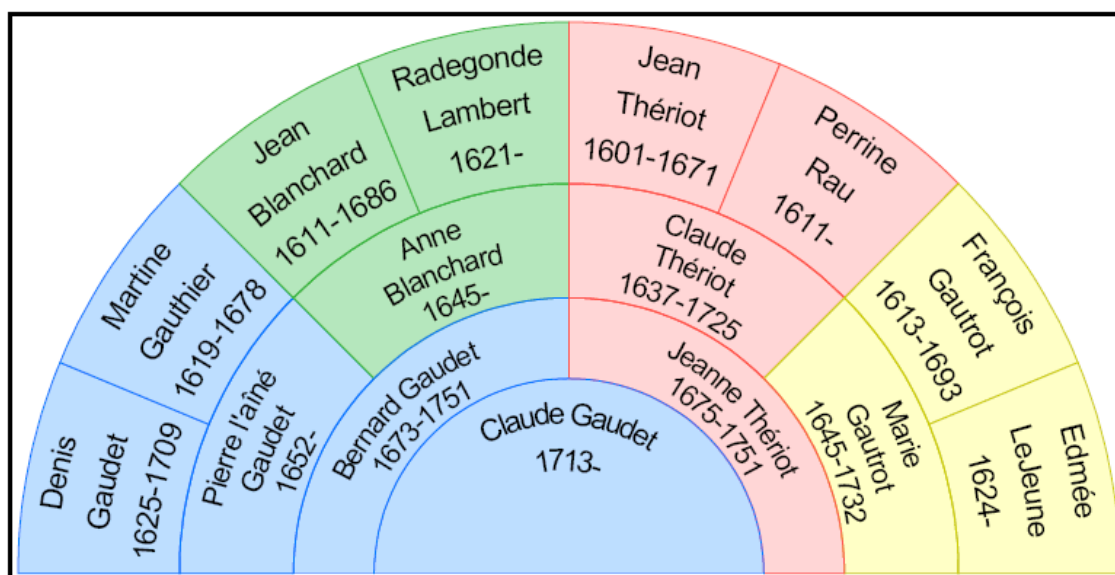
When the Color by Generation option is selected each generation of ancestors or descendants is assigned its own color.



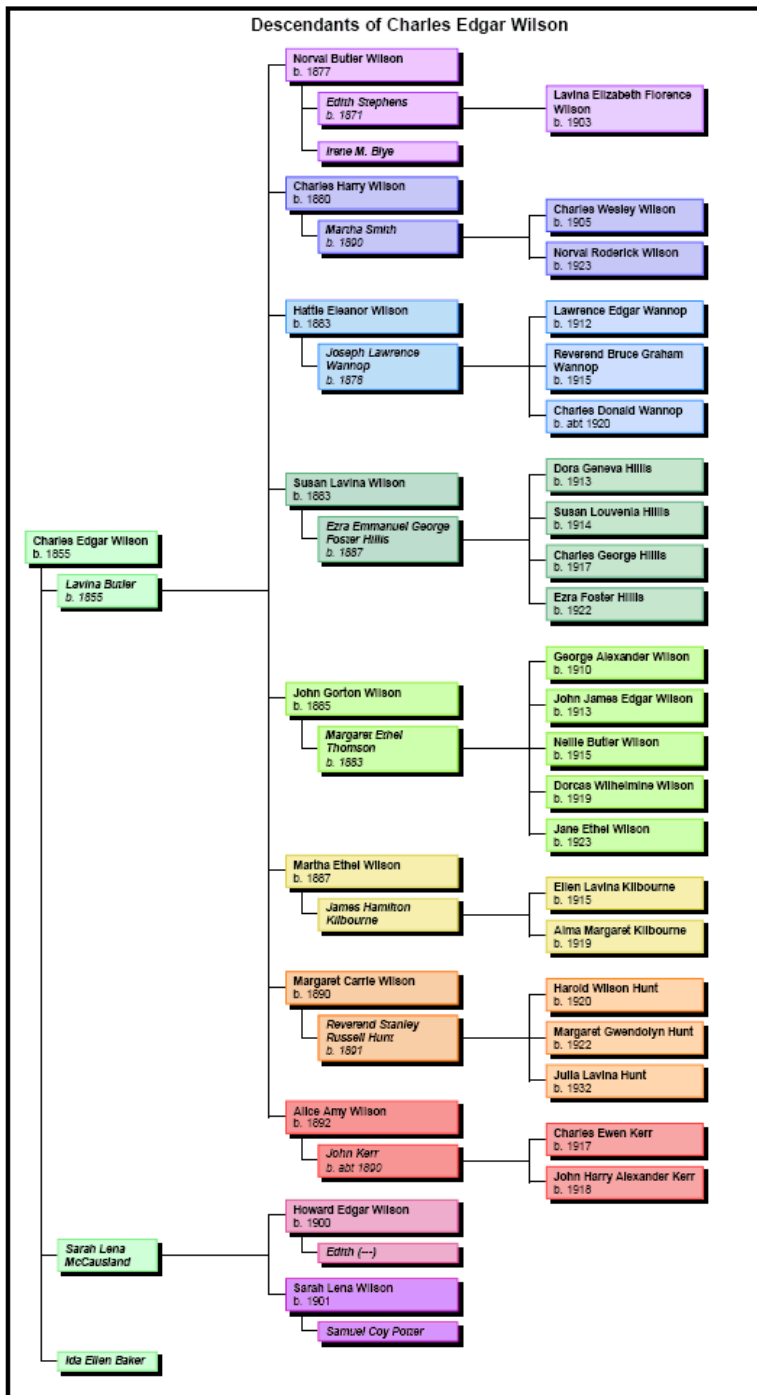
Color by Lineage

Color by Lineage is really two options in one, and can look quite different, depending on whether it is applied to an ancestor or descendant chart. If in an ancestor chart, this option will assign a different color to the following four lines:

1. Father of the Father
2. Mother of the Father
3. Father of the Mother
4. Mother of the Mother



If the Lineage option is selected in a descendant chart, Charting Companion will assign a different color to each of the subject's children and their descendant line.



Color by X-chromosome

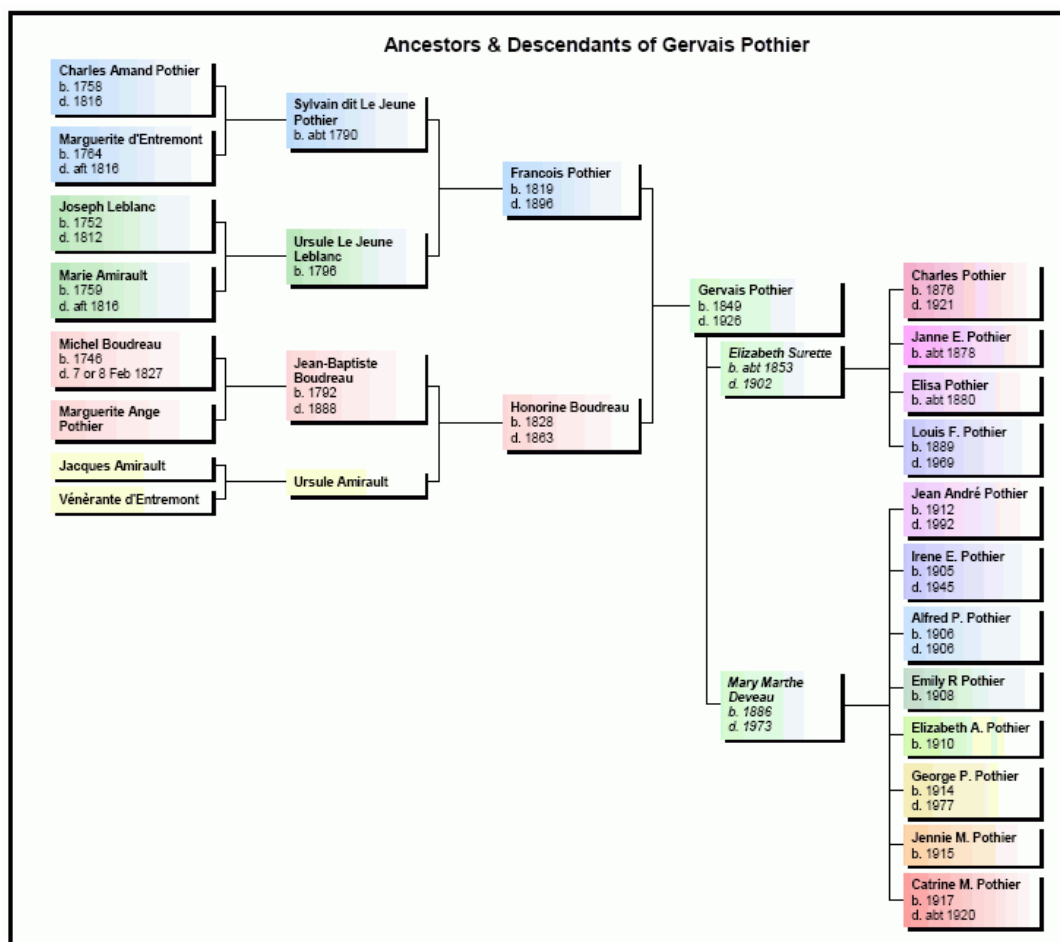
Ancestors will be colored depending on whether they contributed an X-chromosome or not.

Descendants will be colored depending on whether they received a X-chromosome from the bloodline parent. A son receives one X-chromosome from his mother. A daughter receives two X-chromosomes, one each from her mother and father.

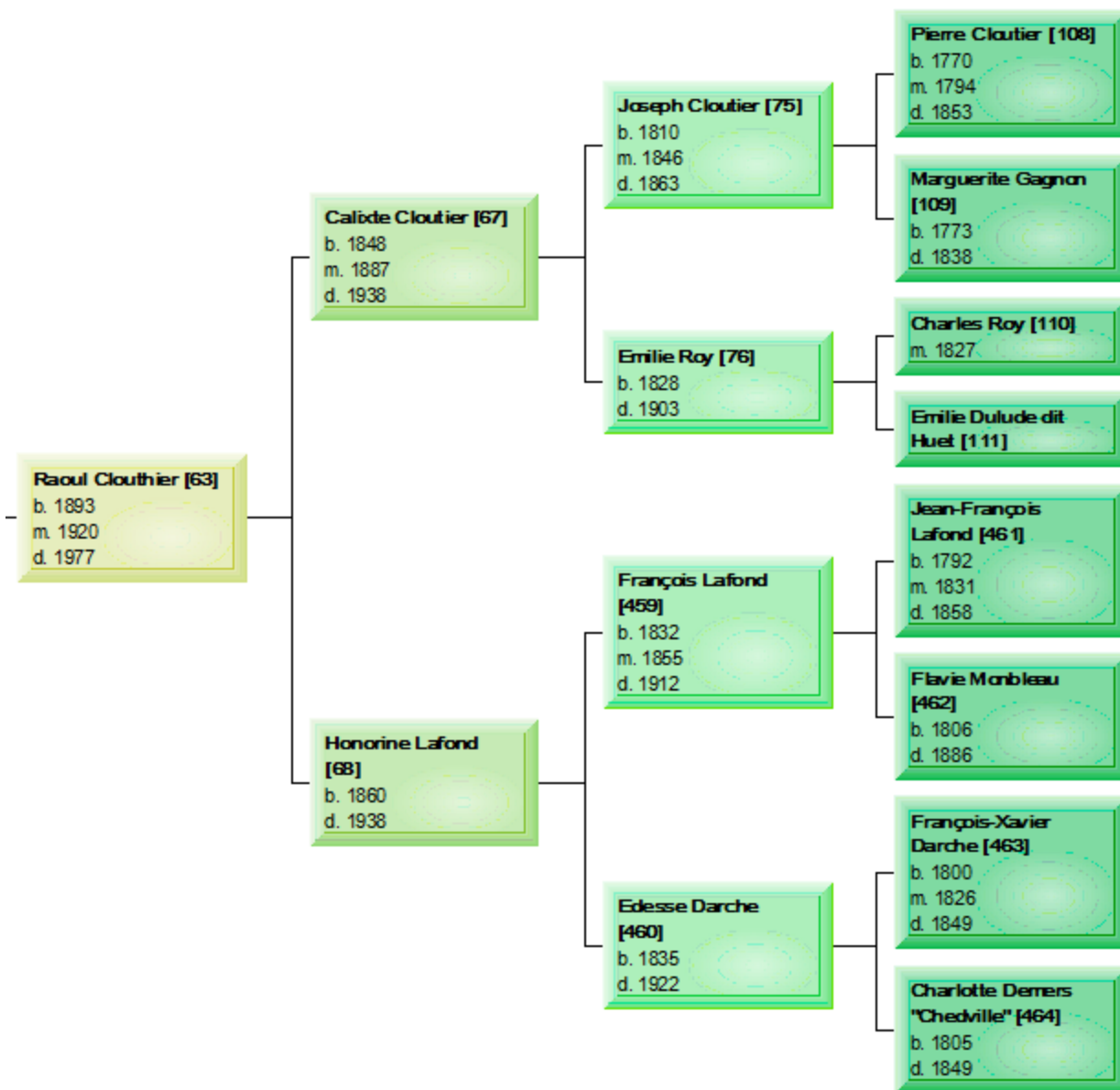
A man inherits one X-chromosome from his mother. A woman inherits two X-chromosomes, one for each parent. For more information, see [Roberta Estes' Blog](#)

Gradient

Choose this option to have the color of each box in the chart fade from the color you choose on the left to white on the right.



Bevel



Individual Custom Colors

Charting Companion can now use custom color events created in your genealogy program to assign specific Fill, Text and Outline colors to individuals on your charts. Individuals who have been assigned a custom color will always print in the box color of your choice, regardless of the color scheme chosen in Charting Companion, unless the No Color option is selected.

To assign custom colors to individuals:

1. Open up your family file in your genealogy program.
2. Browse to and double-click on a desired individual to bring up the Individual's Information dialog box.
3. Under Events/Facts, select the **Add** button.
4. In the Event field, enter the word **Color**.

5. In the Description field enter the colors of your choice for the Fill, Text and Outline colors, in that order, placing a space between each color choice. Colors may be entered as follows:
 - i. **Red Green Blue (RGB) Values** (i.e. 255,0,0 0,0,0 0,255,0)
 - ii. **HTML Color Codes** (i.e. #FF0000 #000000 #00FF00)
 - iii. **Color Words** (i.e. Red Green Blue)

Tip: The following seventeen color words are supported by Charting Companion:

Black, Green, Silver, Lime, Gray, Olive, White, Yellow, Maroon, Navy, Red, Blue, Purple, Teal, Fuchsia, Aqua, Default. If Default is entered, Charting Companion will use the color selected within the Color tab of the Chart Options dialog.

For example, Charting Companion created this box:

Crystal Dawn Deveau

By entering the following information in your genealogy program:

To temporarily override the custom colors, and use the chart colors that you picked in the Color tab, locate the following file:

C:\Users\user\AppData\Roaming\Progeny\CC\Charting Companion.INI

(where "user" is your Login ID), and add this section:

[COLOUR]

CUSTOM=N

Loading & saving custom colors

You can create a file of colors that you define yourself. In the Color dialog, click on "Load Colors", browse to a color file, and load it. Charting Companion will remember the name of the file and load it automatically every time you start the program.

The format of the color file is:

```
;Mauve theme
[COLOR1]
TEXT1=123,45,67
FILL1=98,12,34
OUTLINE1=52,34,78
TEXT2=
FILL2=
OUTLINE2=
(TEXT, FILL and OUTLINE from 3 through 9)
; Comments can appear anywhere
TEXT10=...
FILL10=...
OUTLINE10=...
;Orange theme
[COLOR2]
TEXT1=#FF123A
FILL1=#C0BBDD
OUTLINE1=#4B1023
etc.
```

where [COLOR1], [COLOR2], ... [COLOR31] correspond to a row of colors, and FILL/TEXT/OUTLINE range from 1 to 10, for each generation or lineage.

The colors are defined as RGB (Red/Green/Blue) in either decimal or hexadecimal.

Any color that is not overridden will remain at its default value. Not all colors, rows or generations need to be defined.

Lines that begin with a semicolon ';' are comments and are ignored.

The COLOR.INI files can be placed anywhere, it doesn't matter.

Once you've loaded a color file, Charting Companion makes a note of where the file is located, and will attempt to automatically load the file every time thereafter. If you move or rename the file, Charting Companion will revert to the default colors until you load a color file again.

If you make changes to the colors in the palette, you can save them in a file by clicking on the "Save Colors" button.

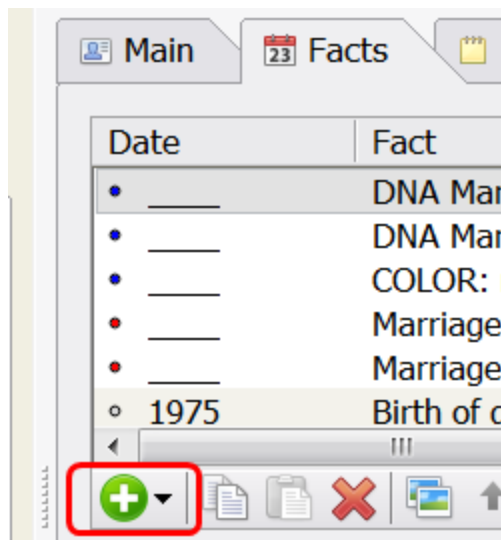
RootsMagic Colors

Charting Companion will take into account the Colors assigned to individuals in the RootsMagic database. The color will be used for the background or fill color. The default colors will be used for the outline (border) and text.

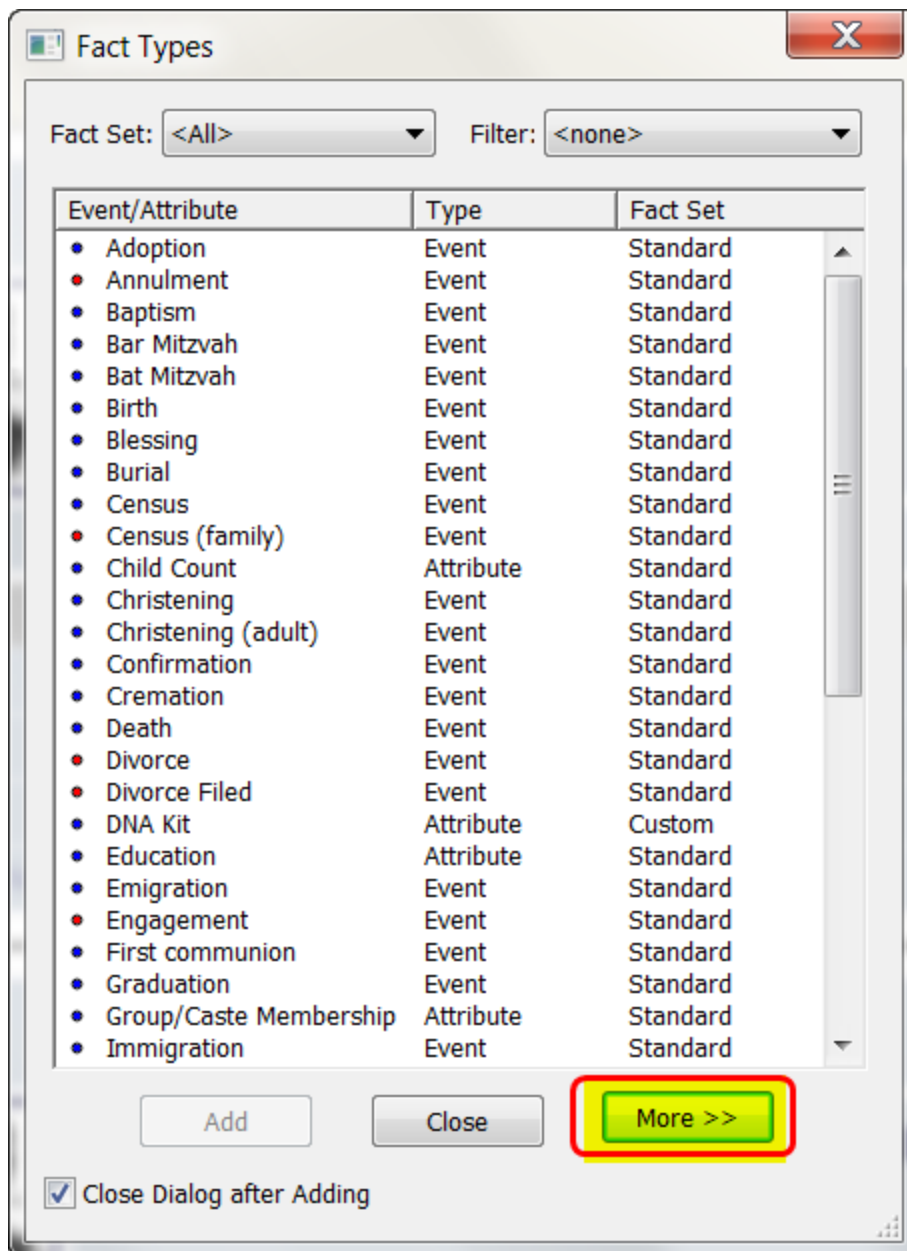
Family Historian Colors

To add custom colors in Family Historian, first add the "COLOR" event. Steps 2-5 need only be done once.

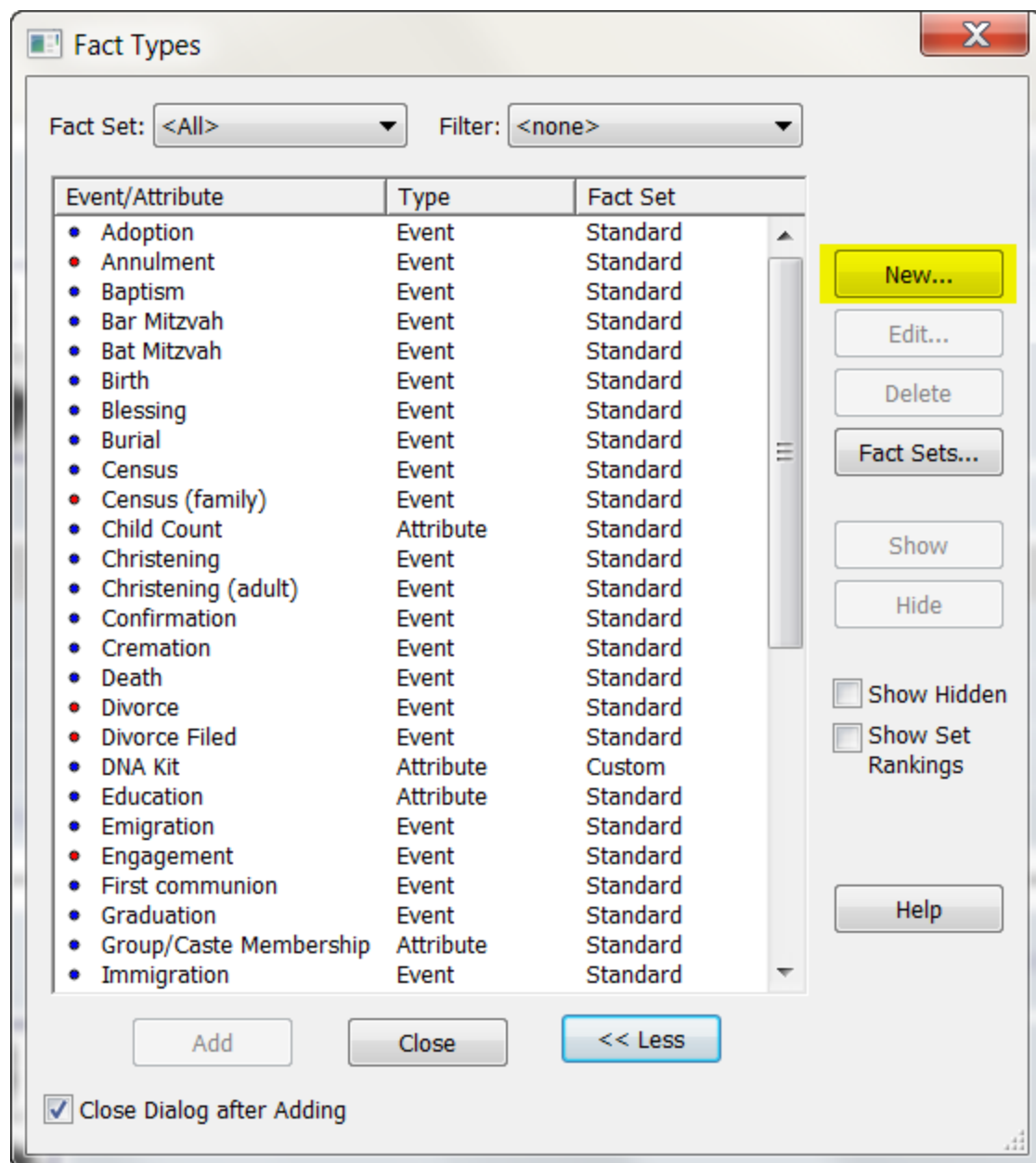
1. Click on the Add Fact button:



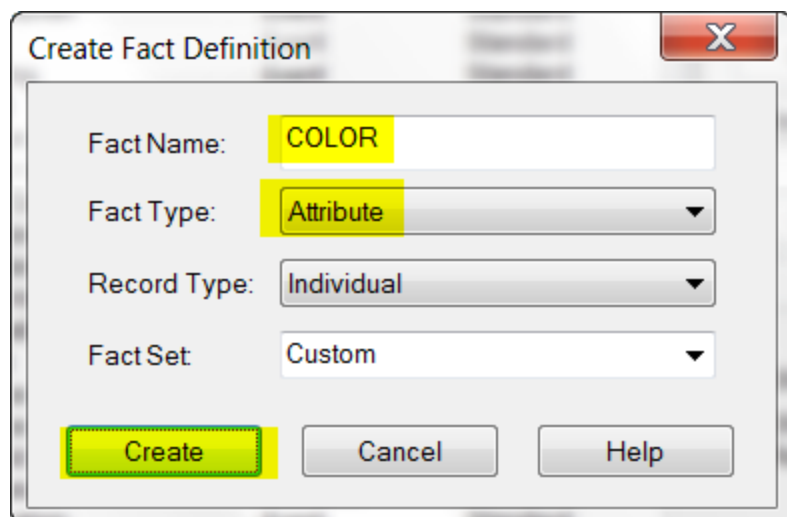
2. Click on "More":



3. Click on "New":

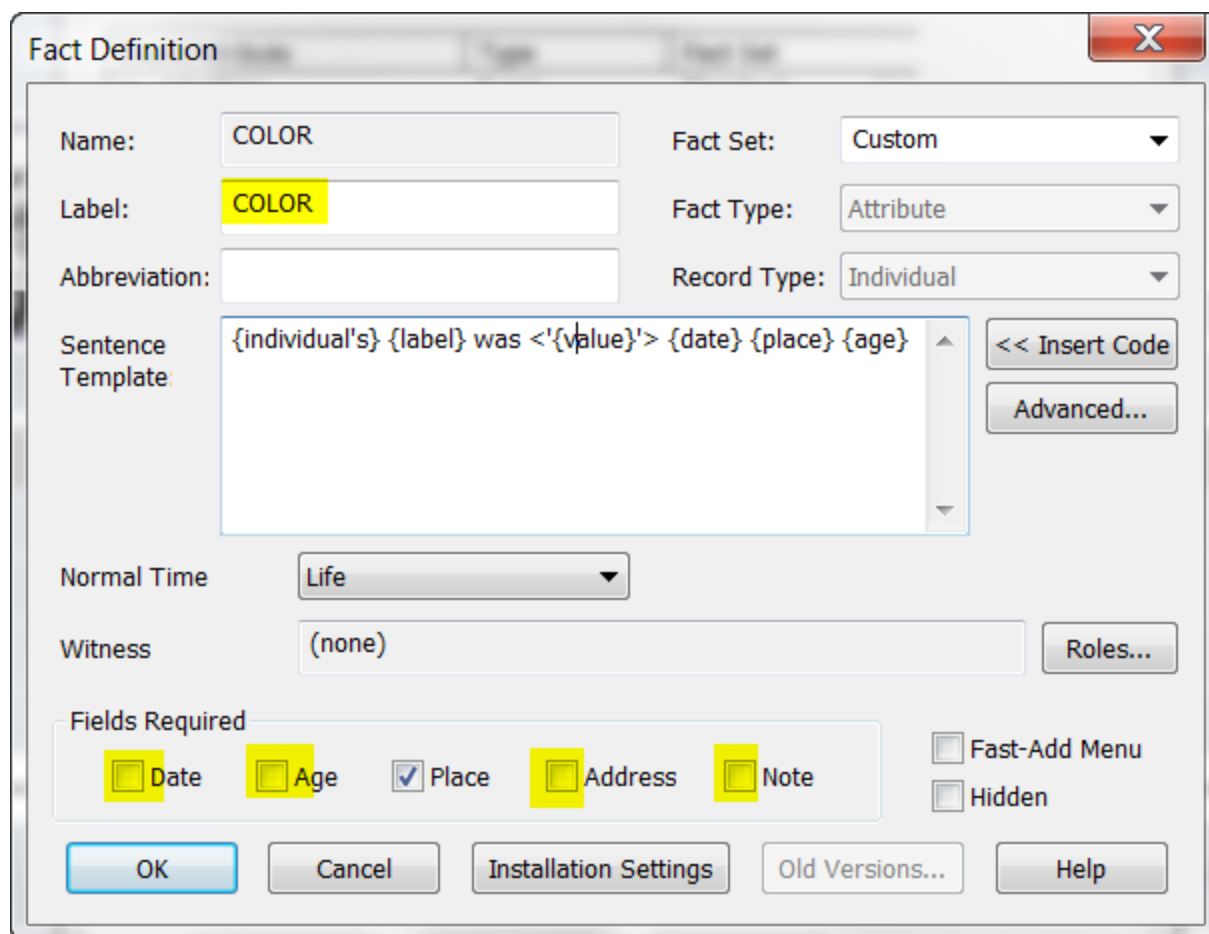


4. Assign the Name "COLOR", Type "Attribute", click on Create:



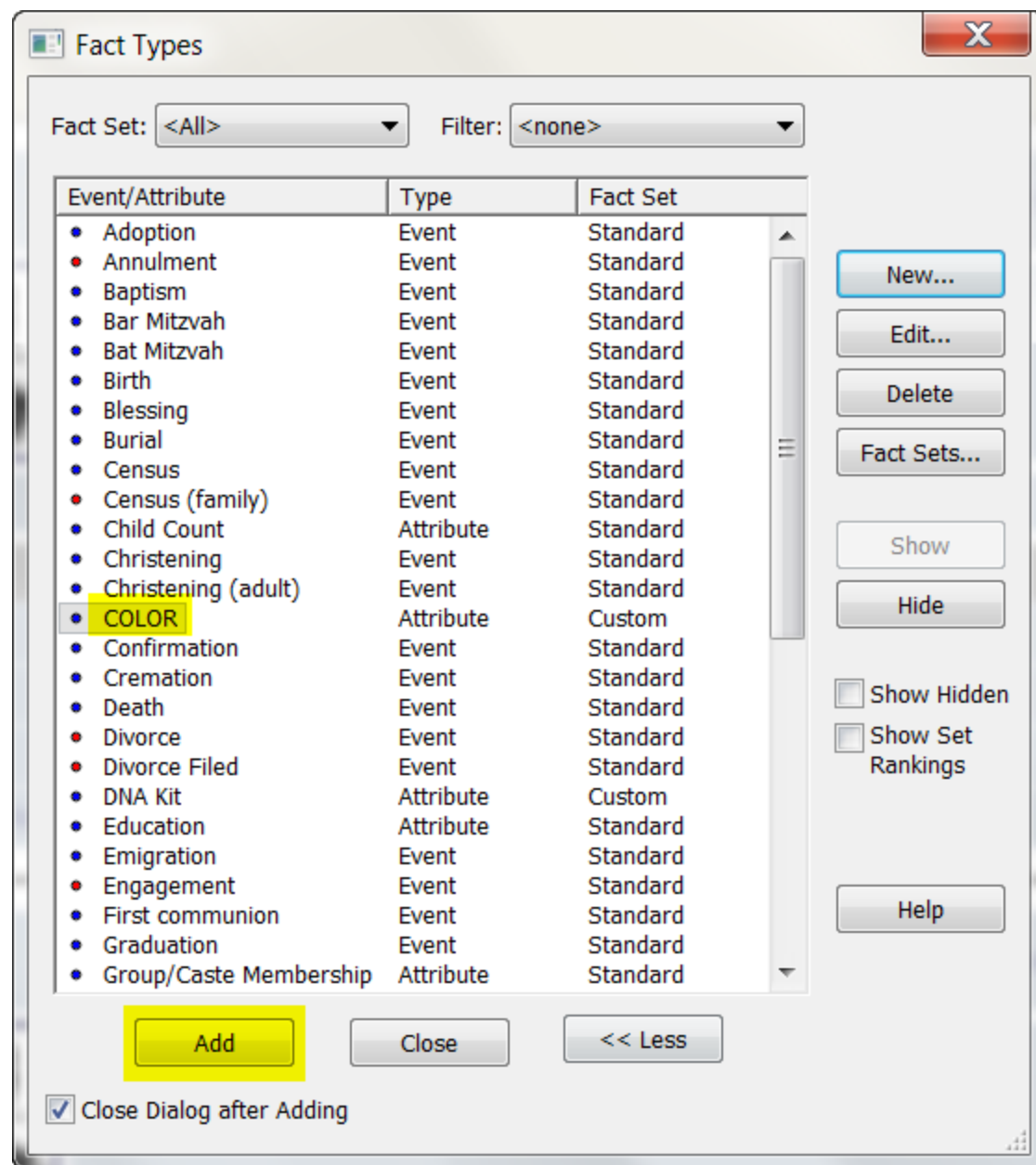
A dialog box titled "Create Fact Definition" with a close button (X) in the top right corner. It contains four input fields: "Fact Name:" with the value "COLOR", "Fact Type:" with a dropdown menu showing "Attribute", "Record Type:" with a dropdown menu showing "Individual", and "Fact Set:" with a dropdown menu showing "Custom". At the bottom, there are three buttons: "Create" (highlighted in yellow), "Cancel", and "Help".

5. Assign Label "COLOR", uncheck Date, Age, Address and Note:



A dialog box titled "Fact Definition" with a close button (X) in the top right corner. It contains several input fields and buttons. The "Name:" field has the value "COLOR". The "Label:" field has the value "COLOR" (highlighted in yellow). The "Abbreviation:" field is empty. The "Sentence Template:" field contains the text "{individual's} {label} was <'{value}'> {date} {place} {age}" and has a scroll bar on the right. To the right of the "Sentence Template:" field are two buttons: "<< Insert Code" and "Advanced...". The "Fact Set:" dropdown menu shows "Custom". The "Fact Type:" dropdown menu shows "Attribute". The "Record Type:" dropdown menu shows "Individual". The "Normal Time" dropdown menu shows "Life". The "Witness" field has the value "(none)". To the right of the "Witness" field is a button labeled "Roles...". Below these fields is a section titled "Fields Required" with five checkboxes: "Date" (unchecked, highlighted in yellow), "Age" (unchecked, highlighted in yellow), "Place" (checked), "Address" (unchecked, highlighted in yellow), and "Note" (unchecked, highlighted in yellow). To the right of these checkboxes are two more checkboxes: "Fast-Add Menu" (unchecked) and "Hidden" (unchecked). At the bottom, there are five buttons: "OK" (highlighted in blue), "Cancel", "Installation Settings", "Old Versions...", and "Help".

6. The COLOR event is now defined in your database. Click on the event to select it, and click on "Add":



7. Enter the color name or RGB values:

The screenshot shows the 'Facts' tab in the Charting Companion software. The interface includes tabs for 'Main', 'Facts', 'Notes', and 'Media'. The 'Facts' tab displays a table with columns for 'Date', 'Fact', and 'Age'. The table contains several entries, including 'DNA Markers:', 'Marriage to M...', 'Marriage to Je...', and 'Birth of daugh...'. The 'COLOR: red green blue' entry is highlighted. Below the table, there is a toolbar with icons for adding, deleting, and editing facts. The 'COLOR:' field is populated with 'red green blue' and is highlighted with a red border. The 'Place:' field is empty.

Date	Fact	Age
•	DNA Markers:	
•	DNA Markers:	
•	COLOR: red green blue	
•	Marriage to M...	
•	Marriage to Je...	
o 1975	Birth of daugh...	

COLOR: red green blue

Place:

Repeat steps 1, 6-7 for other individuals you want to color.

Photos

Photos in Reports and Charts

Several reports and charts allow you to print a photo for each individual in the chart. Charting Companion uses the same default photo you have specified in your genealogy program. Charting Companion does not allow you to change or edit the photo, you must do this through your genealogy program.

Note: Photos may not be available for all types of image files.

Photos can be printed with the following:

- [Standard Family Group Record](#)
- [Ancestor Chart](#)
- [Descendant Chart](#)
- [Hourglass Chart](#)
- [Bowtie Chart](#)
- [Ancestor Book](#)
- [Descendant Book](#)
- Dandelion

For convenience, the default photo is always displayed in the [Family Group](#) view. In addition, photos can be displayed in the Ancestor, Descendant, Hourglass, and Bowtie views.

Charting Companion supports the following file formats:

Windows Bitmap	*.bmp
Encapsulated PostScript	*.eps
JPEG	*.jpg
PC Paintbrush	*.pcx
Photo CD	*.pcd
PhotoShop PSD	*.psd
Portable Network Graphics	*.png
Targa	*.tga
Tagged Image File Format	*.tif

Note: PhotoShop PSD (.psd) images will not display in the Family Group View. However, they will print in charts and reports.*

To include photos in your charts:

1. Open the options dialog window for the report or chart.
2. Check the Include photos box (remove the check mark to disable).

Selecting the photo size

For the Standard Family Group Report

The photo is always proportionately sized to fit within the 1.5 inch square box available. This means that the photo will always retain its original aspect ratio. The photo will always print in the same section as the individual's events, and will be present only for report subjects and their children, not for parents of the subjects or spouses of children.

For box charts:

For box charts you can limit the height of the photo so that the size of the image will not increase past the specified size when the box width is increased. Simply select **Limit photo height** in the **Box** tab of the chart options dialog and enter the desired maximum height.

If you choose not to limit the photo height, the photo width will be automatically sized (smaller or larger) to the width of the printed box. The length will vary proportionately so the photo will always retain its original aspect ratio (width to length).

Tip: The photo is always printed beneath the name and event information for the individual, in the center of the box. You cannot change the position of the photo.

Note: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

For Ancestor and Descendant books:

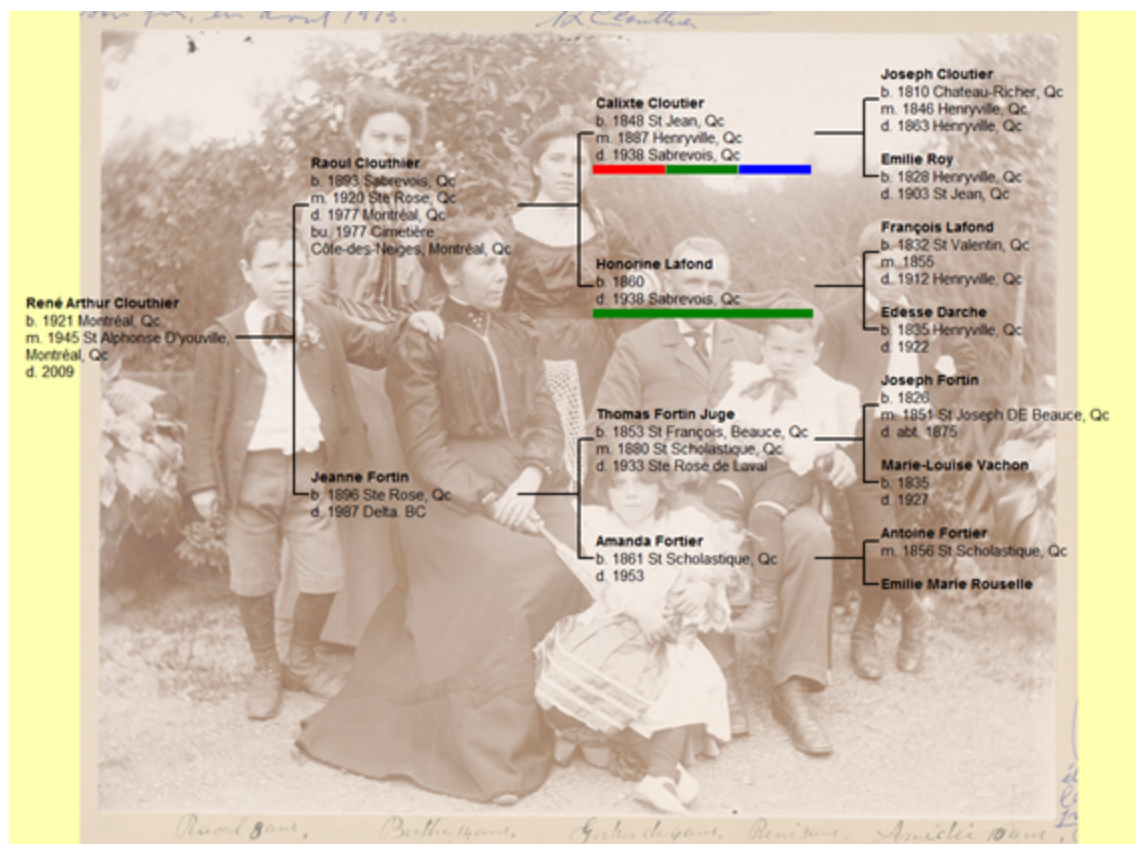
The photo is always sized to be one inch (2.54 cm) high. The width will vary proportionately so the photo will always retain its original aspect ratio (width to length). The photo will always print on the same line immediately following the individual's name. You can change the size and position of the photo through your word processing program after the report has been created.

Note: Microsoft Works and Lotus Ami Pro will not accept photos for the Ancestor and Descendant books.

Family Tree Maker: The photo must be set as "Profile Picture". If it is not set as Profile, the photo will not appear.

Background images

You can add an image or photo as background to your chart.



Options:

Background image

Check on if you want to include a Background Image. Check off to omit the Background Image while preserving the options.

Name of background image

Browse to image file. Can be JPG or PNG. If left blank, the background will be filled with the Background Color.

Image layout

Fit: The entire image is displayed. Parts of the chart will be filled with the Background Color. The aspect ratio is preserved.

Fill: The image is adjusted so as to fill the chart area. Some parts of the image will be cropped. The aspect ratio is preserved.

Stretch: The width and height of the image are adjusted to fit the chart. The image may be distorted.

Center: The image will be centered. If the image is smaller than the chart, it will be surrounded by the Background Color. If the image is larger, parts of the image will be dropped.

Tile: If the image is smaller than the chart, the image will be repeated multiple times across the width and height.

Background Color

Any part of the chart that is not covered by the Background Image, will be filled with the background color. If the name of the Background Image is omitted or blank, the entire background of the chart will be filled with this color.

Opacity

Make the photo lighter so as to not overwhelm the chart. Values less than 1 make the chart lighter and more transparent.

Rounded corners

Round corners use plain colors.

Simple corners

Shadow

Round

Raoul Clouthier

b. 1893 Sabrevois, Qc
m. 1920 Ste Rose, Qc
d. 1977 Montréal, Qc
bu. 1977 Cimetière
Côte-des-Neiges, Montréal, Qc

Raoul Clouthier

b. 1893 Sabrevois, Qc
m. 1920 Ste Rose, Qc
d. 1977 Montréal, Qc
bu. 1977 Cimetière
Côte-des-Neiges, Montréal, Qc

Raoul Clouthier

b. 1893 Sabrevois, Qc
m. 1920 Ste Rose, Qc
d. 1977 Montréal, Qc
bu. 1977 Cimetière
Côte-des-Neiges, Montréal, Qc

Notched

Round notched

Octagon

Raoul Clouthier

b. 1893 Sabrevois, Qc
m. 1920 Ste Rose, Qc
d. 1977 Montréal, Qc
bu. 1977 Cimetière
Côte-des-Neiges, Montréal, Qc

Raoul Clouthier

b. 1893 Sabrevois, Qc
m. 1920 Ste Rose, Qc
d. 1977 Montréal, Qc
bu. 1977 Cimetière
Côte-des-Neiges, Montréal, Qc

Raoul Clouthier

b. 1893 Sabrevois, Qc
m. 1920 Ste Rose, Qc
d. 1977 Montréal, Qc
bu. 1977 Cimetière
Côte-des-Neiges, Montréal, Qc

Corner size: the radius of the circle, or the amount of indent.

Ornamental Borders

Using the Ornamental Borders

Borders are a new option that can be added to the Ancestor, Descendant, Bowtie, Hourglass and Fan charts.

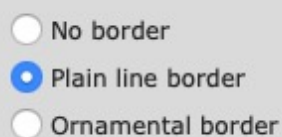
There are four types of borders:

- **Corner** (file names start with 'C'), that go into the four corners of the chart.
- **Garland** (G) that go in the top center, bottom center, left & right center of the chart.
- **Frame** (F) that surround every page of the chart.
- **Rope** (R) that are repeated around the whole chart.

The Corner, Garland and Rope patterns can be Shrunk/Expanded. These three patterns only appear on the “outer” pages of a tiled chart.

The Frame pattern will be stretched to fit the page size. It surrounds every page of a chart.

Click on the **Border** tab of the Options Dialog.

- 
- ☐ No border
 - ☒ Plain line border
 - ☐ Ornamental border

- **Plain line border** is a simple line around the chart.
- **Ornamental border** requires you to choose an image file that describes the border style.



Line width (pts) — 1 pts

- **Line Width** is the thickness of the line used to draw the border.



Shrink (< 100%)
Expand (> 100%) 100 %

- **Shrink/Expand** will change the size of the border artwork. Does not apply to “Frame” type borders.



Color

- The **Color** button will enable you to change the color of the border.



Border margins (in.) 0.250 in.

- The **Border Margins** are an independent margin setting that enable you to control the overlap between the chart and the borders. The Chart Margins are set in the "Layout" tab, and can be larger than the Border Margins. If you are using Corner-style borders in a Full-circle Fan chart, both the Chart and Border margins can be the same. If using a full-Frame border, or Garland borders, you will need to make the Chart Margins a bit larger than the Border Margins, in order to increase the distance between the chart boxes and the edge of the paper.

A rectangular button with rounded corners and a light gray background. The text "Change border" is centered in a dark gray, sans-serif font.

- Click the **Change Border** button to browse through the hundreds of borders available to Charting Companion. The border files are special PNG files, located in the "borders" directory in the program installation folder, ex: "C:\Program Files\Charting Companion 8\borders". Charting Companion cannot use general PNG files at the present time.



\\RAVEN\temp\Progeny Genealogy\Vector
artwork\R1264099-3.png

- The preview window shows a thumbnail of the border, drawn with the thickness and size percentage chosen. The name of the file appears at the bottom.

Ancestor Book

The Ancestor Book, also known as Ahnentafel, produces a narrative report (in a book format for publishing) of successive generations of ancestors for an individual. Many [options](#) are available, to customize the appearance and content of the Ancestor Book.

Ancestors of Hattie Eleanor Wilson

1. **Hattie Eleanor¹ Wilson^{1,2}**, born 12 May 1883 in Brigden, Lambton County, Ontario, Canada; LDS Baptized 19 Sep 1992 in ALBER; LDS Endowed 25 Sep 1992 in ALBER; LDS Sealed to Parents 7 Nov 1992 in ALBER; died 20 Jun 1961 in High River, , Alberta, Canada; buried 23 Jun 1961 in Nanton, , Alberta, Canada, daughter of 2. Charles Edgar Wilson and 3. Lavina Butler. She married^{3,4} on 8 Jun 1910 in Middlesex, , Ontario, Canada **Joseph Lawrence Wannop**, born⁵ 14 Dec 1878 in Langtown, Cumberland, England, United Kingdom; LDS Baptized 19 Sep 1992 in ALBER; LDS Endowed 30 Sep 1992 in ALBER; LDS Sealed to Parents 7 Nov 1992 in ALBER; died 29 Sep 1975 in Haney, , British Columbia, Canada; buried 2 Oct 1975 in Nanton, Alberta, Canada, son of James Lawrence Wannop and Mary Graham; LDS Sealed to Spouse 7 Nov 1992 in ALBER.

Notes for Hattie Eleanor Wilson

Twin to Susan Lavina

(Medical): Had a severe stroke in 1959 that put her in a wheelchair. For some time was in hospital and nursing home in High River.

MARRIAGE:

"About that time [1907], Hattie went to visit her oldest brother, Norval Butler Wilson, at his homestead east of Parkland, Alberta. Nearby, on the bank of the Little Bow River, lived the large homesteading Wannop family from Brandon, Manitoba, in their big house. The young people of the area often met there for a group called 'Christian Endeavour.' Besides Christian teaching, they played games such as Charades and participated in debates. Some romances began through these meetings, including Hattie and one of the Wannop sons, Joseph Lawrence, who was homesteading NE1/4 18-15-25-W4 near his parents' home. Hattie returned home to Ontario, but was soon followed by Joseph to claim his bride.

On June 10, 1910, in Middlesex County, Ontario, Hattie Eleanor Wilson married Joseph Lawrence Wannop... Hattie and Joe spent their honeymoon in Niagara Falls before returning to Alberta." -Wilson Family Pioneers p. 41

Notes for Joseph Lawrence Wannop

Grew up near Brandon, Manitoba, and near Parkland, Alberta.

Children of Hattie Eleanor Wilson and Joseph Lawrence Wannop were as follows:

- 1 **Lawrence Edgar Wannop**, born 13 Jan 1912 in Calgary, , Alberta, Canada; LDS Baptized 19 Apr 1966 in ALBER; LDS Endowed 16 Jul 1966 in ALBER; died⁶ 20 Nov 1964 in Lethbridge, , Alberta, Canada; buried 24 Nov 1964 in Nanton, , Alberta, Canada. He married (1) on 23 May 1942 in Calgary, , Alberta, Canada **Emma Elizabeth Clarke**, born 7 Jan 1912 in Vancouver, , British Columbia, Canada; died 19 Jun 1949 in Calgary, , Alberta, Canada, daughter of Michael Clarke and Mary Theresa Reed; LDS Sealed to Spouse 16 Jul 1966 in ALBER; (2) on 12 Oct 1949 in Raymond, , Alberta, Canada **Hazel McBride**, born 29 Apr 1922 in Magrath, , Alberta, Canada; LDS Baptized 3 May 1930 in , , Alberta, Canada; LDS Endowed 23 Oct 1946 in ALBER, daughter of Ira McBride and Fannie Woolly; LDS Sealed to Spouse 16 Jul 1966 in ALBER. Other events: Occupation aft 1942 in Tour Bus Operator and Taxi Driver. Occupation⁷ aft 1949, School bus driver, Gas Station & Tire Shop Owner (Larry's Tire Shop). Occupation⁸ aft 1949, Upholsterer. Education⁹ in

¹Wannop Family Records.

²Jane (Wilson) Losee, Wilson Family Pioneers. (Leatherdale Publishing Ltd., 2002 Author address: Jane Losee, Box 419 Nanton Alberta, T0L 1R0. (403) 646-2245).

³Minnie (Peach) Greeno, Peach Family Records. (Unpublished information).

⁴Jane (Wilson) Losee, Wilson Family Pioneers. (Leatherdale Publishing Ltd., 2002 Author address: Jane Losee, Box 419 Nanton Alberta, T0L 1R0. (403) 646-2245), p. 41.

⁵Minnie (Peach) Greeno, Peach Family Records. (Unpublished information).

⁶Jane (Wilson) Losee, Wilson Family Pioneers. (Leatherdale Publishing Ltd., 2002 Author address: Jane Losee, Box 419 Nanton Alberta, T0L 1R0. (403) 646-2245), p. 45.

⁷Ibid, p. 44.

⁸Ibid, p. 44.

You can also print a sample page with an [explanation](#) of the numbers and symbols used in the report. [Photos](#) can be included in this report, for all supported [word processors](#) except for Microsoft Works and Lotus Ami Pro.

Note: Photos may not be available for all types of image files.

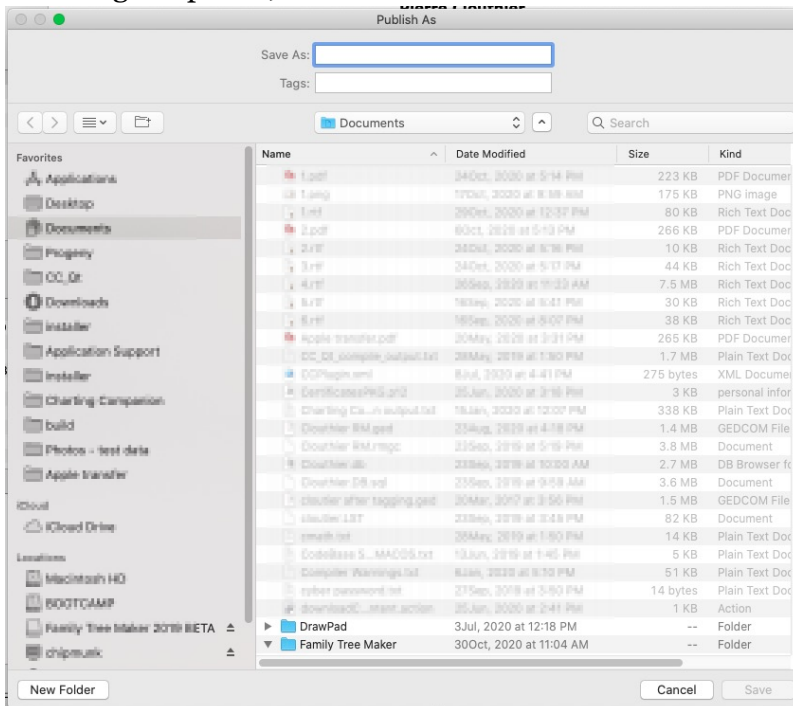
The [options](#) screen is similar to the other Charting Companion reports, but notice that this report does not go directly to your printer! The program saves the Ancestor Book as a word processor file so you can edit or save it for future work (generate an index, change fonts, add graphics, and so on). To print the report, simply use the print menu of your word processor.

To create the Ancestor Book:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Ancestor Book**.
3. Click **Print** at the bottom of the options screen.

The program asks you to supply a file name for the Ancestor Report. You can use whatever name you wish as long as you do not change the file extension (the last three characters following the period).



4. Provide the path and file name (the appropriate file type/extension will be displayed according to your selected word processor). Do not overwrite or change the file extension.
5. Click **OK**.

The Ancestor Report will be formatted for your selected word processor, which automatically starts so you can view, edit, and print. If your word processor does not start automatically, check to see that your [word processor options](#) are set up correctly.

To create an index (automatically done for Microsoft WordPad and Works):

1. Go to the very end of the Ancestor document (the end of the last page).

2. Create the index:

- In Microsoft Word 2003 and older, select **Insert** on the menu bar; then select **Reference, Index and Tables**, and click **OK**.
- In Microsoft Word 2007 and later, select **References** on the menu bar; then select **Insert Index**, and click **OK**.
- In WordPerfect 5.1 press <ALT> <F5>, select option **6**, and then select option **5**.
- In WordPerfect for Windows select **Tools** on the menu bar, select **Generate**, and click **OK**.

Note: Microsoft Works and WordPad do not have the ability to create indexes. To compensate for this, the program automatically creates an index based on paragraph numbers. This index is created when the Ancestor Book is prepared.

To print the Ancestor Book:

- Use the print menu of your word processor (in most programs, select **File** on the menu bar and click **Print**).

Your Ancestor Book should now print.

Note: The word processor may be set to a different printer than Charting Companion. Double check the selected printer in your word processor before printing.

To return to Charting Companion:

- Exit your word processor. You will automatically return to Charting Companion.

Load/Save options

Click on "Save Options" to save all the options of the Ancestor Book, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Ancestor Book Explanation

The following example shows the most common numbering conventions that can appear in the Ancestor book. Your Ancestor book may print some or all of these numbers and symbols, depending on the report options you select.

2. **John² Smith** [17], b. 17 Feb 1849 in New York, NY, d. 3 Jan 1930 [], son of **4.** Herman Smith and **5.** Margaret Sampson. He married 30 Jun 1870 **3. Mary Jones**, daughter of **6.** Albert Wiggins and **7.** Samantha Wiggins.

Their children were:

i **Bobby¹** [43]
1 ii **Susan¹** [44], b. 25 Dec 1871.

[] Smith Family Bible, p. 2

[] U.S. Social Security Death Index

Explanation

John² John Smith is an ancestor of the second generation.

Smith [] The number 6 is a footnote referring to an information source.

[17] This is a record identification number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open).

died 3 Jan 1930 [] The number 7 is a footnote referring to an information source.

4. Herman Smith The number 4 indicates that paragraph where you will find ancestor Herman Smith.

1 ii **Susan¹** [44] The number 1 indicates the paragraph where you will find Susan. The ii shows that Susan is the second child in the family, and the small 1 after her name tells you that she is of the first generation. Susan's reference number is 44

Ancestor Book Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Tip: You can use your word processor to change the fonts for the Ancestor Book.

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as available. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Events. See [Event Type Selection](#) for options. Marriages always print in the Ancestor book. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor books (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the "[Show LDS Events](#)" option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed preceding the place name. (i.e. Coal Miner, Nova Scotia).

- Notes to print. Select **Notes to Print, All, Non-Private, Marked (!) or None**. See also [Treatment of Notes](#), [Confidential Notes & Events](#).
- Sources to print. Select **Full** sources, **None**, or **Title** only.
- Print sources as **Footnotes** or **Endnotes**. Footnotes are printed at the bottom of each page. Endnotes are printed as a group at the end of the document.
- The date format follows the Windows [Short Date](#).

Note 1: WordPad does not support printing footnotes and endnotes, therefore these sources are printed after the notes in the body of the report.

Note 2: Endnotes will print as footnotes in WordPerfect 9.0.

- Cousin Smart. Select this to ensure that duplicate ancestors are not repeated for distant cousins who marry.

- Include photos. Select this to print a [photo](#) for each individual who has a photo.
If you link to the photo, the resulting RTF word processing file will be smaller, but you must link to a re-sized copy of the photo file to reduce its height, otherwise the photos will appear at their full height in the RTF file.
If you embed the photo, the RTF word processing file will be larger, but Charting Companion will automatically reduce the height of the photo.
Note: Microsoft Works and Lotus Ami Pro will not accept photos for the Ancestor and Descendant books.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.
- Include (print) sample page with explanations. Check this box to print an [example page](#) with explanations of the numbers and symbols as the first page of your Ancestor Book. You can use your word processor to move or delete this sample page.

Layout

- Word processor. Select your [word processor](#) from the list of choices. The location of the word processor will be displayed in the **Location** box if it is found. If the program cannot find your word processor, click the **Browse** button and then select the program and path.
- Numbering scheme. Choose **Ancestor** or **Sequential** numbering to be assigned to the direct-line ancestors (ancestor numbers).
- Child numbers. Print a sequential Roman numeral for each child in a family.
- Bold numbers. Print the ancestor number in bold font.
- Indent notes. Indent the first line of each note.
- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed report.
- Tabs:

To ancestor #. This specifies the distance from the left margin to the ancestor's sequence number.

To child #. This specifies the distance from the left margin to the child's sequence number (Roman numeral).

To text. This specifies the distance from the left margin to the printed text.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

Names

- Select the font weight (bold or normal) with all upper- or all lowercase letters for each type of individual included in your report.

1. Click the arrow to the right of the appropriate name box.
2. Select a font weight (or click **Omit** if you don't want the item to print).
3. Click **OK**.

Note: A married woman's maiden name is always printed in parentheses (if not omitted).

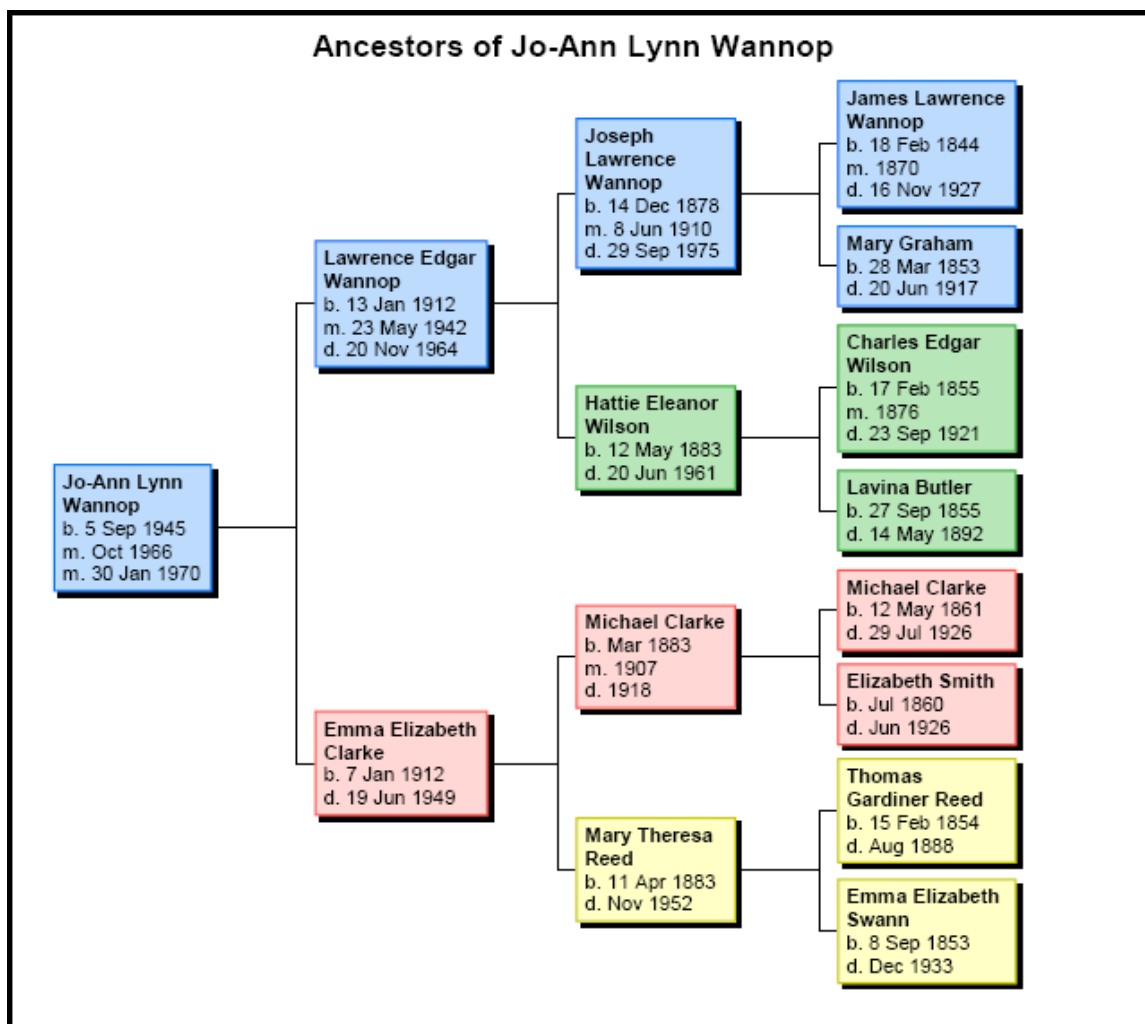
Special Options

There are special options to reduce the size of the book and the index. [Click here](#) for details.

Ancestor Chart

The Ancestor Chart is a box chart that displays an individual and his or her ancestors from left to right across the page. [Photos](#) and [colors](#) can be included in this chart.

Note: Photos may not be available for all types of image files.



Although the default options will satisfy most users, the [options](#) screen allows you to further customize the contents and layout of your chart before printing. For example, you can customize events, date formats, and print size and include as many generations as you wish. Many printed pages can be tiled together to create large charts.

To preview the Ancestor Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Ancestor Chart**.
3. Click **Preview** at the bottom of the options screen. A preview of your chart will be displayed in the main window.



4. To print, click on the Printer button on the Tool Bar, then click the Print button.


To print the Ancestor Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Ancestor Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Ancestor Chart will now print.

To publish the Ancestor Chart



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Ancestor Chart**.
3. Click **Preview**, the Printer icon , then **Publish** at the bottom of the options screen.
Note: you must Preview the chart before Publishing, otherwise the JPG and HTML options will not be available.
4. In the Publish As dialog box, assign a name to your chart.
5. Select **OK**.


This will save the chart for further use in:

- [PDF format](#)
- Image format (JPG, PNG, GIF, BMP)
- [SVG or HTML](#)
- [RTE](#)
- [DXF](#)
- XLS (Excel Spreadsheet)

The default PDF or image viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page



Click on the Fit-to-page icon,  to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

You can remove some branches, and find common ancestors with [Tree Pruning](#).

Click to learn how to [zoom & scroll](#) the Ancestor chart.

Page Range

page 1	3	5
2	4	6

Charting Companion prints by row within column.

To edit the Ancestor Chart

Click on a rectangle and hold down the left mouse button. You can drag the rectangle around and change the chart to suit your preferences. The rectangle and all its ancestors will move together. Hold down the Shift key to move a single rectangle.

Hover the mouse over a vertical line. When the cursor shape changes to a double arrow, you can move the line left or right.

Load/Save options

Click on "Save Options" to save all the options of the Ancestor Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Ancestor Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as are in the file. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program. The Ahnentafel numbering system (aka Sosa, Sosa–Stradonitz, Kekulé or Eytzinger) assigns the number 2N to the father of person 'N', and 2N+1 to the mother.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**. The date format follows the [Short Date](#).
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor books (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

You can substitute [special symbols](#) for some events.

- Print place-names. Select this to print the name of the place where an event occurred.
- Include siblings. Select this to include the brothers and sisters of each individual in your chart. If using colors in the chart, siblings will be assigned a lighter shade within the chosen color scheme. When the chosen [line width](#) is 2 pt or over sibling lines will reduce to 1/2 pt.
- Cousin Smart. Select this to ensure that duplicate ancestors are not repeated for distant cousins who marry. The common ancestor will be printed in a box with horizontal gray line fill (hatch pattern).
- Include photos. Select this to print a [photo](#) for each individual who has a photo.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.

Layout

- **Chart scale.** Enter a value greater than 100 to increase the printed size of the chart. A value less than 100 will shrink the size of the chart. All boxes, lines, and text will be scaled accordingly. The advantage of re-sizing the chart by varying the Chart Scale, is that the boxes will be prevented from being split over two pages.
- **Margins.** Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed chart.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- **Chart Orientation.** "Left-to-right" is the classic horizontal layout. "Bottom-up" is the vertical orientation. Left-to-right is more compact and uses less paper.
- **Page.** Set page width and height to create a larger chart. This is useful when saving to take to the printers or when printing directly to a plotter. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).
- **Paper orientation.** Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options. Note: This is the orientation of the paper, not the orientation of the chart. In other words, your chart will still print in successive generations from left to right.
- **Full page border.** Select this to print a full border around the edge of the page; otherwise the border will print only around the chart.
- **Print page numbers.** Select this to print a page number in the lower right corner of each page. This is recommended for easier assembly of tiled images.

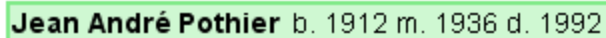
Box

- **Box Style.** Select from three box types: **simple box**, **drop shadow**, or **no box**.
- **Line width.** This option sets the line width of the box outline and the connecting lines between boxes. Choose a smaller size for charts to be put in binders or books, and a heavier point for wall charts or emphasis.
- **Box Width.** Set minimum and maximum widths for the boxes. Note: The program may range within the box widths you specify to ensure that no box is split between two pages when it is printed.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- All boxes same width. Select this to make all the boxes in the same generation the same width; otherwise individual boxes will be separately sized to fit the text in each box.
- New line after name. Select this to start a new line for each event printed in the box; otherwise the program will attempt to print the events on the same line, even with the name if it will fit. Turning this option off can reduce the length of your chart.

New line =
OFF



New line =
ON



- FTM color bar height: height of rectangle where colors assigned in Family Tree Maker are displayed.
- Limit photo height. This option will limit the height of your photo so that the size of the image will not increase past the specified size when the box width is increased. The photo will be centered in the box.

Color

See [Colors - how to pick](#).

Title

The Subject's name will be substituted for the "%n" token. To restore the Title to the default, change it to "Ancestors of %n".

Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

*[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

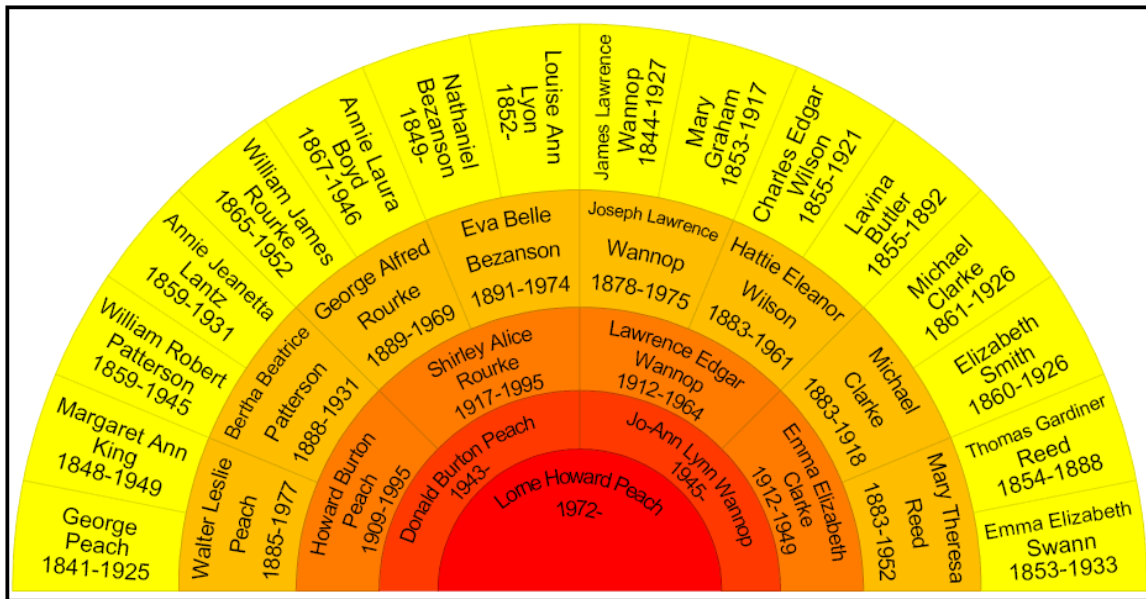
*[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Border

See [Ornamental Borders](#).

Ancestor Fan Chart

The Ancestor Fan Chart is a fan-style representation of the current individual and his or her ancestors. This chart prints the individual's name, birth year, and death year. The program will print the christening year if the birth year is not known, and the burial year if the death year is not known. The ancestor fan chart can be [colored](#) according to gender, generation or lineage.





You can choose a traditional semicircle Ancestor Fan Chart, a quarter circle, or a full circle. The Ancestor Fan Chart will print on ink jet and laser printers but is not guaranteed to print on dot matrix printers.

The size of the Ancestor Fan Chart is determined by the radius. For more information about printing an Ancestor Fan Chart, refer to [Ancestor Fan Chart Options](#).

Please note: The maximum number of generations you can print is 16, because the font becomes too small beyond that. The program will alert you if you try to print more generations than can fit on the paper size you have chosen. If this occurs, choose fewer generations, or a larger radius.

To preview the Ancestor Fan Chart:

1. Click the **Print Reports and Charts** button  on the toolbar.
2. Double-click on **Ancestor Fan Chart**.
3. Click **Preview** at the bottom of the options screen. A preview of your chart will be displayed in the main window.

4. To print, click on the Printer button  on the Tool Bar, then click the Print button.

To print the Ancestor Fan Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Ancestor Fan Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Ancestor Fan Chart will now print.

To print to a file:

- Select the Print to File button if you want to print the ancestor fan chart to a disk file. Note: This disk file will contain the printer control codes, not an image of the ancestor fan chart. You can then copy this disk file to your printer using the [DOS Copy](#) command. You would only do this if your printer/plotter can handle HP-GL codes, but your driver does not. See [Printer Drivers](#) for more information.

To publish the Ancestor Fan Chart



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Ancestor Fan Chart**.
3. Click **Publish** at the bottom of the options screen. Note: you must Preview the chart before Publishing, otherwise the JPG option will not be available.
4. In the Publish As dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart in [PDF format](#), image format (JPG, PNG, GIF, BMP) or [SVG or HTML](#), [DXF](#) for further use. The default PDF viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page



Click on the Fit-to-page icon, to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

Click to learn how to [zoom & scroll](#) the Ancestor Fan chart.

Page Range

page 1	3	5
2	4	6

Charting Companion prints by row within column.

Load/Save options

Click on "Save Options" to save all the options of the Ancestor Fan Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Ancestor Fan Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- Generations. Choose from one to sixteen generations. Eight or nine generations is the most that can be practically printed on an 8.5" x 11" page.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.

Layout

- Fan Style. Choose a half circle (180°), full circle (360°), or quarter circle (90°).
- Output To. Typically you would choose Windows Printer and use only the HP-GL option if you encounter printing problems or for special printers such as plotters. Select from:

Windows Printer. Choose this option to print to any laser, ink jet printer, or plotter for which you have a Windows driver. If you have a dot matrix printer, you should also choose this option, although printing is not guaranteed. This option allows you to choose the paper size in the Print Setup dialog box. The chart will print whatever font you have chosen.

Laser (HP-GL). Choose this option to print to a printer that supports the Hewlett Packard Graphics Language (HP-GL). This option prints faster than the Windows printer option. You must also specify the width and height of your chart (see the Chart Size option below). The chart will print using the default font (Courier).

Plotter (HP-GL). Choose this option to print to a plotter that supports HP-GL. This will be faster than using the Windows printer option but will print only the default font (Courier).

- Page Size. Select the size of the paper used by your printer. If the chart is larger than the page size, it will be tiled over multiple pages. If you are taking your chart to a print shop for printing on large paper, specify the size of here. Ex: 24" x 72", Portrait. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).
- Chart size, Radius. Specify the radius of the Fan chart. The chart dimensions will be:

Style	Height	Width
Half circle	Radius	2 x Radius
Full circle	2 x Radius	2 x Radius

Quarter circle	Radius	Radius
----------------	--------	--------

Note that to fit on one page, the diameter (Full- and Half-circle) or radius (Quarter-circle) of the Fan chart must be equal to the page size, minus the margins.

- Paper Orientation. Choose Landscape or Portrait layout; the default is landscape.
- X Offset. Adjust the horizontal positioning of the chart as related to the left page margin; the default is 0.
- Y Offset. Adjust the vertical positioning of the chart as related to the bottom page margin; the default is 0.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

The Ancestor Fan Chart will be tiled like the Ancestor and Descendant charts. You can specify the radius and the paper size, and the Ancestor Fan Chart will spread to the required number of pages.

Note: TrueType fonts are recommended for the Ancestor Fan Chart ensuring that the rotated text is printed properly along the radius.

If you choose an HP-GL printing option and still cannot print, select the Print to File button. Provide a file name with the .hgl extension, and click OK. The program will now save your chart to a print file. You can then go to the DOS prompt and [copy](#) the print file to your printer.

TIP: On older laser printers, if you select six or more generations, activate the page protect feature on your printer (refer to your printer's instruction manual for instructions) to ensure that your entire chart will print. Page protect is not required for plotters.

Color

See [Colors - how to pick](#)

Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

[1] Because this report is in a fixed format the selected font type will be applied, but the font size will not.

[2] TrueType fonts are recommended for the Ancestor Fan Chart ensuring that the rotated text is printed properly along the radius and the circumference. Also, when using the Preview and Publish features, it is recommended that TrueType fonts are used. Other font types, such as PostScript, may not be supported.

*[3] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Border

See [Ornamental Borders](#)

Printer Drivers

Using HP-GL to print the Fan Chart

Even if your printer or plotter is physically capable of understanding and printing HP-GL, this compatibility may not be built into the printer driver. In this case the HP-GL codes will not be passed to the printer, and the Fan Chart will not print. There is a simple solution to this problem: When generating the Fan Chart, choose the **Print to File** button on the Fan Chart options screen (this is different from "print to file" on the printer setup dialog). Once you have provided a file name, click **OK** to write the Fan Chart to a disk file instead of going directly to the printer. Then print the file from the command line using the [Copy](#) command. Your printer should now print the Fan Chart.

Where to get up-to-date printer drivers

Contact your printer supplier for the latest drivers. If you have a full Internet connection, Hewlett Packard drivers can be downloaded from HP's site at: www.hp.com

Other vendors also make drivers available from their web sites.

Using Command Line Copy to Print Fan

Using the Command Line Copy Command to Print Your Fan Chart File

1. Open a Command Line window (click on Start, type 'cmd' in the "Search Programs and Files window).
2. Go to the folder where you saved the file.
3. Type **COPY /B filename.HGL LPT1:**
4. Press **Enter**.

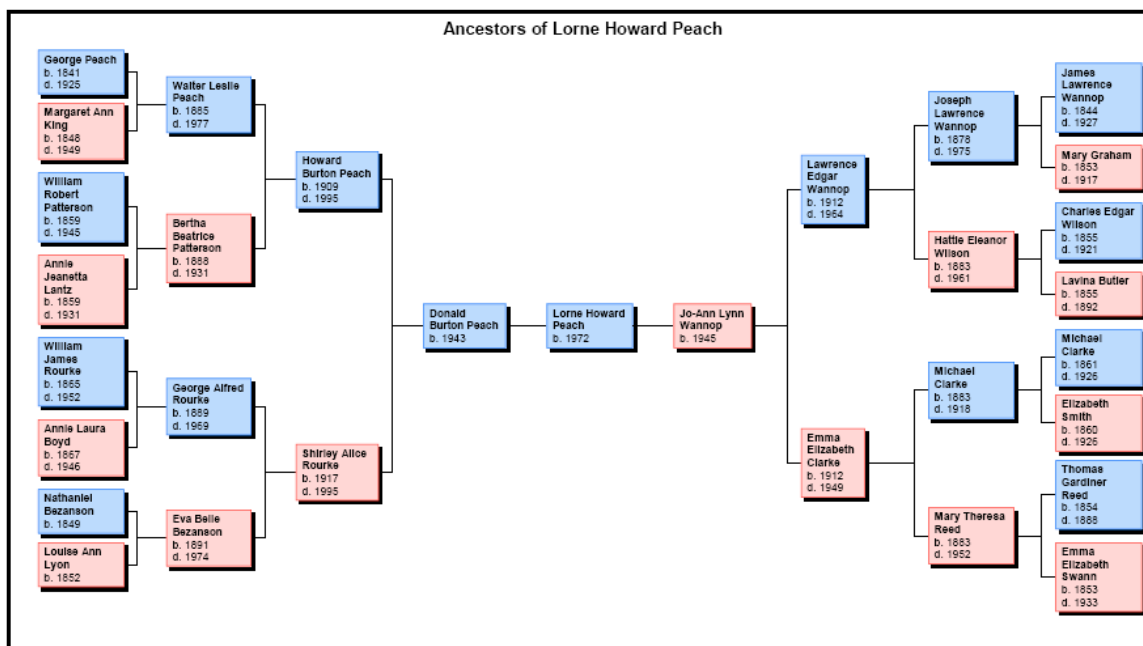
Your Fan Chart should now print.

Bowtie Chart

The Bowtie Chart is a unique alternative to the standard Ancestor Chart. With an individual in the center, paternal ancestors are printed to the left and maternal ancestors are printed to the right.


[Photos](#) and [colors](#) can be included in this chart.


Note: Photos may not be available for all types of image files.



Although the default options will satisfy most users, the [options](#) screen allows you to further customize the contents and layout of your chart before printing. For example, you can customize events, date formats, and print size and include as many generations as you wish. Many printed pages can be tiled together to create large charts.

To preview the Bowtie Chart:

1. Click the **Print Reports and Charts** button  on the toolbar.
2. Double-click on **Bowtie Chart**.
3. Click **Preview** at the bottom of the options screen. A preview of your chart will be displayed in the main window.



4. To print, click on the Printer button  on the Tool Bar, then click the Print button.

To print the Bowtie Chart:

1. Click the **Print Reports and Charts** button  on the toolbar.

2. Double-click on **Bowtie Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Bowtie Chart will now print.

To publish the Bowtie Chart


1. Click the **Print Reports and Charts** button  on the toolbar.
2. Double-click on **Bowtie Chart**.
3. Click **Preview**, the Printer icon , then **Publish** at the bottom of the options screen.
Note: you must Preview the chart before Publishing, otherwise the JPG and HTML options will not be available.
4. In the Publish As dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart for further use in:

- [PDF format](#)
- Image format (JPG, PNG, GIF, BMP)
- [SVG or HTML](#)
- [RTF](#)
- [DXF](#)

The default PDF or image viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page

Click on the Fit-to-page icon,  to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

Click to learn how to [zoom & scroll](#) the Bowtie chart.

Page Range

page 1	3	5
2	4	6

Charting Companion prints by row within column.

To edit the Bowtie Chart

Click on a rectangle and hold down the left mouse button. You can drag the rectangle around and change the chart to suit your preferences. The rectangle and all its ancestors will move together. Hold down the Shift key to move a single rectangle.

Hover the mouse over a vertical line. When the cursor shape changes to a double arrow, you can move the line left or right.

Load/Save options

Click on "Save Options" to save all the options of the Bowtie Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Bowtie Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as are in the file. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**. The date format follows the Windows [Short Date](#).
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor books (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

You can substitute [special symbols](#) for some events.

- Print place-names. Select this to print the name of the place where an event occurred.
- Include siblings. Select this to include the brothers and sisters of each individual in your chart. If using colors in the chart, siblings will be assigned a lighter shade within the chosen color scheme. When the chosen [line width](#) is 2 pt or over sibling lines will reduce to 1/2 pt.
- Include photos. Select this to print a [photo](#) for each individual who has a photo.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.

Layout

- Chart scale. Enter a value greater than 100 to increase the printed size of the chart. A value less than 100 will shrink the size of the chart. All boxes, lines, and text will be scaled accordingly.
- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed chart.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- **Page.** Set page width and height to create a larger chart. This is useful when saving to take to the printers or when printing directly to a plotter. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).
- **Paper orientation.** Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options. Note: This is the orientation of the paper, not the orientation of the chart. In other words, your chart will still print in successive generations from left to right.
- **Full page border.** Select this to print a full border around the edge of the page; otherwise the border will print only around the chart.
- **Print page numbers.** Select this to print a page number in the lower right corner of each page. This is recommended for easier assembly of tiled images.

Box

- **Box Style.** Select from three box types: **simple box**, **drop shadow**, or **no box**.
- **Line width.** This option sets the line width of the box outline and the connecting lines between boxes. Choose a smaller size for charts to be put in binders or books, and a heavier point for wall charts or emphasis.
- **Box Width.** Set minimum and maximum widths for the boxes. Note: The program may range within the box widths you specify to ensure that no box is split between two pages when it is printed.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- **All boxes same width.** Select this to make all the boxes in the same generation the same width; otherwise individual boxes will be separately sized to fit the text in each box.
- **New line after name.** Select this to start a new line for each event printed in the box; otherwise the program will attempt to print the events on the same line, even with the name if it will fit. Turning this option off can reduce the length of your chart.

New line =
OFF

Jean André Pothier b. 1912 m. 1936 d. 1992

New line =
ON

Jean André Pothier
b. 1912
m. 1936
d. 1992

- FTM color bar height: height of rectangle where colors assigned in Family Tree Maker are displayed.
- Limit photo height. This option will limit the height of your photo so that the size of the image will not increase past the specified size when the box width is increased. The photo will be centered in the box.

Color

See [Colors - how to pick](#)

Title

The Subject's name will be substituted for the "%n" token. To restore the Title to the default, change it to "Ancestors of %n".

Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

*[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Border

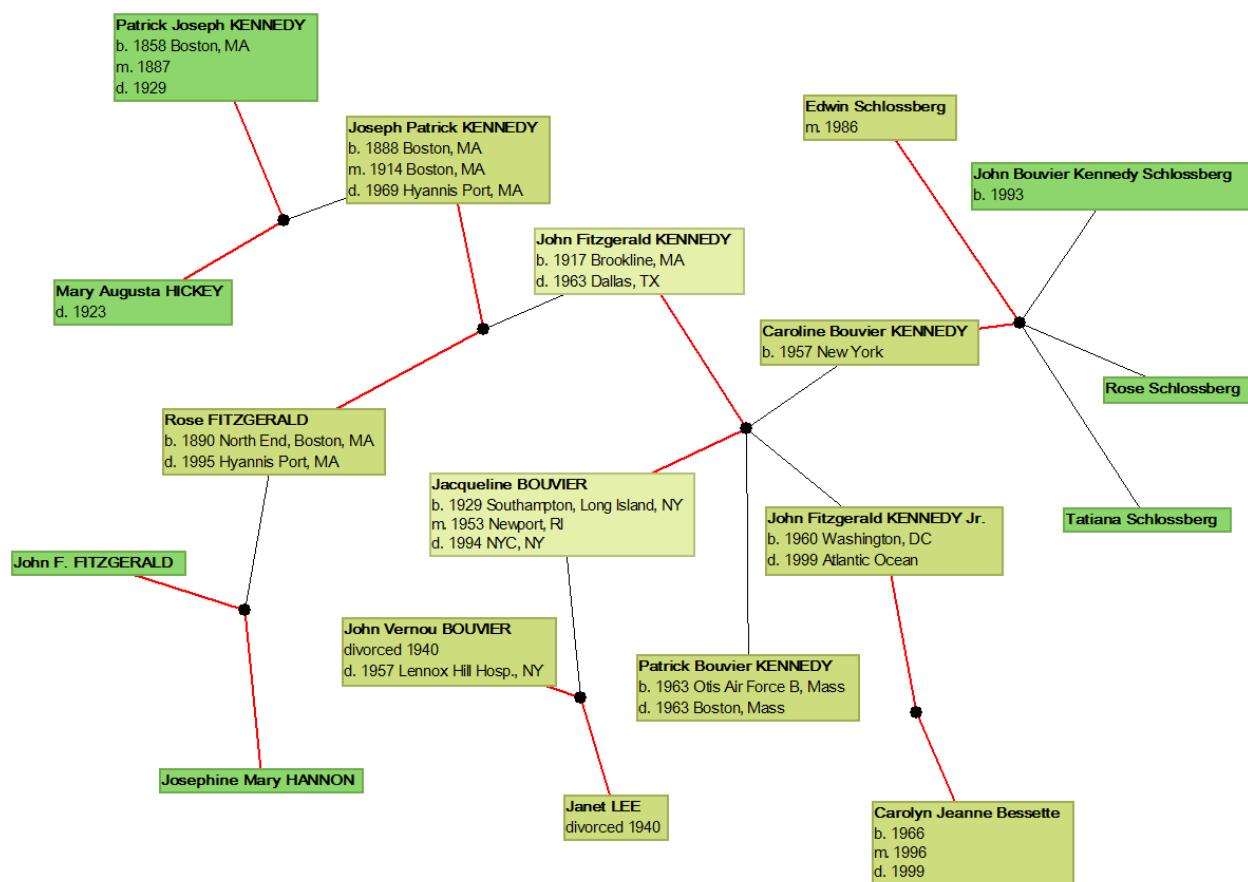
See [Ornamental Borders](#)

Dandelion Chart

The Dandelion Chart is a Force-directed graph¹.

In a Dandelion Chart, the nodes (people) are scattered to minimize cross-over of lines. The Dandelion can show Ancestors as well as Descendants. The advantage of the Dandelion is that it can show the parents and siblings of spouses, who are not in the bloodline.

Each black circle corresponds to a family. The red lines link the parents to the family, the black lines link children. In the example below, John F. Kennedy is a child in the family where Joseph P. Kennedy and Rose Fitzgerald are parents. JFK is a parent in the family that links to Jacqueline Bouvier (the other parent) and their children Caroline, John F. Jr. and Patrick.




You can click on the boxes, or the family nodes, and drag the mouse to move them around.

Press the ESC key to interrupt the chart calculations if it's taking too long.

To Resize the chart to fit to the page



Click on the Fit-to-page icon,  to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

[1] From [Wikipedia](#): *Force-directed graph drawing algorithms are a class of algorithms for drawing graphs in an aesthetically pleasing way. Their purpose is to position the nodes of a graph in two-dimensional or three-dimensional space so that all the edges are of more or less equal length and there are as few crossing edges as possible, by assigning forces among the set of edges and the set of nodes, based on their relative positions, and then using these forces either to simulate the motion of the edges and nodes or to minimize their energy.*

Dandelion Chart Options

For all other options, see [Hourglass Chart Options](#).

Content Tab

The Hyperfractal option makes Charting Companion go one extra level in the propagation of family trees: it will include the descendants of siblings. This makes the tree more comprehensive, but could also increase the density, crowding and overlap. Use Hyperfractal for small number of generations (2 or 3).

Layout tab

Note that the "Page Size" is the size of the paper you print on. "Chart Size" is how big you want the chart to be.

If Chart Size is bigger than Page Size, the Dandelion chart will be tiled over multiple pages. If Chart Size is equal to Page Size (less margins and header), the Dandelion Chart will fit on one page.

Ex: If your paper is 8½" x 11", and your margins 0.5", in order to fit on one page your chart size should be:

$$8\frac{1}{2}" - 2 \times 0.5" \text{ margins} = 7\frac{1}{2}" \text{ Width}$$

$$11" - 2 \times 0.5" \text{ margins} - 0.5" \text{ Title} = 9\frac{1}{2}" \text{ Height}$$

The screenshot shows the 'Dandelion Chart Options' dialog box with the 'Layout' tab selected. The 'Chart scale' is set to 100%. The 'Margins (in.)' section has Top, Bottom, Left, and Right all set to 0.750 in. The 'Paper Orientation' section has 'Landscape' selected. The 'Page (in.)' section has Width 8.5 and Height 11. The 'Chart (in.)' section has Width 6.25 and Height 9.5. The 'Full page border' checkbox is unchecked, and the 'Print page numbers' checkbox is checked.

Dandelion tab

There are five parameters that determine how long the Dandelion Chart will take to stabilize, and how uniformly the boxes will be distributed. You can experiment to see what combinations best suit your purpose.

1. Stiffness refers to the imaginary "springs" that link joined boxes. Low stiffness slows down stabilization; high stiffness speeds up.
2. Repulsion is the imaginary force that repels boxes that are not connected. Lower repulsion shortens stabilization.
3. Damping is the rate at which the forces diminish or are absorbed over time. High damping speeds up stabilization; low damping (0.1) slows down. However high damping (0.9) might never stabilize.
4. Threshold is the system stability, the lowest value attained by the simulation process. Once the Threshold is achieved, the rearranging stops. Higher threshold speeds up damping, but may result in a more tangled Dandelion.
5. Time Interval is the incremental time slice that the simulation advances through each iteration. A bigger time interval speeds up damping, however the tree may not stabilize.
6. Loop Count is the number of times the system is iterated before stopping. You can set it to a lower value to force the stabilization to quit early.

The top progress bar indicates how close it is getting to stabilization. The bottom progress bar is the loop count. Whichever reaches completion first will end the iterations.

Updating the chart

Certain option changes will cause the chart to be re-generated:

- Number of generations
- Cousin Smart
- Female/Mitochondrial/Y-chromosome
- Siblings

Other changes will result in a rapid refresh:

- Date, Place, Events
- Page or Chart size; Margins; Orientation; Box size
- Colors, Font, Title
- Photos

Descendant Book

The Descendant Book, also known as Register, produces, in book format, successive generations of descendant families for a given individual (progenitor). Although the default options will satisfy most users, many [options](#) are available to customize the appearance and content of the Descendant Book, allowing you to match the NGS Quarterly (default), Descendant, or Henry systems.

Descendants of John Wilson and Jane Craig

1. **John¹ Wilson**, born¹ abt 1795 in Rich Hill, County Armagh, Ireland, UK; died² 1847 in Grosse Isle, , Québec, Canada; buried 1847 in Grosse Isle, , Québec, Canada, son of (---) Wilson. He married³ in 1816 **Jane Craig**, died 1847 in Grosse Isle, , Québec, Canada, buried 1847 in Grosse Isle, , Québec, Canada, daughter of (---) Craig and Rachel Gibson.

Notes for John Wilson

Typhoid Fever: An acute infectious fever caused by the typhoid bacillus and characterized by severe intestinal disturbances, an eruption of rose-red spots on the chest and abdomen, and physical prostration. -Funk & Wagnall's Standard Desk Dictionary, 1979.

MEDICAL:

Cause of Death: Typhoid Fever

Notes for Jane Craig

MEDICAL:

Cause of Death: Typhoid Fever

Children of John Wilson and Jane Craig were as follows:

- | | | |
|-----|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| + 2 | i | Sarah¹ Wilson . She married William McCausland . |
| 3 | ii | Jane¹ Wilson , died ⁴ 1869. |
| 4 | iii | Maria¹ Wilson , died ⁵ <u>bef 1847</u> in , , Ireland. |
| 5 | iv | Martha¹ Wilson , died ⁶ <u>abt 1847</u> . |
| 6 | v | Margaret¹ Wilson , died <u>abt 1847</u> . |
| 7 | vi | Rachel¹ Wilson , born 1818; died 1866. |
| + 8 | vii | John M.¹ Wilson , born 6 May 1826 in , County <u>Armagh</u> , Ireland, UK; died 7 Mar 1884 in Near <u>Brigden</u> , Lambton County, Ontario, Canada; buried 1884 in Bradshaw <u>Cemetery</u> , near <u>Brigden</u> , Lambton County, Ontario, Canada. He married Rebecca Taylor . |
| 9 | viii | Samuel¹ Wilson , born 1830; died 1904. |
| 10 | ix | Robert¹ Wilson , born 1837; died 1918. |

¹Jane (Wilson) Loree, Wilson Family Pioneers. (Leatherdale Publishing Ltd., 2002 Author address: Jane Loree, Box 419 Nanton Alberta, T0L 1R0. (403) 646-2245). p.2.

²Wilson Family Records.

³Jane (Wilson) Loree, Wilson Family Pioneers. (Leatherdale Publishing Ltd., 2002 Author address: Jane Loree, Box 419 Nanton Alberta, T0L 1R0. (403) 646-2245). p.2.

⁴Ibid, p.2.

⁵Ibid, p.3.

⁶Ibid, p. 2, p. 4.

You can also print a sample page with an [explanation](#) of the numbers and symbols used in the report. [Photos](#) can be included in this chart for all supported [word processors](#) except for Microsoft Works and Lotus Ami Pro.

Note: Photos may not be available for all types of image files.

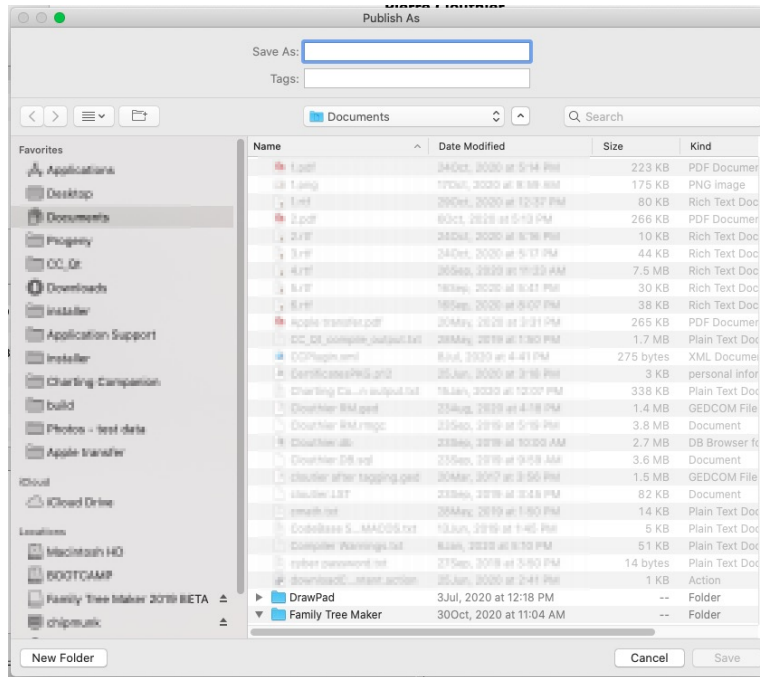
The [options](#) screen is similar to the other Charting Companion reports, but notice that this report does not go directly to your printer! The program saves the Descendant Book as a word processing file so you can edit or save it for future work (you can generate an index, change fonts, add graphics, and so on). To print the report, simply use the print menu of your word processor.

To create the Descendant Book:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Descendant Book**.
3. Click **Print** at the bottom of the options screen.

The program will now ask you to supply a file name for the Descendant Report. You can use whatever name you wish as long as you do not change the file extension (the last three characters following the period).



4. Provide the path and file name (the appropriate file type/extension will be displayed according to your selected word processor). Do not overwrite or change the file extension.
5. Click **OK**.

The Descendant Book will be formatted for your selected word processor, which automatically starts so you can view, edit, and print. If your word processor does not start automatically, check to see that your [word processor options](#) are set up correctly.

To create an index (automatically done for Microsoft WordPad and Works):

- [1] Go to the very end of the Descendant document (the end of the last page).
- [2] Create the index:
 - In Microsoft Word 2003 and earlier, select **Insert** on the menu bar; then select **Reference, Index and Tables**, and click **OK**.
 - In Microsoft Word 2007 and later, select **References** on the menu bar; then select **Insert Index**, and click **OK**.
 - In WordPerfect 5.1 press <ALT> <F5>, select option **6**, and then select option **5**.
 - In WordPerfect for Windows select **Tools** on the menu bar, select **Generate**, and click **OK**.

Note: Microsoft Works and WordPad do not have the ability to create indexes. To compensate for this, the program automatically creates an index based on paragraph numbers. This index is created when the Descendant Book is prepared.

To print the Descendant Book:

- Use the print menu of your word processor (in Microsoft WordPad and most other programs, select **File** on the menu bar and click **Print**).

Your Descendant Book should now print.

Note: The word processor may be set to a different printer than Charting Companion. Double check the selected printer in your word processor before printing.

To return to Charting Companion:

- Exit your word processor. You will automatically return to Charting Companion.

Load/Save options

Click on "Save Options" to save all the options of the Descendant Book, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Descendant Book Explanation

The following example shows the most common (excluding Henry numbers) numbering conventions that can appear in the Descendant book. Your Descendant book may print some or all of these numbers and symbols, depending on which report options you select.

1. **John³ Smith** [17] (Robert², Scott¹) b. 17 Feb 1849 in New York, NY, d. 3 Jan 1930 [He married 30 Jun 1870 **Mary Jones**, daughter of Albert and Samantha Wiggins.

Their children were:

+ 2 i **Bobby** [43]
 3 ii **Susan** [44], b. 25 Dec 1871.

[Smith Family Bible, p. 2

[U.S. Social Security Death Index

Explanation

- John³** John Smith is a third generation ancestor.
- Smith** [The number 6 is a footnote to an information source.
- [17] This is a record reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open).
- died 3 Jan 1930 [The number 7 is a footnote referring to an information source.
- (Robert², Scott¹) These numbers refer to Robert's lineage: John is Robert's son. Robert is Scott's son.
- + 2 i **Bobby** [43] The plus sign (+) indicates that Bobby had children. His paragraph number is 2. He is the first (i) child in the family, and he is of the fourth (4) generation. Bobby's reference number is 43.

Descendant Book Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to 200 generations.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor reports (preceding the place name). Marriages always print in the descendant book.

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

- Notes to print. Select **Notes to Print, All, Non-Private, Marked (!) or None**. See also [Treatment of Notes](#), [Confidential Notes & Events](#).
- Sources to print. Select **Full** sources, **None**, or **Title** only.
- Print sources as **Footnotes** or **Endnotes**. Footnotes are printed at the bottom of each page. Endnotes are printed as a group at the end of the document. Note 1: WordPad does not support printing footnotes and endnotes, therefore these sources are printed after the notes in the body of the report. Note 2: Endnotes will print as footnotes in WordPerfect 9.0.
- Print events for continued children. Select this to include births, deaths, spouses, etc. for all individuals even if they are continued later in the report. Normally this information is printed only for children with no issue.
- Female lines. Select this to print female as well as male descendant lines.
- Cousin Smart. Select this to ensure that duplicate descendants are not repeated for distant cousins who marry.
- Include photos. Select this to print a [photo](#) for each individual who has a photo. If you link to the photo, the resulting RTF word processing file will be smaller, but you must link

to a re-sized copy of the photo file to reduce its height, otherwise the photos will appear at their full height in the RTF file.

If you embed the photo, the RTF word processing file will be larger, but Charting Companion will automatically reduce the height of the photo.

Note: Microsoft Works and Lotus Ami Pro will not accept photos for the Ancestor and Descendant books.

- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.
- Include (print) sample page with explanations. Check this box to print an [example page](#) with explanations of the numbers and symbols as the first page of your descendant book. You can use your word processor to move or delete this page.
- The date format follows the Windows [Short Date](#).

Layout

- Word processor. Select the [word processor](#) you use on your computer system from the list. The location of your word processor will be displayed in the Location box if it is found. If the program cannot find it, click **Browse** and select the program and path.
- Numbering scheme. Choose **Roman numerals**, **Henry system**, or **no Roman numerals** for numbering the children within each family.
- Continuation. This prints a unique identifying number (paragraph number) for each child and a "+" symbol for each child who has children and is included later in the report. If continuation is turned off, paragraph numbers are assigned only to children who have children.
- Bold numbers. This option prints the identifying number in bold font.
- Indent notes. This option indents the first line of each note.
- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed report.
- Tabs:

To Paragraph #. This specifies the distance from the left margin to the paragraph number or Henry number.

To Roman numeral. This specifies the distance from the left margin to the child's sequence number (if selected).

To text. This specifies the distance from the left margin to the printed text.

Enter the tab settings in the appropriate box.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

Names

Select the font weight (bold or normal) with all upper- or lowercase letters for each type of individual included in your report.

1. Click the arrow to the right of the appropriate name box.
2. Select a font weight (or select **Omit** if you do not want the item to print at all).
3. Click **OK**.

Note: A married woman's maiden name is always printed in parentheses (if not omitted).

Special Options

There are special options to reduce the size of the book and the index. They are set in the following file:

```
"C:\Users\user name\AppData\Roaming\Progeny\CC\Charting Companion.INI"
```

where "user name" is your login ID. Edit the file with a text editor such as Notepad to add or change the options. Do not use a word processor. Make sure the topic (in square brackets "[]") is included.

The options are:

```
[ INDEX ]  
  
MARRIED=Y  
  
DATES=Y  
  
FIRST_NAME=N  
  
CONTINUED_SPOUSE=Y  
  
[ REGISTER ]  
  
SPOUSE_STYLE=DS  
  
FOOTNOTE_CONTINUED_CHILDREN=Y
```

Explanation:

```
[ INDEX ]  
  
MARRIED=Y
```

Include (Y) / omit (N) women's married names from index. Default: Y.

```
[ INDEX ]  
  
DATES=Y
```

Include (Y) / omit (N) dates from index. Default: Y.

[INDEX]

FIRST_NAME=N

Include all given names (N) / first name only (Y) from index. Default: N.

[INDEX]

CONTINUED_SPOUSE=Y

Include (Y) / omit (N) continued spouses. "Continued spouses" are spouses that have children.
Default: Y.

[REGISTER]

SPOUSE_STYLE=DS

Order is spouse-date-place (SD) or date-place-spouse (DS). Default: DS.

[REGISTER]

FOOTNOTE_CONTINUED_CHILDREN=Y

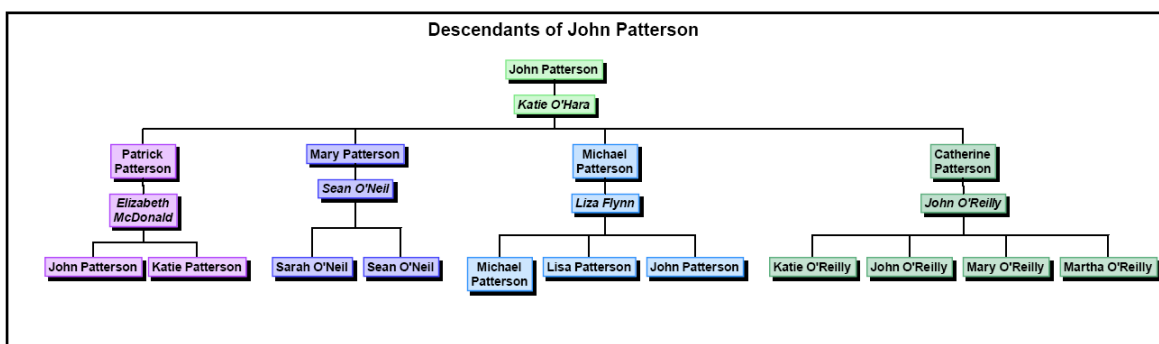
Include (Y) / omit (N) footnotes for continued children. Default: Y.

Descendant Chart

The Descendant Chart is a box chart that prints an individual and his or her descendants. Choose the **Top-down** option to create a traditional descendant chart where the subject is displayed at the top in the center, with descendants printed underneath. Select the **Left-to-right** option to print a chart where the subject is displayed on the left in the center of the chart, with descendants printed to the right of the subject. The Left-to-right option generally uses less space than the Top-down. [Photos](#) and [colors](#) can be included in this chart.


Note: Photos may not be available for all types of image files.


The following image shows the Descendant chart in top-down orientation. For left-right orientation click [here](#).




Although the default options will satisfy most users, the [options](#) screen allows you to further customize the contents and layout of your chart before printing. Many printed pages can be tiled together to create large charts.

To preview the Descendant Chart:

1. Click the **Print Reports and Charts** button  on the toolbar.
2. Double-click on **Descendant Chart**.
3. Click **Preview** at the bottom of the options screen. A preview of your chart will be displayed in the main window.

4. To print, click on the Printer button  on the Tool Bar, then click the Print button.

To print the Descendant Chart:

1. Click the **Print Reports and Charts** button  on the toolbar.
2. Double-click on **Descendant Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Descendant Chart will now print.

To publish the Descendant Chart

1. Click the **Print Reports and Charts** button  on the toolbar.
2. Double-click on **Descendant Chart**.
3. Click **Preview**, the Printer icon , then **Publish** at the bottom of the options screen.
Note: you must Preview the chart before Publishing, otherwise the JPG and HTML options will not be available.
4. In the Publish As dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart for further use in:


- [PDF format](#)
- Image format (JPG, PNG, GIF, BMP)
- [SVG or HTML](#)
- [RTE](#)
- [DXF](#)

- XLS (Excel Spreadsheet)

The default PDF or image viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page



Click on the Fit-to-page icon,  to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

You can remove some branches, and find common ancestors with [Tree Pruning](#).

Click to learn how to [zoom & scroll](#) the Descendant chart.

Page Range

page 1	3	5
2	4	6

Charting Companion prints by row within column.

To edit the Descendant Chart

Click on a rectangle and hold down the left mouse button. You can drag the rectangle around and change the chart to suit your preferences. The rectangle and all its descendants will move together. Hold down the Shift key to move a single rectangle.

Hover the mouse over a vertical line. When the cursor shape changes to a double arrow, you can move the line left or right.

Load/Save options

Click on "Save Options" to save all the options of the Descendant Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Descendant Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as are in the file. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**. The date format follows the Windows [Short Date](#).
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor books (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

You can substitute [special symbols](#) for some events.

- Print place-names. Select this to print the name of the place where an event occurred.
- Choose from **All descendants**, **Male lines**, **Y chromosome DNA**, **Mitochondrial DNA**, or **Omit Spouses**.
 1. **All descendants** - Select this to print both the male and female descendant lines.
 2. **Male lines** - This chart includes the male line of descendants including one generation of daughters, however, daughters' lines are not pursued.
 3. **Y chromosome DNA** - This chart includes only the males and their spouses, however, if creating a color chart, only the males appear in color.
 4. **Mitochondrial DNA** - This is a type of DNA that is carried by both the men and women but is only inherited from their mother. This chart will include only those in your direct maternal line, meaning the mother, her children, and since only the females can pass this on, the charts continue with the children of the daughters and so forth.
 5. **Omit Spouses** - Spouses (non-bloodline) will not be shown.

- Include spouse last generation: Show the spouses of the descendants in the last generation. Uncheck if you don't want to show the spouses in the last generation.
- Cousin Smart. Select this to ensure that duplicate ancestors are not repeated for distant cousins who marry. The common ancestor will be printed in a box with horizontal gray line fill (hatch pattern).
- Include photos. Select this to print a [photo](#) for each individual who has a photo.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.

Layout

- Chart scale. Enter a value greater than 100 to increase the printed size of the chart. A value less than 100 will shrink the size of the chart. All boxes, lines, and text will be scaled accordingly. The advantage of re-sizing the chart by varying the Chart Scale, is that the boxes will be prevented from being split over two pages (Left-to-right only).
- Chart Orientation. Choose the **Top-down** option to create a traditional descendant chart where the subject is displayed at the top in the center, with descendants printed underneath. Select the **Left-to-right** option to print a chart where the subject is displayed on the left in the center of the chart, with descendants printed to the right of the subject.
Bottom-up will place the root at the bottom, and later generations flow upwards, like a tree.

- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed chart.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- Page. Set page width and height to create a larger chart. This is useful when saving to take to the printers or when printing directly to a plotter. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).
- Paper orientation. Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options. Note: This is the orientation of the paper, not the orientation of the chart. In other words, your chart will still print in successive generations from left to right.
- Full page border. Select this to print a full border around the edge of the page; otherwise the border will print only around the chart.
- Print page numbers. Select this to print a page number in the lower right corner of each page. This is recommended for easier assembly of tiled images.
- Last gen. optimize: The last generation of Left-to-right chart is printed horizontally, to reduce the height. Not implemented yet for Top-down.
- Align tops. If checked, each parent will line up with the first child in the family, in other words they will align at the top. If unchecked, the parent will be centered over the children.

Box

- **Box Style.** Select from three box types: **simple box**, **drop shadow**, or **no box**.
- **Line width.** This option sets the line width of the box outline and the connecting lines between boxes. Choose a smaller size for charts to be put in binders or books, and a heavier point for wall charts or emphasis.
- **Box Width.** Set minimum and maximum widths for the boxes. Note: The program may range within the box widths you specify to ensure that no box is split between two pages when it is printed.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- **All boxes same width.** Select this to make all the boxes in the same generation the same width; otherwise individual boxes will be separately sized to fit the text in each box.
- **New line after name.** Select this to start a new line for each event printed in the box; otherwise the program will attempt to print the events on the same line, even with the name if it will fit. Turning this option off can reduce the length of your chart.

New line =
OFF

Jean André Pothier b. 1912 m. 1936 d. 1992

New line =
ON

Jean André Pothier
b. 1912
m. 1936
d. 1992

- **FTM color bar height:** height of rectangle where colors assigned in Family Tree Maker are displayed.
- **Limit photo height.** This option will limit the height of your photo so that the size of the image will not increase past the specified size when the box width is increased. The photo will be centered in the box.

Color

See [Colors - how to pick](#)

Title

The Subject's name will be substituted for the "%n" token. To restore the Title to the default, change it to "Descendants of %n".

Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

*[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Border

See [Ornamental Borders](#)

DNA Matrix

The DNA Matrix report combines the Descendant chart and DNA matches such as generated by the Website GEDmatch. The DNA Matrix is also called the "[McGuire Method](#)".

The DNA Matrix will show you the pairs of DNA test matches between all members of your family. The DNA Matrix will also show you if any of the cM values do not correspond to the relationships. Ex: A parent/child relationship of 2000 cM is too low.

The DNA Matrix is helpful when working out tentative or speculative family structures, for example when confirming hypotheses, or placing adoptees.

Click for [detailed explanation](#) of chart.

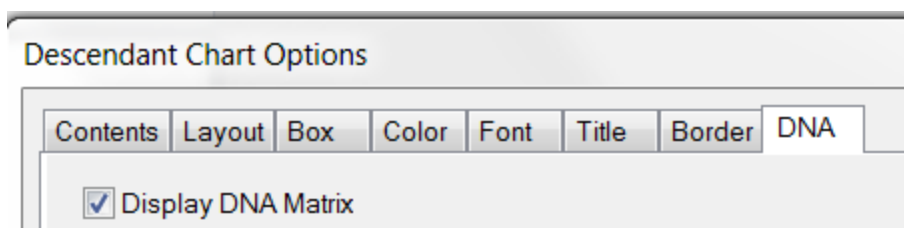
See [next section](#) for how to generate match files.

Creating a DNA Matrix involves two steps:

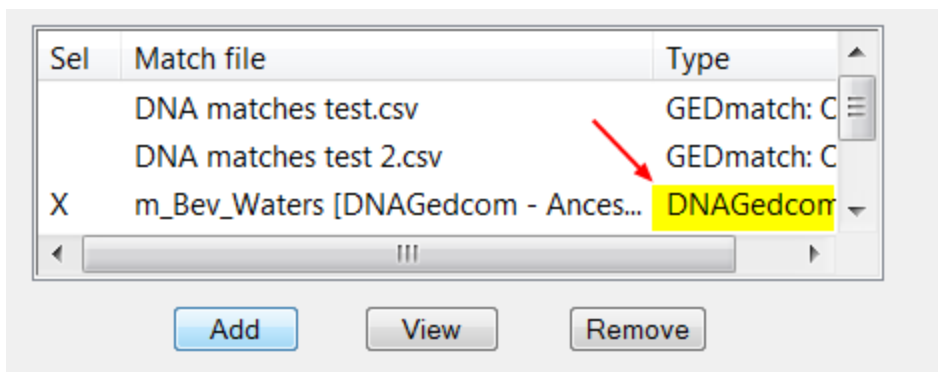
1. Adding "[DNA kit](#)" events to your genealogy database. Charting Companion assumes that a person can have Kit Nos. that are temporarily not used (vg. not in an active CSV match file). Charting Companion allows you to leave them in the database as a convenience, in case you want to put them back into play for another analysis.
2. Telling Charting Companion where your DNA match ".CSV" file is located ("CSV" = Comma-separated values).

Charting Companion: displaying the matches

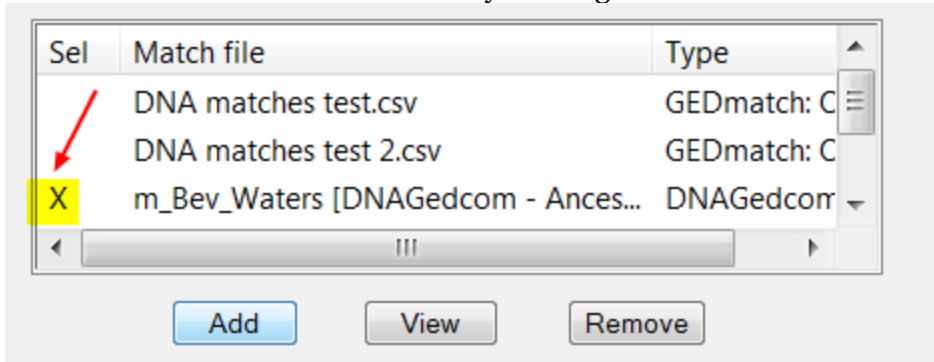
1. To display the matches in a chart, in Charting Companion, click on "Charts & Reports → Descendant chart", click on "DNA" tab, click on the "Add" button, browse to the name of your DNA CSV file.
Click on "Preview" to display the chart, "Publish" or "Print" to save.
2. Don't forget to check "Display DNA Matrix" to see it. You can un-check it to generate a chart free of any genetic information, without having to clear all your settings.



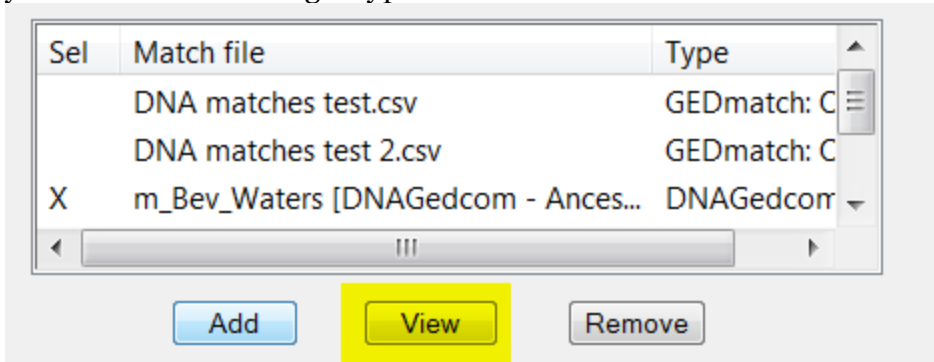
3. Click on "Add" to add a CSV match file. This is the file that contains the chromosome number, segments lengths and centiMorgan (cM) length of your matches.
Assign a template or type to this file by clicking on its "Type" column.



4. Make sure this file will be included by clicking on its "Sel." column.



5. Click on "View" to display the actual columns in the first 100 rows of the file, and make sure you have chosen the right type. The columns headers should match the content of the file.



Click on "Reset" (below) if you have changed the file type and want to see the new column assignments.

Click on the bottom right-hand corner & hold the left mouse button to drag & resize the window.

Click on a column header ("Kit 1" etc) to change the column assignment. In a User-defined file, this allows you to process CSV match files that are not pre-programmed. The minimum fields that are required are: Kit 1, Kit 2, and cM or percentage. The Kit ID Nos. can be person's names.

View DNA Match File columns

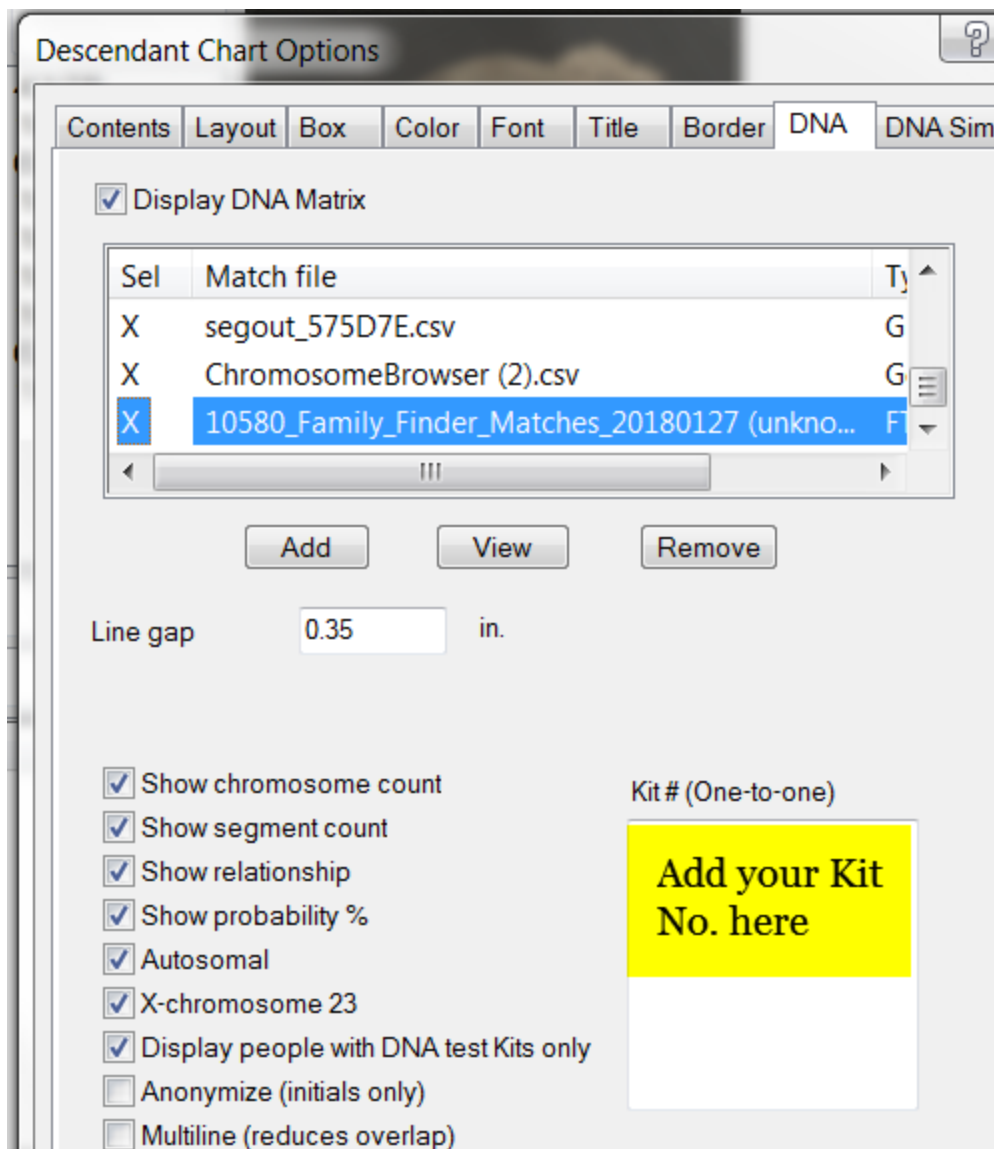
DNA matches test.csv
Click on column header to assign description

Kit 1	Name 1	Email 1	Kit 2	Name 2	Email 2	Chromosome	Segment begin	Segment end	centiMorgans
KIT1	Melvin Smith	MSemail	KIT5	Prudence Clearwater	ZSemail	1	1,234	5,678	3,300.0
KIT1	Melvin Smith	MSemail	KIT2	Zachary Smith	ZSemail	1	0	0	76.0
KIT1	Melvin Smith	MSemail	KIT3	Mehitabel Smith	MSemail	1	0	0	99.0
KIT1	Melvin Smith	MSemail	KIT4	Percival Smith	ZSemail	1	0	0	236.0
KIT2	Zachary Smith	MSemail	KIT3	Mehitabel Smith	ZSemail	1	0	0	500.0
KIT2	Zachary Smith	MSemail	KIT4	Percival Smith	ZSemail	1	0	0	332.0
KIT3	Mehitabel Smith	MSemail	KIT4	Percival Smith	ZSemail	1	0	0	25.0
KIT1	Melvin Smith	MSemail	KIT7	Tiffany und Drang	ZSemail	1	0	0	60.0
KIT4	Percival Smith	MSemail	KIT6	Conchita Clearwater	ZSemail	1	0	0	70.0
KIT4	Percival Smith	MSemail	KIT5	Prudence Clearwater	ZSemail	1	0	0	70.0
KIT5	Prudence Clearwater	MSemail	KIT8	Zoe Noodles	ZSemail	1	0	0	70.0
KIT3	Mehitabel Smith	MSemail	KIT9	Jed Zeppelin	ZSemail	1	0	0	70.0
KIT8	Zoe Noodles	MSemail	KIT9	Jed Zeppelin	ZSemail	1	0	0	70.0

OK Cancel Reset

Click & drag to resize window

In some cases, the CSV match file only contains one Kit No. You must enter the second Kit No., usually yourself, in the "Kit # (One-to-one)" box:



You can create your own simple CSV match file by entering the ID of each person, followed by the cM:

```
Kit1,Kit2,cM
AB,CD,750
AB,EF,890
CD,EF,1200
etc.
```

Set the type to "User defined" and assign each column .

6. Set your options:

☐ Show chromosome count
 ☐ X-chromosome 23
☐ Show segment count
 ☒ Display people with DNA test Kits only
☒ Show relationship
 ☐ Anonymize (initials only)
☒ Show probability %
 ☒ Multiline (reduces overlap)
☒ Autosomal
 ☐ Show log
 Endogamy adjustment (1.0 = no adj.)

6.1. **Line gap:** the distance, in inches or cm., between the blue horizontal lines.

6.2. **Show chromosome, segment count:** the total number of chromosomes, and sum of all segments.

6.3. **Show relationship:** Son, brother, niece, second cousin twice removed, great-great-great... grandfather, etc.

6.4. **Show Probability:** percentage of the time that the cM will match the relationship. If this number is red, the cM could be too high or too low. If it's off by a few cM, it is not significant. If it's off by a lot, it could signify that the genealogical relationship is incorrect. An endogamous group (inter-marriage) will also show higher values. Source of data is explained [here](#).

The cM match data are empirical; it is not a cut'n dry, black-and-white decision, it is merely a guideline that the genealogist takes into account along with other factors.

In some cases, there is no percentage number. That is because there are certain cM/relationships for which there is only range data, not a distribution of probabilities, in other words go/no-go. Ex: 4C2R can be in the range of 0-82. If your cM fall in this range and your chart indicates a 4C2R relationship, it is considered a possible.

6.5. **Autosomal:** chromosomes 1-22

6.6. **X-chromosome:** chromosome 23

6.7. **Display people with DNA kits only:** will prune the tree so only the people with DNA kits are displayed, and anyone who does not have a DNA test will be removed. Makes the chart more compact and easy to review.

6.8. **Anonymize:** Displays person's initials only. Great for sharing with strangers or in public when discussing the chart.

6.9. **Multiline:** if two people are matched in more than one file, the results will normally be separated by slashes:

76 cM/81 cM

If Multiline is checked, each match will be on a separate line.

6.10. **Show log:** the log will automatically be displayed after each chart. The log will list which persons had DNA tests in the chart, and in what CSV match file and line does their match

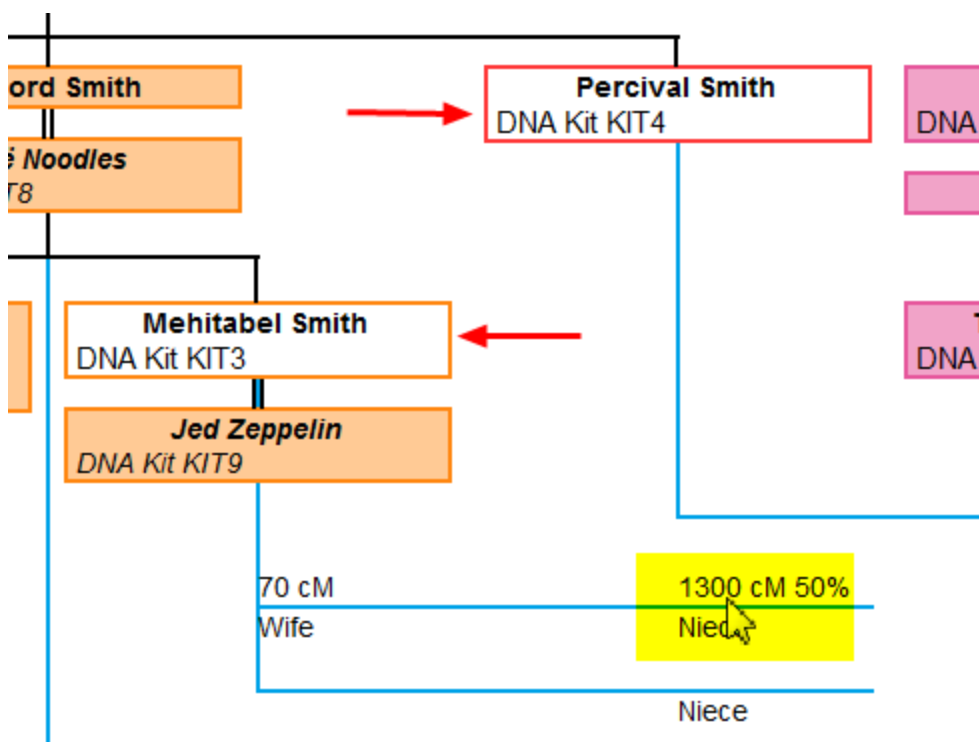
occur. Useful for troubleshooting. The log file has the same name as the genealogy database, followed by "_CC_LOG.txt" at the end.

6.11. Endogamy adjustment: This number will be divided into the actual cM to "discount" or reduce the cM to compensate for endogamy (when tribes or sub-populations inter-marry). An endogamous population will exhibit higher cM counts than what is normally associated with a relationship, and the relationships, based on standard tables, will be overstated (closer than actual). The default is 1.0 (no adjustment). Experiment with progressively higher values. Ex: a cM count of 200 (2C) with adjustment factor of 2.0 will be treated as 100 (3C). This adjustment is applied to all relationships in the tree.

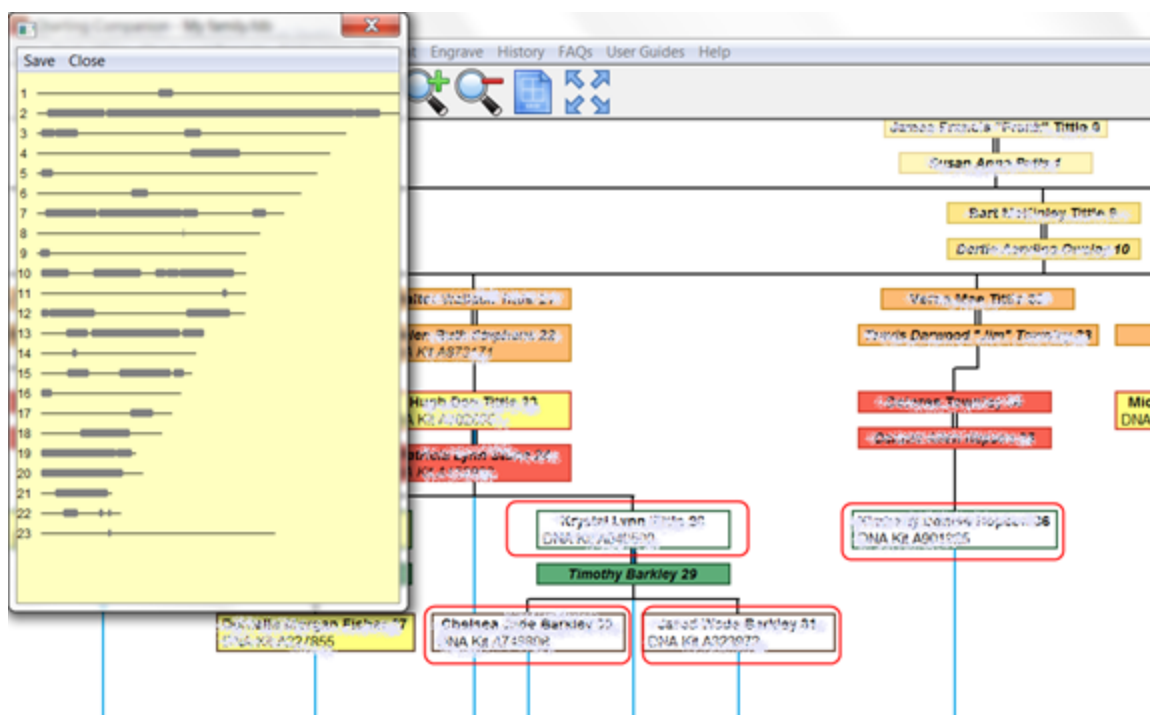
6.12. Automatic Finder: The Automatic Finder will go through the entire database, gather everyone with a DNA Kit, identify their common ancestor, and go to the common ancestor. It will set the number of generations necessary to encompass everyone. If there are more than one ancestor from whom testees can descend, it will choose the ancestor with the most number of testees in his/her descendants.

When you have selected the common ancestor, launch the DNA Matrix.

7. If your chart is too large, you can reduce the number of people by checking the options "Display people with DNA kits only, or [Pruning](#) as follows:
 - 7.1. Right-click on each person that has a DNA kit, or that you want to include in the final chart, and click on "Select".
 - 7.2. When all the people have been selected, right-click on a person again, click on "Prune".
8. If a parent and a child both have a DNA kit, they will overlap. Click on the boxes to drag them to move them. You can increase the Minimum Box Width to space them apart further (see Box tab).
9. It is suggested that the number of generations extend only so far as there are people with kits. Omit later generations if no one of that generation has been tested.
10. When using the "Anonymize" feature, set the minimum width (Box tab) to space out the boxes so the DNA text won't overlap. If your program uses RINs (record numbers), turn on the RIN display to create an unambiguous reference to the individuals. In Family Tree Maker, to display RINs click on "File, Options, Show person ID".
11. Charting Companion creates a log when reading the match file. The name of the log file is based on the genealogy database file, followed by "_CC_LOG.txt". The log file lists:
 - 11.1. All the people in the Descendant tree who have a DNA Kit No. assigned to them ("DNA kit" events)
 - 11.2. Pairs of people who were matched up between the chart and the match file.
12. If you click on the cM/relationship, Charting Companion will highlight the two members of the match.



13. If you hold down the Ctrl key, and click on the boxes of people who have DNA Kits, a window will show how much DNA they have in common.



The selected people's boxes will be white. Yellow boxes indicate people who share DNA and could potentially be added to the mix.

Click a second time to un-select a box.

When you release the Ctrl key, the chromosome box will disappear and the chart will be reset.

DNA Simulation

The DNA Simulation attempts to place a "graft" into an existing tree. A graft (aka scion) is a person who is seeking his/her biological family. It can be an orphan or an adoptee; it can be a person who was raised by one biological parent, and is searching for the other biological parent. An independent genealogist ("Search Angel") can do research on behalf of a graft.

Charting Companion will construct a Descendant tree, then will systematically try to link the graft to every person in the tree, one at a time. Charting Companion will calculate the expected centiMorgan (cM) implied by the hypothetical relationship, and compare it to the actual laboratory DNA test results. Each iteration is called a "scenario". If the DNA test results are outside the cM range, the current scenario is bad, will be discarded, and Charting Companion will advance to the next possible position of the graft in the tree. If the DNA results are consistent, the good scenario will be saved.

The cM values of the relationships are specified in a CSV match file, explained in detail in [DNA Matrix](#).

In addition to linking to existing persons, Charting Companion will also insert hypothetical or placeholder spouses and children, and attempt to link the graft to these additional people. These added persons represent potential extramarital relationships, mistresses, affairs, previous unknown marriages, unknown children, children given up to adoption, non-paternal events, etc. They are meant to suggest possible connections that would otherwise be very time-consuming to evaluate manually.

These hypothetical people are only added in memory and do not affect the genealogical database.

All successful (feasible) positions or scenarios will be saved in a chart diagram, and displayed in an HTML page. The images and HTML file can be attached to an email, or uploaded to a Website for displaying on Facebook.

To generate a DNA Simulation, all that is needed at a bare minimum is:

1. Select as a **Subject** (name in yellow bar window) the name of the person who will be the top of the tree, vg. the patriarch or most recent common ancestor (MRCA).
2. Specify the number of generations in the **Contents** tab. The generations must be high enough to include the people with the DNA test results.
3. Specify a CSV match file in the **DNA tab**. A match file contains a list of pairs of people who share DNA, and the amount of DNA that they share. See "DNA Matrix" for more detail.
4. Select the name of the graft in the **DNA Simulation** tab. This is the person that Charting Companion will attempt to insert or place in a succession of places in the Descendant tree. Note that this person should **not be connected** to anyone in the tree; it should be a stand-alone "island". The graft can be part of his/her own separate tree, as a child or parent.

Click on the "Perform Simulation" button, and the results will be displayed in your browser.

You can control the simulation with the following parameters.

Minimum Parent Age: Assuming that the graft's and parent's birthdates are known or estimated, the graft will only be linked as a child if the graft's birthdate is *greater* than or equal to the parent's birthdate plus the Minimum Parent Age.

Ex. 1: Min. PA 20, Graft born 1950, parent born 1925: OK (parent was 25 when graft was born).

Ex. 2: Graft born 1950, parent born 1935: no link, parent too young.

Maximum Parent Age: the graft will only be linked as a child if the graft's birthdate is *less* than or equal to the parent's birthdate plus the Maximum Parent Age.

Ex. 1: Max. PA 60, Graft born 1950, parent born 1900: OK (parent was 50 when graft was born).

Ex. 2: Graft born 1950, parent born 1885: no link, parent too old.

The graft will not be linked if its birthdate occurs after either parent's death date.

To minimize spurious scenarios, you can estimate the birthdates of people in the tree.

Years per generation: The age of inserted people will be estimated based on this interval. Ex: YPG 25, father b. 1910. An inserted child will have a nominal birthdate of 1935 for purposes of comparing with the graft's birthdate.

Max. generations: When inserting spouses and children, this is the maximum number of generations that Charting Companion will pursue. If no birthdates are specified in the genealogy database, a high "Max. generations" number can create too many unlikely levels of descendants. On the other hand, if the Descendant tree goes far back, a high Max. generations will enable you to reach deep into the past and suggest some scenarios that are feasible but you might never have thought of.

Max. Simulations: if Charting Companion goes out of control and creates too many scenarios, you can cut it off at this number. Zero indicates no limit.

Insert people: Un-check if you want to prevent the addition of hypothetical people, and want to link to known people only.

Parent gender: If the graft knows his mother, for example, and is searching for his biological father, set to "Male". No attempt will be made to link to female parents.

Output valid + failed scenarios: Will create thumbnails of all scenarios, even those that have failed, for diagnostic & analysis purposes.

Chart folder, file name: Set to where you want Charting Companion to store the image files (PNG) and the HTML page that displays them.

Person to be Placed: Browse to the graft. The graft should not be linked to anyone in the tree. You can link the graft to a parent; the parent's name must then be the person to be selected. Charting Companion will construct an auxiliary tree consisting of the the person named here, and his/her children. The whole unit will be placed in the larger tree, and all cM match values will be examined.

Perform Simulation: Launches the automatic simulation.

The charts are generated based on the options in the **DNA Matrix** tab. In particular, you can check "Display people with DNA kits only" to make the charts more compact, and "Anonymize" to display initials only, which will make it suitable for publishing on the Internet.

Select "Omit spouses" in the Contents tab to show bloodline only.

WARNING: There must be no discrepancies or "red flags" in the descendant tree, otherwise all simulations will be rejected regardless of whether the graft fits or not. A discrepancy is when the DNA laboratory results are not in the range expected for a given relationship. Ex: First cousins who only have 200 cM, or "aunt/niece" who share 3300 cM.

Troubleshooting

Troubleshooting.

If no blue lines appear, make sure that:

1. **You checked "Display DNA Matrix" at top of DNA tab in options dialog.**
2. You have selected an ancestor (Most Recent Common Ancestor or MRCA) that encompasses enough people that have kits.
3. You have selected enough generations (Contents tab) to reach modern-day people with Kits.
4. You have spelled the custom event correctly: "DNA Kit". It must be spelled exactly (not case sensitive).
5. You have entered the Kit Nos. correctly, exactly as they appear in the CSV match file.
6. You have assigned the right CSV match file type. In the DNA tab, click on the "View" button to preview the CSV match file, and confirm that the column headings are correctly assigned.
7. You have clicked an 'X' in the "Sel." column of the DNA tab.

8. You have selected a CSV file that includes Kit Nos. for the people in the tree.
9. You have selected "Autosomal" DNA, not "X-chromosome".
10. In the Contents tab, you have selected "All descendants" or "Omit spouses".
11. For DNA Simulation, if you get no scenarios, try increasing the "Max. generations" in the DNA Simulation tab. Also, check the "Insert People" option.

F

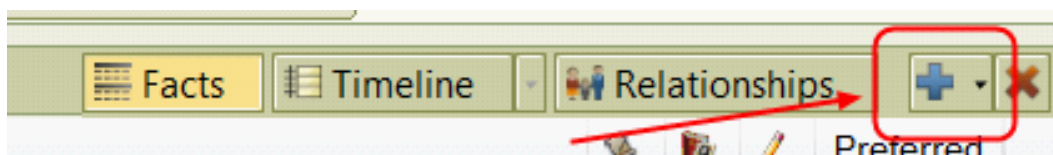
F

How to enter the "DNA kit" event in FTM

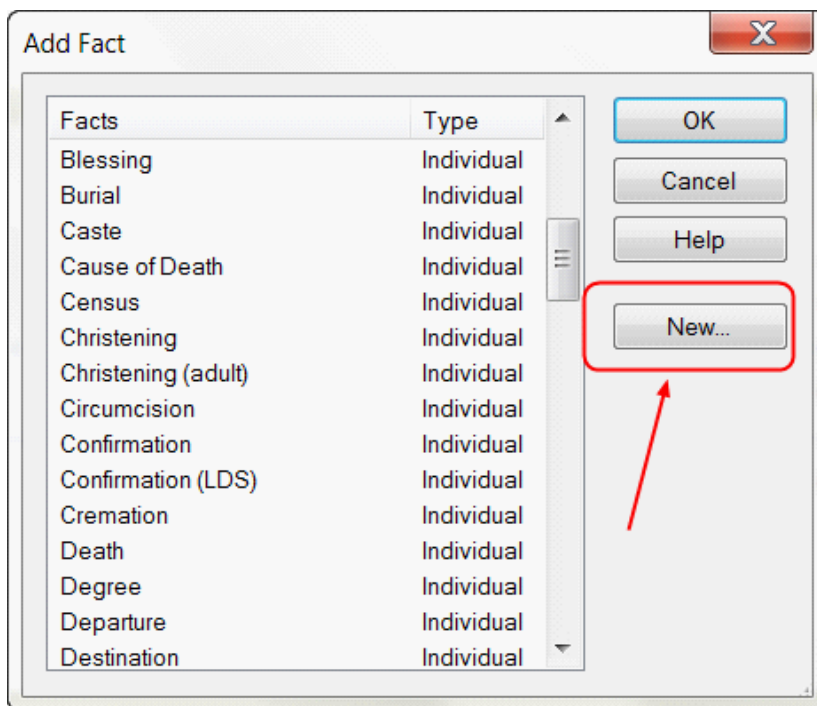
How to add "Kit No." events in your genealogy database

Add a user-defined or custom event called "DNA kit" to each person who has been tested and for whom there is a Kit No. Enter the Kit No. in the "Description" field of the event.

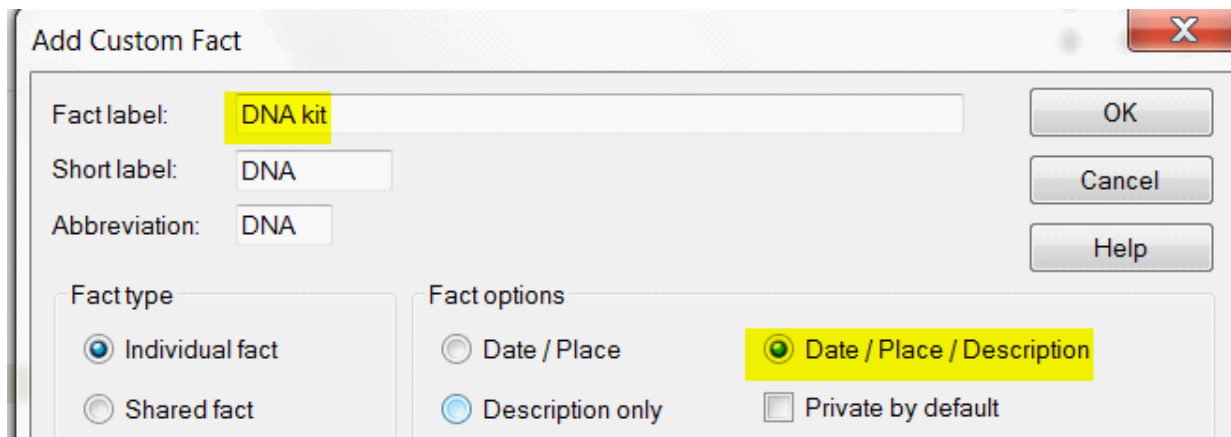
1. To add a custom event in FTM, in the Person View click on the "+" at the top of the screen:



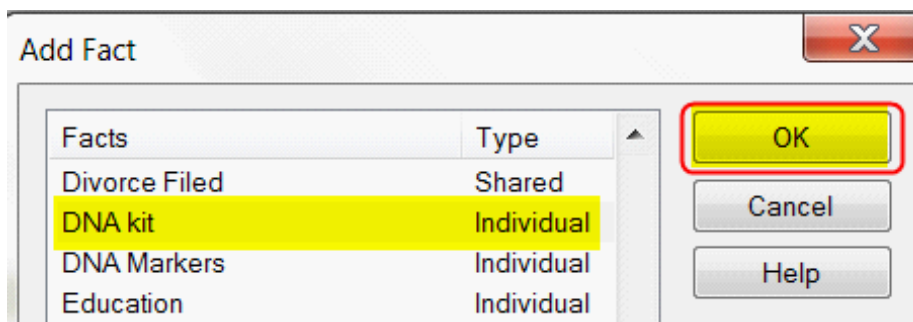
2. Click on the "New" button (only has to be done once):



3. Call it "DNA kit", select "Date/Place/Description":



4. Click on "OK" to add an event to a person:



5. Enter the Kit No. at the right of the screen:

DNA kit:
Date
Place
A123456

Other programs have a similar method.

If your match file does not contain Kit Nos., use the persons' names instead. Enter the names in the DNA kit event, exactly as they appear in the CSV file.

How to enter the "DNA Kit" event in Legacy

Click on the individual to bring up the "Individual's Information" screen. Click "Add":

Individual's Information

Given: Alfred

Surname: Masse

Title Pre.: Title Suf.: Living? ☒ M ☐ E ☐ ?

Born: 17 Oct 1889 in Ile Verte, Qc 128

Chr: in 69

Died: 10 Apr 1959 in Montréal, Qc

Buried: in

Events/Facts

Age	Event/Fact	Date	Desc/Place/Notes
	color		aqua black blue

Add (highlighted with a red box and a red arrow)

Edit

Options

Share

Set Order

Repeat ☐ This individual never married and had no children

Exclude from Potential Problems...

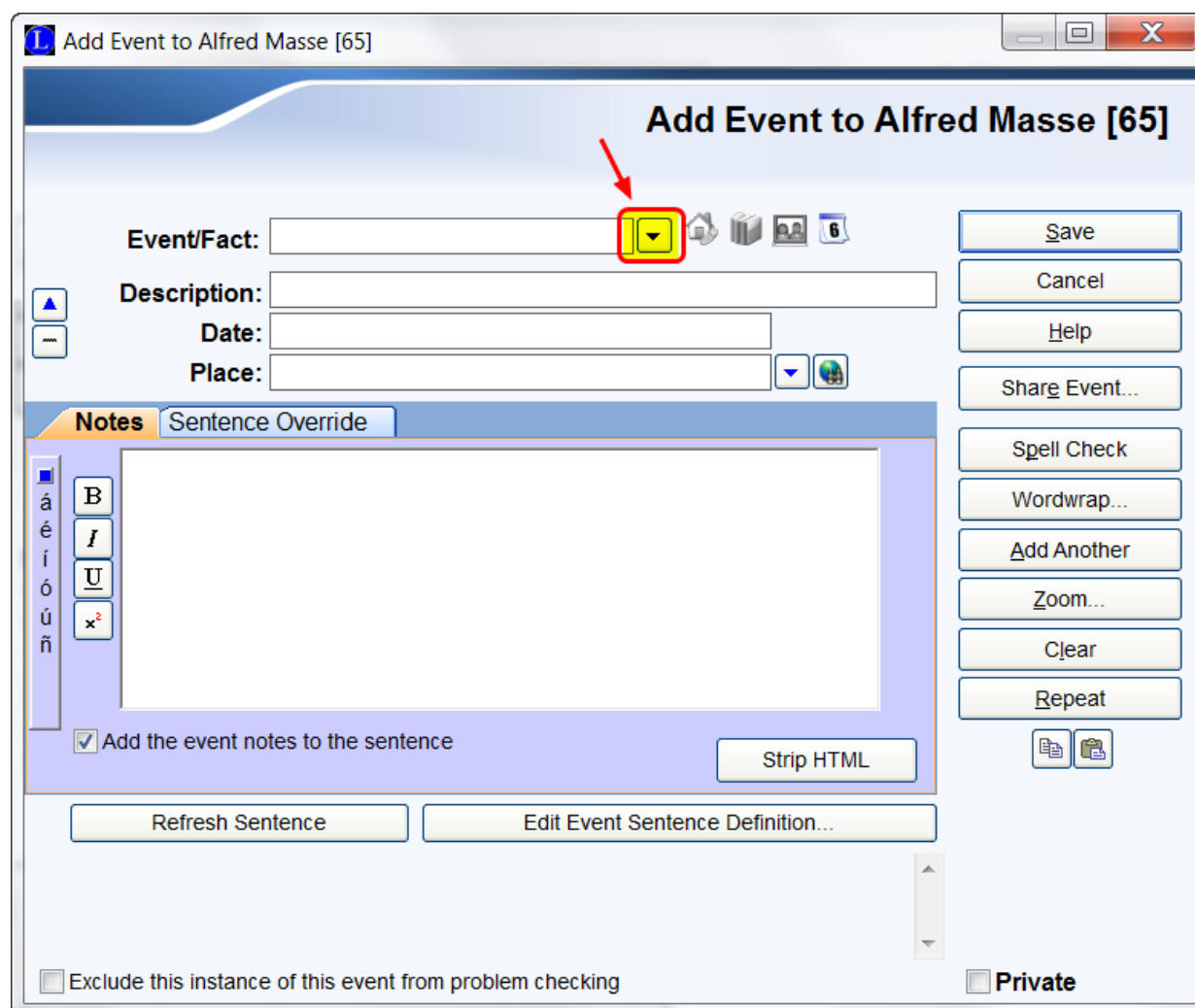
User ID AFN FamilySearch ID Find a Grave ID

Privacy Settings... (Not Private)






☐ Birthday Reminder

☐ Death Date Reminder

Click on the button to display a list of all available events:





Add Event to Alfred Masse [65]





Event/Fact:     

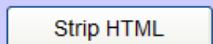
Description:

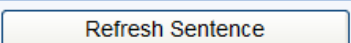
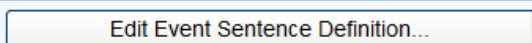
Date:

Place:  



Notes **Sentence Override**

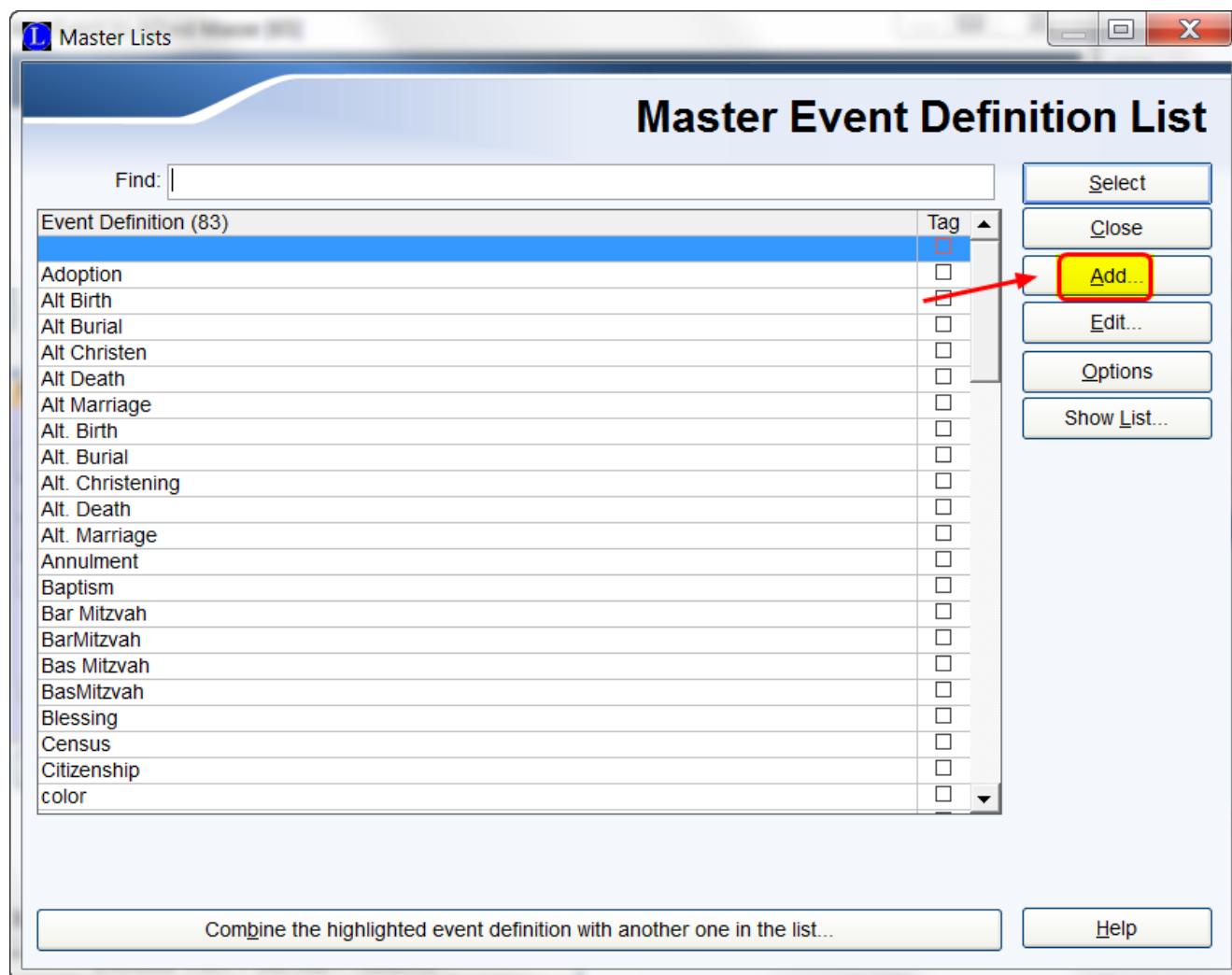
☒ Add the event notes to the sentence 

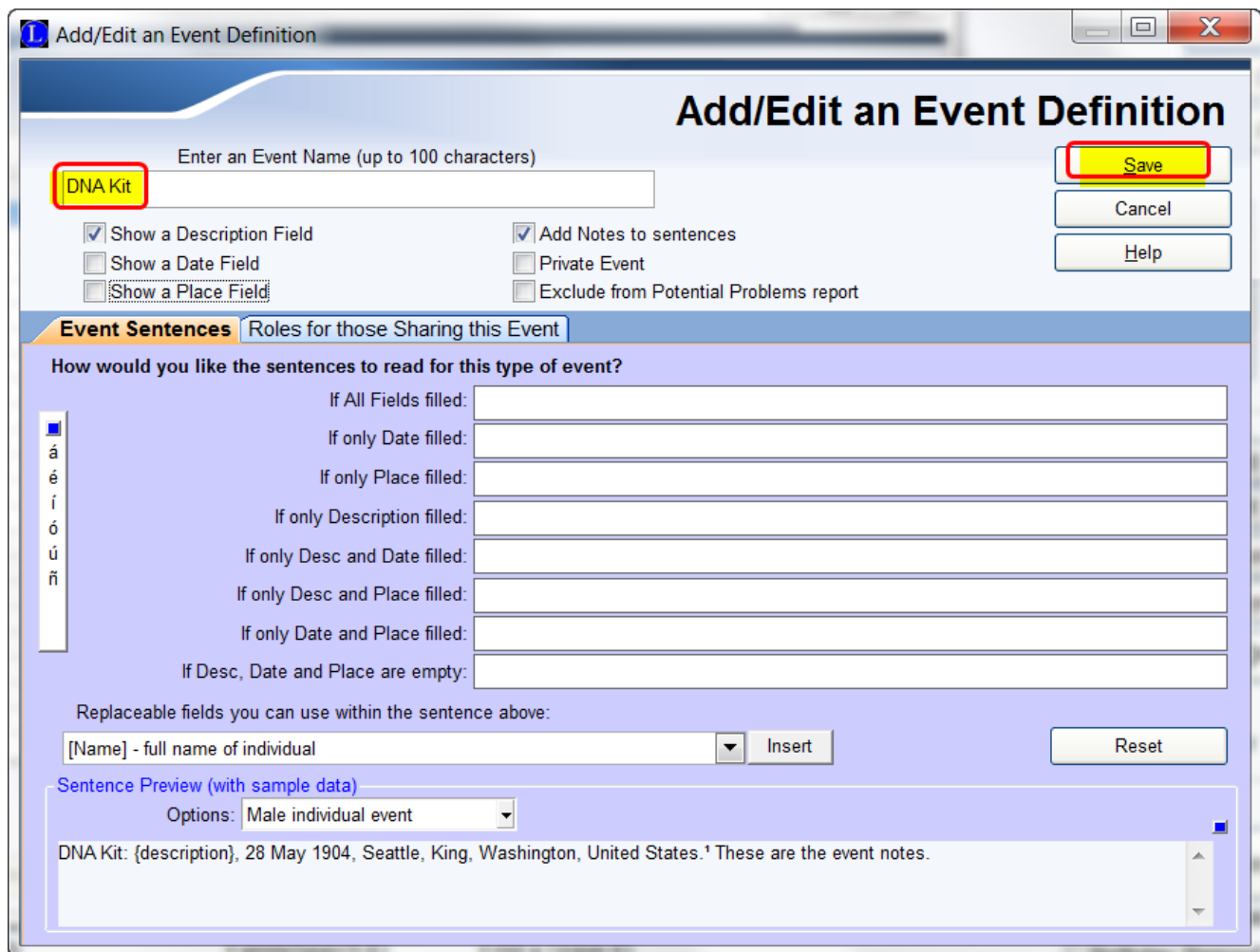
☐ Exclude this instance of this event from problem checking ☐ **Private**

Save
Cancel
Help
Share Event...
Spell Check
Wordwrap...
Add Another
Zoom...
Clear
Repeat
 

Click on the "Add" button:



Enter "DNA Kit" in the event name, check "Show a Description Field", click on the "Save" button. This created the event type. You only have to do this once.



Add/Edit an Event Definition

Enter an Event Name (up to 100 characters)

DNA Kit **Save** **Cancel** **Help**

☒ Show a Description Field ☒ Add Notes to sentences
☐ Show a Date Field ☐ Private Event
☐ Show a Place Field ☐ Exclude from Potential Problems report

Event Sentences Roles for those Sharing this Event

How would you like the sentences to read for this type of event?

If All Fields filled:
If only Date filled:
If only Place filled:
If only Description filled:
If only Desc and Date filled:
If only Desc and Place filled:
If only Date and Place filled:
If Desc, Date and Place are empty:

Replaceable fields you can use within the sentence above:

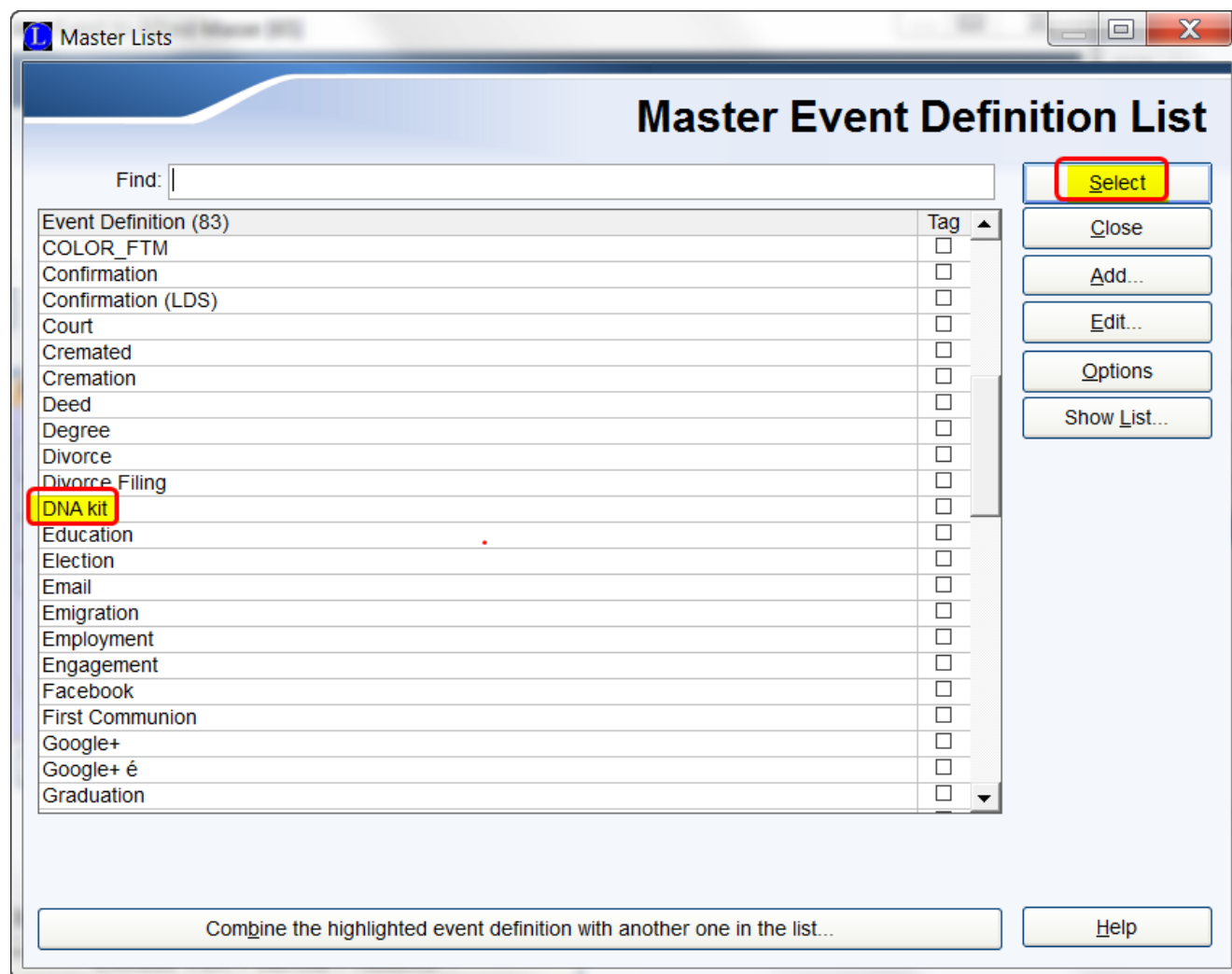
[Name] - full name of individual

Sentence Preview (with sample data)

Options: Male individual event

DNA Kit: {description}, 28 May 1904, Seattle, King, Washington, United States.¹ These are the event notes.

Next, display the event list again, click on the new event type "DNA Kit", click on "Select":



Enter this person's Kit No., click on the "Save" button:

Add Event to Alfred Masse [65]

Event/Fact: DNA kit

Description: A12345

Date:

Place:

Notes | Sentence Override

☒ Add the event notes to the sentence

Strip HTML

Refresh Sentence | Edit Event Sentence Definition...

DNA kit: A12345,,¹

☐ Exclude this instance of this event from problem checking

☐ Private

Save
Cancel
Help
Share Event...
Spell Check
Wordwrap...
Add Another
Zoom...
Clear
Repeat

Repeat for all individuals with DNA Kits.

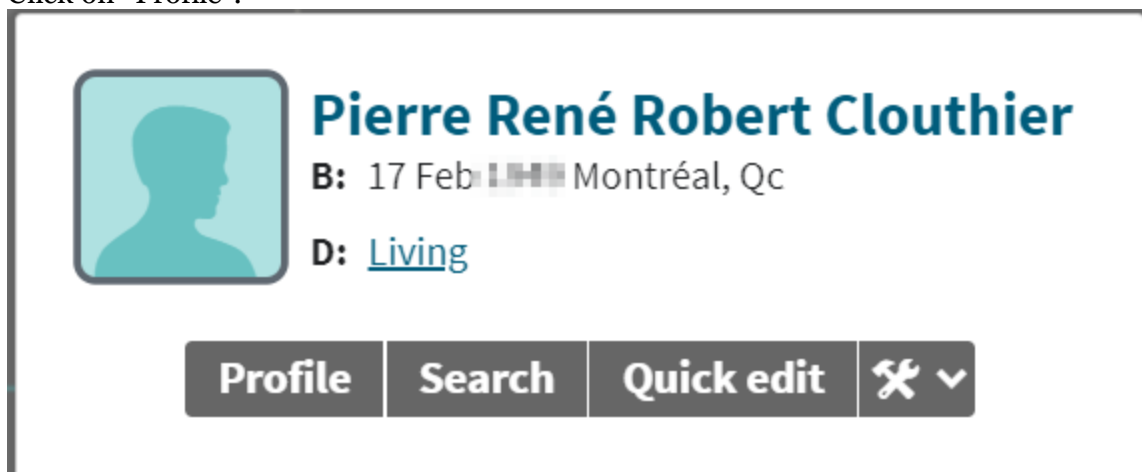
How to enter the "DNA kit" event in Ancestry

To create a "DNA Kit" event in Ancestry,

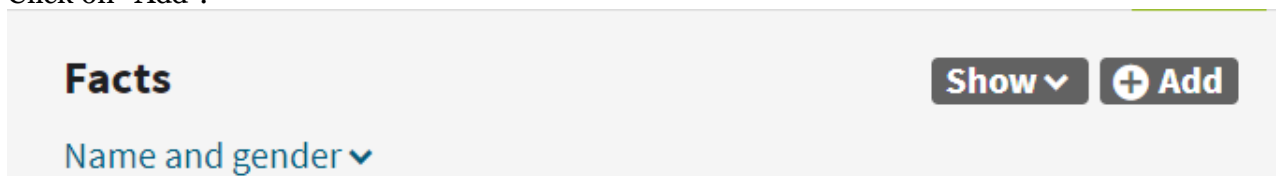
1. Click on a person's Profile box,



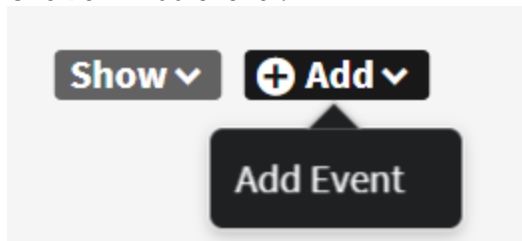
2. Click on "Profile":



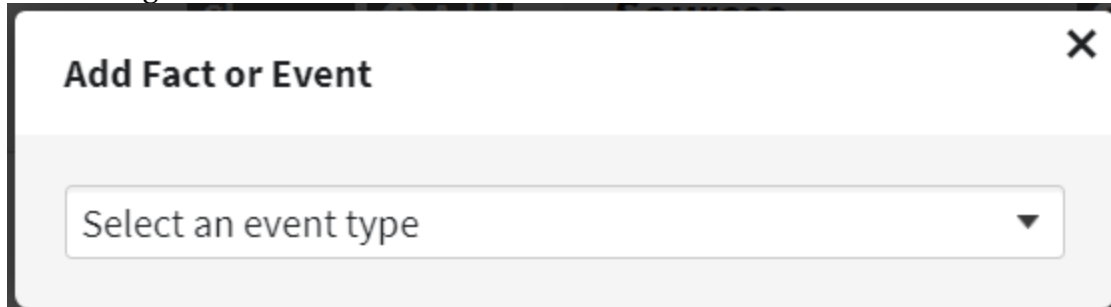
3. Click on "Add":



4. Click on "Add event":



5. Click on right arrow:



Add Fact or Event

Select an event type ▼

6. Select "DNA Markers":

Divorce

Divorce Filed

DNA Markers

Education

Elected

7. Enter Kit No. in Description:

Add DNA Markers



Pierre René Robert Clouthier

(1949-)

Fact Details

Media

Source Citations

Fact Details

Date

DD MMM YYYY

Location

City, County, State, Country

Description

A123456

Add

Cancel

8. Alternatively, you can also create a new type of event called "DNA Kit":

Select an event type

Birth

Death

Marriage

Custom Event

Other Facts

9. Add event name, and Kit No.:

Fact Details

Fact Label

DNA Kit

Date

DD MMM YYYY

Location

City, County, State, Country

Description

A815819

Add **Cancel**

10. Download your data as a GEDCOM file, and open the GEDCOM file with Charting Companion.
Click for instructions on how to [download a GEDCOM file from Ancestry](#).

How to enter the "DNA Kit" event in Family Historian

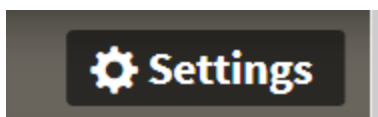
See [instructions](#) for "COLOR" event, replace with "DNA Kit".

How to download your DNA from Ancestry

Assuming you have a done DNA test at Ancestry, login to your Ancestry account, click on "DNA":



Click on "Settings" at the top right:



Click on "Download raw DNA data":

Actions

Download Raw DNA data

Complete security steps to protect your information and download your data.

[What is Raw DNA data?](#)

Download Raw DNA Data

You will be prompted for your password. Ancestry will then send you an email with a link to download the raw DNA file:



Raw DNA Data Download Confirmation

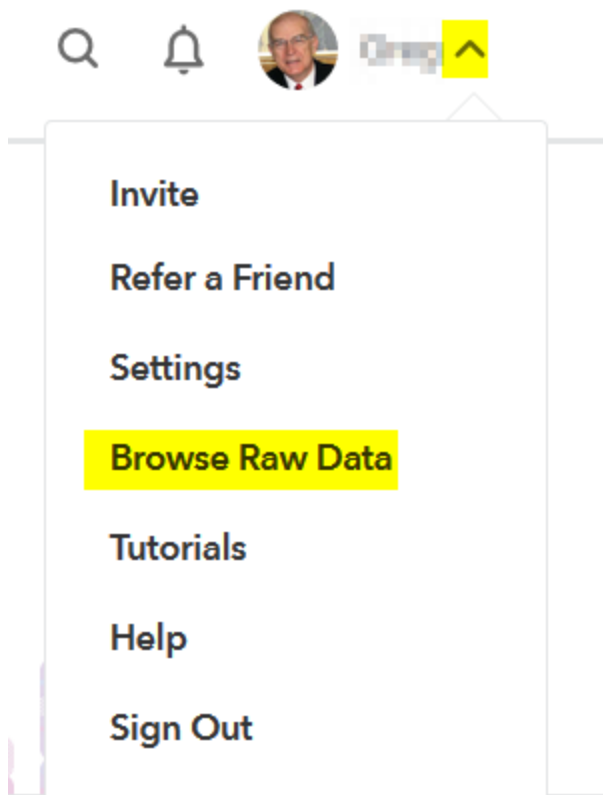
Please confirm your request to download raw DNA data for [redacted]
[redacted] by clicking on the button below:

Confirm Data Download

You are now ready to upload your raw DNA file to GEDmatch, Family Tree DNA, MyHeritage, or other sites that match DNA to others.

How to download your data from 23andMe

Click on the arrow next to your profile image, click on "Browse Raw Data":



Click on "Download":

Your Raw Data

Search for specific genes and markers (SNPs) of interest.* You can view or **download** your data at anytime in its raw, uninterpreted format (your A's, T's, G's, and C's).

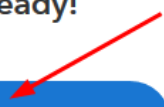
Click on "Download raw data":

Download Raw Data

Search for specific genes and markers (SNPs) of interest.* You can view or download your data at anytime in its raw, uninterpreted format (your A's, T's, G's, and C's).



Your raw data download is ready!



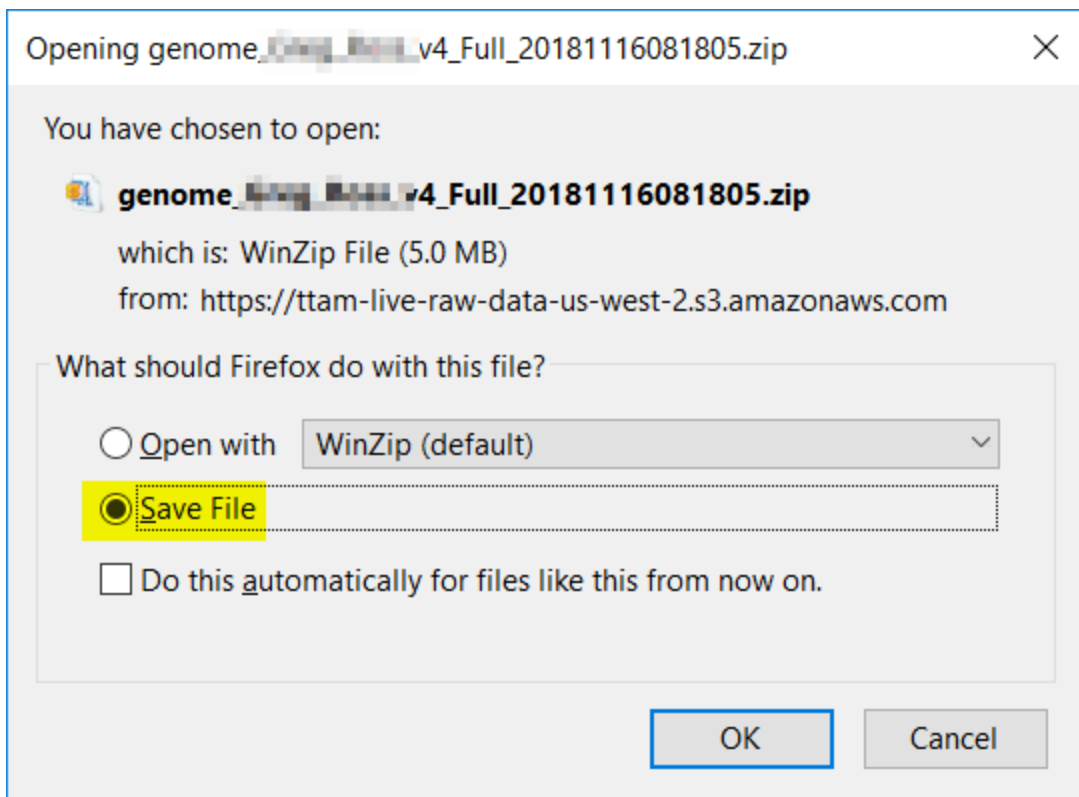
Download raw data

You will get the following message:

Your raw data download should start automatically.
If it doesn't, [click here to try again](#).

[Return to download page](#)

You will be prompted to save the file:



This is the file that you will upload to GEDmatch or other matching service.

GEDmatch: how to download CSV match file

How to create the "match" file

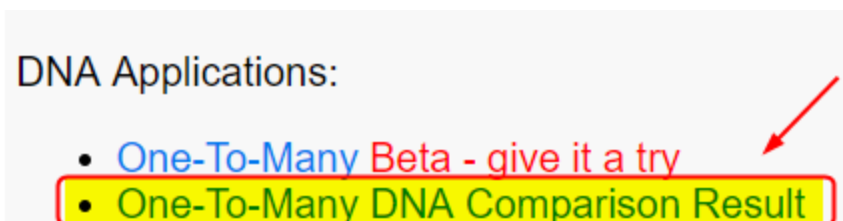
Here are a couple of tutorials on GEDmatch:

<http://smithplanet.com/stuff/gedmatch.htm>

<https://maltsoda.wordpress.com/2018/02/28/gedmatch-basics-part-1/>

Note: GEDmatch have recently switched to a new format, called "Genesis". The following instructions apply to Genesis. The old GEDmatch format is no longer available. Charting Companion will continue supporting the old GEDmatch format, as well as the new Genesis format.

1. To obtain a "match" file, at the GEDmatch/Genesis Home page, click on the "One-to-many matches" option:



2. Enter your Kit Number, click on "Display results":

One-to-many DNA comparison (V2-A)

Enter your kit number:

Click here to display your results:

3. Press Ctrl A to select entire results, paste into a text file (Windows Notepad), or spreadsheet.

When you contact a potential match, you should include in your email your kit number and the kit number you think you match with. Many people manage multiple kits, and they have.

It is generally considered to be bad form to send out emails to large numbers of names on your results list, without first reviewing those results in some detail. This falls into the category of 'spam'.

'Overlap' is the number of positions that exist in common between both kits, without regard to whether they match or not. The amount of overlap, along with the largest cM amount, is usually a good indication of the relative quality of the match.

Matches with low overlap have that field highlighted with a pink or red background, depending on the overlap value. Matches with very low overlap are not shown.

Kit: ~~8L6467366~~ (*PieC) [Ancestry]

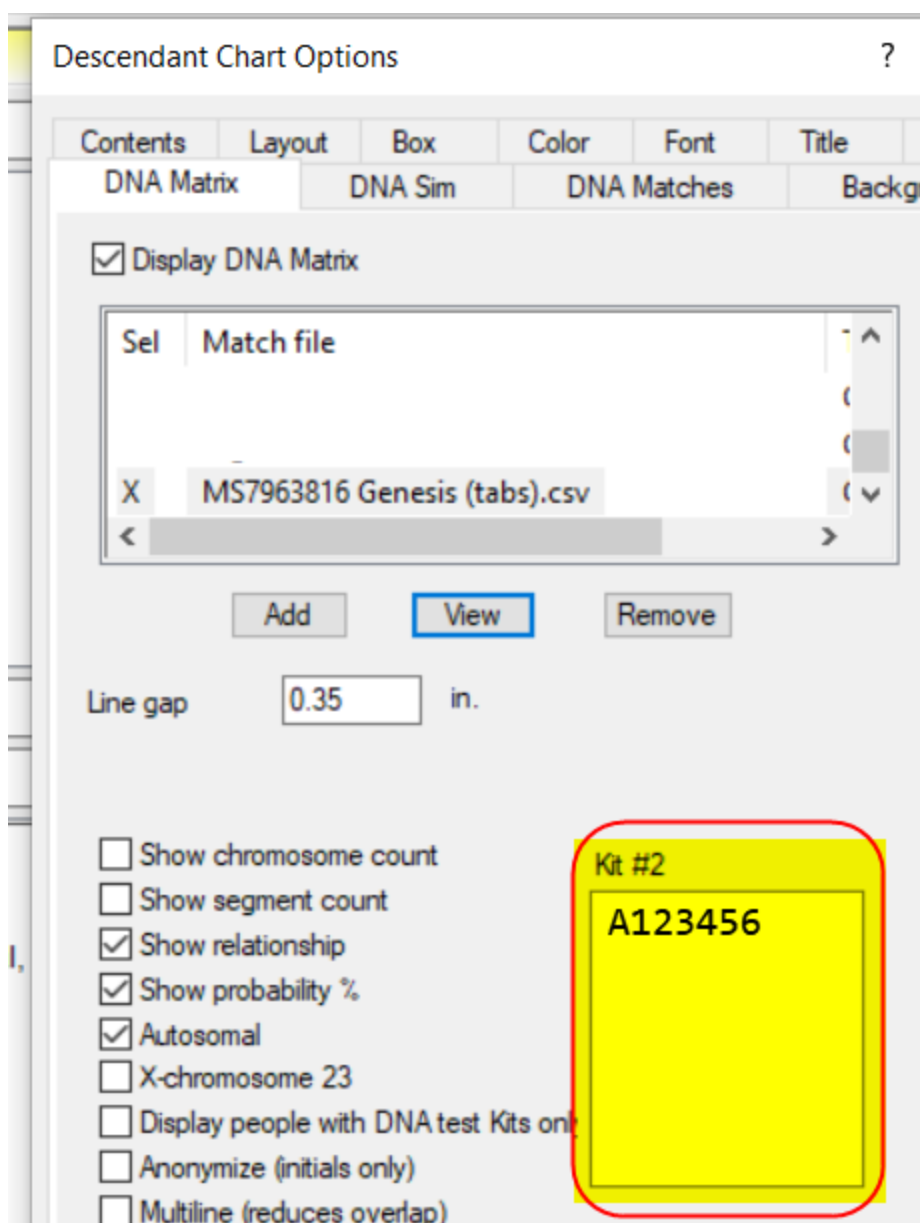
Kit	1:1	Name	Email	Largest Seg	Total cM	Gen	Overlap	Date Compared	Testing Company
8L6467366	Δ	*Gnarfulous	gnarfulous@gmail.com	151.9	3578.4	1.0	423016	2019-02-11	Migration - F2 - A
8L6467366	Δ	*JeaD	jeaD@kyberon.com	63.0	867.6	2.0	193018	2019-02-11	Migration - F2 - A
8L6467366	Δ	PauC	pauC@kyberon.com	67.2	852.4	2.0	192530	2019-02-11	Migration - F2 - A
8L6467366	Δ	*LouD	louD@kyberon.com	52.8	800.9	2.1	181225	2019-02-11	Migration - F2 - A
8L6467366	Δ	*PieD	pieD@kyberon.com	74.6	791.3	2.1	192611	2019-02-11	Migration - F2 - A
8L6467366	Δ	*laudetpotier	laudetpotier@gmail.com	54.9	564.6	2.3	304622	2019-02-11	Migration - F2 - A
8L6467366	Δ	*Anne	anne@kyberon.com	51.3	451.5	2.5	180242	2019-02-11	Migration - F2 - A
8L6467366	Δ	*BerC	berC@kyberon.com	35.5	438.8	2.5	180501	2019-02-11	Migration - F2 - A
8L6467366	Δ	*mpn522	mpn522@gmail.com	55.2	416.9	2.6	139876	2019-02-11	Migration - V4 - M
8L6467366	A	*JacC	jacC@kyberon.com	46.5	339.3	2.7	180374	2019-02-11	Migration - F2 - A

4. Click "Submit":

Delete the top rows, up to but not including the row that contains the column headers: "Kit:", "1:01", "Name", "Email", etc.

	A	B	C	D	E	F	G	H	I	J	K	L
3	Kit	1:01	Name	Email	Largest Se	Total cM	Gen	Overlap	Date Compared	Testing Company		
4	A833829	A	*Gnarfulou	plene@by	151.9	3578.4	1	423016	11 02 2019	Migration - F2 - A		
5	A833820	A	*JeaD	plene@by	63	867.6	2	193018	11 02 2019	Migration - F2 - A		
6	A754753	A	PauC	plene@by	67.2	852.4	2	192530	11 02 2019	Migration - F2 - A		
7	A388372	A	*LouD	plene@by	52.8	800.9	2.1	181225	11 02 2019	Migration - F2 - A		
8	A387170	A	*PieD	plene@by	74.6	791.3	2.1	192611	11 02 2019	Migration - F2 - A		
9	A365949	A	*laudetpo	rmecochase	54.9	564.6	2.3	304622	11 02 2019	Migration - F2 - A		
10	A687457	A	*Anne	plene@by	51.3	451.5	2.5	180242	11 02 2019	Migration - F2 - A		
11	A863413	A	*BerC	plene@by	35.5	438.8	2.5	180501	11 02 2019	Migration - F2 - A		
12	M324699	A	*mpn522	rmecochase	55.2	416.9	2.6	139876	11 02 2019	Migration - V4 - M		
13	A836031	A	*JacC	plene@by	46.5	339.3	2.7	180374	11 02 2019	Migration - F2 - A		
14	M917592	A	D. R. Hunt	hunter112	46.7	106.1	3.5	139193	11 02 2019	Migration - V4 - M		
15	A763965	A	*PTC	jvco@belle	37.1	76.5	3.8	300881	11 02 2019	Migration - F2 - A		
16	A383759	A	*JPL	reglaforde	32.8	74.7	3.8	181067	11 02 2019	Migration - F2 - A		
17	A556771	A	Colette Lit	col558@a	18.1	72.2	3.8	205602	11 02 2019	Migration - F2 - A		

5. Save as CSV file. You will need to enter the Kit 2 number in the special window in the DNA Matrix tab of the options dialog.



When the "Save as" dialog comes up, explicitly enter the name and extension, ex: "my_charts.csv". "CSV" stands for "Comma Separated Values", which is a simple universal text format. Do not use a word processor such as MS Word, because it creates files in a special format that is very complex to read, which Charting Companion has not been programmed to do.

Note that the program expects the data to contain:

Column	Data
1	Kit 1 number

Special Kit # 2 window	Kit 2 number
6	centiMorgan (cM)

MyHeritage: how to download CSV match file

The screenshot shows the MyHeritage website interface. At the top, there's a navigation bar with 'MyHeritage', 'Home', 'DNA', and 'Research'. Below this, a banner for 'DNA Matches' is visible. On the left, there are two match cards: one for 'Johr Fassbender' and another for 'Johr Fassbender (born Mother)'. To the right, there's a section titled 'Test additional family members'. Below the matches, a red box highlights the 'Advanced options' dropdown menu, which is open, showing two options: 'Export entire DNA Matches list' and 'Export shared DNA segment info for all DNA Matches'. A red arrow points to the second option. At the bottom left, it says 'Showing 1-10 of 1,612 DNA Matches'. In the center, there's a 'Sort by: Shared DNA' dropdown and a search bar.

DNA Matrix - Quick Start Guide

Charting Companion DNA Matrix Quick Start Guide by Jason Cole

TIPS:

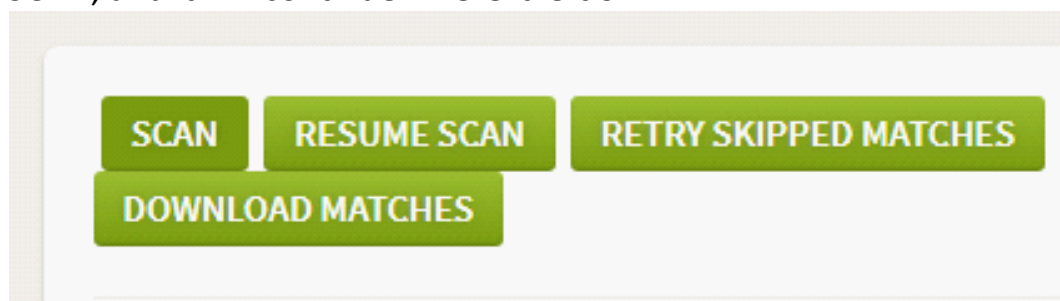
- Keep all your match files in the same directory.
- If using DNAGedCom, use the directory that is the default for storing CSV files within the client. This will ensure that each time you update your DNAGedCom client that your CSV files for DNA Matrix are updated at the same time. You will just need to add the "DNA Kit" fact in your genealogical program.
- You can have as many files loaded and selected as you like, but the further back of an ancestor you select, and the more files loaded, the longer it will take to produce the DNA Matrix Chart.

PART 1: GATHERING MATCHES

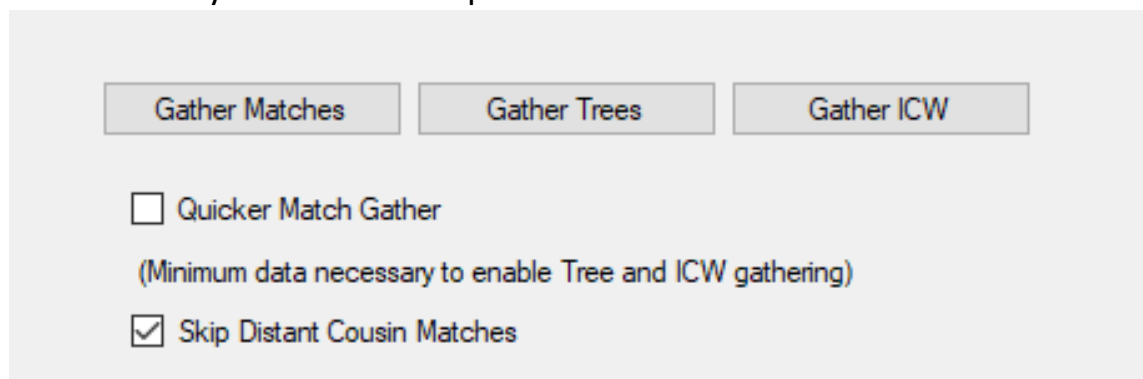
To begin you must first acquire these files from the different test providers:

1) AncestryDNA

- a. Direct - AncestryDNA Helper Chrome Extension (Found on the Chrome Store):
 - i. Navigate to Your DNA Match page on www.ancestry.com
 - ii. You will first click on SCAN. This process can take an extremely long time to complete, and it will cause your web browser to keep popping up. You may want to run this while you are sleeping. If this stops before it completely scans all your matches you can run RESUME SCAN, and it will continue where it left off.

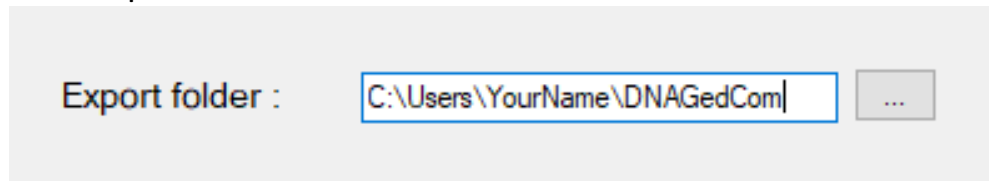


- iii. After the scan is complete you will click DOWNLOAD MATCHES. This will download a file named M_(Your User Name).csv. It will be located in your default download folder.
- b. DNAGedCom Client:
 - i. Log into your DNAGedCom client.
 - ii. Ensure that you have these options selected:



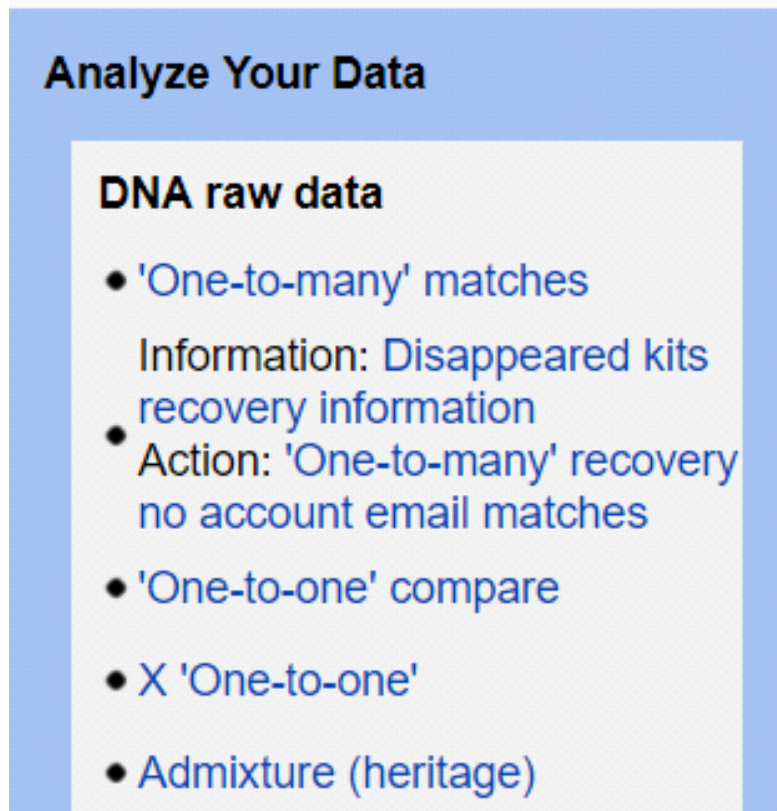
- iii. Click GATHER MATCHES.
 - iv. When the scan is completed the M_(Your User Name).csv file will be exported to the default directory for DNAGedCom. You can find that

under options:



2) GEDMatch:

- a. Click on 'One-to-many' matches, and enter the kit number for yourself, or another person you're researching:



- b. Click on TOGGLE SELECT. This will choose everyone in this list, but only the top 100 kits are used. You can also click the box below SELECT for each kit you would like to include, if you would prefer to select kits individually,

instead of in bulk:

Select 5 or more from Select column, and click on

Submit

Intensity of **GREEN background** indicates how

To qualify as a 'match' in the genealogical time

It must have BOTH. Results with the largest se

In general, the results shown below use thresho

PLEASE verify any result shown on this list wi

To check the number of SNPs, click on the 'A' o

Please **DO NOT** send emails to anyone on this l

DO NOT create mass mailing lists from these r

Toggle Select

Toggle Only New

Kit Nbr	Type	List	Select	Sex	GED/WikiTree
▼ ▲					
T [REDACTED]	F2	L	<input checked="" type="checkbox"/>	M	GED Wiki

- c. Click SUBMIT.
- d. On the Tab Bar you will click on List/CSV.

Chromosome Browsers

Matrices

GEDCom

List/CSV

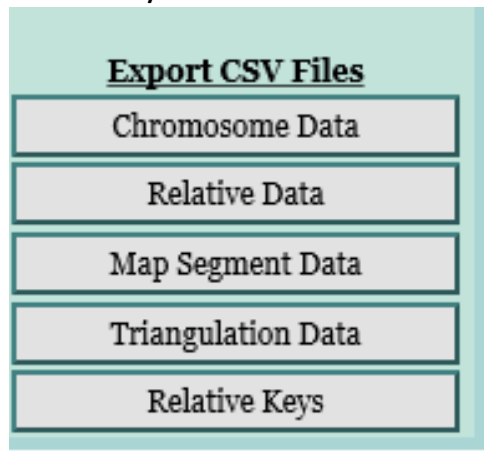
Tag Groups

- e. On the List/CSV tab click on MATCH CSV FILE.

Lists and CSV Downloads

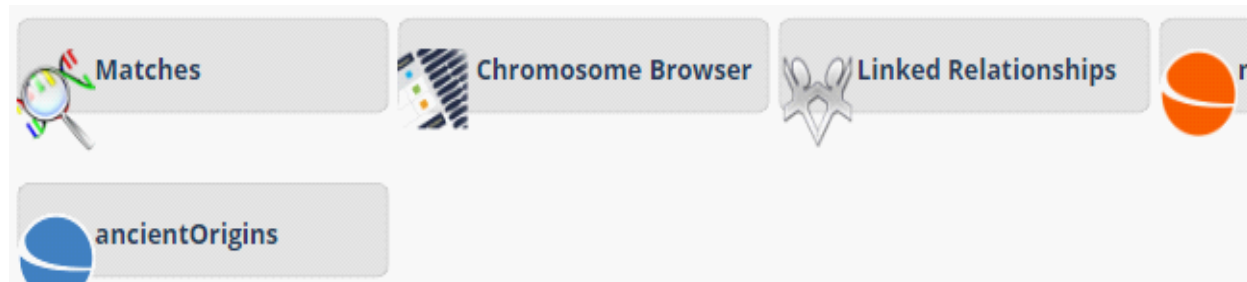
List	Note	
Matching Segment List	Only the first 100 kits will be included	
Match List	Only the first 100 kits will be included	

- f. When the output is generated you will CTRL + A to select all, then CTRL + C to copy it to your clipboard. Open a blank document in any Text Editor, like Notepad, and CTRL + V to paste the output into this file. Name the file (YourName)_GEDMatch.CSV
- 3) Genome Mate Pro (GMP):
- a. You will click on the OPTIONS tab in main GMP window. In the bottom left corner you will click on Chromosome Data. This will produce a file named ChromosomeBrowser.csv. Save with other CSV files you have created. That's all you have to do for GMP.



- 4) Family Tree DNA:

- a. Direct:
- i. Log into your account on Family Tree DNA and click on CHROMSOME BROWSER:



- ii. Click on “DOWNLOAD ALL MATCHES TO EXCEL (CSV FORMAT)”



- iii. This will download all matches to a file to your Default download directory named: (YourKitNumber) Chromosome_Browser_Results(DATE).csv

b. DNAGedCom Client:

- i. Log into your DNAGedCom client.
- ii. Change Min. CM count to 15. You can leave at the default of 7, but will be easier to work with 15. Click on GATHER MATCH/ICW.

 A screenshot of the DNAGedCom client interface. It shows two buttons: 'Gather Match/ICW' and 'Gather Trees'. Below these buttons is a checkbox labeled 'Gather Additional ICW (Coming Soon)' which is checked. Below the checkbox is a label 'Minimum cM:' followed by a text input field containing the number '15'.

- iii. When the scan is completed the (YourKitNumber) _ChromosomeBrowser.csv file will be exported to the default directory for DNAGedCom. You can find that under options:

 A screenshot of the DNAGedCom client interface. It shows a label 'Export folder :' followed by a text input field containing the path 'C:\Users\YourName\DNAGedCom'. To the right of the input field is a button with three dots '...'.

PART 2: ADDING TO YOUR FAMILY TREE

After you have gather all your match files you will need to add those kits numbers to your matches. This is done in the Genealogical program of your choice. Each of the different providers will require a different DNA fact entered for yourself and each match. You can enter as many DNA facts as you have kit numbers for matches.

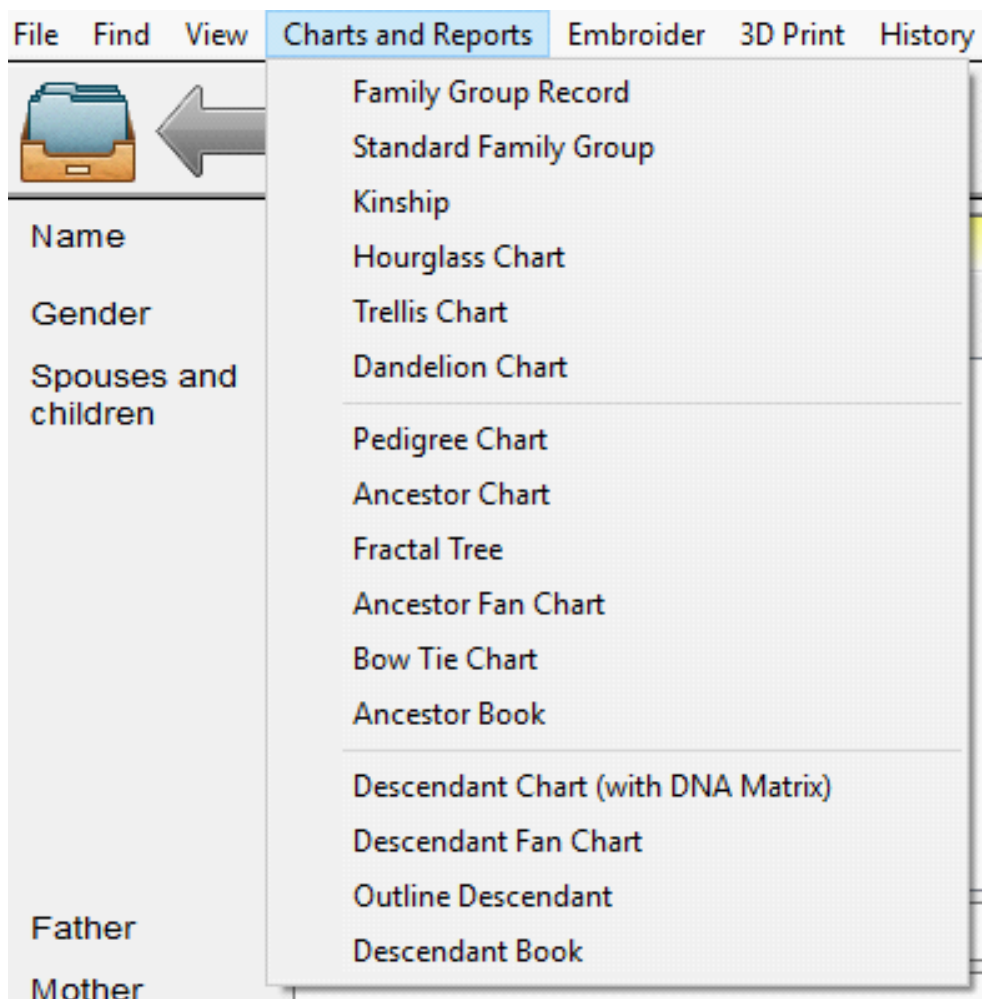
- 1) You will need to create a new Fact in your database named “DNA Kit” and ensure the DESCRIPTION field for this fact is turned on, as this is where you enter the kit number. If you are using RootsMagic, you can also use the default “DNA Test” fact, and enter the kit number in the DESCRIPTION field instead of supplying Y or mt-DNA test results.
- 2) Enter a separate “DNA Kit” fact for each one of your test results, and matches test results. It is best to Copy and Paste into your database.
- 3) Below is a chart with what kit numbers you will need and the column letters within the different CSV files:

Provider & Format	YOUR column #	Match Column #	Example Format
AncestryDNA Direct	A	B	01234E31-2T22-43E5-TCB0-8
AncestryDNA DNAGedCom	A	B	01234E31-2T22-43E5-TCB0-8
GEDMatch	A	D	A5820820
Genome Mate Pro	ALWAYS 1	C	1
FamilyTreeDNA Direct	A	B	Tommy Chong
FamilyTreeDNA DNAGedCom	A	B	Tommy Chong

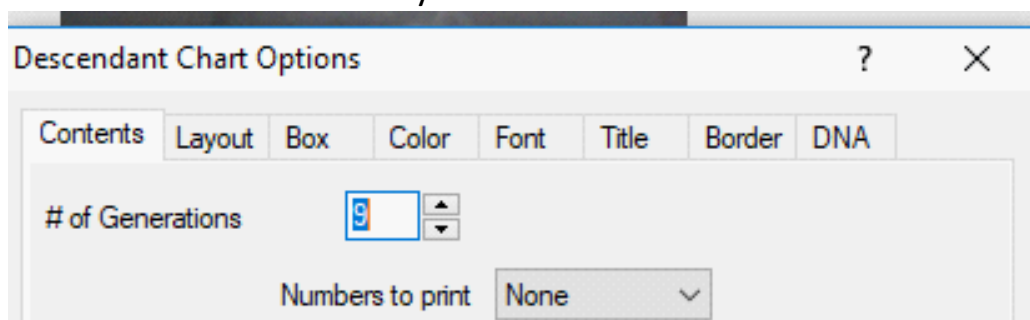
PART 3: PUTTING IT ALL TOGETHER.

The hard part is done!!

Open Charting Companion 6, and click on CHARTS AND REPORTS then DESCENDANT CHART (WITH DNA MATRIX).



Click on the last tab that says DNA:



Make sure DISPLAY DNA MATRIX is selected!:

Descendant Chart Options

Contents Layout Box Color Font Title Border DNA

☒ Display DNA Matrix

Sel	Match file	Type
-----	------------	------

< >

Add View Remove

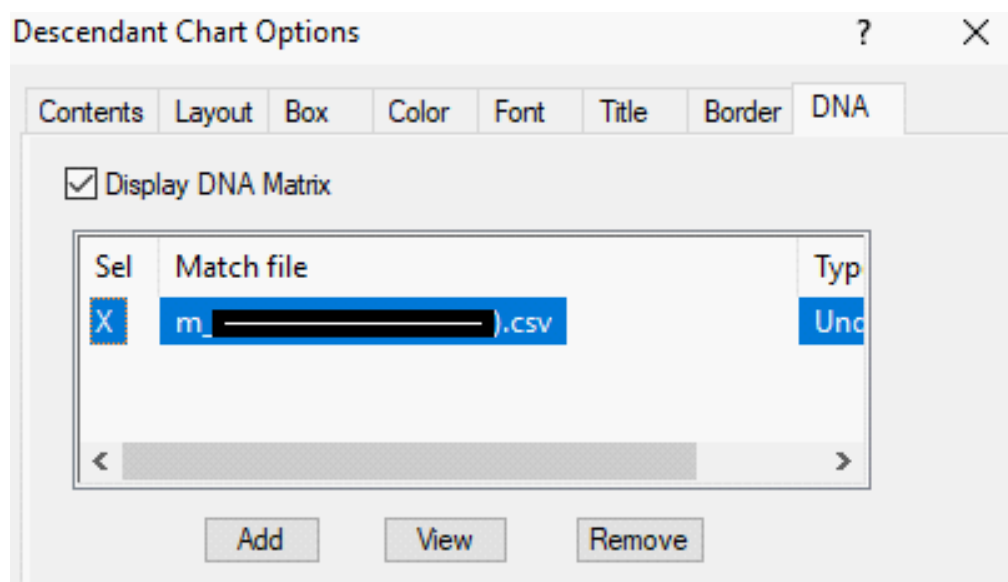
Line gap 0.30 in.

☒ Show chromosome count
☒ Show segment count
☒ Show relationship
☒ Autosomal
☐ X-chromosome 23
☒ Display people with DNA test Kits only
☐ Anonymize (initials only)
☒ Multiline (reduces overlap)
☐ Show log

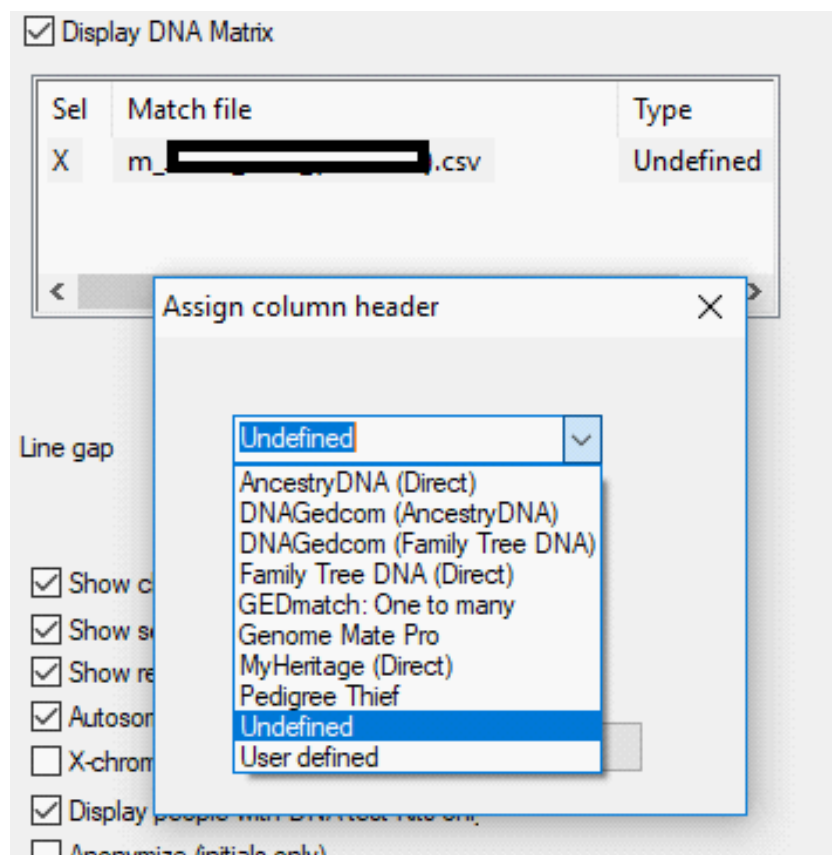
Preview Publish Print
Save Options Load Options Cancel

Select the options you would like to include (See Help File for descriptions), then click ADD to add the load different match files. A standard windows dialog will appear to let you choose your file.

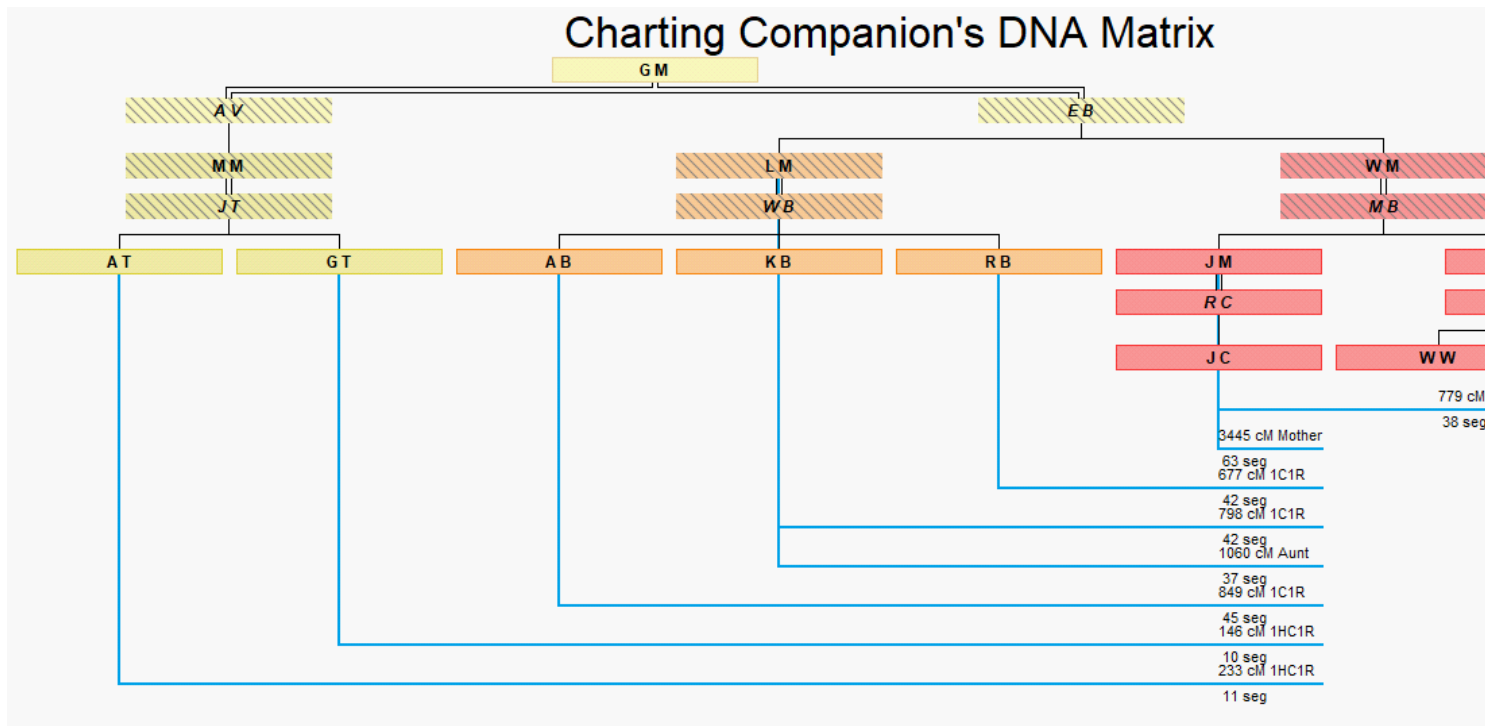
Click the empty box below SEL and an X will appear to select your match file. You can select as many files as you would like.



On the last column it will say TYPE. Click on this to assign which type of file it is. Family Tree DNA uses the same template for both the Direct and DNAGedCom method. Each of the others has its own format.



Click on Preview to see your chart!



The Genetic Genealogist

The centiMorgan (cM) data used to validate the DNA Matrix are based on Blaine Bettinger's The Genetic Genealogist **Shared cM Project**:

<https://thegeneticgenealogist.com/2017/08/26/august-2017-update-to-the-shared-cm-project/>

The Shared cM data is gratefully used with his permission.

A summary of the table is here:

<https://dnainter.com/tools/sharedcm>

If you wish to participate, you can upload your data to:

https://docs.google.com/forms/d/e/1FAIpQLSc5a0SIHIeiuLl5Wxn4sLqgnRV-su2klK2W_YzIJc9xq2i4zw/viewform

Learn more at the Facebook Genetic Genealogy Tips & Techniques:

<https://www.facebook.com/groups/geneticgenealogytipsandtechniques>

(Apply to join).

DNA Matches

DNA Matches provides you with a way of organizing your Matches or Contacts.

There are two types of matches:

1. Both members of the match are in your family tree. Their common DNA is displayed in the DNA Matrix chart.
2. One side of the match is in your family tree, but the other person's link is unknown. It could be a distant cousin whose common ancestor you have not identified yet.

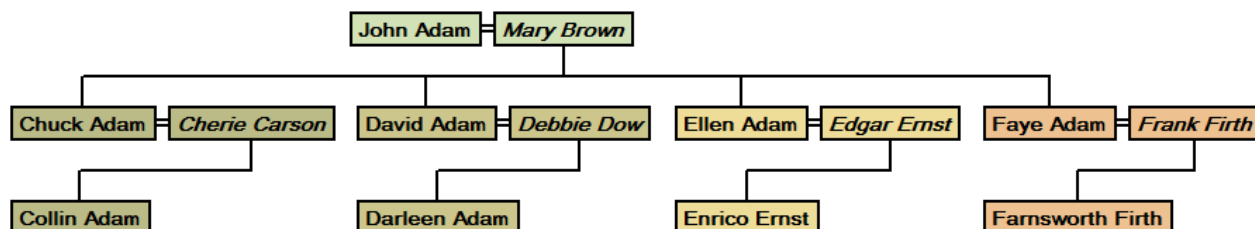
To organize these "one-sided" matches, Charting Companion creates a spreadsheet with members of your family in the first column, and all the matches spread across the first row.

The matches are sorted in decreasing number of family members that they match, and the cM (centiMorgans).

By examining the clusters of matches, you can tell which branch of the family they probably connect to.

Here's an example. Suppose John Adam marries Mary Brown, and they have children Chuck, David, Ellen and Faye, who marry a Carson, Dow, Ernst and Firth respectively. Their four children have children in turn, who obtain DNA tests. By grouping the matches in columns that correspond to which members of the family the children match, you will see matches who cluster around the grandchildren of all four families. These are likely from the Adam or Brown lines. On the other hand, if a person only matches Chuck's child, this is likely a Carson match. Similarly, any person that only matches Fays' child is from the Firth line.

Here is the family tree:



Here is the spreadsheet generated by Charting Companion when the "DNA Matches" options is checked:

	A	B	C	D	E	F	G
1		A123456	A987654	A314159	A192837	A657483	A000217
2	John Smith						
3	Mary Brown						
4	Chuck Adam						
5	Cherie Carson						
6	Collin Adam	24.6	56.7				125
7	David Adam						
8	Debbie Dow						
9	Darleen Adam	56.7		66.8			
10	Ellen Adam						
11	Edgar Ernst						
12	Enrico Ernst	89			150		300
13	Faye Adam						
14	Frank Firth						
15	Farsnworth Firth	200				250	

Kit A123456 (col. B) matches all four of John Adam's grandchildren, they likely connect on the Adam or Brown lines.

Kit A987654 (col. C) only matches Collin Adam, probably a Carson connection. Similarly, the next three matches are probably Dow, Ernst and Firth family connections respectively.

The last Kit A000217 (col. G) matches Adam/Carson and Adam/Ernst, so is likely an Adam/Brown connection.

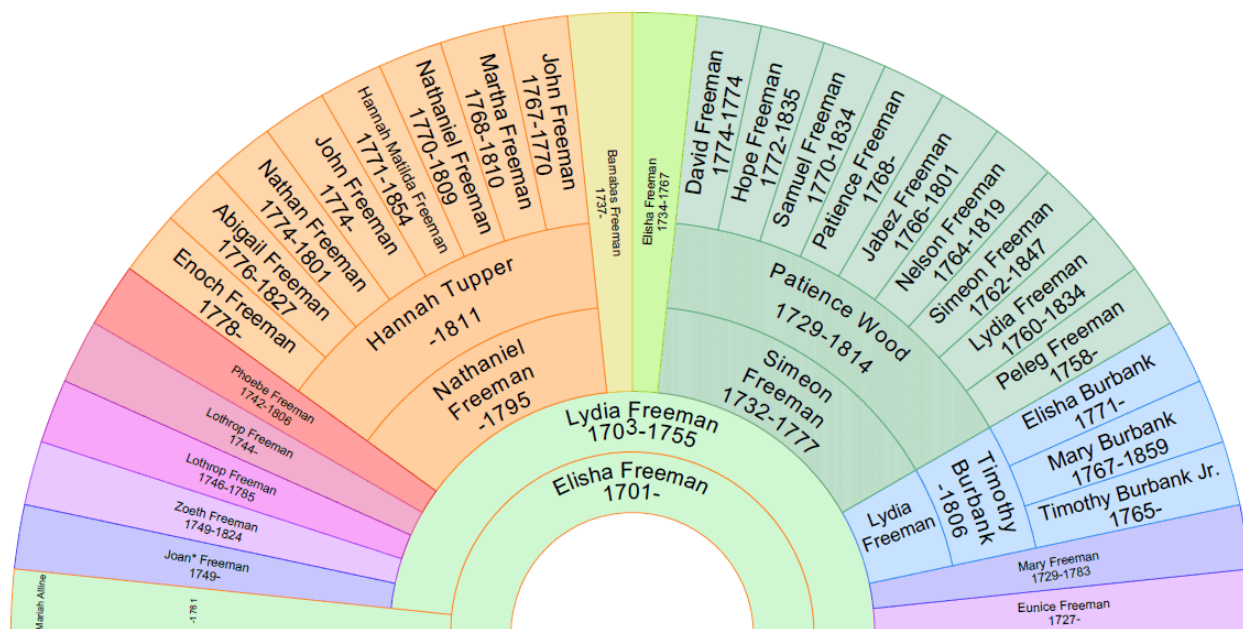
When viewed this way, the DNA Matches report helps in your research by narrowing down the common ground you will be seeking to establish with other people who match your family's DNA.

The options are:

- **Create DNA Matches list:** if checked, will automatically create a DNA Matches spreadsheet when creating a DNA Matrix. The [Display DNA Matrix](#) option must also be checked.
- **centiMorgans (cM) threshold:** the minimum match value to be included in the spreadsheet. A lower value will include more matches.
- **Spreadsheet file name:** where Charting Companion will store the DNA Matches report.

Descendant Fan Chart

The Descendant Fan Chart is a fan-style representation of the current individual and his or her descendants. This chart prints the individual's name, birth year, and death year. The program will print the christening year if the birth year is not known, and the burial year if the death year is not known. The fan chart can be [colored](#) according to gender, generation or lineage.





You can choose a traditional semicircle Fan Chart, a quarter circle, or a full circle. The Fan Chart will print on ink jet and laser printers but is not guaranteed to print on dot matrix printers.

The size of the Descendant Fan Chart is determined by the radius. For more information about printing a Fan Chart, refer to [Fan Chart Options](#).

Please note: The maximum number of generations you can print is 16, because the font becomes too small beyond that. The program will alert you if you try to print more generations than can fit on the paper size you have chosen. If this occurs, choose fewer generations, or a larger radius.

To preview the Descendant Fan Chart:

1. Click the **Print Reports and Charts** button  on the toolbar.
2. Select **Descendant Fan Chart**.
3. Click **Preview** at the bottom of the options screen. A preview of your chart will be displayed in the main window.

4. To print, click on the Printer button  on the Tool Bar, then click the Print button.

To print a Descendant Fan Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Select **Descendant Fan Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Descendant Fan Chart should now print.

To print to a file:

- Select the **Print to File** button if you want to print the descendant fan chart to a disk file. Note: This disk file will contain the printer control codes, not an image of the fan chart. You can then copy this disk file to your printer using the [Command Line Copy](#) command. You would only do this if your printer/plotter can handle HP-GL codes, but your driver does not. See [Printer Drivers](#) for more information.

To publish the Descendant Fan Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Select **Descendant Fan Chart**.
3. Click **Publish** at the bottom of the options screen. Note: you must Preview the chart before Publishing, otherwise the JPG option will not be available.
4. In the **Publish As** dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart in [PDF format](#), image format (JPG, PNG, GIF, BMP) or [SVG or HTML](#), [DXF](#) for further use. The default PDF viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page



Click on the Fit-to-page icon, to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

Click to learn how to [zoom & scroll](#) the Descendant Fan chart.

Page Range

page 1	3	5
2	4	6

Charting Companion prints by row within column.

Load/Save options

Click on "Save Options" to save all the options of the Descendant Fan Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Descendant Fan Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- Generations. Choose from one to sixteen generations. Eight or nine generations is the most that can be practically printed on an 8.5" x 11" page.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.
- Include spouse last generation: Show the spouses of the descendants in the last generation. Uncheck if you don't want to show the spouses in the last generation.

Layout

- Fan Style. Choose a half circle (180°), full circle (360°), or quarter circle (90°).
- Output To. Typically you would choose Windows Printer and use only the HP-GL option if you encounter printing problems or for special printers such as plotters. Select from:

Windows Printer. Choose this option to print to any laser, ink jet printer, or plotter for which you have a Windows driver. If you have a dot matrix printer, you should also choose this option, although printing is not guaranteed. This option allows you to choose the paper size in the Print Setup dialog box. The chart will print whatever font you have chosen.

Laser (HP-GL). Choose this option to print to a printer that supports the Hewlett Packard Graphics Language (HP-GL). This option prints faster than the Windows printer option. You must also specify the width and height of your chart (see the Chart Size option below). The chart will print using the default font (Courier).

Plotter (HP-GL). Choose this option to print to a plotter that supports HP-GL. This will be faster than using the Windows printer option but will print only the default font (Courier).

- **Page Size.** Select the size of the paper used by your printer. If the chart is larger than the page size, it will be tiled over multiple pages. If you are taking your chart to a print shop for printing on large paper, specify the size of here. Ex: 24" x 72", Portrait. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).
- **Chart size Radius.** Specify the radius of the Fan chart. The chart dimensions will be:

Style	Height	Width
Half circle	Radius	2 x Radius
Full circle	2 x Radius	2 x Radius
Quarter circle	Radius	Radius

Note that to fit on one page, the diameter (Full- and Half-circle) or radius (Quarter-circle) of the Fan chart must be equal to the page size, minus the margins.

- **Paper Orientation.** Choose Landscape or Portrait layout; the default is landscape.
- **X Offset.** Adjust the horizontal positioning of the chart as related to the left page margin; the default is 0.
- **Y Offset.** Adjust the vertical positioning of the chart as related to the bottom page margin; the default is 0.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

The Descendant Fan Chart, will be tiled like the Ancestor and Descendant charts. You can specify the radius and the paper size, and the Descendant Fan Chart will spread to the required number of pages.

Note: TrueType fonts are recommended for the Fan Chart ensuring that the rotated text is printed properly along the radius.

If you choose an HP-GL printing option and still cannot print, select the Print to File button. Provide a file name with the *.hgl extension, and click OK. The program will now save your chart to a print file. You can then go to the Command Line prompt and [copy](#) the print file to your printer.

TIP: On older laser printers, if you select six or more generations, activate the page protect feature on your printer (refer to your printer's instruction manual for instructions) to ensure that your entire chart will print. Page protect is not required for plotters.

Color

See [Colors - how to pick](#)

• Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

[1] Because this report is in a fixed format the selected font type will be applied, but the font size will not.

*[2] **TrueType** fonts are recommended for the Fan Chart ensuring that the rotated text is printed properly along the radius and the circumference. Also, when using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[3] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

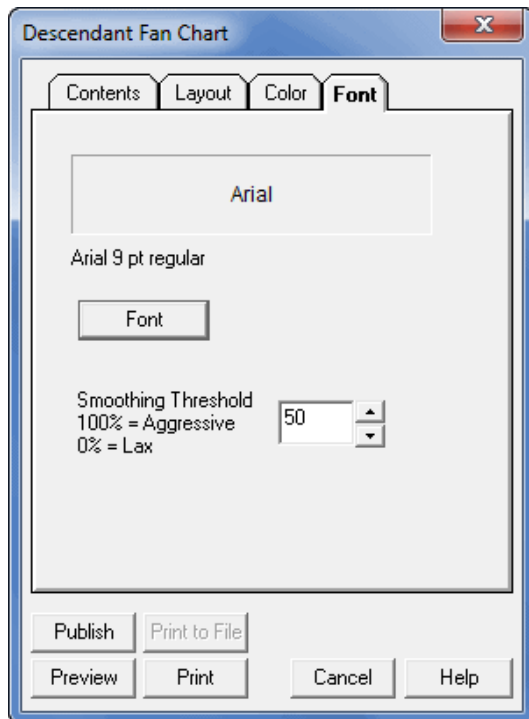
Smoothing Threshold:

The Smoothing Threshold is the percentage of names that have to be the same font size. A high number imposes strict limits on the font, and will cause the fonts to be generally smaller. A low number allows greater latitude, more variance in the font sizes, and a greater proportion of large fonts.

The font size for each name is initially calculated to be the largest size that will fit in the 'cell' that the name occupies. Short names will have large font sizes, and long names will have smaller font sizes.

In order to give the Fan Chart a pleasing appearance, the fonts within any generation (or 'ring') are 'smoothed' by calculating which font size is small enough to accommodate 80% of the names. This can result in some names appearing smaller than they could otherwise be, in order to be in harmony with neighbouring names. The same principle is applied across generations as well.

This can sometimes result in names appearing too small. If you wish to override the program logic, set the Smoothing Threshold to a lower number, which will allow shorter names to appear in a larger font size. Experiment, as the results will be different depending on the particular mix of names.



Border

See [Ornamental Borders](#)

DNA Matrix

See [Descendant Chart](#).

Family Group Record

The Family Group Record is a fixed format (that is, LDS format) report similar to traditional Family Group documents. Although the default options will satisfy most users, the [options](#) screen allows you to specify the content and layout of the report, including LDS events, notes, and sources, before printing.

Family Group Record

Hattie Eleanor Wilson / Joseph Lawrence Wannop MRIN 37
C:\Documents and Settings\user1\My Documents\Wilson Family.fdb

12 Jan 2008

1 of 4

Wife's Name Hattie Eleanor Wilson		- RIN 79		LDS ORDINANCE DATA B = Baptised SS = Sealed-to-Spouse E = Endowed SP = Sealed-to-Parent	
Born	12 May 1883	Place	Brigden, Lambton County, Ontario, Canada	Date	
Chr.				B	19 Sep 1992 ALBER
Mar.	8 Jun 1910	Place	Middlesex, , Ontario, Canada	E	25 Sep 1992 ALBER
Died	20 Jun 1961	Place	High River, , Alberta, Canada	SS	7 Nov 1992 ALBER
Bur.	23 Jun 1961	Place	Nanton, , Alberta, Canada	SP	7 Nov 1992 ALBER
Father	Charles Edgar Wilson		- RIN 82	Mother	Lavina Butler - RIN 83
Wife's other husbands					
Husband's Name Joseph Lawrence Wannop				- RIN 78	
Born	14 Dec 1878	Place	Langtown, Cumberland, England, United Kingdom	Date	
Chr.				B	19 Sep 1992 ALBER
Died	29 Sep 1975	Place	Haney, , British Columbia, Canada	E	30 Sep 1992 ALBER
Bur.	2 Oct 1975	Place	Nanton, , Alberta, Canada	SS	7 Nov 1992 ALBER
Father	James Lawrence Wannop		- RIN 80	Mother	Mary Graham - RIN 81
Husband's other wives					
Children				Parents' MRIN 39	
1.Sex	Name			Date	Temple
M	Lawrence Edgar Wannop	- RIN 76			
Born	13 Jan 1912	Place	Calgary, , Alberta, Canada	B	19 Apr 1966 ALBER
Chr.				E	16 Jul 1966 ALBER
Mar.	23 May 1942	Place	Calgary, , Alberta, Canada	SS	16 Jul 1966 ALBER
Died	20 Nov 1964	Place	Lethbridge, , Alberta, Canada	SP	7 Nov 1992 ALBER
Bur.	24 Nov 1964	Place	Nanton, , Alberta, Canada		
Spouse	Emma Elizabeth Clarke		There are other marriage(s)	- RIN 77	MRIN 36
2.Sex	Name				
M	Reverend Bruce Graham Wannop	- RIN 833			
Born	16 Oct 1915	Place	Calgary, , Alberta, Canada	B	
Chr.				E	
Mar.	10 Oct 1941	Place	Heath, , Alberta, Canada	SS	
Died	5 Aug 1998	Place	Maple Ridge, , British Columbia, Canada	SP	
Bur.		Place	Maple Ridge, , British Columbia, Canada		
Spouse	Dorothy Turnbull		- RIN 835	MRIN 238	
3.Sex	Name				
M	Charles Donald Wannop	- RIN 834			
Born	abt 20 May 1920	Place	Calgary, , Alberta, Canada	B	
Chr.				E	
Mar.	26 Oct 1946	Place	Nipawin, , Saskatchewan, Canada	SS	
Died	31 Aug 2001	Place	Prince George, , British Columbia, Canada	SP	
Bur.					
Spouse	Lois Evelyn Holter		- RIN 836	MRIN 239	
<input type="checkbox"/> Check here if other children are listed on additional pages.					
Wife		Hattie Eleanor Wilson - RIN 79			
Notes for Hattie Eleanor Wilson:					
GENERAL: Twin to Susan Lavina					
MEDICAL: Had a severe stroke in 1959 that put her in a wheelchair. For some time was in hospital and nursing home in High River.					
Additional Information			Name and Address of Person Preparing Form		
			Phone	Date Prepared 12 Jan 2008	

To preview the Family Group Record:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Family Group Record**.
3. Click **Preview** at the bottom of the options screen.

Your default PDF viewer will now open with a preview of your report.

To print the Family Group Record:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Family Group Record**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print.

Your Family Group Record will now print.

To publish the Family Group Record:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Family Group Record**.
3. Click **Publish** at the bottom of the options screen.
4. In the Publish As dialog box, assign a name to your report.
5. Select **OK**.

This will save the report in [PDF format](#) for further use. The default PDF viewer will then open, with your newly published report in view.

Load/Save options

Click on "Save Options" to save all the options of the Family Group Record, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Family Group Record Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as are in the file. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Notes to print. Select **Notes to Print, All, Non-Private, Marked (!) or None**. See also [Treatment of Notes](#), [Confidential Notes & Events](#).
- Sources to print. Select **Full** sources, **None**, or **Title only** to print.
- Multiple marriages. Select which spouse to print (if multiple spouses), and check if you wish other marriages to print with the notes.
- Events. Choose to print **LDS Ordinances** or not.
**Note: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.*
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.
- The date format follows the Windows [Short Date](#).

Layout

- Print space for additional children (work sheet). Select this to print blank space for additional children. This is most useful if you need to write additional children on the family group record during your research.
- Print notes and sources on separate page. Select this to print notes and sources on a new page.
- Pedigree chart reference number. Enter the chart and position number for the selected individual as they appear on his or her pedigree chart. These chart numbers will print in the report title following the individual's name.
- Left margin. Enter the desired space for the left margin.
- To change the page size to A4, click on File → Printer Setup → CC PDF Printer → Properties → 21.0 cm × 29.7 cm (8.27" × 11.7"), then Preview. Or, choose the paper size from the printer options when printing.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

Font

- **Font.** This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

[1] Because this report is in a fixed format the selected font type will be applied, but the font size will not.

*[2] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

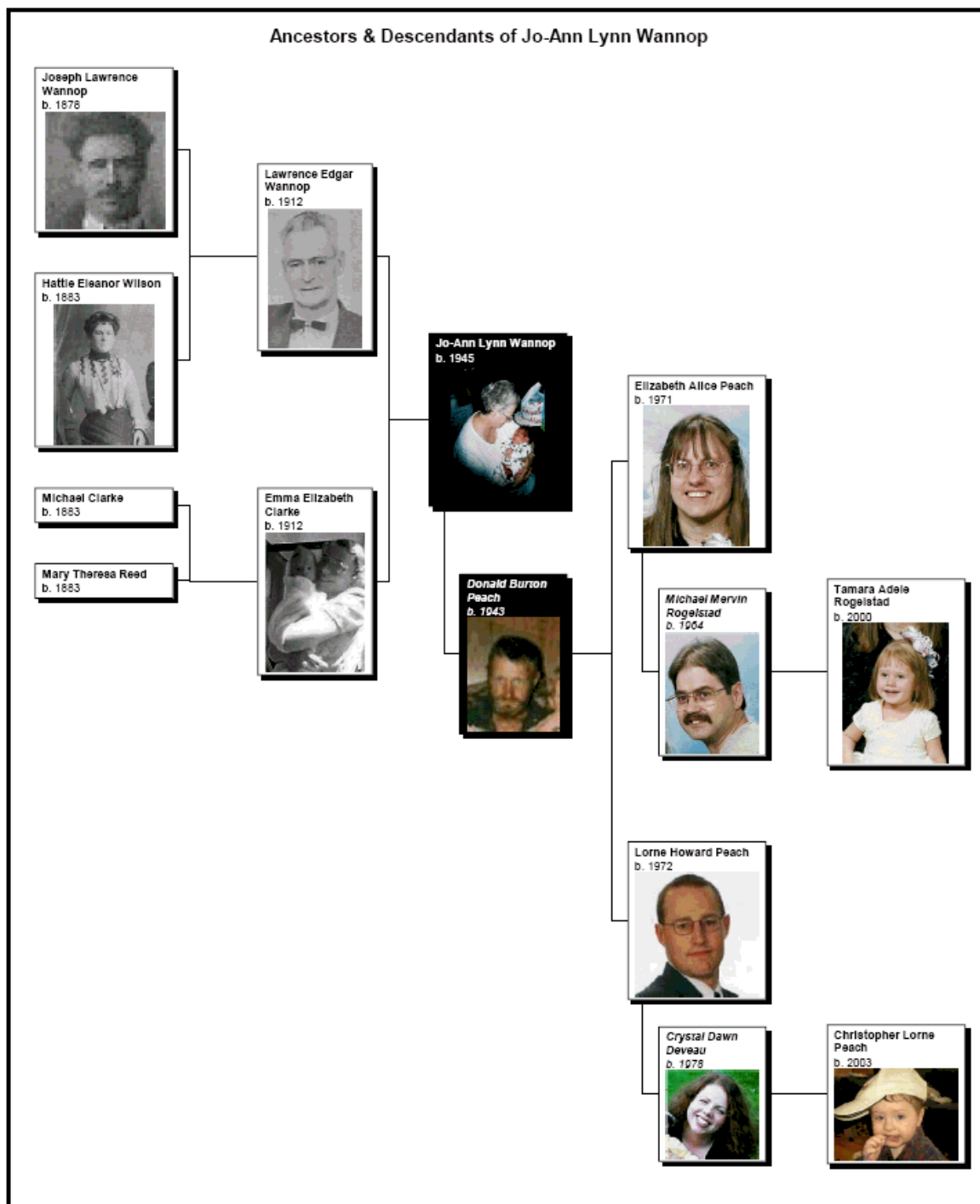
*[3] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Hourglass Chart

The Hourglass Chart is a box chart that prints both ancestors and descendants for an individual. By default, ancestors are shown to the left of the subject and descendants are shown to the right.

[Photos](#) and [colors](#) can be included in this chart.

Note: Photos may not be available for all types of image files.



Many [options](#) are available to format the content and layout of the Hourglass Chart, including an option to change the orientation so the descendants are to the left and ancestors are to the right. Many printed pages can be tiled together to create large charts.

Note: Unlike the Ancestor and Descendant charts, boxes may be split over a page break on large charts.

Click to learn how to [zoom & scroll](#) the Ancestor chart.

To preview the Hourglass Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Hourglass Chart**.
3. Click **Preview** at the bottom of the options screen. A preview of your chart will be displayed in the main window.



4. To print, click on the Printer button on the Tool Bar, then click the Print button.


To print the Hourglass Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Hourglass Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Hourglass Chart will now print.

To publish the Hourglass Chart



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Hourglass Chart**.
3. Click **Preview**, the Printer icon , then **Publish** at the bottom of the options screen.
Note: you must Preview the chart before Publishing, otherwise the JPG and HTML options will not be available.
4. In the Publish As dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart for further use in:


- [PDF format](#)
- Image format (JPG, PNG, GIF, BMP)
- [SVG or HTML](#)

- [RTF](#)
- [DXF](#)

The default PDF or image viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page



Click on the Fit-to-page icon,  to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

To edit the Hourglass Chart

Click on a rectangle and hold down the left mouse button. You can drag the rectangle around and change the chart to suit your preferences. The rectangle and all its ancestors or descendants will move together. Hold down the Shift key to move a single rectangle.

Hover the mouse over a vertical line. When the cursor shape changes to a double arrow, you can move the line left or right.

Page Range

page 1	3	5
2	4	6

Charting Companion prints by row within column.

Load/Save options

Click on "Save Options" to save all the options of the Hourglass Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Hourglass Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as are in the file. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**. The date format follows the Windows [Short Date](#).
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor Books (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

You can substitute [special symbols](#) for some events.

- Print place-names. Select this to print the name of the place where an event occurred.
- Include siblings. Select this to include the brothers and sisters of each individual in the ancestor part of your chart. If using colors in the chart, siblings will be assigned a lighter shade within the chosen color scheme. When the chosen [line width](#) is 2 pt or over sibling lines will reduce to 1/2 pt. "Anc. siblings 1st generation only" means that the brothers & sisters of the Subject will be displayed, along with their descendants. "Anc. siblings all generations" means that the brothers & sisters will be shown for all generations. Their descendants will only appear for the first generation.
- Include spouse last generation: Show the spouses of the descendants in the last generation. Uncheck if you don't want to show the spouses in the last generation.
- Female lines. Select this to print female as well as male descendant lines (descendants only).

- **Cousin Smart.** Select this to ensure that duplicate ancestors are not repeated for distant cousins who marry. The common ancestor will be printed in a box with horizontal gray line fill (hatch pattern).
- **Include photos.** Select this to print a [photo](#) for each individual who has a photo.
- **Print submitter.** Select this to print the [submitter's](#) name and information as a footer of the report.

Layout

- **Chart scale.** Enter a value greater than 100 to increase the printed size of the chart. A value less than 100 will shrink the size of the chart. All boxes, lines, and text will be scaled accordingly.
- **Margins.** Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed chart.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- **Chart Orientation.** Select **Ancestors on left** to display an individual's ancestors on the left and descendants on the right. Select **Descendants on left** to switch the order.
- **Page.** Set page width and height to create a larger chart. This is useful when saving to take to the printers or when printing directly to a plotter. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).
- **Paper orientation.** Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options. Note: This is the orientation of the paper, not the orientation of the chart. In other words, your chart will still print in successive generations from left to right.
- **Full page border.** Select this to print a full border around the edge of the page; otherwise the border will print only around the chart.
- **Print page numbers.** Select this to print a page number in the lower right corner of each page. This is recommended for easier assembly of tiled images.

Box

- **Box Style.** Select from three box types: **simple box**, **drop shadow**, or **no box**.
- **Line width.** This option sets the line width of the box outline and the connecting lines between boxes. Choose a smaller size for charts to be put in binders or books, and a heavier point for wall charts or emphasis.
- **Box Width.** Set minimum and maximum widths for the boxes. Note: The program may range within the box widths you specify to ensure that no box is split between two pages when it is printed.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- All boxes same width. Select this to make all the boxes in the same generation the same width; otherwise individual boxes will be separately sized to fit the text in each box.
- New line after name. Select this to start a new line for each event printed in the box; otherwise the program will attempt to print the events on the same line, even with the name if it will fit. Turning this option off can reduce the length of your chart.

New line =
OFF

Jean André Pothier b. 1912 m. 1936 d. 1992

New line =
ON

Jean André Pothier
b. 1912
m. 1936
d. 1992

- FTM color bar height: height of rectangle where colors assigned in Family Tree Maker are displayed.
- Limit photo height. This option will limit the height of your photo so that the size of the image will not increase past the specified size when the box width is increased. The photo will be centered in the box.

Color

See [Colors - how to pick](#)

Title

The Subject's name will be substituted for the "%n" token. To restore the Title to the default, change it to "Ancestors & Descendants of %n".

Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

*[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Border

See [Ornamental Borders](#)

Kinship Report

The Kinship Report prints, for a selected person, a list of all relatives together with their relationships. This is a great report to capture all the people (ancestors, descendants, and cousins) related to an individual you are researching.

Kinship of Hattie Eleanor Wilson			1
Name	Relationship	Common Ancestor	
(---), Ann	Grandmother of the husband	(---), Ann	
(---), Edith	Half sister-in-law	Wilson, Charles Edgar	
(---), Farrah	Wife of the 2nd cousin	Wilson, John	
Abraham, Joseph	Wife of the great-grandson	Wilson, Hattie Eleanor	
Atkinson, Jeffery Arthur	Husband of the great-grandaunt	Craig, (---)	
Avery, Christopher Alan	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Baker, Ida Ellen (d. 1937)	Husband of the granddaughter	Wilson, Hattie Eleanor	
Benson, Calvin Oscar (b. 1952)	Wife of the father	Wilson, Charles Edgar	
Benson, Jacqueline Rae (b. 1982)	Husband of the granddaughter	Wilson, Hattie Eleanor	
Benson, Kristopher Everett (b. 1979)	Great-granddaughter	Wilson, Hattie Eleanor	
Blye, Irene M.	Great-grandson	Wilson, Hattie Eleanor	
Boudreau, Leonard Wayne (b. 1969)	Sister-in-law	Wilson, Charles Edgar	
Broadhead, Cheryl Ann (b. 1968)	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Broadhead, Kathryn Deborah (b. 1995)	Great-granddaughter	Wilson, Hattie Eleanor	
Broadhead, Timothy William (b. 1965)	2nd great-granddaughter	Wilson, Hattie Eleanor	
Broadhead, William (b. 1925 d. 1996)	Great-grandson	Wilson, Hattie Eleanor	
Broadhead, William Thomas (b. 1992)	Husband of the granddaughter	Wilson, Hattie Eleanor	
Burton, Amanda Marie (b. 1988)	2nd great-grandson	Wilson, Hattie Eleanor	
Burton, Ashley Dawn (b. 1988)	2nd great-granddaughter	Wilson, Hattie Eleanor	
Burton, Randolph John (b. 1963)	2nd great-granddaughter	Wilson, Hattie Eleanor	
Butler, Lavina (b. 1855 d. 1892)	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Butler, Patrick	Mother	Butler, Lavina	
Cahoon, Dawnetta	Grandfather	Butler, Patrick	
Chartrand, Ronald Joseph (b. 1948)	Wife of the grandson	Wilson, Hattie Eleanor	
Chartrand, Wanda Sue (b. 1968)	Husband of the granddaughter	Wilson, Hattie Eleanor	
Chartrand, Wendy May (b. 1967)	Great-granddaughter	Wilson, Hattie Eleanor	
Clarke, Emma Elizabeth (b. 1912 d. 1949)	Great-granddaughter	Wilson, Hattie Eleanor	
Clima, Kevin Edward	Daughter-in-law	Wilson, Hattie Eleanor	
Craig, (---)	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Craig, Jane (d. 1847)	2nd great-grandfather	Craig, (---)	
Craig, Rachel	Great-grandmother	Craig, Jane	
Crandall, Douglas Anthony (b. 1978)	Great-grandaunt	Craig, (---)	
Cupples, Patricia Hamilton (b. 1974)	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Deveau, Crystal Dawn (b. 1978)	Wife of the great-grandson	Wilson, Hattie Eleanor	
Dickson, John Adam (b. 1909 d. 1976)	Wife of the great-grandson	Wilson, Hattie Eleanor	
Downey, Chris Douglas (b. 1959)	Husband of the niece	Wilson, Charles Edgar	
Downey, Christine Elizabeth (b. 1995)	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Downey, Rory Douglas (b. 1988)	2nd great-granddaughter	Wilson, Hattie Eleanor	
Downey, Whitney Leslie Ann (b. 1989)	2nd great-grandson	Wilson, Hattie Eleanor	
Ellis, Martha	2nd great-granddaughter	Wilson, Hattie Eleanor	
Erickson, Dennis (b. 1950)	Grandmother	Ellis, Martha	
Erickson, Sheldon Robert (b. 1971)	Husband of the granddaughter	Wilson, Hattie Eleanor	
Ferris, Queenie May (b. 1920)	Great-grandson	Wilson, Hattie Eleanor	
Fitz Patrick, LeRoy (b. 1889 d. 1970)	Wife of the nephew	Wilson, Charles Edgar	
Gibson, Rachel	Husband of the niece	Wilson, Charles Edgar	
Graham, Mary (b. 1853 d. 1917)	2nd great-grandmother	Gibson, Rachel	
Halliwell, Verna Lynn (b. 1948)	Mother-in-law	Graham, Mary	
Hannah, Florence Irene (b. 1903 d. 1993)	Wife of the grandson	Wilson, Hattie Eleanor	
Harker, Krystal Ann (b. 1978)	Wife of the nephew	Wilson, Charles Edgar	
Hillis, Charles George (b. 1917 d. 1970)	Wife of the great-grandson	Wilson, Hattie Eleanor	
Hillis, Dora Geneva (b. 1913 d. 1995)	Nephew	Wilson, Charles Edgar	
Hillis, Ezra Emmanuel George Foster (b. 1887 d. aft 1940)	Niece	Wilson, Charles Edgar	
Hillis, Ezra Foster (b. 1922 d. 1936)	Brother-in-law	Wilson, Charles Edgar	
Hillis, Susan Louvenia (b. 1914)	Nephew	Wilson, Charles Edgar	
Holladay, Micheal Wannop (b. 1998)	Niece	Wilson, Charles Edgar	
Holladay, Shawn Witbeck (b. 1974)	2nd great-grandson	Wilson, Hattie Eleanor	
Holter, Lois Evelyn (b. 1931 d. 1990)	Husband of the great-granddaughter	Wilson, Hattie Eleanor	
Holubec, Douglas Paul (b. 1956)	Daughter-in-law	Wilson, Hattie Eleanor	
	Husband of the granddaughter	Wilson, Hattie Eleanor	

12 Jan 2008

Using the [options](#) screen you can further customize the contents and layout of your report before printing. For example, you can choose the number of generations, only the closest or all relationships, types of events, and the date format.

To preview the Kinship Report:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Kinship Report**.
3. Click **Preview** at the bottom of the options screen.

Your default PDF viewer will now open with a preview of your report.

To print the Kinship Report:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Kinship Report**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print.

Your Kinship Report will now print.

To publish the Kinship Report:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Kinship Report**.
3. Click **Publish** at the bottom of the options screen.
4. In the Publish As dialog box, assign a name to your report.
5. Select **OK**.

This will save the chart in [PDF format](#) for further use. The default PDF viewer will then open, with your newly published report in view.

Load/Save options

Click on "Save Options" to save all the options of the Kinship Report, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Kinship Report Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose the number of generations of ancestors, descendants, and cousins you want included in the report, to a maximum of 200 generations.
- Relationships. Many individuals can be related in more than one way. Select **Print all** relationships or print **Only closest** relationship for each person in the report.

*Tip: If you select **Only closest** for large kinships that take a long time to process, your report will run faster.*

- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**.
- Events. Select **Birth** and **Death** events to include in your report.
- Print common ancestor. Select this to print the ancestor the subject individual shares with each person in the report.

Layout

- Title. Enter your own title to print at the top of the report, or skip this field to use the default title.
- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed report.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- Paper Orientation. Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options.
- Print report date. Select this to print the date on the bottom right corner of each page.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.

- To change the page size to A4, click on File → Printer Setup → CC PDF Printer → Properties → 21.0 cm × 29.7 cm (8.27" × 11.7"), then Preview. Or, choose the paper size from the printer options when printing.

Font

- **Font.** This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

[1] Because this report is in a fixed format the selected font type will be applied, but the font size will not.

*[2] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[3] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Outline Descendant Report

The Outline Descendant report prints an individual's descendants indented by generation. This is a useful summary report since it prints only one or two lines per person.

Descendants of (---) Wilson					
2					
<div> <div>(---) Wilson</div> <div> <div>① John Wilson</div> <div> <div>① John M. Wilson</div> <div> <div>① Charles Edgar Wilson</div> <div>① Charles Harry Wilson</div> </div> </div> </div> </div>					
					① Charles Wesley Wilson b. 1905 Innisfail, , Alberta, Canada d. 1975 Edmonton, , Alberta, Canada
					② Norval Roderick Wilson b. 1923 Salmon Arm, , British Columbia, Canada d. 1997 Penticton, , British Columbia, Canada
				① Hattie Eleanor Wilson b. 1883 Brigden, Lambton County, Ontario, Canada d. 1961 High River, , Alberta, Canada	
				+ Joseph Lawrence Wannop b. 1878 Langtown, Cumberland, England, United Kingdom m. 1910 Middlesex, , Ontario, Canada d. 1975 Haney, , British Columbia, Canada	
				① Lawrence Edgar Wannop b. 1912 Calgary, , Alberta, Canada d. 1964 Lethbridge, , Alberta, Canada	
				② Bruce Graham Wannop b. 1915 Calgary, , Alberta, Canada d. 1998 Maple Ridge, , British Columbia, Canada	
				② Charles Donald Wannop b. abt 1920 Calgary, , Alberta, Canada d. 2001 Prince George, , British Columbia, Canada	
				① Susan Lavina Wilson b. 1883 Brigden, Lambton County, Ontario, Canada d. 1925 Winnipeg, Manitoba, Canada	
				+ Ezra Emmanuel George Foster Hillis b. 1887 of Courtland, Norfolk County, Ontario, Canada m. 1911 Lambeth, Middlesex County, Ontario, Canada d. aft 1940	
				① Dora Geneva Hillis b. 1913 near Roseisle, , Manitoba, Canada d. 1995 Winnipeg, Manitoba, Canada	
				② Susan Louvenia Hillis b. 1914 Roseisle, , Manitoba, Canada	
				② Charles George Hillis b. 1917 Winnipeg, Manitoba, Canada d. 1970 Ottawa, Carleton County, Ontario, Canada	
				② Ezra Foster Hillis b. 1922 Winnipeg, Manitoba, Canada d. 1936 Winnipeg, Manitoba, Canada	
				① John Gorton Wilson b. 1885 Brigden, Lambton County, Ontario, Canada d. 1939 near Parkland, , Alberta, Canada	
				+ Margaret Ethel Thomson b. 1883 Galt, Waterloo County, Ontario, Canada m. 1909 d. 1978 Midnapore, , Alberta, Canada	
				① George Alexander Wilson b. 1910 near Parkland, , Alberta, Canada d. 1976 Nanton, , Alberta, Canada	
				② John James Edgar Wilson b. 1913 near Parkland, , Alberta, Canada d. 1921 near Parkland, , Alberta, Canada	
				② Nellie Butler Wilson b. 1915 near Parkland, , Alberta, Canada d. 1921	
				② Dorcas Wilhelmine Wilson b. 1919 Calgary, , Alberta, Canada d. 1997 Claresholm, , Alberta, Canada	
				② Jane Ethel Wilson b. 1923 Calgary, , Alberta, Canada	
				① Martha Ethel Wilson b. 1887 Brigden, Lambton County, Ontario, Canada d. 1964 London, Middlesex County, Ontario, Canada	
				+ James Hamilton Kilbourne m. 1909 Kilworth, Delaware Township, Middlesex County, Ontario, Canada d. 1967 London, Middlesex County, Ontario, Canada	
				① Ellen Lavina Kilbourne b. 1915 near Kilworth, Delaware Township, Middlesex County, Ontario, Canada d. 1996 Huntsville, Muskoka County, Ontario, Canada	
				② Alma Margaret Kilbourne b. 1919 near Kilworth, Delaware Township, Middlesex County, Ontario, Canada	
				① Margaret Carrie Wilson b. 1890 near Pondmills, Middlesex County, Ontario, Canada d. 1978 Calgary, , Alberta, Canada	
1	2	3	4	5	6

Although the default options will satisfy most users, the [options](#) screen allows you to customize the contents and layout of your report before printing. For example, you can choose to print vertical generation lines, preceding child numbers, a recap at the top of each page, and an index of all individuals in the report.

To preview the Outline Descendant Report:



1. Click the **Print Reports and Charts** button on the toolbar.
 2. Double-click on **Outline Descendant Report**.
 3. Click **Preview** at the bottom of the options screen.
- Your default PDF viewer will now open with a preview of your report.

To print the Outline Descendant Report:



1. Click the **Print Reports and Charts** button on the toolbar.
 2. Double-click on **Outline Descendant Report**.
 3. Click **Print** at the bottom of the options screen.
 4. Click **OK** to print.
- Your Outline Descendant Report will now print.

To publish the Outline Descendant Report:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Outline Descendant Report**.
3. Click **Publish** at the bottom of the options screen.
4. In the Publish As dialog box, assign a name to your report.
5. Select **OK**.

This will save the chart in [PDF format](#) for further use. The default PDF viewer will then open, with your newly published report in view.

Load/Save options

Click on "Save Options" to save all the options of the Outline Descendant, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Outline Descendant Report Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as exist in the file. Although you can print up to 200 generations, 12 is the advisable maximum if you want them to fit on a standard-sized page using the default font size. The program will tell you if you are trying to print too many generations on the report. Choose Landscape to fit more generations.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**. The date format follows the Windows [Short Date](#).
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor books (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

- Print place-names. Select this to print the name of the place where an event occurred.
- Print spouse. Select this to include spouses for the individual descendants.
- Cousin Smart. Select this to ensure that duplicate descendants are not repeated for distant cousins who marry.

Style

- Recap. This feature prints the direct descendant line, which takes you to the first person on each page. This is especially useful for large reports. Select **none**, **box only**, or **shaded box**.
- Indent each generation. Each generation in the report is indented by the number of character spaces specified in this box, to a maximum of 30 spaces.

- Event format. Select this to print one event per line or to apply word wrap, which prints several events on one line.
- Print vertical generation lines. Select this to print vertical lines denoting each generation in the report.
- Bold (name format). Select this to print the name for each descendant and spouse in bold.
- Print child number. Select this to print a sequential number for each child in a family. This number prints as a prefix to each child's name.
- Generation number. Select this to print a superscript generation number for each descendant.

Layout

- Title. Enter your own title to print at the top of the report, or skip this field to use the default title.
- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed report.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- Paper Orientation. Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options.
- Print report date. Select this to print the date on the bottom right corner of each page.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.
- To change the page size to A4, click on File → Printer Setup → CC PDF Printer → Properties → 21.0 cm × 29.7 cm (8.27" × 11.7"), then Preview. Or, choose the paper size from the printer options when printing.

Index

- Choose the type of index to print for the report. You can choose from no index, a one column person index, a two column person index, or a name index.

A person index sorts individuals by a surname and given names. Two different people with the same name would be indexed separately.

A name index is a condensed index of names, not individuals. It shows where all the given names for each surname are located in the report.

Font

- **Font.** This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

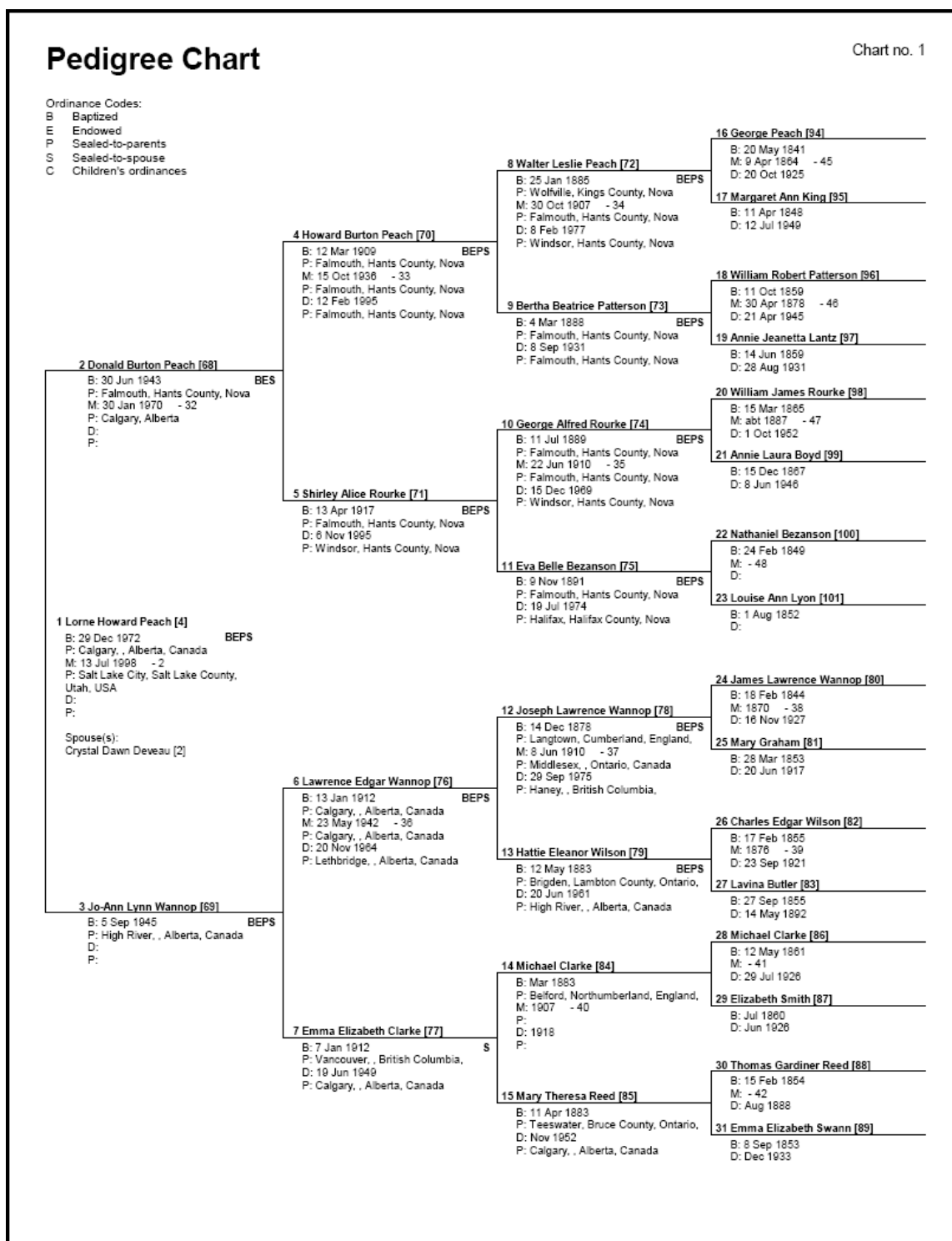
Font Tips:

*[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Pedigree Chart

The Pedigree Chart prints an individual's direct-line ancestors, which include parents, grandparents, great-grandparents and so on. All spouses for the subject individual will also be printed. The chart does not show siblings, cousins, aunts, or uncles.



You have a choice of printing 4, 5, or 6 generations per page. If you request more generations than will fit on one page, the program continues the pedigree chart on additional pages, numbering the pages for you. To ensure that the number of generations you selected per page actually fits on one page for your data, the program will reduce the text font size until it fits. For large pedigree charts this may result in slower printing. For faster printing choose a smaller font size to begin with.

If a person in the last generation has no parents, a new Pedigree page will not be generated as it would only contain the same name.

Using the [options](#) screen helps you further customize the contents and layout of your chart, including printing associated family group records and an index.

To preview the Pedigree Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Pedigree**.
3. Click **Preview** at the bottom of the options screen. Your default PDF viewer will now open with a preview of your chart.

To print the Pedigree Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Pedigree**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Pedigree Chart will now print.

To publish the Pedigree Chart



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Pedigree**.
3. Click **Publish** at the bottom of the options screen.
4. In the Publish As dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart in [PDF format](#) for further use. The default PDF viewer will then open, with your newly published chart in view.

Load/Save options

Click on "Save Options" to save all the options of the Pedigree Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Pedigree Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, then disable the Always show options before printing check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations as exist in the file. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Print pedigree index. Select this to print an alphabetical list of everyone on the Pedigree Chart.
- Print LDS ordinance information. Choose this to print LDS Ordinances.
**Note: LDS Ordinances will not print if the "[Show LDS Events](#)" option has been turned off.*
- Pages to print. Select the beginning and ending chart numbers to print. Leave it blank to print all charts (that is, pages).

Tip: You can print just an index, without the chart, by setting the beginning chart number to 99 and ending chart number to 99.

- Print associated family group records. Select this to print a family group record for each person in the pedigree chart.
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.
- The date format follows the Windows [Short Date](#).

Layout

- Number of generations per page. Select from **4**, **5**, or **6** generations to be printed on each page.
- Chart numbering. Specify the **beginning chart number** only if you are reprinting sections of a pedigree chart. You must also enter the first individual's **position number** and **chart number** on the original pedigree chart.
- Print sequential numbers. Select this to print sequential chart numbers for each pedigree chart so no gaps occur in the assigned chart numbers. De-select this to skip numbers for missing pedigree charts.
- Show Global Generation Number: prints absolute generation number in gray bar across the center of the chart.

- Left margin. Enter the desired space for the left margin.
- To change the page size to A4, click on File → Printer Setup → CC PDF Printer → Properties → 21.0 cm × 29.7 cm (8.27" × 11.7"), then Preview. Or, choose the paper size from the printer options when printing.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

Font

- Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

[1] Because this report is in a fixed format the selected font type will be applied, but the font size will not.

Maximum font size allowed for Pedigree Chart:

4 generations 10 pts

5 generations 8 pts

6 generations 7 pts

*[2] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[3] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Scrolling & zooming

Panning

Hold down the left mouse button and drag the chart to pan (move around).

Zooming

To zoom in and out, hold down the Ctrl key, and roll the thumb wheel on the mouse. Rolling towards the screen will zoom in (“getting closer”), and rolling the mouse wheel away from the screen will zoom out.

If you hold down the Shift key together with the Ctrl, the zooming will be finer (smaller increments).

You can also click on buttons in the tool bar to zoom in and out.



You can click on View, Zoom In and Zoom Out.

Pressing Ctrl + will zoom in, Ctrl – will zoom out, and Ctrl O will reset the zoom to 100%.

Home will re-center the chart.

Grid

To see where the page breaks will be, click on the Grid button. The page limits (including the margins) will appear as blue lines. You can also click on View, Grid.



Note that the Status Bar at the bottom of the screen will indicate the size of the chart, in pages:





2 pages wide x 2 high (131%)

Standard Family Group Record

The Standard Family Group Record is a variable length report providing family information for an individual and his or her immediate family including spouse(s), parents, children and notes. In addition, all user-defined events can be printed with this version of the family group sheet. Although the default options will satisfy most users, the options screen allows you to specify the

content and layout of the report, including events and notes before printing. [Photos](#) can be included in this report.

Note: Photos may not be available for all types of image files.

Family Group Record for Charles Edgar Wilson		1
Husband: Charles Edgar Wilson (#82)		
Birth	17 Feb 1855	Middleton, Norfolk, Ontario, Canada
Residence ¹	1913	125 - 19 Ave NE, Calgary, , Alberta, Canada
Occupation ²		Brigden, Lambton County, Ontario, Canada / Farmer & Dairyman
Occupation ³		, Middlesex County, Ontario, Canada / Dairyman
Occupation ⁴		, Norfolk County, Ontario, Canada / Farmer & Dairyman
Death	23 Sep 1921	Calgary, , Alberta, Canada
Burial ⁵		Union Cemetary, Calgary, , Alberta, Canada
Father:	John M. Wilson (#1102)	Mother: Rebecca Taylor (#1103)
		
Wife: Lavina Butler (#83)		
Birth	27 Sep 1855	Middleton, Norfolk, Ontario, Canada
Marr. ⁶	1876	
		Charles Edgar Wilson (#82)
Death ⁷	14 May 1892	London, Middlesex County, Ontario, Canada
Burial ⁸		Woodlawn Cemetary, London, Middlesex County, Ontario, Canada
Father:	Patrick Butler (#1087)	
Mother:	Martha Ellis (#1088)	
		
1. Norval Butler Wilson (#1093)		
Birth ⁹	12 Jun 1877	, Norfolk County, Ontario, Canada
Marr. ¹⁰	24 Aug 1898	
		Edith Stephens (#1138)
Marr. ¹¹	9 Sep 1945	
		Irene M. Blye (#1139)
Death ¹²	1949	San Gabriel, , California, USA
		
2. Charles Harry Wilson (#1094)		
Birth ¹³	4 Sep 1880	, Norfolk County, Ontario, Canada
Marr. ¹⁴	abt 1904	
		Martha Smith (#1141)
Death ¹⁵	20 Apr 1946	Penticton, , British Columbia, Canada
Burial		Lake View Cemetary, Penticton, , British Columbia, Canada
		

To preview the Standard Family Group Record:



1. Click the **Print Reports and Charts** button on the toolbar..
 2. Double-click on **Standard Family Group**.
 3. Click **Preview** at the bottom of the options screen.
- Your default PDF viewer will now open with a preview of your report.

To print the Standard Family Group Record:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Standard Family Group**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print.

Your Standard Family Group Record will now print.

To publish the Standard Family Group Record:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Double-click on **Standard Family Group**.
3. Click **Publish** at the bottom of the options screen.
4. In the Publish As dialog box, assign a name to your report.
5. Select **OK**.

This will save the chart in [PDF format](#) for further use. The default PDF viewer will then open, with your newly published report in view.

Load/Save options

Click on "Save Options" to save all the options of the Standard Family Group, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Standard Family Group Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Note: Some features may not be available for all file types or may be slightly varied.

Contents

- # of Generations. Choose from one to as many generations of **Descendants** or **Ancestors** as available. The maximum number of generations that can be printed is 200.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Notes to print. Select **Notes to Print, All, Non-Private, Marked (!) or None**. See also [Treatment of Notes](#), [Confidential Notes & Events](#).
- Events. See [Event Type Selection](#) for options. If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor reports (preceding the place name).

Tip: Events with no date or place appear only in the Family Group View, Standard Family Group Record, Ancestor Book and Descendant Book. They do not print on any charts.

Note 1: LDS Ordinances will not print if the [Show LDS Events](#) option has been turned off.

Note 2: The event Description, if one exists for a given event in your file, will be displayed in the events box following the place name. (i.e. Nova Scotia / Coal miner).

- Include photos. Select this to print a [photo](#) for each individual who has a photo.
- Print submitter. Print the [submitter's](#) name and information as a footer of the report.
- The date format follows the Windows [Short Date](#).

Layout

- Margins. Select **Top, Bottom, Left, and Right** margins for your printed chart.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- Paper Orientation. Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options.

- Page break at notes. Select this if you wish to print notes on a new page.
- Print worksheet. Select this to print a worksheet with blank spaces for missing individuals and missing event information. This will be useful for data collection during your research.
- To change the page size to A4, click on File → Printer Setup → CC PDF Printer → Properties → 21.0 cm × 29.7 cm (8.27" × 11.7"), then Preview. Or, choose the paper size from the printer options when printing.

Font

- Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

*[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.*

*[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

Tree Pruning

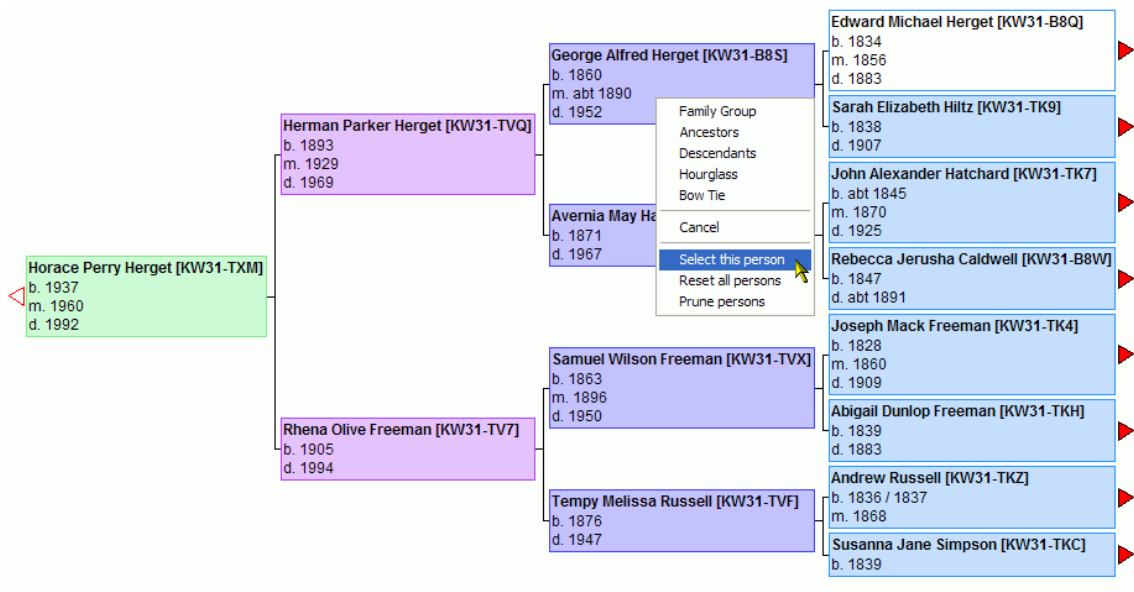
Tree pruning enables you to choose individuals, in an ancestor or descendant view, to emphasize their common lineage by removing all other persons.

Note: this does not delete persons from your data.

Pruning an Ancestor Tree or Descendant Tree:

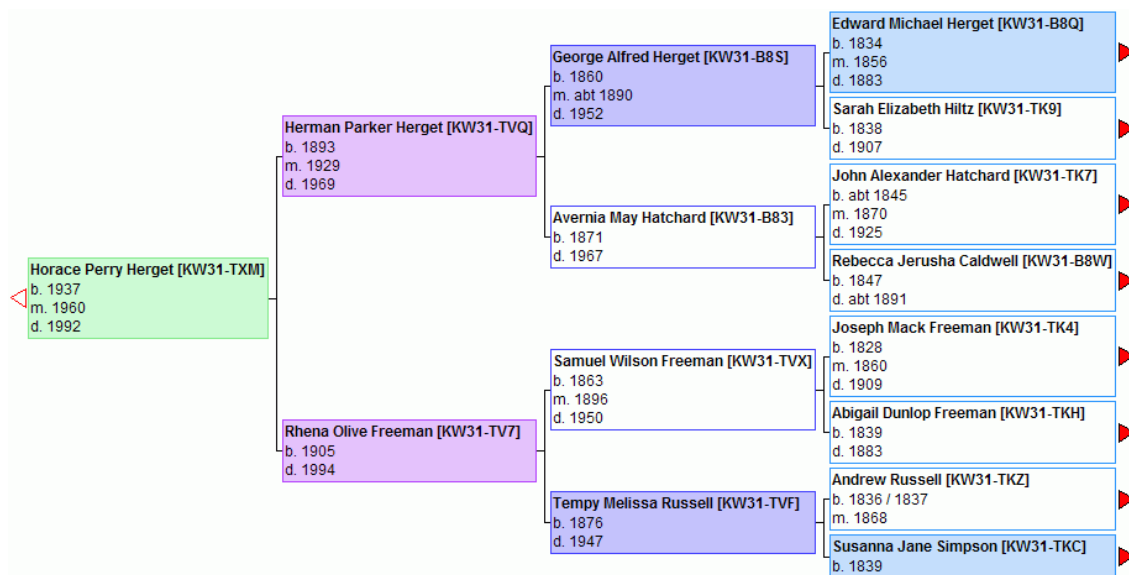
To create a pruned Ancestor Tree, start with an Ancestor View, and then do the following:

1. Right click on an individual and choose Select this person.

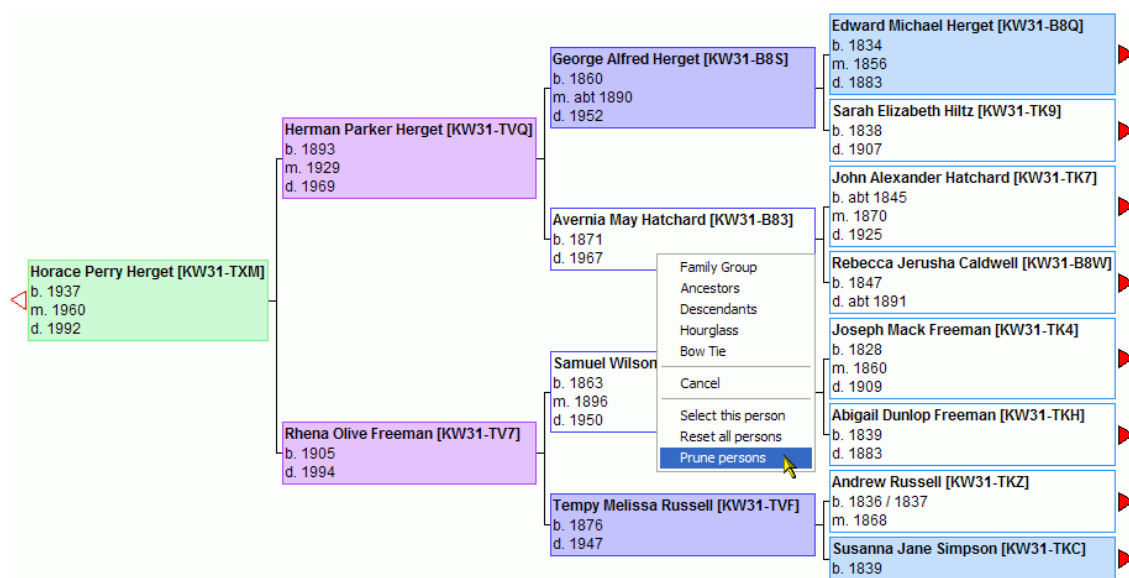


2. Select a second person the same way and the path to the common ancestor is automatically figured out.

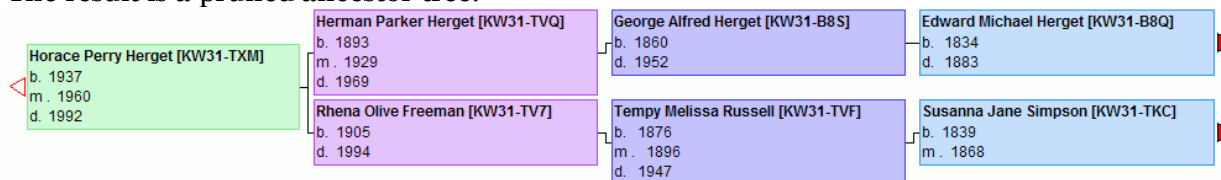
You can click on more than two people to show more comprehensive views.



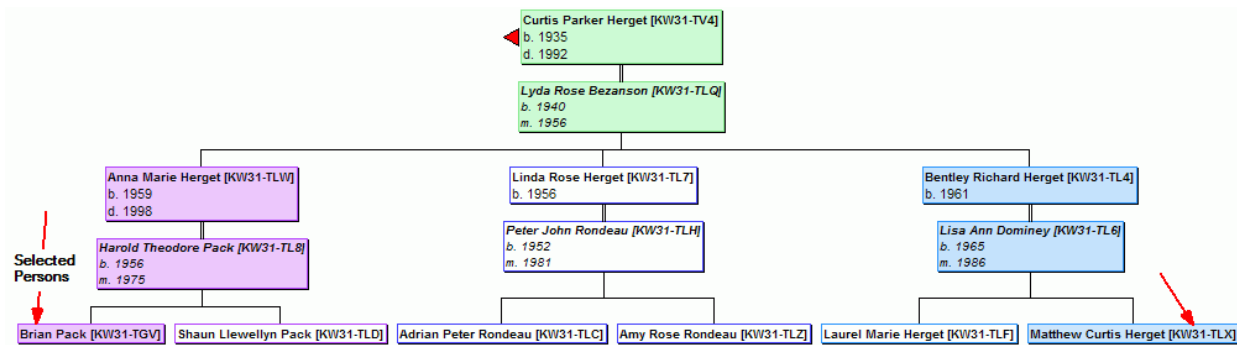
3. Now prune your ancestor tree by right clicking on any person and selecting Prune persons.



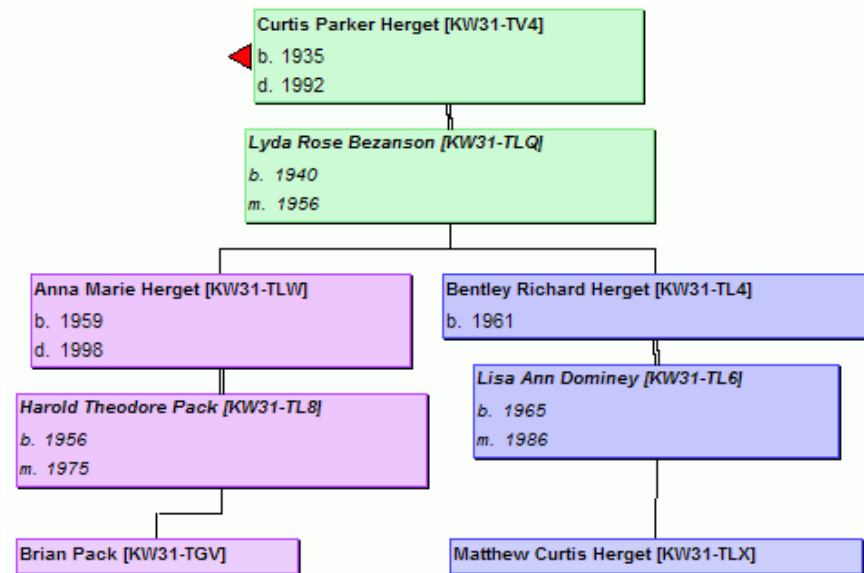
4. The result is a pruned ancestor tree:



You can prune a descendant tree the same way:

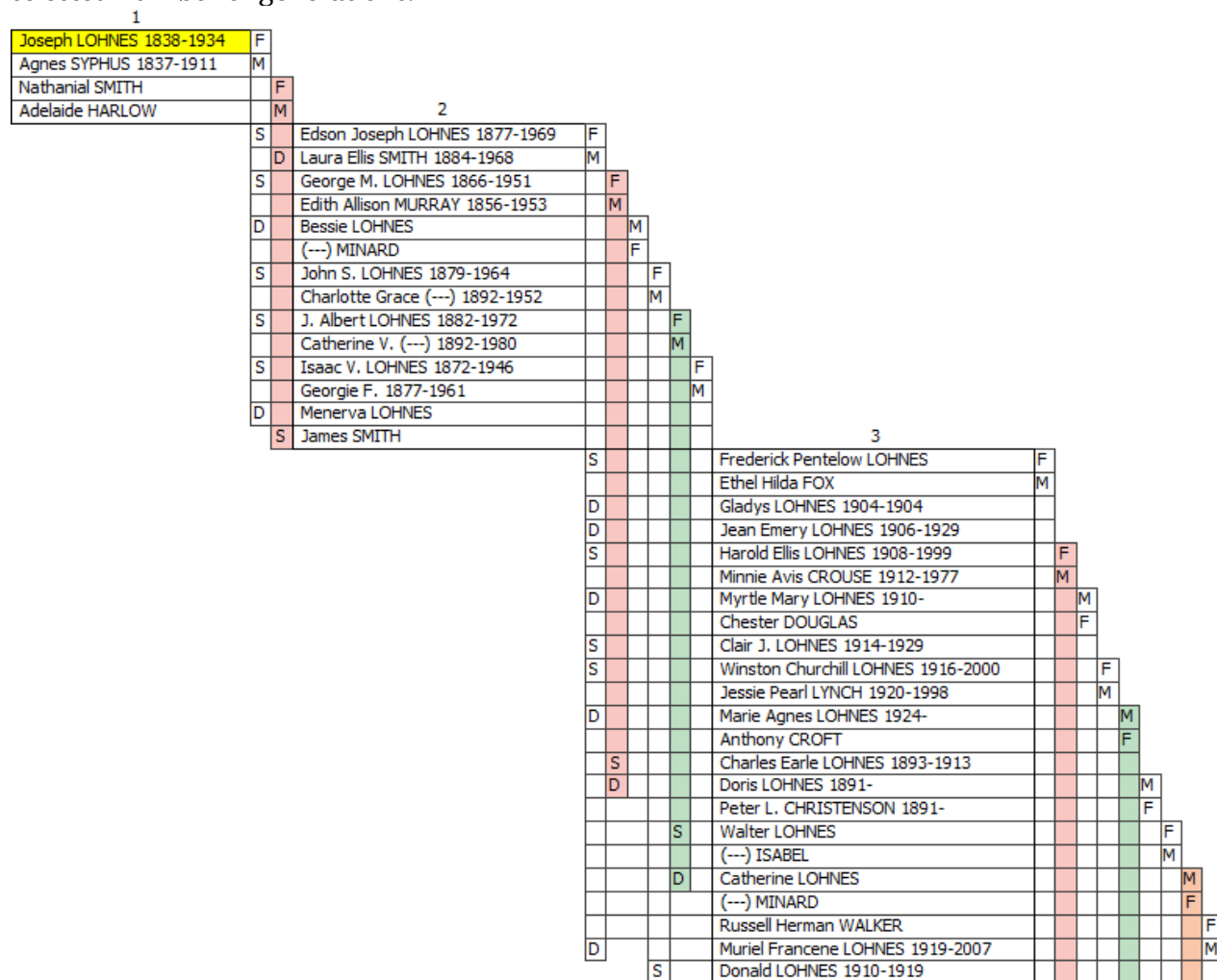


This is the result of a pruned descendant tree:



Trellis® Chart

The Trellis® Chart is a chart that prints all relationships to an individual, found in your file, for a selected number of generations.



Many [options](#) are available to format the content and layout of the Trellis® Chart. Many printed pages can be tiled together to create large charts.

'F' stands for Father, 'M' stands for Mother, 'S' is Son and 'D' is Daughter.

To preview the Trellis® Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Select **Trellis® Chart**.
3. Click **Preview** at the bottom of the options screen. Your chart will now open within Charting Companion.



4. To print, click on the Printer button on the Tool Bar, then click the Print button.

To print the Trellis® Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Select **Trellis® Chart**.
3. Click **Print** at the bottom of the options screen.
4. Click **OK** to print. Your Trellis® Chart will now print.

To publish the Trellis® Chart:



1. Click the **Print Reports and Charts** button on the toolbar.
2. Select **Trellis® Chart**.
3. Click **Publish** at the bottom of the options screen.
4. In the **Publish As** dialog box, assign a name to your chart.
5. Select **OK**.

This will save the chart in [PDF format](#) for further use. The default PDF viewer will then open, with your newly published chart in view.

To Resize the chart to fit to the page



Click on the Fit-to-page icon, to make the chart fit on one single page. There are two ways to accomplish this:

1. Increase the size of the paper to be as large as the chart.
2. Shrink the chart to fit the paper.

Load/Save options

Click on "Save Options" to save all the options of the Trellis Chart, to a file. You can restore the options by clicking "Load Options". This provides a handy reference to a variety of styles or option combinations.

Trellis® based on GeneaQuilts: A System for Exploring Large Genealogies, A. Bezerianos, P. Dragicevic, J.-D. Fekete, J. Bae, B. Watson, Visualization and Computer Graphics, IEEE Transactions on, vol.16, no.6, pp.1073-1081, Nov.-Dec. 2010

Trellis® Chart Options

Charting Companion remembers your report option settings from the last time you ran the program. If you regularly use the same options and do not want to see the options screen each time you run this report, disable the **Always show options before printing** check box. If you want to change the options after un-checking this option, bring it up by clicking on the menu (Charts & Reports, ...).

Contents

- The **# of Generations** indicates how many generations will be displayed above & below the subject. For example, "4 generations" will include the subject, three generations of ancestors and three generations of descendants, for a total of seven generations.
- Numbers to print. Select reference number (RIN, PIN, AFN, User ID or ID number, as determined by the file type you have open) or **None** to print after the individual's name. The default is the same as that specified in your genealogy program.
- Date format. Select **Long Date** (4 Jul 1776), **Short Date** (1776), or **No Date**. The date format follows the Windows [Short Date](#).
- Print submitter. Select this to print the [submitter's](#) name and information as a footer of the report.

Layout

- Chart scale. Enter a value greater than 100 to increase the printed size of the chart. A value less than 100 will shrink the size of the chart. All boxes, lines, and text will be scaled accordingly.
- Margins. Select **Top**, **Bottom**, **Left**, and **Right** margins for your printed chart.
- Page width & height. Maximum dimensions are 256" height and 256" width. (This is a limitation of Windows).

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

- Paper orientation. Select Portrait or Landscape mode. This has the same effect as changing the paper orientation in your printer setup options. Note: This is the orientation of the paper, not the orientation of the chart. In other words, your chart will still print in successive generations from left to right.
- Full page border. Select this to print a full border around the edge of the page; otherwise the border will print only around the chart.
- Print page numbers. Select this to print a page number in the lower right corner of each page. This is recommended for easier assembly of tiled images.

Box

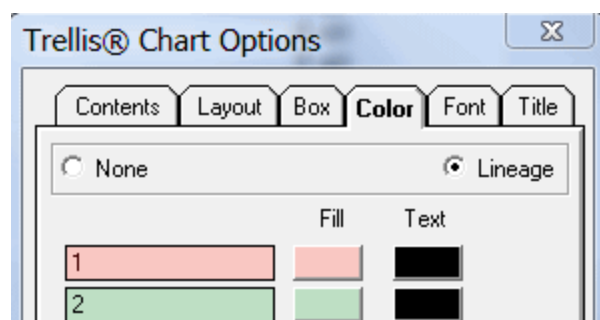
- Choose between Full Width or Half Width charts. To create a more compact chart, using less paper, select half width. To create a full sized chart, showing symbols for mother, father, sons and daughters, select the full width feature.

Line width.

- This option sets the line width of the box outline and the connecting lines between boxes. Choose a smaller size for charts to be put in binders or books, and a heavier size for wall charts or emphasis.

Color

- Color style. Choose a color scheme.



Note that the Custom Colors in the Windows Color Dialog are pre-filled with the ten colors from the Color tab.

- Default colors. To return to the program's default colors for all color styles within a chart dialog click the **Default colors** button.



Title

The Subject's name will be substituted for the "%n" token. To restore the Title to the default, change it to "Ancestors & Descendants of %n".

Font

Font. This preference allows you to select font type, style, and size for your reports and charts. Click the **Font** button; the standard Windows font dialog will be displayed. Select from the list of available fonts, style, and size; then click **OK**.

Font Tips:

[1] When using the Preview and Publish features, it is recommended that **TrueType** fonts are used. Other font types, such as PostScript, may not be supported.

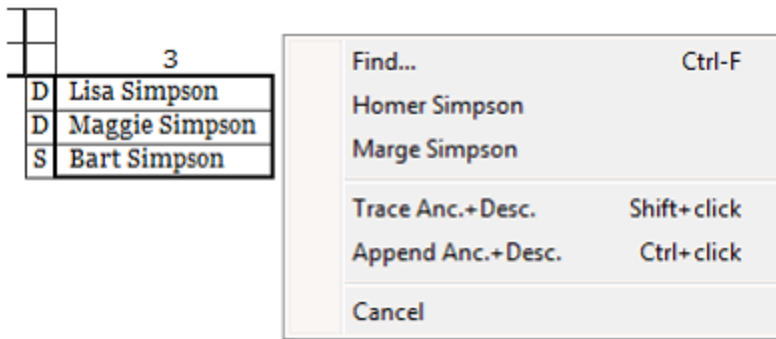
[2] Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.

Browsing the Trellis

Click to learn how to [zoom & scroll](#) the Trellis chart.

Navigation

If you Right-click on a name, you can jump to the parents, spouse or children of that person.



This makes it easier to Navigate a large family tree.

If you Right-click on a family column, you can jump to the parents or the children.

Pressing the Home key will take you to the top of the chart. Pressing End will go to the last generation at the bottom.

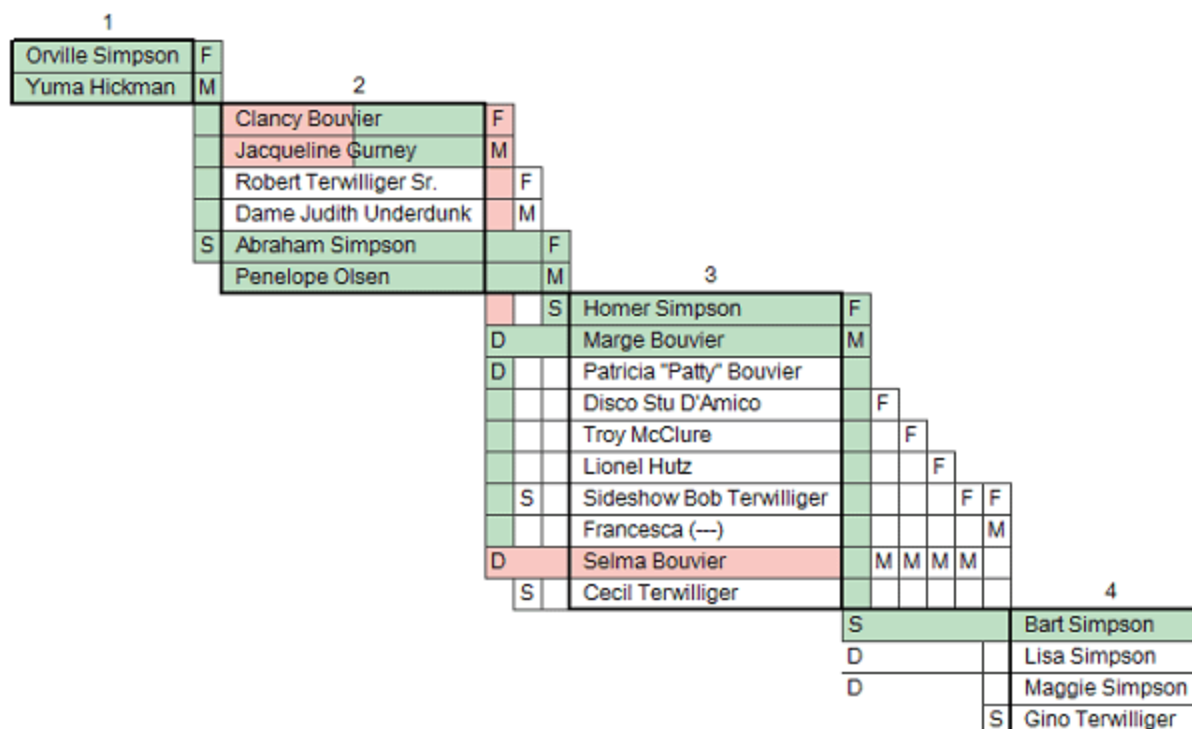
Tracing bloodlines

If you hold down Shift while clicking on a person with the left mouse button, all his/her ancestors and descendants will be highlighted.

If you press Ctrl and click the left button, the second person's lineage will be added to the first. Any common ancestors will be highlighted with a blend of the two colours.

You can continue Ctrl-clicking to add as many people as you want. The colors can be changed in the Color tab of the Options Dialog.

You can also initiate tracing by right-clicking one or more persons, and choosing from the pop-up menu. In this example we clicked on Bart and Selma:



Right-click anywhere and choose “Reset” to erase the tracing.

Right-click and choose “Collapse” to shown only the highlighted persons. “Expand” restores the full chart.

Rotate

Trellis charts have a tendency to spread diagonally downwards. To reduce the number of pages required to print the chart, check the “Rotate” option in the Layout tab.

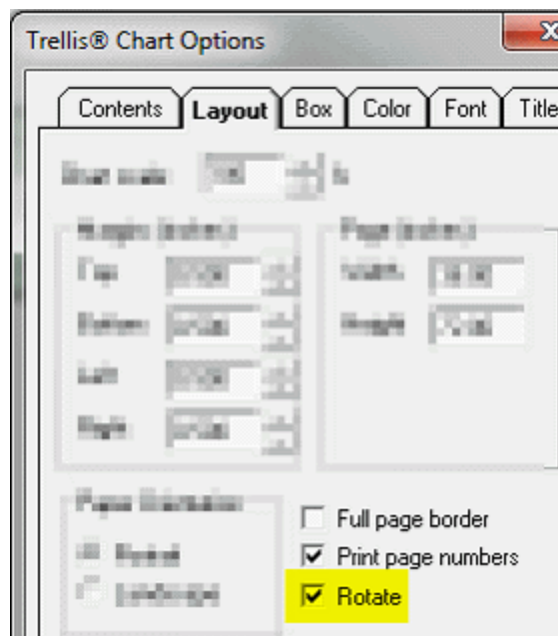


Figure 1 - Rotated chart

Searching

Right-click and choose “Find” (or press Ctrl F) to open a search dialog. Enter parts of the name you are searching for, and the Trellis chart will find the first occurrence that matches the search terms. Press F3 to search for the next name.

Printing, Previewing & Publishing

Printing

Charting Companion allows you to print your charts on any size of paper. Large charts can be created by tiling many pages together or by printing on a large-scale plotter. Charts and reports can be printed on any of the vast number of printers supported by Windows, including dot matrix, ink jet, and laser printers. The Fan Chart has special requirements that are available only on laser and ink jet printers.

The Descendant and Ancestor Books are automatically output to the [word processor](#) of your choice. From there you can perform additional editing before printing, such as adding photographs to your report. Supported word processors include WordPerfect, Microsoft Word, Microsoft Works, Open Office, Lotus Ami Pro and Microsoft WordPad. WordPad is included free in your Windows accessories group.

There are three ways to print a report from Charting Companion:

- From the menu bar, select **Reports** and click on your choice of report.
- From the menu bar, select **File** and click **Print**.
- From the toolbar, click on the **Family**, **Ancestor**, or **Descendant** reports button and select the appropriate report from the samples shown on the screen.

Tip: The Report buttons on the toolbar are in black and white. The View buttons are in color.

Selecting **Print** in any of the options screens for the twelve reports will open a [print dialog](#) screen.

Note: All charts and reports, with the exception of the Ancestor and Descendant books, can also be [previewed](#) and/or [published in PDF format](#).

Print Preview

For your convenience, all charts and reports, with the exception of the Ancestor and Descendant books, which automatically get sent to a word processor, can be previewed before printing.

To preview a chart or report:

- From the options dialog, select Preview

The Ancestor, Ancestor Fan chart, Bowtie, Hourglass, Trellis, Descendant and Descendant Fan charts will preview directly in the main window.

The Family Group Records, Kinship, Pedigree and Outline Descendant will preview as a PDF document.

The Ancestor Book and Descendant Book will preview in your default word processor.

The chart or report can then be printed by clicking on the printer icon, or from your PDF viewer, or you may return to Charting Companion and print from the options dialog.

Press the Home key to re-center the dialog.

Press Ctrl + to zoom in, Ctrl - to zoom out.

Press Ctrl O to reset the zoom to 100%.

Publishing

The Publish feature in Charting Companion makes it easier than ever before to share your charts with others by allowing you to save them in PDF format. This option is available for all charts and reports, with the exception of the Ancestor and Descendant books, which are sent automatically to a word processor for editing.



What is PDF?

PDF, or Portable Document Format, is a compact, universal file format that preserves document formatting, such as font, color, graphics, and layout, regardless of what type of software or operating system the document was originally created in.

With PDF you can:

- Easily share documents electronically. Because PDF files are compact, they can be sent through e-mail or saved to diskette.
- Create files that can be viewed by anyone with PDF viewing software, which, in many cases, can be obtained for free. This means others can see your document without having to buy any special programs and without incurring any costs to themselves.
- View documents on almost any operating system, with no conversion hassles or system compatibility worries. PDF files can be viewed in Windows, Macintosh, Linux, Unix and even Palm OS.

To publish a chart or report:

- From the options dialog, select **Publish**.

This will save the document in PDF format for further use. After saving, the default PDF viewer will open, with your newly published chart or report in view.

Some charts also support publishing in an image format (JPG, PNG, GIF, BMP) . PNG is preferred for line art. BMP creates larger files. JPG is better for continuous tone (photos), or charts with photos in them.

Publishing formats.

	Image (BMP, PNG, GIF, JPG, TIFF)	PDF Portable Document Format	RTF Rich Text Format	HTML Hyper Text Markup Language	SVG Scalable Vector Graphics	DXF Data eXchange Format	STL STereo Lithography
Big wall charts		✓		✓	✓	✓	
Take to a print shop	✓	✓		Maybe			
Insert in a book	✓		✓				
Email	✓	✓	✓	✓			
Publish on the Web	✓	✓		✓			
Edit with vector graphics program					✓	✓	
3D Printing							✓
Technology	Raster	Raster + vector	Vector	Vector	Vector	Vector	Vector
Maximum size	ca. 3,800 in ² Ex: 28" x 136"	36" x 200" 80" x 150" 66" x 180"	22"	2,000" and more Depends on browser	No limit	No limit	8" to 10" Depends on 3D printer

Printing Tips for Box Charts

Charting Companion will print the [Ancestor](#), Ancestor Fan, [Descendant](#), Descendant Fan, [Hourglass](#), and [Bowtie](#) Charts on as many pages as necessary. A fine dotted line and crop marks will also print to aid in aligning two adjoining pages.

TIP: For dot matrix printers using continuous fan-fold paper, you can create a continuous vertical chart with no gaps by specifying zero (0") for the top and bottom margin in the Report Options.

One of the program's more powerful features is the ability to present a chart on as few pages as possible. Often you can print your chart on even fewer pages by trying one or more of these suggestions:

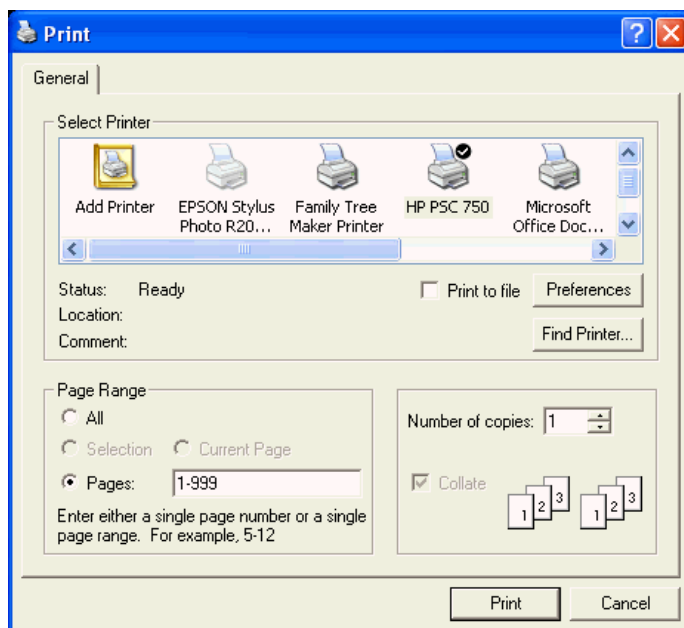
- Turn on Cousin Smart.
- Choose the short date format.
- Select fewer events.
- Turn off place-names for events.
- Turn off New Line after Name.
- Choose landscape mode.
- Choose a different or smaller font.
- Scale down the chart (that is, print it at less than 100 percent)
- Specify smaller margins.
- For the [Descendant Chart](#), switch the chart orientation from Top-bottom to left-right, or vice-versa. Check "Last gen. optimize" to reduce the height of the Left-to-right.

Some of these tips may also apply to other reports, including the Outline Descendant and Kinship.

Tip: Charting Companion will automatically adjust to U.S. (inches) or metric (centimeters) units of measure depending on the regional settings in your Windows operating system. This applies to chart and box sizes, as well as margins and indent options for your charts and reports.

Using the Print Setup Window

When you print any report or chart, with the exception of the Descendant Book and Ancestor Book, the following print dialog box appears. This is the standard Windows print dialog. If you need help setting up your printer in Windows, consult your Windows user's guide.



To respond to the print dialog:

- Click OK or Setup to change the printer options.

SVG and HTML

SVG is "**Scalable Vector Graphics**".

You can now save Ancestor, Descendant, Hourglass and Bowtie charts in SVG format, or embedded in an HTML page.

Vector graphics is the use of geometrical primitives such as points, lines, curves, and shapes or polygons — all of which are based on mathematical expressions — to represent images in computer graphics.

SVG is a vector format, where an image is described as lines and X/Y coordinates, as opposed to a raster format (JPG, PNG, GIF) where images are made of rows of pixels. SVG excels at line art such as charts. Raster is better suited for photographs. See [Wikipedia](#) for a more extensive explanation.

Charting Companion can publish Ancestor, Descendant, Hourglass and Bowtie charts in SVG format for editing, or embed the SVG in an HTML file for displaying on a Website.

Advantages of SVG/HTML

The benefits of SVG are:

- You can publish the HTML chart on a Website.
- Vector images look better. The quality is consistent regardless of which device is displaying them (mobile phone, tablet, desktop).
- Edit the SVG with a vector graphics editor like [InkScape](#), [GIMP](#), Adobe Illustrator, Corel Draw, Microsoft Visio, etc. Add your own text annotations, embellishments, background images, move boxes around.
- Combine multiple SVG charts.
- SVG files can be displayed in any browser.
- An SVG chart can include hyperlinks and social media buttons (Facebook, Twitter, Google+) that can be clicked to link to Websites. Any event where the Place or Description contain "http://" will be converted to a hyperlink. Add User-defined or Custom events to store the URL.
- You can print an SVG chart.
- You can zoom in/zoom out while preserving the sharpness of the lines.
- SVG charts can include photos.
- You can email and share SVG charts.
- SVG images are more compact than the raster equivalent. SVG charts are easier to email, faster to download.
- You can convert SVG to raster (JPG, PNG), but not the other way around.
- Vector images are Search-Engine friendly, because they contain ASCII text.

- If a person has Notes, they will be displayed in a box when the cursor floats above the person's photo.

Creating an SVG or HTML

To create a chart in SVG format, first choose the chart type (click on "Charts and Reports, Ancestor" for example), and click "Preview".



Then click on the Printer icon, and "Publish". Choose "HTML" or "SVG" as the file type, and click "Save".

Choose:

- SVG if you want to edit the chart
- HTML if you want to upload it to your Website, or email it to a friend or relative.

If you have a file named "ga.js" in the installation (program) directory that contains Google Analytics JavaScript, the contents of this file will be inserted in the HTML file, just before the </head> tag.

SVG Graphic Editors

See following links for lists and reviews of vector graphics editors:

- [Wikipedia](#)
- [Gizmos Freeware Reviews](#)
- [Smashing Magazine](#)
- [About.com](#)
- [ZDNet](#)
- [Onextrapixel](#)
- [Open Source Alternative](#)
- [Speckyboy Design Magazine](#)
- [Azrael Group](#)

(Please report any broken links. The Web is evanescent.)

"*Brevity is the soul of wit.*" (Polonius, Hamlet)

"*Brevity is the soul of lingerie.*" (Dorothy Parker)

RTF (Rich Text Format)

Origin

The [Rich Text Format](#) (abbreviated RTF) is a proprietary document file format developed by Microsoft Corporation from 1987 until 2008 for cross-platform document interchange with Microsoft products. RTF syntax is based on Donald Knuth's [TeX](#) typesetting software. RTF files are text files, and can be displayed or edited with a simple text processor such as Notepad.

Most word processors are able to read and write some versions of RTF.

Benefits

The advantage of publishing charts in RTF is that they can be merged into a word processing document, and combined with a Descendant Book or Ancestor Book.

RTF is a vector format. RTF charts are smaller and sharper than raster images like JPG or PNG.

How to use

To copy an RTF chart into another document:

- Display the RTF chart in your word processor
- Press Ctrl A to select entire chart
- Press Ctrl C to copy the chart
- Display your book. Insert a blank page in the middle of your book:
 1. In MS Word, click on "Page Layout, Break, Section Break/Next page" (twice)
 2. In the new blank page, click on "Page Layout, Orientation, Landscape" if you want to change the orientation of this single page to Landscape
- Press Ctrl V to paste the chart. If Ctrl V doesn't work, click on the Home menu "Paste, Paste Special", choose "Formatted Text (RTF)"
- Don't forget to re-generate the Index

RTF files can also be included in a PowerPoint presentation by inserting the file as an Object.

The RTF file can be saved as an MS Word ".DOC" or ".DOCX" file.

Limitations

Note that in Microsoft Word, the maximum page dimension is 22" (56 cm), and RTF images cannot be tiled (multi-page). For larger charts, use PDF, SVG or PNG.

MS Word does not support rotating fonts other than 90°; it is not possible to display Fan charts in RTF. Use PDF, SVG or PNG instead.

OpenOffice has not fully implemented the RTF spec., the rectangles will be displayed, but possibly not the text.

The current version of Charting Companion supports only one page per chart.

DXF (Data eXchange format)

DXF was developed by Autodesk for exporting AutoCAD drawings. DXF is a common vector file format, and can be read by any drafting software, as well as MS Visio, SmartDraw, Adobe Illustrator, etc.

DXF stores photos in BMP format, which is not compressed and therefore very large. This will cause the size of the chart file to be big.

Excel spreadsheets (XLS)

The "XLS" (Excel spreadsheet format) is available for Ancestor and Descendant charts. The current version of Charting Companion exports the five basic events: Birth, Christening, Marriage, Death and Burial.

All the options governing who gets displayed (siblings, Y-DNA, mtDNA, etc.) applies to the XLS export.

You can use this format to perform special extracts, analyses, DNA matching, etc.

The date is exported as a string of text because genealogy dates are too complex to be treated as native dates in Excel. Excel cannot represent dates where the day or month is unknown. For example, Excel displays "@date(2016,2,0)" (Feb. 2016) as "31 Jan 2016", or "@date(2016,0,0)" as "30 Nov. 2015".

To configure the date format, see [here](#).

If there is interest, Charting Companion could be enhanced to place day, month and year in individual columns.

To create a CSV file, export the XLS file to CSV.

XLS files can also be read by Open Office, and Libre Office.

Wall Charts

Wall Chart Overview

A wall chart is any large-scale genealogy chart that exceeds the paper size capacity of a typical dot matrix, ink jet, or laser printer.

Conventional Method

Charting Companion allows you to print ancestor and descendant charts of any size. If your chart exceeds the size of the paper, it will print on multiple pages. This is called tiling. With the aid of printed alignment marks and crop marks, you simply cut and paste the individual pages to create the large (tiled) chart.

Wall Chart Printing Alternatives

Charting Companion provides two additional options for [printing wall charts](#) on a single large sheet of paper:

1. Print directly to a large-scale plotter attached to your PC.
2. Print to a disk file (print file), which can be given to a local print shop for output to the shop's large-scale plotter. *Important: This disk file can only be used for printing the chart to a printer. It cannot be used by a graphics or HTML viewer.*



Wall Chart Printing Tips Manual

*For more information on printing wall charts, please see our handy Wall Chart Printing Tips manual, which can be downloaded by selecting **User Guides, Wall Chart Printing Tips** from the Charting Companion menu.*

Note: You must be connected to the Internet to access this feature.

Printing Wall Charts

Charting Companion provides three options for printing large-scale wall charts on a single large sheet of paper:

Option 1: Print directly to a plotter attached to your PC.

If you own or can borrow a large-scale plotter, this option provides the quickest and most direct results.

Note: You must have the appropriate Windows [printer driver](#) for the make and model of your plotter.

- Ensure that your plotter is selected in the printer setup, and click **OK** from the chart options screen.

Option 2: Publish to PDF (recommended)

Choose Custom paper size, set Width & Height, Publish to PDF, save PDF to USB memory, take to Print Shop.

Option 3: Print to a disk file (print file).

You can direct your chart to a disk file, that can be given to a local print shop for output to a large-scale plotter there.

Important: This disk file can only be used for printing the chart to a printer. It cannot be used by a graphics or HTML viewer.

Tip: You must have the appropriate Windows printer driver installed on your system for the make and model of the plotter used by the print shop.

1. Print the chart as you normally would, except when the print dialog screen is displayed, check (X) the Print to File option as follows:
2. You will be asked to supply the disk drive and file name to save your chart file to a disk.
3. Take the disk to the print shop for printing.



Wall Chart Printing Tips Manual

*For more information on printing wall charts, please see our handy Wall Chart Printing Tips manual, which can be downloaded by selecting **User Guides, Wall Chart Printing Tips** from the Charting Companion menu.*

Note: You must be connected to the Internet to access this feature.

Special Features

Saving a Copy of Your View Screen

A special feature in Charting Companion allows you to save a copy of the screen image for an Ancestor, Ancestor Fan, Descendant, Descendant Fan, Hourglass, or Bowtie View. This screen image is saved as a graphic file (BMP, JPEG, GIF, or PNG) on your hard disk. You can then use this file in other documents you create with your word processor, desktop publisher, or image editing software. For example, you can add your personal comments (annotations) with Microsoft's Paint program (included in your Windows accessories group). From the Paint program you can also print in color if you have a color printer.

To save a copy of an Ancestor, Descendant, Hourglass, or Bowtie view (current screen image only) to your hard disk:

1. Create your chart view (make sure it is displayed on the screen).
2. From the menu bar, click **File**.
3. Click **Save Screen** Image.
4. Enter the file name and path to save the image on the hard disk.
5. Select the file type by selecting the down arrow next to **Save as type** and clicking on the desired format.
6. Click **OK**.

You can also save as an image file by previewing, then clicking on "Publish", and choose an image file format (JPG, PNG, BMP, GIF). PNG is best if the chart consists only of lines; JPG is best if the chart includes photos.

Resetting preferences

If you hold down the Shift key when starting Charting Companion, all the options will be reset to default.

Press on the Shift key, double-click on the Charting Companion icon. Or right-click on the icon and click on "Open".

Or click on the Start button, then Charting Companion while holding down the Shift key.

Special symbols for events

You can substitute special, custom symbols of your choice for some events. In the following file:

```
C:\Users\loginID\AppData\Roaming\Progeny\CC\Charting  
Companion.INI
```

(where "loginID" is your login ID), add the following lines at the end of the file:

```
[SYMBOLS]
```

```
BIRTH=>
```

```
MARRIAGE=&
```

DEATH=<

BURIAL=+

OCCUPATION=\$

Automatic scripts

An automatic script enables Charting Companion to generate one or more charts and reports automatically. Charting Companion will cycle through all the scripts, create the chart, save it in the specified format, and display the results.

How to prepare automatic scripts

The scripts are saved as XML files, in the same format as the chart options.

To create a script, do the following.

1. Create an empty file named "MELANIE.~" in the directory where Charting Companion is installed. This file signals that you will be creating script files. Ex:
C:\Program Files (x86)\Charting Companion\melanie.~
You only need to do this once.
2. Go to the Subject whom you want to be the root of the chart.
3. Click on the menu "Charts & Reports", click on the chart of your choice. The Options dialog will come up.
4. Change the settings as you choose.
5. Click on "Save options". Select a file name and directory where to save this script file. Give the file a meaningful name, including chart type, output format, name of Subject, description of the options, etc.
Ex: Ancestor PDF John Smith 5 gen.xml
6. You will be prompted for the chart file format: PDF, PNG, HTML, etc.
7. Charting Companion will save all the current options for this chart.

How to use automatic scripts

To make Charting Companion execute the scripts:

1. Press Ctrl + Shift + F12. This will bring up the special Test menu option.
2. Click on the menu "Test -> Reports -> Run test from scripts"
3. Browse to the directory where you saved your scripts. You can select one or multiple scripts to be run.
4. Click OK to run the script(s). The chart files will be automatically displayed in the default viewer: Adobe Reader for PDFs, Windows Edge (or whichever image viewer you have set as default) for PNG and HTML, MS Word for RTF, etc.

The Subject's internal ID will be specific to the genealogy file, so the scripts must be run against the original file from which they were created.

If you want to copy a whole set of script files to run against another genealogy file, you can edit the XML file and change the Subject's ID. Look for the line:

```
<Subject val="62"/>
```

Change the number to whichever value corresponds to the new Subject.

You can also change the output file type:

File format	Code
PDF	<code><publishType val="4"/></code>
PNG	<code><publishType val="128"/></code>
HTML	<code><publishType val="8"/></code>
RTF	<code><publishType val="4096"/></code>

You can start from the XML files that Charting Companion creates to save your chart options. The XML option files are located in:

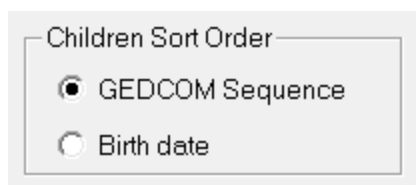
C:\Users\myUserId\AppData\Roaming\Progeny\CC

User Preferences

Children Sort Order

For some genealogy file formats (GEDCOM, RootsMagic), the order in which children & siblings are displayed can be:

- Birth date order
- File order, "GEDCOM Sequence" (the order in which they are stored in the file)



Date Format

See [Charts & Reports](#).

Font

This preference allows you to select font type and style for your screen display.

NOTE: This does not change or affect the font used in the charts and reports you create. This must be done through the chart or report dialog box.

Font Tip:

*Charting Companion does not allow the selection of some early Windows System fonts, originally included for backward capability purposes, such as Modern, Roman, Script and Terminal. If you would like to use one of these font styles, please select a similar **TrueType** version.*

To change the font:

1. Click on **File** in the menu bar.
2. Select **Options**.
3. Click the **Font** tab; the standard Windows font dialog will be displayed.
4. Select from the list of available fonts, style, and size; then click **OK**.

Ibid

Note: Some features may not be available for all file types.

Charting Companion lets you to choose to use Ibid. for repeating sources in your LDS-style and Standard Family Group Records, as well as in your Ancestor and Descendant books. When this option is activated, repeating sources that follow directly beneath each other will have the word "Ibid." appear in place of source title, author, repository and so on, with citation (detail) text and comments following after. This allows you to save valuable space and paper in your reports.

Tip: Due to the design of the report layout, Ibid is reset for each person in the LDS-style and Standard Family Group Records.

To use Ibid. for repeating sources:

1. From the menu bar, select **File**, then click on **Options**, .
2. Check the **Use Ibid. for repeating sources** box.
3. Click **OK**

LDS Events

Note: Some features may not be available for all file types.

Charting Companion allows you to choose whether to show/print LDS Events. This affects only the presentation of your database in Charting Companion and does not change the files in any way.

- If the Show LDS Events box is selected, you will have the ability to include LDS Events in all reports and charts.

- If the Show LDS Events box is NOT selected, LDS events will not appear in any views or reports. Also, the LDS Event option will be grayed out in all Options dialog boxes.

To show/not show LDS Events:

1. From the menu bar, select **File**, then click on **Options**.
2. Check the **Show LDS Events** box.
3. Click **OK**.

Restoring Defaults

You can set your own options for the views, reports, and [user preferences](#). At any time, you can restore these options to their original default values.

To restore the default options:

1. From the menu bar, select **File**, then click on **Options**.
1. Click **Restore** under the General tab.
2. Click **OK**.

Setting Your Preferences

Charting Companion lets you customize many features for the views and reports, as well as deciding how you interact with the program. For your convenience, the following options are available on the menu bar under **File**, then **Options**:

Note: Some features may not be available for all file types.

[Word processor](#)

[Treatment of notes \(word wrap\)](#)

[Substitutions](#)

[Surnames](#)

[LDS Events](#)

[Children Sort Order](#)

[Ibid](#)

[Status bar](#)

[Substitutions](#)

[Surnames](#)

[LDS Events](#)

If you hold down the Shift key when starting the program, the User Preferences will be reset. Hold down the Shift key and double-click on the Charting Companion icon, or click on the icon once and hit Enter.

This is handy if the program is trying to automatically open a file that is causing problems, for example an FTM 2012 file that you forgot to convert to FTM 2014.

Author

The author preference provides Charting Companion with personal information that can be printed as a footer in your reports and charts.

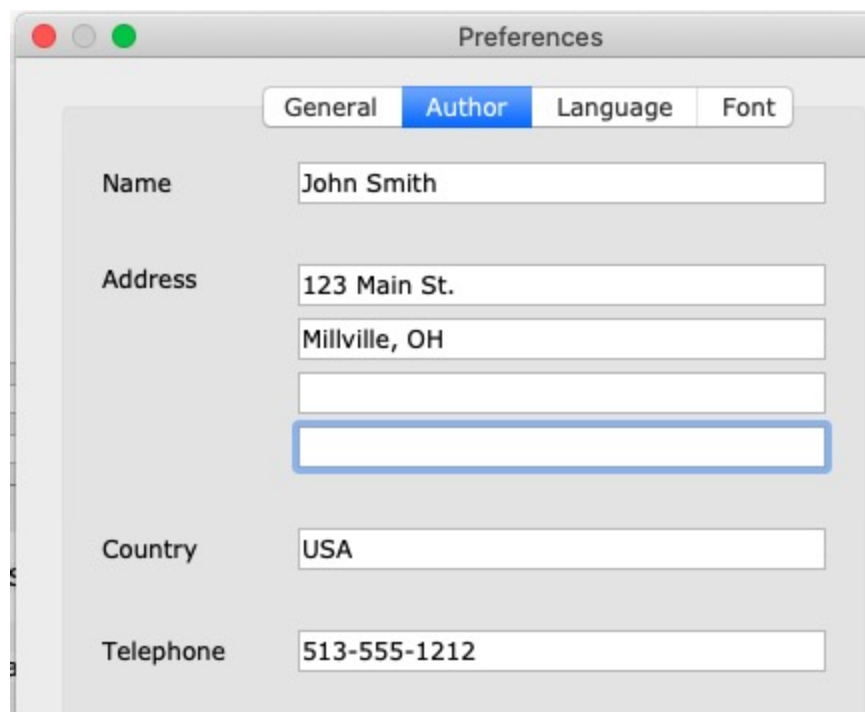
The author information is initialized to the values defined in your genealogy program each time you run Charting Companion.

Important. If you wish to make a permanent change to your author information, you should do it within your genealogy program. Charting Companion will allow you to temporarily change the author information to print on your reports; however, this information is not updated within your genealogy file.

To change the author information:

1. From the menu bar, select **File**, then click on **Options**.
2. Click on the **Author** tab.
3. Enter or change your personal information and comments.
4. Click **OK**.

Note: If you insert "%d" (without quotes) in any of the Author lines, it will be replaced with today's date:



Author information with date symbol

becomes:

John Smith, 123 Main St., Millville, OH, U.S.A 24 Jul 2015

"%f" will substitute the file name, and "%p" the file path, including drive & directory.

Substitutions

Charting Companion will make the following substitutions in all applicable reports. This affects only the presentation of events in the reports and does not change the files in any way.

- Substitute christening event information when birth is not known.
- Substitute burial event information when death is not known.

To disable substitution:

1. From the menu bar, select **File**, then click on **Options**.
2. Deselect **Substitute Chr. and Burial**.
3. Click **OK**.

Surnames

There are two alternatives for printing and displaying surnames. You can choose:

- **As entered**. For example, VanBuren will appear as VanBuren.
- **Uppercase**. For example, VanBuren will appear as VANBUREN.

This user option affects the presentation of all surnames in Charting Companion but does not change or update the files in any way. The only exceptions are the Descendant and Ancestor books, where you can select various surname formats for those reports only.

To change the way surnames are displayed or printed:

1. From the menu bar, select **File**, then click on **Options**.
2. Choose **As Entered** or **Uppercase**.
3. Click **OK**.

Replacing the "(---)" when a name is missing.

If you add the following to the configuration file:

```
[ NAME ]  
MISSING=***
```

Charting Companion will substitute the character string you specify where a person exists, but the given name or surname is missing in the database. The default is "(---)".

If you enter this:

```
[ NAME ]  
MISSING=
```

missing names will not be replaced with a string. They will simply be omitted.

Replacing "Unknown" when there is no person.

If you add the following to the configuration file:

```
[ NAME ]  
UNKNOWN=***
```

Charting Companion will substitute the character string you specify where a person is missing in the database. This occurs for example when a person has a mother but no father.

If you enter this:

```
[ NAME ]  
UNKNOWN=
```

Unknown persons will be omitted altogether.

The configuration file is:

```
"C:\Users\UserName\AppData\Roaming\Progeny\CC\Charting Companion.INI"
```

where *UserName* is your login name.

Treatment of Notes

Charting Companion allows you to determine how to print your notes. This affects only the presentation of your notes in reports and does not change the files in any way.

Note: Some features may not be available for all file types or may be slightly varied.

Word Wrap

If you enable word wrap, Charting Companion will print your notes in one continuous line, skipping to a new line only when the end of a line is reached or a new paragraph is started. Otherwise, Charting Companion will print your notes line for line exactly as you have entered them.

Tip: To print your notes exactly as entered in your genealogy file, do not enable word wrap and choose a True Type fixed pitch font, such as Courier New.

To enable word wrap:

1. From the menu bar, select **File**, then click on **Options**.
2. Check the **Enable Word Wrap** box.
3. Click **OK**.

Confidential Notes & Events

Some genealogy programs enable you to choose whether to print confidential notes in your reports by selecting **Notes to Print, All, Non-Private, Marked (!) or None** in the various **Report Options** dialog boxes. Legacy marks private notes with "[" while others may use (!). Charting Companion will save your preferred setting for this option until otherwise selected or defaults are restored to print "Non-Private" notes only.

Events marked Private will never show or print in Charting Companion unless they are edited to be non-confidential in your program.

Word Processor

The word processor preference tells Charting Companion which word processor you want to use for your Descendant and Ancestor books. Supported word processing programs are:

- WordPerfect (DOS and Windows)
- Microsoft Word
- Microsoft Works
- Open Office
- Microsoft WordPad
- Lotus Ami Pro
- Open Office, Neo Office, Libre Office

The default is Microsoft WordPad, that comes free with Windows. If you have no other word processing program, there is no need to change this setting.

If your word processing program is not listed here and you know that it can use rich text format (RTF), choose Microsoft Word and specify the program name and directory path.

Note 1: Microsoft Works and Lotus Ami Pro will not accept photos for the Ancestor and Descendant books.

*Note 2: There are some known problems with WordPerfect **version 9.0** which may cause the following to occur:*

- 1. Poor image quality when viewing on screen i.e. red dots on photos. This does not occur in the printed report.*
- 2. Image placement can be inconsistent i.e. photo is placed over text. You may be able to manually move the photo by clicking and dragging the image when viewing in Word Perfect.*
- 3. Endnotes will not print. Solution is to choose footnote option.*
- 4. Index will print as single column only. No known solution.*

To select the word processor preference:

1. From the menu bar, click **File**, then **Options**.
2. Click the arrow to the right of the word processor scroll box.
3. Select your word processor from the list of choices.
4. Click **OK**.

Charting Companion will search your hard drive and attempt to locate the word processing program you have chosen. However, it will search only for the standard program name and path used by the word processor's install procedure. If you have given your word processor a nonstandard program name or if Charting Companion cannot find it, you must click the **Browse** button and specify the path and file name (executable) for your word processor.

Glossary

AFN (Ancestral File number)

A number used to identify each record in Ancestral File, a program in FamilySearch™ containing millions of names from throughout the world that are organized into family groups and pedigrees.

Confidential Notes & Events

You can choose whether to print confidential notes (those marked with "[[" or (!), as defined by your genealogy program) in your reports by selecting **Notes to Print, All, Non-Private, None** or **Marked (!)** in the various **Report Options** dialog boxes. Charting Companion will save your preferred setting for this option until otherwise selected or defaults are restored to print "Non-Private" notes only.

Events marked private will never show or print in Charting Companion unless they are edited to be non-confidential within your genealogy program.

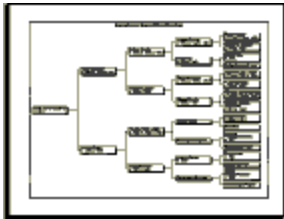
Cousin Smart

This option ensures that common ancestors or descendants for two distant cousins who marry are not repeated on the same chart, resulting in a smaller chart on less paper. This is also known as Pedigree Collapse, or Implexus.

ID number

This number is assigned by the original author or compiler(s) of this record. This number may not be unique and can contain alpha characters or, as in many cases, nothing at all. It is another way individuals or groups may be identified and found in the file.

Landscape

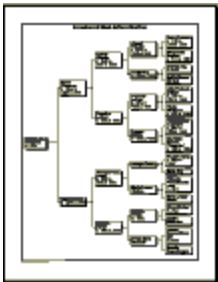


Width is greater than Height.

LDS Ordinances

Religious events unique to the Church of Jesus Christ of Latter-day Saints, including **Bapt/L** - Baptism (LDS), **Endow.** - Endowment, **Seal/P** - Seal to parents, **Seal/S** - Seal to spouse.

Portrait



Height is greater than Width.

RIN (record identification number)

Your genealogy program may assign each individual record a record identification number. This number is used to distinguish that individual from all others in your file. Since many people in the file may have the same name, this number helps you quickly find a specific individual.

Tile

User-defined events

These events, defined by you within your genealogy program, will be included in your report if you check the Check All (events) box in the report options dialog.

Note: If an event has a Description, it will appear along with the place name in the Family Group View (following the place name) as well as the Descendant and Ancestor books (preceding the place name).

Index

- \$ -

\$PCOMP NO SCAN 15

- 2 -

23andMe DNA download 116

- A -

about 2
about Companion 2
additional children 144
Ahnentafel Explanation 53
Ahnentafel Report 50
Ahnentafel Report Options 54
alignment 191
all same width 59, 90
Always Show Options Before Printing 54, 59, 66, 84, 90, 138, 144
Ami Pro 201
Analytics 187
ancestor 56, 59, 184, 191
ancestor book 50
ancestor chart 56, 192
ancestor chart options 59, 90
Ancestor Fan Chart 63
ancestors 63
Ancestry DNA 112
Ancestry DNA download 115
Assigning Names to Your Files 18

- B -

Bettinger, Blaine 133
birth symbol 193
Blaine Bettinger 133
BMP 183, 193
bold 54, 84
Borders 5
bow tie 73
Bow Tie Chart Options 73
bowtie 70

Bowtie Chart 70
box 56, 59, 87, 90
box chart 56, 87
box style 59, 90
box width 59, 90
browse 22
burial symbol 193

- C -

case sensitive 19
Catalog of files 15
CATALOGG.TXT 15
centiMorgan 133
change current subject 22
chart 56, 59, 63, 87, 90, 138
chart options 54, 66, 84, 90, 138, 144
 contents 59
charts 25, 56, 87
children 54, 84
Choosing event types 28
christening symbol 193
circle 66, 138
citation 22
color 30, 59, 66, 73, 90, 138, 149
Color by Gender 30
Color by Generation 30
Color by Lineage 30
color charts 30
color printer 193
computer 14
computer requirements 14
computer system requirements 14
configuration file 25
contents 54, 66, 84, 138, 144
 Cousin Smart 90
continuation 84
continued children 84
copy 69
Cousin Smart 2, 54, 59, 84, 184
create an index 50, 79
criteria 19
crop marks 184, 191
current subject
 changing 22
custom color 30
custom symbols 193
customization 200

customize 197

- D -

date 59, 90, 198

Date format 26

date in footer 198

death symbol 193

default 197

Default Options 197

Default preferences 193, 197

descendant 79, 87, 90, 184, 191

descendant chart 87, 90, 192

Descendant Chart Options 90

Descendant Fan Chart 136, 138

Descendant Fan Chart options

fan style 138

desktop publishing 193

Direct Preview 5

disk file 50, 79, 191, 192

disk space 14

diskette 14

Display fonts 196

DNA 94

DNA Ancestry 112

DNA FTM 104

DNA kit event 104

DNA Legacy 106

DNA Matches 134

DNA matrix 94, 141

DNA Matrix - troubleshooting 103

DNA Simulation 101

DOS 66, 69, 138

DOS Copy 66, 69, 138

dot matrix 63, 136, 184

dot matrix printers 184

Download DNA 23andMe 116

Download DNA Ancestry 115

Download DNA MyHeritage 123

drivers 69

drop shadow 59, 90

DXF 183

- E -

email 13

Event Selection 28

Event Type 28

Event Type Selection 28

events 54, 59, 90, 144

example 84

example 53, 83

font 54

extension 50, 79

- F -

Facebook 133

family group 141

Family Group Record 141

Family Group Record Options 144

Family Group View 19, 22

Family Historina custom colors 38

Fan Chart 63, 66, 69, 192

Fan Chart options 66

Fan Chart, Descendant 136

fan style 66

fan-fold paper 184

female lines 84, 90

file 12, 15, 18

File list 15

file name 12, 18

Files and Records 12

find 19, 20

find an individual 19, 20

finding 19, 20

first time 1

folder 201

font 50, 59, 66, 73, 79, 84, 90, 138, 144, 149, 155, 159, 164, 169, 182, 197

generations 66

Fonts 196

footer date 198

Forcing defaults 12

Format date 26

formats for publishing 183

FTM DNA 104

- G -

GDI 196

GDI+ 196

GEDCOM 15

GEDmatch 119

genealogy 2

generate index 50, 79

generations 54, 59, 63, 84, 90, 136, 138

layout 144

Genetic Genealogist, The 133

getting started 1

GIF 183, 193

Global fonts 196

go to 19, 20

Google Analytics 187

gradient 30

graft 101

grid 179

- H -

help 13

Henry System 84

Hewlett Packard Graphics Language 66, 138

horizontally 184

hourglass 146

Hourglass Chart 146

Hourglass Chart Options 149

How to reset 15

HP 69

HP-GL 66, 69, 138

HTML 183, 187

- I -

Ibid 196

Image 183

image editing 193

indent 54, 84

index 50, 79

index creation 50, 79

individual colors 30

- J -

JPEG 193

JPG 183, 193

- K -

Kinship Report 153

Kinship Report Options 155

- L -

landscape 59, 66, 138, 184

laser printer 90

laser (HP-GL) 66, 138

laser printer 59, 66, 138

layout 54, 59, 84, 90

LDS 196

LDS Ordinances 196

left-right 87

Legacy DNA 106

legal paper 66, 90

line width 138

limit photo height 59, 73, 149

line box 59, 90

line width 59, 66, 73, 90, 149

lineage 84

List of files 15

Load Options 136

Lotus Ami Pro 201

- M -

MacGuire 94

Maguire 94

maiden name 54, 84

margin 54, 59, 84, 90, 144

margins 54, 84, 90

marriage symbol 193

marriages 144

match list 19

matches arrows 22

Matrix, DNA 141

Maximum chart size 183

McGuire 94, 141

Measurement system 28

memory 14

Metric 28

Microsoft 14, 50, 79, 193, 201

modified register

NGS Quarterly system 79

multiple marriages 144

MyHeritage download DNA 123

- N -

name 18, 19
Name List 19
names 54, 84
 new line after name 184
New features 5
new line after name 90
 numbers to print 59
notes 54, 84, 144, 200
notes to print 54, 144
 numbering 84
numbering 54
numbers to print 54, 84, 90, 144

- O -

omit 54, 84
open 15
Open Office 201
Opening files 15
options 25, 59, 66, 84, 90, 138, 144, 177, 197, 200, 201
 Photos 54
orientation 59, 90, 138
 output to 66
Ornamental borders 5
Outline Descendant Report 157
Outline Descendant Report Options 159
output to 138

- P -

page number 59
 page protection 90
page protect 66, 138
page protection 66, 138
Paintbrush 193
paper 59, 90
paper orientation 59, 66, 90, 138
paragraph numbers 84
path 79
path photographs 50
PDF 182, 183
Pedigree Chart 162
Pedigree Chart Options 164
photo height 59, 73, 90, 149

photo size 44
photographs 2, 79
Photos 44, 59, 70, 73, 84, 90, 146, 149
place 59, 184
place-names 59, 90
plotter 63, 66, 90, 136, 138, 191, 192
PNG 183, 193
portrait 59, 66, 90, 138, 184
preference 25, 201
preferences 197, 200
preview 56, 63, 70, 87, 141, 146, 153, 157, 162, 166, 182
print 50, 79, 136
Print a Report 182
print dialog 185
Print Events for Continued Children 84
print file 191, 192
Print Preview 182
Print Setup 185
print shop 192
print to file 63, 69, 136
printer 69
printer drivers 69
printing from DOS
 Fan Chart 69
printing reports 50, 79, 182
Printing Tips for Ancestor and Descendant Charts 184
Printing Wall Charts 56, 87, 191, 192
PROGENY.CFG 25
program Help 13
prompt 69
prune 171
prune persons 171
pruning 171
publish 56, 63, 70, 87, 136, 141, 146, 153, 157, 162, 166, 182, 183
Publishing Reports 183

- Q -

quick start 1

- R -

RAM 14
reference number 144
register 79, 83, 84, 201

register explanation 83
Register report 79
report 25, 50, 54, 79, 84, 141, 201
Resetting Charting Companion 12
Resetting program 197
Resetting the file list 15
Resetting to default 193, 197
re-size 56, 87, 182, 191
Restarting from scratch 12
restore 197
Rich Text Format 189, 201
RIN 19, 22, 54, 59, 90, 144
 roman numerals 84
roman numerals 54
rotate 179
RTF 183, 189, 201

- S -

same width 90
 scale 59
save 183, 193
Save Options 136
saving a copy of your view screen 193
scale 63, 90, 136
scale text 184
scan 15, 18
Scan Disk 15, 18
scion 101
screen image 193
Scrolling & zooming 166
search 19
searching the file
 selecting individual 19
select a file 15
select this person 171
Selection events 28
semi-circle 63, 136
service 13
setup 185
shadow 59, 90
Shared cM Project 133
Shift Key - holding down when starting program 197
short date 184
Show 196
Show LDS Events 196
siblings 2, 59
Simulation 101

smoothing 138
smoothing threshold 138
source citation
 Spouses & Children 22
sources 54, 84, 196
 sources to print 144
sources to print 54, 84
splice 101
Standard Family Group Options 166, 169
Standard Family Group Record 166, 169
standard paper 66, 90
 tree chart options 138
Starting fresh 197
Starting program and resetting 197
status bar 25
STL 183
style 84
Submitter 198
Substitutions 197
 burial 199
superscript 22
support 13
Surnames 197, 199
SVG 183, 187
system requirements 14

- T -

tabs 54, 84
telephone 13
The Genetic Genealogist 133
threshold 138
TIFF 183
tiled 56, 87
tiling 56, 87, 191
tips - printing 184
title only 54, 84, 144
toolbar 21
top-down 87
tracing
 bloodlines 179
treatment 200
Treatment of Notes 197, 200
tree chart 136
tree pruning 171
trellis
 chart 177
 navigation 179

trellis

 searching 179

Troubleshooting DNA Matrix 103

type 50, 79

types of reports 25

types of views 21

- U -

U.S. 28

Units of measurement 28

uppercase 197

US 28

users guide 13

- V -

Vector 187

VGA

 Windows 14

view 22

views 21

- W -

Wall Chart Overview

 Wall Charts 191, 192

Wall Charts 63, 136, 197

What's New in Charting Companion 5

where to get help 13

Windows date format 26

windows printer 66, 138

Word 50, 79, 201

word processing programs

 Microsoft 201

 word processor 201

word processor 50, 79, 197

 child numbers 54

 endnotes 84

word wrap 200

WordPad 50, 201

 WordPerfect 79

WordPerfect 50, 201

Works 50, 79

 Microsoft 201

worksheet 144

- X -

X offset 66, 138

X-Chromosome 30, 59, 66, 73, 90

- Y -

Y offset 66, 138

- Z -

zooming 166, 179