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This section discusses the various types of printed output produced by the FAMILY HISTORY SYSTEM. Before actually describing the individual reports and charts however, much time will be spent on details which you may find of little interest during your initial attempts to bring your carefully entered family information to the printed page. I hope that you will return to this section at other times to become familiar with those details which should help you to better understand how the reports are put together and how they may better serve your efforts to document your family's history.

While much of the printed output produced by this software consists of standard types of reports or charts expected from a genealogical record system, that is: Ancestor Report, Ancestor (TREE) Charts and MAPs, Descendant Report, Descendant Charts, Relative Reports and Individual/Family Group Information. Some of the data items displayed or terms used in describing the reports may be unfamiliar to you. The following paragraphs describe some of these terms, including those of "ancestor", "descendant", "lineage number", "generation level", "bloodline" and "related individuals".

V.A SOME DEFINITIONS

An "ANCESTOR" of an individual refers to one of the parents, grandparents, great-grandparents, etc., of the individual. A "DESCENDANT" of an individual refers to any one of his or her children, grandchildren, great-grandchildren, etc. The parent-child relationships described are "blood" relationships and do not refer to "legal" or adoptive relationships. (Adoptive relationships may be recorded and distinguished from other parent-child relationships by placing an "*" to the right of the adoptive parent ID in the child's Name Record) Two individuals are considered to be "RELATED" or to be "RELATIVES" if they have a common ancestor. Therefore we would not consider individuals who are only "in-laws", that is "related" through marriage, to be relatives in the above sense. A "SPOUSE" refers to either partner in a marital relationship. (One aspect of this system's files and reports is that they have been designed, as much as possible, to not give a preferential status to any individual based upon gender)

The "GENERATION LEVEL" of an ancestor or descendant of an individual refers to the number of "parent-child" relationships that separate the ancestor or descendant from the individual. For example, with respect to a selected individual (who is said to have generation level 0), the generation levels of some relatives are: children (GL=+1), grandchildren (GL=+2), great grandchildren (GL=+3), parents (GL=-1), grandparents (GL=-2), great grandparents (GL=-3). Notice that descendants have positive generation levels and ancestors have negative generation levels.

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The “BLOODLINE” between an ancestor and any of his/her descendants refers to a sequence of numbers, one for each parent-child relationship that separates the ancestor from the descendant, where the number for a given parent-child relationship refers to the number of the child in that generation level who is an ancestor of the descendant. For example, the bloodline (3,2,4,2) indicates that the descendant is the 2nd child of the 4th child of the 2nd child of the 3rd child of the ancestor in question.

The “LINEAGE NUMBER” of an ancestor refers to a number that is assigned sequentially to the ancestors of the individual in the following manner:

- the base individual has lineage number 1
- the individual’s father has lineage number 2
- the individual’s mother has lineage number 3
- the father’s father has lineage number 4
- the father’s mother has lineage number 5
- the mother’s father has lineage number 6
- the mother’s mother has lineage number 7; etc.

In general, if an ancestor has lineage number n , then that ancestor’s father will have lineage number $2n$ (2 times n) and the ancestor’s mother will have lineage number $2n+1$. These are the “counting” numbers that would naturally be assigned to persons on the traditional “horizontal” ancestor tree chart. Some relationships to notice: all male ancestors have “even” lineage numbers and all female ancestors have “odd” lineage numbers. And for a given ancestor on the chart, the lineage number of the child which appears on the chart is found by dividing the parent’s lineage number by 2 (and discarding the remainder, if any. For example, an ancestor with lineage number 127 will have a child with lineage number 63 appearing on the ancestor tree... both females, by the way). Since beginning to work on these programs I have become aware that the term “Ahnentafel number” is more commonly applied to this lineage number in genealogical literature, though I have become accustomed to the term “lineage number” and so will continue to use it in this manual.

While “lineage number” and “bloodline” are convenient “numerical” concepts for describing “direct” relationships such as exist between an individual and his/her ancestors or descendants, the problem of uniquely describing one’s non-direct relatives (aunts, uncles, cousins, etc.) is a bit more complicated. The very definition of “relative” given above suggests a natural approach which would combine these concepts to label relatives with a “lineage number”+“bloodline” where the lineage number is that of the “nearest common ancestor” of the two individuals (that is the common ancestor with lowest lineage number) and the “bloodline” is the one that describes the line of descendancy of the relative from the common ancestor. This is the approach that is used by this system’s relative report for grouping and listing all recorded relatives of an individual.

NOTE: *It has come to my attention that there is a certain “ambiguity” in the “nearest common ancestor” when there are crossed family lines. The “nearest common ancestor” with respect to one of two related individuals may not be the same “nearest common ancestor” with respect to the other of them. In the ROYAL sample file, Queen Elizabeth and Prince Philip provide a good example of this.*

The family group report provides an option for showing the relationship and LINEAGE of the subject of the report. In that case, the LINEAGE displayed consists of:

- the LINEAGE Number if it is an ancestor
- the BLOODLINE, in the format (x,x,x,...,x), if it is a descendant, or
- the LINEAGE Number + BLOODLINE as described above if it is a non-direct relative.

NOTE: *The Register style of “merged group report”, introduced in this update of the software provides an option for printing “lineage” which is somewhat different than described above. In that case a descendant “lineage” is similar to the “bloodline” described previously. But instead of being a simple sequence of child numbers it may contain child numbers (as lower case roman numerals), register number of the ancestor at each generation level, and/or the first name of the ancestor at each generation level. Further the entries in the lineage go from left to right as generations progress back, instead of from right to left as in the “bloodline”.*

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V.A.1 Relationship “Rules” - “COMMON”, “CIVIL LAW” and “LATIN”

There are some other methods for describing relatives, which, though they assign a non-numeric and non-unique label to relatives, give a more generally understood idea of the relationship between individuals. These labels are ones such as: mother, father, cousin, aunt, grandmother, great-great-grand-uncle, etc. The Family History System supports three sets of rules for assigning such labels. Two of them are based upon the most familiar styles of relationship labels used in the U.S. One, which describes the child of a First Cousin as a First-Cousin-once-Removed, is called the “common” rules for relationships. The other, which describes the child of a First Cousin as a “Second Cousin”, is called the “civil law” rule for relationships. A third rule, called the “Latin” rule, is based upon a style of relationship labels common in some European countries. This rule assigns cousin relationships as in the “Civil” rule but avoids the use of a “grand” modifier for expressing other relationships. The “RELCODES” system table provides descriptive labels for the basic relationship categories. The Report Definition File “RELATION” table provides the actual labels that appear in reports.

V.B COMMON FEATURES OF REPORT PROGRAMS

Although there are several Family History System report programs, and each has some unique characteristics, they all share some common features, including the basic screen format, the sequence of operations required for producing a report, and the use of Function Keys for selecting the various options. The following paragraphs describe some of these common features.

V.B.1 REPORT PROGRAM SCREEN FORMATS

The screen displays for each of the report programs share the following format:

The top portion of the display identifies the Family File that will be used by the report program. A Family File Setup is described by a 8-character keyword and a short descriptive label. The number of Name records in the family file will also be shown. Below the Family File description will be lines that identify the Printer Setup that will be used when printing a report or chart. This area will also show the Forms Width, and the Forms Length for the printer setup

The lower right portion of the screen is used for displaying and updating various report options

Family History System			
* * * Relative Report Program * * *			
Family File Setup: Russell My Family		# Names: 2312	
Printer Setup: KXP4450 Panasonic Laser Printer			
Form: Width: 79 Length: 24			
Work File Information: Date Created:		Records: A: D: O:	
Base Record: Name:			
Hi Ancestor GL:	Hi Descend GL:	Ancestors:	Relatives:
Select Program Option		+-----+ Relative Report	
F1 Change File Setup		---- Work File Parameters ----	
F2 Change PRINTER Setup		53 Max Ancestor Level to Search	
F3 Create Workfile		99 Max Descendant Lev to Search	
F4 Change Report Options		1 Anc Lnes: 1=All,2=Male,3=Fem	
F6 Print Report		1 Desc Lines: 1=All,2=Male,3=Fem	
F7 Change Anc/Desc/Rel Mode		1 Search Order: 1=Gen 2=Family	
		Y Include Adoptions (Y/N)	
F9 Return to Main Menu		----- Page Print Options -----	
		0 Beginning Page Number	
		Up/Dn/Enter Change F1 Save Esc END	

View 1: Relative Report Program Screen Display

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The lower left portion of the screen describes the actions that may be performed by pressing various Function Keys.

The middle part of the screen will frequently show statistics about a WORK file that is used by the program to print a report or chart or about records that have been selected for the report by some other process.

V.B.2 REPORT PROGRAM SEQUENCE OF OPERATIONS

The steps for printing a report or chart are roughly the same within each of the report programs. They include:

- identifying the (name) records to be included in the report or chart
- choosing the options desired for the report or chart
- printing the report or chart.

Identifying the individuals to be included in a report (or chart) usually involves creating some sort of Work file that will be used for printing the report. The Work file is frequently designed to simplify the task of sequencing the records in some type of "relationship sequence". The default settings for all report options may be established by the user so that few options may require changing for printing a particular report or chart.

V.B.3 REPORT PROGRAM FUNCTION KEYS

To help you to establish a pattern for printing reports or charts, each of the report programs employs the same set of function keys for performing the common tasks described in the previous section. These function keys are:

- F1 Select a Family File from the Family File Setup table
- F2 Select a Printer from the Printer Setup table
- F3 Create "Work" file or Identify the records to be printed in the chart or report
- F4 Change report options in lower right part of screen
- F6 Print the chart or report
- F9 Return to Main Menu program.

In some cases, one or two additional function keys may be used for a special task within that program. For instance, in the screen display shown previously, the F7 key is used to switch among different types of reports that are produced by the same program. (The Relative Report Program also produces Ancestor and Descendant reports) Many report programs recognize the F8 key as a request to temporarily leave the system to perform some DOS operations. The screen will be cleared and the DOS prompt will appear. Return to the program by entering the EXIT command at the DOS prompt.

V.C REPORT TYPES and STYLES

The following sections describe various types of printed output that can be produced from information in your family file. The reports are classified according to their characteristics and a list of all reports and charts is provided with an indication of the classification of each one.

V.C.1 TYPES OF REPORTS (Detail Lists, Charts, Summary Reports, Utility Reports)

There is such variety of printed output produced by the Family History System programs that it is helpful to group them by common features as follows:

Detail Reports - provide information about individuals in a family file

Summary Reports - provide statistics (or numerical data) about groupings of individuals in a family file

Charts - are reports in which the format of the report (or the placement of printed information in the report) provides visual information which goes beyond the actual printed text; frequently charts will include some graphical symbols for grouping or connecting items of information

Utility Reports - provide information that does not come from a family file; these typically document information from the different "Definition Files" (that is, the FDF, PDF, TDF, SDF, MDF, and RDF files).

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V.C.2 STYLES OF REPORTS (Fixed Format, Free Format, LifeLine)

Another useful classification scheme for Detail Reports involves the “style” of the report. This is a term that identifies the basic appearance of the report. The following paragraphs describe the three basic styles of reports: Fixed Format, Free Format and LifeLine Format.

Prior to March 1990, all Family History System reports were in a style that placed all information of a given type in a “FIXED” location in the report. In Ancestor/Descendant/Relative reports, a column or “tabular” format was used in which each item of information was listed in a fixed column with a descriptive heading. Family group reports appeared as “filled out” information sheets with each type of information placed in a fixed location of the report. Most of these reports required a printline of at least 132 characters. Consequently they required using compressed print with standard 8 ½” wide paper.

In March 1990, new FREE FORM styles of Ancestor/Descendant/Relative and Family Group reports were introduced in which all information was printed out in a “block” or “paragraph” format with the width of the block of text varying according to the “Forms Width”. This permitted using printlines as narrow as 80 characters for most reports, allowing the use of more readable PICA or ELITE type styles.

In January 1993 a new style of Ancestor/Descendant/Relative report was introduced. It restricted the individual’s information to three items... the Name, Life Span (consisting of the years of birth and death, separated by a hyphen), and a “Life Line”. The “Life Line” is a line segment representing the person’s life, with symbols for the events of birth, marriage(s), birth(s) of children, and death. The LifeLine is placed on the report line so that it falls appropriately within an area representing a time span, which is fixed for the entire report. For instance, a descendant report for a great grandfather might show the LifeLines distributed between the dates of 1820 and 1999. This style of report may prove useful for visually observing trends in longevity or the span of birth events in a family.

In 1997, other detail reports, such as the Search/Select/LIST reports and the Report Indexes, were also offered in styles other than the Fixed, columnar style that was previously used.

In addition to the styles of reports described here, a few reports have additional style options. These will be mentioned as part of the description of the report in a later section.

V.D Report Table - List of Printed Output

The following table shows a list of the various printed outputs produced by the Family History System with indications of the Types and Styles of each. The CODE for the report is the four-character identifier for the report entry in the Report Definition File. The codes for report “TYPE”s are: D=Detail, S=Summary, C=Chart, U=Utility and R=Relationship. (A Relationship report or chart is one that is designed to emphasize family relationships between records) A TYPE of “X” indicates that the report requires an INDEX File and so can only be produced by the extended system provided to registered users. The Codes for report “STYLE”s are: FX=Fixed Format, FR=Free Format, and TL=Time Line. Styles are only shown for detail reports as all charts and summary reports are fixed format. The table also shows the keystrokes that can be used to print the report, starting from the Main Menu. The F6 keystroke for actually printing a report or chart is omitted when the report is the only one produced by a program. In all cases, the additional keystrokes that may be required to select records or choose report options will be omitted.

CODE	TYPE	STYLE	KEYSTROKES (From Main Menu)	DESCRIPTION
	D S C U R X	FX FR TL		
SRCH	D	X	F1-F4-F1-F6	Search Results
FSUM	S U		F1-F1-F6	File Summary Report
ARPT	D R	X X X	F2-A-1-F6-1	Ancestor Detail Report
ASUM	S R		F2-A-1-F6-2 also F2-D-F6-2-2	Ancestor Summary Report
ADUP	D	X	F2-A-1-F6-3	Ancestor Duplicates Report
DRPT	D R	X X X	F2-A-2-F6-1	Descendant Detail Report
DSUM	S R		F2-A-2-F6-2 also F2-D-F6-2-2	Descendant Summary Report
DDUP	D	X	F2-A-2-F6-3	Descendant Duplicates Report

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CODE	TYPE					STYLE			KEYSTROKES (From Main Menu)	DESCRIPTION	
	D	S	C	U	R	X	FX	FR			TL
RRPT	D				R		X	X	X	F2-A-3-F6-1	Relative Detail Report
RSUM		S	C		R					F2-A-3-F6-2 also F2-D-F6-2-2	Relative Table
BLGR	D						X			F2-B-1-F6-3	Blank Family Group Form
FXGR	D						X			F2-B-1	Fixed Format Group Report
FFGR	D						X			F2-B-2	Free Format Group Report
REGR	D						X			F2-B-3	Register Style Group Report
ACHT		C			R					F2-C-1-1-F6-1	Ancestor Chart - 4GEN/5GEN Style
AMAP		C			R					F2-C-1-1-F6-2	Ancestor MAP
AVBX		C			R					F2-C-1-2-F6	Ancestor Box Chart (Vertical)
AHBX		C			R					F2-C-1-3-F6-3	Ancestor Box Chart (Horizontal)
DVBX		C			R					F2-C-2-1	Descendant Box Chart (Vertical)
DHBX		C			R					F2-C-2-2-F6-3	Descendant Box Chart (Horizontal)
FPTH		C			R					F2-C-3-F6-3	Family Path Chart
HSUM		S	C		R					F2-C-(123)-(32.)-F6-1	Horizontal Box Chart Summary
LIST	D						X	X	X	F2-D-F6-1	Search/Select LIST
ISUM		S				X				F2-D-F6-2-1	Indexed Summary Report
TTFL		S				X				F2-E	Tiny Tafel Listing
TOCR				U						F2-F-F6-1	Report Table of Contents
NDXR	D					X	X			F2-F-F6-2	Report/Chart Index
FILE				U						F3-A	File SETUP Report
TABL				U						F3-B-F4-1	System TABLES Report
SFMT				U						F3-B-F4-2	Screen Format Table Reports
MSGs				U						F3-B-F4-3	Program Message Lists
RPTS				U						F3-B-F5	Report Definition Reports
PRTC				U						F3-C	Printer SETUP Report
GDIM				U						F3-D-1-F5-2	GEDCOM Import (Error) Report
GDLs	D			U			X			F3-D-1-F6	GEDCOM File Listing
MMEX										F3-D-2-F5	MailMerge Export Options
MMLS	D			U			X			F3-D-2-F6	MailMerge File Listing
PVLD	D			U			X			F3-E-F6-1	Pointer Validation Error Report
DVLD	D			U			X			F3-E-F6-2	Data Validation Error Report
MDAT		S		U		X				F3-E-F6-3	Data Comparison Report
INDX	D					X	X			F3-F	Indexed Listing

V.E REPORT OPTIONS

The previous sections have indicated that many reports can be produced in optional styles, allowing you to choose the form of the report that is most useful for you. There are many other ways that the reports and charts can be tailored by changing the settings for options that control various features of the output. For instance, most detail reports allow you to choose whether an individual's name will be printed with the Surname first or last and you can choose to have the surname printed in CAPS for emphasis. Other options control whether ID #'s will be shown or whether dates, place names or relationships will be printed in a report or chart.

Actually, each report option can be obtained from three different sources:

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- The Option Table for the individual report - this is the option table that is part of the definition for the individual report in the Report Definition File (RDF) being used (use Main Menu option F3-B-F5-F2 to list the reports, select the desired report, then use F2 to display the report option table for the report)
- The Global Parameters Option table of the Report Definition File (use Main Menu option F3-B-F5-F3-4 to display the Global Parameters Option table)
- The RPTOPTS system table, which is the master list of all report options (use Main Menu option F3-B-F4-1 to display the list of System Tables, then select the RPTOPTS table to view the list of all report options)

Whenever an option setting is needed by a report, the program first looks in the option table for the report. If the option is not found there, it then looks in the Global Parameters Option table. If the option is not found there, then the program obtains the setting from the RPTOPTS system table. (In the Report Definition File distributed with the software, the only option settings that are not found among Global Parameter Options or options for individual reports/charts are the ones for setting the characters for events appearing in LifeLine style reports)

V.E.1 REPORT OPTION TABLE

This section will look at portions of the full RPTOPTS system table to describe the meanings of certain option groups and a few individual options. The groups of options that you will find in the full set are:

- **Global Options** - these are options that apply to most, if not all, printed output but may not appear as options for individual reports
- **Work File Parameters** - these are not actually report options; they are settings which affect the creation of relationship word files
- **Page Print Options** - these options control aspects of the print procedure and do not affect the content of the reports
- **Report Options** - these options control the content of reports and charts; some options apply to only one or two reports; the options that apply to a particular report or chart will appear in the options menu for the individual report or chart
- **Register Options** - these options control features that are unique to the Register style of merged group report
- **Chart Options** - these options provide settings for features that are only applicable to the printing of certain charts and will appear among the options for the individual chart
- **Ancestor MAP Options** - these options apply only to the printing of Ancestor MAPs
- **Summary Report Options** - these options apply only to the relationship or indexed summary reports
- **LifeLine Event Characters** - these options describe the characters that will be used for printing the LifeLine portion of reports that are printed in that style; in the default RDF file, these are Global Parameter Options and do not appear as options for the individual reports that can be printed in the LifeLine style
- **Tiny Tafel Options** - these options control features of the Tiny Tafel report, an option which is only provided to registered users because it requires having a surname sequenced Indexed File
- **Group Report Sections** - these options control the selection of the types of information that will appear in the Family Group (or Individual Information) reports
- **Validation Options** - these options control the checks that will be performed by the Data Validation Utility (Main Menu selection F3-E-F6-2)
- **GEDCOM Information Options** - these options control the types of information that will be processed during a GEDCOM Export/Import procedure. For a type of information to be processed, it must have the appropriate option indicator set to "Y" and the table of GEDCOM Tags being used must support that type of information.

Each row of the RPTOPTS table shows four items of information about a report option. The items are:

- **CODE** - a four character name used to identify the option within the programs
- **TYPE** - the type of value that can be assigned to the option. Type 0 accepts any ASCII character, Types 1-20 correspond to groups of characters that represent allowed values (e.g. 1=[Y,N], 2=[Y,N,D], 3=[Y,N,A]), and Types 2x (x=1-5) allow numeric values with up to x digits
- **DEFAULT** - is the default option value in the distributed RDF file

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- **DESCRIPTION** - is a brief description of the option.

The following sections will look more closely at a few of these option groups. Other groups of options may be described more fully in the section concerning the particular printed output or process to which they apply.

V.E.1.a Global Parameter Options

This section describes those options in the “Global Options” group. These options are found in the “Global Parameters” section of the RDF file. Use Main Menu selection F3-B-F5-F3-4 to display the list of Global Parameter Options.

CODE	TYPE	DEFAULT	DESCRIPTION
-GO-	-1	-	----- Global Options -----
CPRT	1	N	Print Copyright Line (Y/N)
EVPG	1	N	Always End on Even Page (Y/N)
AREF	1	Y	Allow REFERENCE File (Y/N)
APST	1	Y	Prompt for Next Strip (Y/N)
EURA	1	N	European Address (Y/N)
RRUL	21	1	Rel Rules:1=Comm,2=Civ,3=Latin
EXAD	1	Y	Show Adopt in Rel Labels (Y/N)
BRKT	7	S	Bracketed Comments? (Y/N/S)
SP12	1	Y	Print Spouses 1st-->Last (Y/N)
MNGP	22	2	Minimum Column Separation
MXGP	22	5	Maximum Column Separation

These are options that are likely to always be set to the same value for all reports, its value depending upon the personal preference of the user. The options are:

- *Print Copyright Line* - this controls the printing of a line at the bottom of each page of a report which identifies the source of information in the report. The content of the line is defined by Global Report Variable COPYRITE. The default content for this line is the text “Information Gathered By:” followed by the first three lines of the Address stored in the Configuration file
- *Always End on Even Page* - this controls whether an additional “blank” page will be printed at the end of reports which would otherwise have an odd number of pages. This is useful when printing reports that are to be part of a booklet in which it is common for each section (chapter, report) to begin on an odd numbered page. The “Blank page” will have headings, footings and a single line of text printed 1/3 of the way down the page. The content of the line of text is given by Global Report Variable BLNKPAGE that has as its default value the text: “This Page Contains No Information”
- *Allow REFERENCE File* - this controls whether you will be prompted to allow entries for a report to be entered into a Report Reference file from which a Report Index (and Table of Contents) can be printed. Reference files are only of use in the Extended version of FHS supplied to registered users. Therefore the default value for this option is “N” for the basic set of programs and “Y” for the extended version
- *Prompt for Next Strip* - when a report or chart requires a printline larger than that allowed by the Forms Width of the printer setup being used, the printing will be accomplished by printing multiple “strips”. For example, if a report requires a printline of 132 characters and the forms width is 80 characters, the report can be printed in two strips, one for the first 80 characters of each printline and a second with characters 81-132 of each printline. This option controls whether you will be prompted at the end of such a report to print the additional strips. (Even if this option has a value of “N”, the additional strips can be printed by setting the “Printer OFFSET” option to a value greater than zero. For example, a Printer OFFSET of 80 will cause the program to begin each line of the report with the 81st character of the printline)
- *European Address (Y/N)* - this controls the formatting of addresses in free format reports. If European Addresses are being used then the postal code will be printed before the city. If European Addresses are not being used then the postal code will be printed after the state.

NOTE: This option affects the formatting of all addresses. A better approach to the handling of address styles would be to allow each individual address to be identified as European or not European, however that would require a change to the address file format and will be put off to a later date.

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- *Rel Rules:1=Comm,2=Civ,3=Latin* - This option controls the selection of the set of “Rules” that will be used to construct Relationship Labels. The types of rules recognized are: 1=Common, 2=Civil, and 3=Latin. (See section V-V.A-V.A.1 above for a description of these rules)
- *Show Adopt in Rel Labels* - This option controls whether a relationship label will include an indication that there is an adoptive parent-child relationship somewhere along the path of relationships joining the related individuals. If the option setting is “Y” then an asterisk (*) will be placed in the first position of the relationship label when it is determined by an adoptive relationship
- *Bracketed Comments?* - This option controls the printing of comments that are enclosed between “curly brackets” (the symbols “{“ and “}”). A value of “N” for this option will omit the printing of bracketed comments, a value of “Y” will allow the comments to be printed without the enclosing brackets, and a value of “S” will allow the comments to be printed together with (“S”howing) the brackets
- *Print Spouses 1st-->Last* - This option controls the order in which multiple spouses will be printed in a report. A value of “Y” for this option will cause the spouses to be printed in chronological sequence, which is the reverse of the order that they are stored in the file
- When printing column style reports, the programs will insert blank spaces between the columns of information to provide separation between the adjacent items of information and to cause the report line to more completely fill the printline if the required printline is much less than the forms width. The last two option settings in the table control the minimum and maximum number of spaces that a report will be allowed to insert between two adjacent columns of information.

V.E.1.b Work File Parameters

The next group of “report” options does not control report printing at all. Instead, these control options involved in the creation of “relationship” (ancestor, descendant or relative) work files. The creation of these work files takes place in the Ancestor, Descendant and Relative report programs, the Register style group report program, and in the program that produces standard Ancestor Charts (Forms) and Maps. Therefore, you will find options from this group among the “report options” for those individual reports and charts.

CODE	TYPE	DEFAULT	DESCRIPTION
-WF-	-1	-	---- Work File Parameters ----
MXAL	22	53	Max Ancestor Level to Search
MXDL	22	99	Max Descendant Level to Search
ORDR	21	1	Search Order: 1=Gen, 2=Family
ALNS	21	1	Anc Lines: 1=All, 2=Male, 3=Fem
DLNS	21	1	Desc Lines: 1=All, 2=Male, 3=Fem
ADOP	1	Y	Include Adoptions (Y/N)

The options in this group include:

- *Max Ancestor Level to Search* - gives the maximum number of generations of ancestors that will be identified in the relationship work file. A value of 0 indicates that no ancestors are to be placed in the file (which would make it only a Descendant relationship file). The default value of 53 corresponds to the highest generation level for which lineage numbers (ahnentafel numbers) can be accurately determined and printed by the software
- *Max Descendant Level to Search* - gives the maximum number of generations of descendants (for the base individual or any ancestors) that will be identified in the relationship work file. A value of 0 indicates that no descendants are to be placed in the file (which would make it only an Ancestor relationship file)
- *Search Order: 1=Gen, 2=Family* - this option controls the order in which descendants for an individual (or ancestor) will be searched for inclusion in the work file. The two types of search order are by *Generations* and by *Family*. A search by *Generations* will locate all descendants in a generation level before attempting to locate any descendants in the next generation level. (All grandchildren will be located before looking for any great-grandchildren). A search in *Family* order will locate all descendants of a child before looking for any descendants of the next younger sibling. The two search orders correspond to the two styles for printing Descendant and Relationship reports, and in fact a descendant or relationship report can be printed in either style independent of the “descendant search order” that was used for creating the work file. The printed output will be the same in any case *unless* there are “crossed lines” of relationship... that is, an individual occurs multiple times

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on the family tree. One feature of the relationship work file is that an individual that is repeated on the family tree will not be included in the search for ancestors or descendants after the first occurrence. Instead, a “pointer” is inserted to the earlier occurrence in the work file. In reports, “pointers” to earlier occurrences of an individual in the report are given in terms of “back references” to the page and line number (or the chart and entry number) of the earlier occurrence. For these two types of backward references to coincide, it is important that the relationship work file and the printed report represent the same sequence of individuals. Therefore if you are printing a descendant or relationship report *which includes crossed lines*, a “generation” style of report should be printed using a work file created with Search Order=1 and a “family” style of report should be printed using a work file created with Search Order=2

- *Anc Lines: 1=All,2=Male,3=Fem* - This controls the types of individuals that contribute to the search for next generation ancestors. If this is set to 2 (Male) then the next generation of ancestors will only include the ancestors of men, although both fathers and mothers will be included in that next generation. If the setting is 3, then the next generation will only include the ancestors of women, though again both fathers and mothers will be included in the next generation. While this allows you to restrict your attention to only paternal or maternal relationships, this is not the option that you should choose, if you were, say, interested in *all* ancestors of your mother. In that case, you should choose your mother as the base individual for the work file and include all ancestral lines
- *Desc Lines: 1=All,2=Male,3=Fem* - This controls the types of individuals that contribute to the search for next generation descendants. If this is set to 2 (Male) then the next generation of descendants will only include the descendants of men, although both sons and daughters will be included in that next generation. If the setting is 3, then the next generation will only include the descendants of women, though again all children of those women will be included in the next generation
- *Include Adoptions (Y/N)* - This option controls whether adoptive relationships will be considered when creating the relationship work file. If this option is set to “N” then adoptive parent-child relationships (which are indicated by an “*” to the right of the father or mother ID in the child’s name record) will not be included when creating the relationship work file. This affects the recording of both ancestry and descendancy. Reports or charts printed from work files, which exclude adoptions, will similarly omit the adoptive ancestor or adopted child. This can affect the child numbers assigned to children in reports and appearing in the *lineage* or *bloodlines* printed using the work file.

V.E.1.c Page Print Options

These options control features of the printed page rather than the content or style of the report or chart.

CODE	TYPE	DEFAULT	DESCRIPTION
-PP-	-1	-	----- Page Print Options -----
BGNP	25	0	Beginning Page Number
BGPP	25	1	Page Number to Begin Printing
FOFS	23	0	Printer Offset
LREF	1	N	Show Line REF Index (Y/N)
REFL	5	L	Place REF (L/R/I/O/B)
HEAD	1	Y	Print Report Heading (Y/N)
FOOT	1	Y	Print Report Footing (Y/N)
CFRM	1	N	Continuous Forms? (Y/N)

These Page Print options include:

- *Beginning Page Number* - This allows you to print a report that will continue the page numbers of a previously printed report. The default value of 0 will normally result in the page numbers beginning with “1”. However, if you have opted to record report references into a REFERENCE work file and the reference work file already has other reports recorded in it, then a value of 0 for this option will result in the page numbering beginning with the next page number after the last page of the last referenced report
- *Page Number to Begin Printing* - this is the first page number that you want the program to actually send to the report destination (screen, printer, file). If you have had to terminate the printing of a report previously, say after 30 good pages, you can set this value to 31 and reprint the report. The first 30 pages will be “skipped”, although the program will have to go through all the work of formatting them, and then the printing will actually start

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with page 31. This option can also be used to create entries in a reference work file for a previously printed report that was not referenced. Just set this option to a large value, say 9999, and print the report, allowing report references to be recorded. The program will go through the work of formatting the report, but printing will never actually take place. When using this option to continue or repeat the printing of a report, you should make certain that all options and information are the same as in the previous printing to assure that all information will appear in the same location of the report

- *Printer Offset* - this option controls the leftmost print position that will be included in the printed report. For instance, a value of 80 for Printer Offset will cause the first print position to be the 81st character of the formatted print line. This allows you to print very wide reports or charts in "strips" on printers or forms that cannot accommodate the full print line
- *Show Line REF Index* (Y/N) - This option controls the printing of line reference numbers in the margins of reports. The numbers can be useful for locating individuals identified through back-references within the report and from references in report indexes. (The printing of report indexes is an option of the extended version of the software provided to registered users.) Actually, for the reference numbers to appear on the report page two conditions must be met. First, this option must be set to "Y", and second, the page margin settings in the printer setup that is being used must be large enough (≥ 4) to accommodate the line reference numbers and the reference index character ($>$ or $<$)
- *Place REF* (L/R/I/O/B) - This option identifies which margins are to be used for the Line Reference numbers requested by the previous option. Option values are: L=Left, R=Right, I=Inside, O=Outside, and B=Both sides. The chosen margin(s) for printing the index must have a value ≥ 4 for the line reference numbers to appear on the report page. (Margin settings are given in the Printer Setup that is used for printing the report)
- *Print Report Heading* (Y/N) - A value of "N" for this option will cause the report headings to be omitted from the report. (Omitting report headings and footings from column style reports can result in a document that may be imported into a database program or word processor for subsequent processing or printing using special features of that software)
- *Print Report Footing* (Y/N) - A value of "N" for this option will cause the report footings to be omitted from the report
- *Continuous Forms?* (Y/N) - This option requests printing the report or chart without page breaks.

V.E.1.d Report Options

This group of options controls the selection and format of information that will be printed in reports and charts. Not all options will be applicable to every report or chart. Most of the ones that apply to a particular report or chart will be included in the option menus that are assigned to the definition of the report/chart in the Report Definition File. (See the next section for more about individual report option menus)

CODE	TYPE	DEFAULT	DESCRIPTION
-RP-	-1	-	----- Report Options -----
MINM	22	20	Minimum Name Length
PLNM	22	22	Place Name Column Width
SURF	1	Y	Print Surname First (Y/N)
SURU	1	Y	Surname in UPPER CASE (Y/N)
SURH	1	N	Use Husband's Surname (Y/N)
SNDX	1	N	Print Soundex (Y/N)
PRGL	1	N	Print Generation Level (Y/N)
PLIN	1	N	Print Subject Lineage (Y/N)
PRID	1	N	Print ID's (Y/N)
PIDH	9	H	Print ID's (Y/N/H)
PPID	1	N	Print Parent ID's (Y/N)
SEX	1	Y	Print Gender (Y/N)
AGE	2	D	Age/Anniv (Y/N/D)
RELA	1	N	Show Relationships (Y/N)
#CH	1	Y	Show Number of Children (Y/N)
DATE	1	Y	Dates (Y/N)

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CODE	TYPE	DEFAULT	DESCRIPTION
DAT2	3	Y	Dates (Y/N/A)
DTYR	1	Y	Only Show Year of Dates (Y/N)
PLAC	1	N	Places (Y/N)
MARY	3	N	Marriage (Y/N/A)
LRES	1	N	Latest Residence (Y/N)
COMM	1	N	Comments (Y/N)
BLKL	1	N	Blank Line Between (Y/N)
BYPS	6	B	Use Bypass Logic (W/C/B/N)
ULBF	3	Y	Underline Blank Fields (Y/N/A)
RSYM	1	Y	Show REF Type Symbols (Y/N)

The report options include:

- *Minimum Name Length* - In fixed format reports, this is the minimum width of the name field. A fully formatted name can be up to 52 characters long but it is seldom necessary to allow for more than 25-30 characters for the name field. In the *outline* style of descendant and relative reports, the name field will be wider for some generations than others... in that case, this is the minimum name field width. In the *uniform* styles of those reports, this is the fixed size of the name field. (If this is set to 0 for Fixed Format lists produced by the Search/Select/LIST option then the name field will be omitted from the report.)
- *Place Name Column Width* - In fixed format (columnar) lists, this provides the width for each column of information that contains place names (Birth, Marriage, Death). The default of 22 is appropriate for use with family files that do not support Long Place Names. If Long Place Names are used, then place names can be up to 41 characters and a larger value than 22 may be desired. NOTE: Increasing the size of place name columns will increase the required forms width for printing the report.
- *Print Surname First* - A value of "Y" for this option will cause the name field to be in the form: "Surname, Given-Name". Otherwise the name field will be of the form: "Given-Name Surname"
- *Surname in UPPER CASE* - A value of "Y" for this option will cause the Surname to be converted to Upper Case when formatting the name field. This causes the Surname to be more prominent, making it easier to identify common surnames when quickly scanning a report. Entries in the UPCASE system table are used to perform upper case conversion of special or international characters when this option is selected
- *Use Husband's Surname* - This option is used when printing listings to cause the program to use the (most recent) husband's surname for the surname of a married woman. This conforms to a common custom in some countries. Actually, in formatting the wife's name, her own surname is also shown as an attachment to her Given Name. To allow for variance from this rule for individual women who choose to continue using their own surname, there is a "Surname Use" field in the Name Record. When the "Surname Use" field for a married woman is "Y", then her husband's surname will NOT be used for formatting her name in reports, even when the "Use Husband's Surname" option is in effect
- *Print Soundex* - This option controls the printing of a four-character code that is used to group together "similar sounding" names. In detail lists, the soundex shown will be for the Surname. In indexed summary reports, the soundex will be for the index key field for which the information is being summarized
- *Print Generation Level* - In the "Relationship reports" (Ancestor/Descendant/Relative reports) this option controls the printing of the "relative generation level" on the report line. This number represents the number of generations that the person on the report line is separated from the subject (base ID) of the report. In an Ancestor report for example, this would be the number of generations between the base individual and the ancestor (for Father:Mother it would be -1, for GFather:GMother it would be -2, etc)
- *Print Subject Lineage* - This group report option controls the printing of a symbol or set of symbols representing a path of relationships between the subject of the group report and the individual on whom relationships are based. For an ancestor, the lineage is just the Ahnentafel or Ancestor number. For a descendant, the lineage is the "bloodline" or a sequence of numbers representing the number of the child in each generation along the path of descendency. For an indirect relative, the lineage is a combination of the Ahnentafel number of the "nearest common ancestor" and the "bloodline" from that ancestor to the subject of the report

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- *Print ID's (Y/N)* - This option controls the printing of an individual's ID number (the sequence number of the person's Name record in the FHS family file). If marriage information is included in the report, this option also applies to the printing of the spouse's ID number
- *Print ID's (Y/N/H)* - This is a special form of the option for printing ID's described above. It is used for Ancestor Charts and Individual Family Group Reports to allow for the option (H) of only printing the ID number for the subject of the report/chart, in the Header portion of the report/chart.
- *Print Parent ID's* - This option controls the printing of the Father and Mother ID numbers in a detail report
- *Print Gender* - This option controls the printing of a code representing the Gender (Sex) of the individual. The Gender may be represented by a single character code or by a label (Male, Female). The symbols or labels used are taken from the SEXCODE global table in the Report Definition File and may not be the same as the symbols used in the Sex Code field of the name record
- *Age/Anniv (Y/N/D)* - This option controls the printing of the individual's age in reports. If marriage information is included in the report, then this option also controls the printing of the last (most recent) anniversary of the marriage. A value of "D" for this option will cause the Age/Anniversary field(s) to be included in the report, but a value will appear for the data item only if the person is Deceased (for Age) or the marriage has terminated (for Anniversary). A marriage is considered to be terminated if the ending date in the marriage record is non-zero or if either spouse has died. If the date of termination of a marriage is determined by the death date of a spouse then an asterisk (*) will be placed to the right of the Anniversary number. This is to indicate that the number is based upon an assumption of the program that may not be accurate
- *Show Relationships* - This option controls the printing of a relationship label for each relative (in an Ancestor/Descendant/Relative report or detail listing) or for the subject of a group report
- *Show Number of Children* - This option for Detail Listings controls the printing of a field representing the number of recorded children of an individual
- *Show Dates* - This option controls whether Birth/Marriage/Death dates will be printed in the report. This option appears in two forms, one, represented by table entry "DATE", in which the option values are "Y" and "N", and another, represented by table entry "DAT2", in which the option values are "Y", "N" and "A". The latter option, added in March 2000, is used in the options for horizontal and vertical box charts where the "A" value (meaning "All" dates) requests that marriage termination dates also be shown.
- *Only Show Year of Dates* - This is an option of report indexes which allows omitting the month and day from the date to reduce the space required for the field on the report line
- *Places* - This option controls the printing of Birth/Marriage/Death Place names
- *Marriage (Y/N/A)* - This option controls the printing of marriage information in a report. In some reports a value of "Y" will request the printing of just the date and place of the most recent marriage while "A" will request that "A"ll information (including the spouse's name) be printed for each marriage. When printing multiple marriages, one of the Global Report options controls the order in which the marriages will be listed
- *Latest Residence* - This option for detail listings controls the printing of information about the most recent "Residence"... a Residence is an Address record that is found under an individual's Name record or under any of the individual's Marriage records
- *Comments* - This option controls the printing of name (and marriage) comments. A separate Global report option controls the printing of those parts of comments that are enclosed in "curly brackets" ({ and })
- *Blank Line Between* - In Ancestor/Relative reports, this option controls the printing of an extra blank line before each Ancestor's report line
- *Use Bypass Logic (W/C/B/N)* - This is an option that applies to the "batch printing" of group reports; that is, the printing of a set of group reports for a list of ID numbers. It allows you to request that certain group reports not be printed *when they contain no information that cannot be found on another of the group reports that is being printed*. The values for this option are:

W - indicating that a wife's group report is not to be printed if a husband's report is being printed

C - indicating that a child's group report is not to be printed if a parent's report is being printed

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B - indicating that Both the Wife and Child Bypass rules are to be observed

N - indicating that Neither bypass option is to be observed (all reports are to be printed)

- *Underline Blank Fields* - This is an option for the printing of fixed format group reports. Printing underscores in blank fields may make it easier to fill in missing information
- *Show Ref Type Symbols* - This is an option for the printing of report indexes requesting that each report reference be preceded by a symbol indicating the type entry being referenced. The symbols used are taken from the "REFERENC" Global Table in the Report Definition File, shown below.

Table: REFERENC	Seq	Sym	Entry Type
	1		Standard Reference Entry
	2	*	Subject of Group Report
	3	sp	Spouse of Subject
	4	ch	Child
	5	F	Subject's Father
	6	M	Subject's Mother
	7	sF	Spouse's Father
	8	sM	Spouse's Mother
	9	cSp	Child's Spouse

Table 1: Reference Codes Global Report Table

V.E.1.e Chart Options

This group of options controls options that apply to certain charts. Not all options will be applicable to every chart. Most of the ones that apply to a particular chart will be included in the option menus that are assigned to the definition of the chart in the Report Definition File.

CODE	TYPE	DEFAULT	DESCRIPTION
-CH-	-1	-	----- Chart Options -----
ALIN	1	N	Show Lineage Numbers (Y/N)
PCOD	1	Y	Show Parent Codes (Y/N)
CHNM	1	Y	Show Child Numbers (Y/N)
LKPG	1	N	Use Page Numbers to Link (Y/N)
SPBX	1	Y	Allow Boxes to Span (Y/N)
NEST	1	Y	Allow Nesting (Y/N)
SPLT	1	N	Allow 2 Lines for Name (Y/N)
NBOX	1	Y	Print Box Boundaries (Y/N)
DWTH	22	15	Box Data Width
BSEP	21	1	Box Separation
STEM	21	1	"Stem" Length
CMBD	3	Y	Combine Data Lines (Y/N/A)

The Chart Options include:

- *Show Lineage Numbers* - This option controls the printing of ancestor lineage numbers (or ahnentafel numbers) in front of the individual's name on Ancestor Charts
- *Show Parent Codes* - This option controls the printing of a single character "M"other or "F"ather code in box style ancestor charts. (This can be useful when printing mini horizontal box charts)
- *Show Child Numbers* - This option controls the printing of a child's number (in the sequence of siblings) on a descendant chart
- *Use Page Numbers to Link* - Requests that multiple 4 Generation or 5 Generation Ancestor charts be linked using page numbers instead of Chart ID codes. (Chart ID codes are more appropriate for workbooks of Ancestor Charts as they are not affected by the insertion of new charts)
- *Allow Boxes to Span* - When printing very wide box charts in strips, this option controls whether an information box on the chart is permitted to span two printed strips

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- *Allow Nesting* - This Vertical Box Chart option controls whether an information box can be printed before the Ancestor/Descendant tree of the preceding box in the column has been completed
- *Allow 2 Lines for Name* - This option provides for printing an individual's given name and surname on separate lines in an information box
- *Combine Data Lines (Y/N/A)* - This option for box charts (Ancestor/Descendant/Family Path) controls the placement of birth/death dates and places on the same data line when permitted by the chosen box data width; a value of "Y" allows placing birth/marriage/death dates and places on a single line except that the birth place and death date will not be placed on the same line. The value of "A" for the option removes the exception. A value of "N" will result in birth/marriage/death dates and places occupying separate data lines without regard to the box data width.

NOTE: if "Combine Data Lines" is chosen, then the leading spaces on date fields will be eliminated to allow more room on the line for other information.

- *Print Box Boundaries* - This controls the printing of box boundaries in vertical box charts; (vertical box charts without the box boundaries are similar to "drop style" charts produced by other programs)
- *Box Data Width* - This is the number of print positions within each information box of a vertical or horizontal box chart. (If the box data width causes information to be truncated for some entries, the box chart programs will display the maximum box width required after the printing of the chart is complete. You can determine the required box width for a chart by first printing the chart to the screen and adjusting the Box Data Width to the required value before the final printing)
- *Box Separation* - This is the (minimum) number of blank print positions between adjacent information boxes of a horizontal box chart
- *"Stem" Length* - This is the (minimum) length of the vertical connecting lines between information boxes of a horizontal box chart.

V.E.2 REPORT OPTION MENUS - Saving Default Settings

To simplify the presentation and selection of the many options that may be applicable to a particular report or chart, most of these options are selectable from Menus that appear in the lower right corner of the screen after you have selected one of the report processing programs from the FHS Main Menu. (The options shown there are the ones that are in the Option table for the individual report as described in a previous section) Within each report program, Function key F4 is used to request making changes to the option menu. When you select that option, the "active viewing area" shifts to the lower right portion of the screen and the first report option will be hilited by "arrows" on the right and left of the item. Use the UP/DOWN cursor control keys to move the selection arrows to other options in the list. When you wish to change the setting for a hilited option, press the ENTER key, make the desired change, and then press the ENTER key again. After all report option settings appear satisfactory, press the ESCape key to terminate the procedure.

You may SAVE your preferred settings for options in these menus by pressing the F1 key when you have finished making your changes to the options. The settings are stored in the Report Definition File that is being used for the session and will be used as the default settings for subsequent sessions that use the same Report Definition File.

V.E.3 OTHER REPORT OPTIONS - "Bottom Line Prompts"

Other report options will be offered to you through "bottom line" prompts. These usually offer choices for styles of reports or for optional processes that may be performed during the printing of the report or chart. For example, when you start to print a report, most report programs will ask something like:

Select Destination: 1) Screen 2) Printer 3) File

which is simply asking whether the report output should be directed to the Screen, to a Printer (using the current Printer Setup) or to a File on disk.

Another bottom line prompt that will be offered for most reports is:

Create REFERENCE File for Index? (Y/N)

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This permits you to create a WORK file that contains the locations of names referred to in the reports. One of the extended options provided to registered users will print report indexes from the REFERENCE file. (The offering of this option is controlled by one of the Global Report options: "Allow REFERENCE File (Y/N)". You can eliminate this prompt by setting that option to "N")

Each of these "bottom line prompts" has a default response that will be used if you simply respond by pressing the Enter key or the space bar. That response is provided as part of the definition for the prompt message that appears in the current Message Definition File. (Use Main Menu options F3-B-F4-3 to display or modify the current message definition file contents)

V.E.4 PAUSING AND CANCELING THE PRINTING OF REPORTS

While producing any of the reports, the printing may be temporarily interrupted by pressing the "space bar" or any of the "character keys". The report may then be continued again by pressing the space bar (or one of the character keys) or may be terminated by pressing the ESC key. If you use the PGDN key to continue a report, then the program will pause at the top of the next page of output. This may prove convenient for pausing a printer that is running low on paper. You can continue the printing by pressing any key.

NOTE: *If you do pause the printing in this way to change the paper and then continue printing, do not turn the printer off while changing the paper as the printer settings that were being used to print the report will be lost.*

V.F REPORT DESCRIPTIONS

In the following descriptions, the keystrokes required to select the report program from the Main Menu are shown, in parentheses, following the name of the report or chart in the section heading. I will sometimes refer to the Ancestor, Descendant and Relative reports as "relationship reports" because their organization is designed to emphasize the relationship between individuals. The Family Group reports give more detailed information about each individual. The Ancestor Charts and "Map" should prove useful for tracking the results of your ancestral research while the "Box" Chart options can produce "wall charts" that graphically illustrate family relationships. After becoming familiar with the various types of reports and charts, those who have access to HP Deskjet, Laserjet or compatible printers may want to look at Section XII which describes an interface to a utility which provides landscape printing of reports and charts on those printers.

V.F.1 ANCESTOR Report Program (Main Menu Option F2-A-1)

The Ancestor Report program produces three reports: a Detail report, a Summary report, and a Duplicates report. Before any of these reports can be printed however, it is necessary to identify the set of ancestors that are to be included in the report.

V.F.1.a *Creating an ANCESTOR Work File (F2-A-1-F3)*

Ancestors are identified by performing an ancestor search and recording the results in an Ancestor Work File. The maximum number of generations of ancestors that are to be searched appears as one of the options for the Detail Ancestor Report. Another option allows you to choose whether or not adoptive relationships are to be included in the search for ancestors. You can also specify whether the ancestor search is to be limited to locating ancestors of just females, just males, or of all ancestors. Program option F4 can be used to modify the option settings before creating the work file. The search process is begun by selecting program option F3.

When you press F3, the program asks you for the Base ID... this is the ID number for the Name Record of the individual whose ancestors are to be located. You will also be asked to give the name of the Ancestor Work file that is to be created. The program then begins the ancestor search, recording information about the located ancestors in the WRK file. The progress of the report is shown in work file statistics in the middle of the screen. This "work" dataset does NOT have to be recreated each time an ancestor report is printed if there is no change to the family file that would change the relationships recorded in it. The ancestor work files created by this program and by the ancestor chart program are in the same format and may be used interchangeably.

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V.F.1.b Detail Ancestor Report (F2-A-1-F6-1)

The Detail Ancestor Report groups ancestors by generation level and shows the lineage numbers of the ancestors listed. Because no lines are printed for “missing” lineage numbers, (for ancestors not yet recorded in the files), this report is much more concise than the traditional ancestor chart. The lineage numbers may be used to follow lines of ancestry on the ancestor report using the relationships described in the previous discussion concerning lineage numbers (see page V-2). (The term “Ahnentafel list” is also used for reports of this type)

Ancestor reports can be printed in three different styles: Fixed Format, Free Format and LifeLine Format. (See page V-6)

If you have decided to identify adoptive relationships (by placing an * to the right of the adoptive mother/father ID in the name record) and you have included adoptive relationships in the ancestor search, adoptive parents will be noted by an “*” to the right of the lineage number in this report.

If a child is born to related individuals, the common ancestor of those individuals will appear twice on an ancestor report for that child, once among the father’s ancestors and again among the mother’s ancestors. In the ancestor reports produced by this system, such common ancestors will be noted (by a backward reference following the second occurrence of the ancestor in the report) and the lineage of the ancestor will be continued only for the ancestor’s occurrence with the smallest lineage number.

If you have elected to show marriage dates in this report, the date of marriage will only be shown on the line for female ancestors. The number of years married is computed from the dates in the marriage record, the death dates of the spouses and/or the current date at the time the report is produced. If the death date of one of the spouses is used to determine the number of years married, then a “*” will appear to the right of that number in the report.

V.F.1.c Ancestor Summary Report (F2-A-1-F6-2)

The Ancestor Summary Report shows the results of accumulating certain items of information for ancestors at each generation level. The report can be printed in two styles: Horizontal and Vertical. The Horizontal format prints the items of information for a generation of ancestors on a single line. The Vertical style of report prints the items of information for a generation of ancestors in a column. The items included in the report, identified by the label that appears in the title line for the Horizontal style report, are:

- AGL - Ancestor Generation Level
- Relation - Relationship label
- M, F - the numbers of males and females
- TOTAL - the total number of ancestors at this generation level (an “*” to the right of this number indicates that it is greater than the sum of the numbers of males and females. This means that there are records with sex code other than “M” or “F”)
- NOP - the number of ancestors who have NO Parents recorded (these are considered to be “Heads of Family Lines”)
- BY>0 - the number of records with birth year greater than 0
- LOBY,HIBY - the low and high values recorded for non-zero birth year
- #BPL - the number of birth places recorded
- MAR - the number of name records with at least one marriage or spouse record
- #MAR - the total number of marriage/spouse records (if both spouses are in the group being summarized then the single marriage record will be counted once for each of them)
- MY>0 - the number of marriage/spouse records with marriage year>0
- LOMY,HIMY - the low and high values recorded for non-zero marriage year
- #MPL - the number of marriage/spouse records with place of marriage recorded
- DY>0 - the number of records with death year>0
- DY<9 - the number of records with 0<death year<9999 (this ignores those records which have the value 9999 for death year indicating that the person is deceased but that the year is unknown)
- LODY,HIDY - the low and high values recorded for year of death (among those records counted under “DY<9”)

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- #DPL - the number of records with place of death recorded.

Among the options for this report is one for counting the “Heads of Family”. These are ancestors who have no recorded parents in the family file. In the horizontal style of Ancestor Summary, you can request that detail information about these “Heads of Family” be included in the report. The detail information includes the lineage number, the full name and the years of birth and death.

V.F.1.d Ancestor Duplicates Report (F2-A-1-F6-3)

The Ancestor Duplicates Report lists ancestors who occur more than once on the family tree. The duplicate ancestors are listed in ID # sequence. Below each ancestor’s name is a line for each occurrence of the individual in the Ancestor Work file, showing the relationship and lineage number from the work file entry.

V.F.2 DESCENDANT Report Program (Main Menu Option F2-A-2)

The Descendant Report program produces three reports: a Detail report, a Summary report, and a Duplicates report. Before any of these reports can be printed however, it is necessary to identify the set of descendants that are to be included in the report.

V.F.2.a Creating a DESCENDANT Work File (F2-A-2-F3)

Descendants are identified by performing a descendant search and recording the results in a Descendant Work File. The maximum number of generations of descendants that are to be searched appears as one of the options for the Detail Descendant Report. Another option allows you to choose whether or not adoptive relationships are to be included in the search for descendants. You can also specify whether the descendant search is to be limited to locating descendants of just females, just males, or of all descendants. Program option F4 can be used to modify the option settings before creating the work file. The search process is begun by selecting program option F3.

When you press F3, the program asks you for the Base ID... this is the ID number for the Name Record of the individual whose descendants are to be located. You will also be asked to give the name of the Descendant Work file that is to be created. The program then begins the search, recording information about the located descendants in the WRK file. The progress of the report is shown in work file statistics in the middle of the screen. This “work” dataset does *not* have to be recreated each time a descendant report is printed if there is no change to the family file that would change the relationships recorded in it.

V.F.2.b Detail Descendant Report (F2-A-2-F6-1)

The Detail Descendant Report lists the descendants of an individual in “relationship” sequence. In doing this, individuals may be grouped either by “generations” or by “families”. The generation grouping uses the “bloodline” to group and “label” the individuals listed. In so doing, individuals in the same generation who are “closely related” appear near one another in the report. Brothers and sisters appear in succession in birth date sequence, with 1st cousins, 2nd cousins, etc. grouped around them. It is also easy to locate, in previous generations, the ancestor which an individual has on that generation level by locating the individual on that level whose bloodline forms the initial sequence of numbers in the bloodline of the descendant in question.

The “family” grouping will have children located closer to their parents, though brothers and sisters will be more widely separated in the report. The report for “family” grouping may be printed either in an “outline” format with each individual’s name offset according to the generation in which he/she belongs or in a “uniform” format in which the names begin in the same print position on each line and the “bloodline” of each descendant appears in full to the left of the name. (See section V.A for the meaning of the term “bloodline”)

If you have decided to identify adoptive relationships (by placing an * to the right of the adoptive mother/father ID in the name record) and you have included adoptive relationships in the descendant search, adoptive relationships will be noted by an “*” to the right of the child number in the bloodline.

An individual may occur more than once among the descendants if there are “crossed” family lines. In the descendant reports produced by this system, such common descendants will be noted (by a backward reference following the second and subsequent occurrence of the descendant in the report) and the children of the descendant will be recorded only for the first occurrence of the descendant in the report.

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If you have elected to show the number of years married in this report, the number is computed from the dates in the marriage record, the death dates of the spouses and/or the current date at the time the report is produced. If the death date of one of the spouses is used to determine the number of years married, then a “*” will appear to the right of that number in the report.

V.F.2.c Descendant Summary Report (F2-A-2-F6-2)

The Descendant Summary Report shows the results of accumulating certain items of information for descendants at each generation level. The report can be printed in two styles: Horizontal and Vertical. The Horizontal format prints the items of information for a generation of descendants on a single line. The Vertical style of report prints the items of information for a generation of descendants in a column. The items included in the report, identified by the label that appears in the title line for the Horizontal style report, are:

- DGL - Descendant Generation Level
- Relation - Relationship label
- M, F - the numbers of males and females
- TOTAL - the total number of descendants at this generation level (an “*” to the right of this number indicates that it is greater than the sum of the numbers of males and females. This means that there are records with sex code other than “M” or “F”)
- BY>0 - the number of records with birth year greater than 0
- LOBY,HIBY - the low and high values recorded for non-zero birth year
- #BPL - the number of birth places recorded
- MAR - the number of name records with at least one marriage or spouse record
- #MAR - the total number of marriage/spouse records (If both spouses are in the group being summarized then the single marriage record will be counted once for each of them)
- MY>0 - the number of marriage/spouse records with marriage year>0
- LOMY,HIMY - the low and high values recorded for non-zero marriage year
- #MPL - the number of marriage/spouse records with place of marriage recorded
- DY>0 - the number of records with death year>0
- DY<9 - the number of records with 0<death year<9999 (this ignores those records which have the value 9999 for death year indicating that the person is deceased but that the year is unknown)
- LODY,HIDY - the low and high values recorded for year of death (among those records counted under “DY<9”)
- #DPL - the number of records with place of death recorded

V.F.2.d Descendant Duplicates Report (F2-A-2-F6-3)

The Descendant Duplicates Report lists descendants who occur more than once in the work file. The duplicate descendants are listed in ID # sequence. Below each descendant's name is a line for each occurrence of the individual in the Descendant Work file, showing the relationship and bloodline from the work file entry.

V.F.3 RELATIVE Report Program (Main Menu Option F2-A-3)

The Relative Report program produces three types of reports: a detail report, a relationship table, and a duplicates report. These reports include entries for all relatives of an individual found during a search of the files which:

- First locates all ancestors of the individual going back a user specified number of generations, and
- then finds all descendants of the individual and all located ancestors, going forward a user specified number of generations.

The limits on numbers of generations searched allow some control over the maximum “distance” located relatives will be from the individual used to start the search. For example, if you were only interested in “off-line” relations to the 1st cousin level, you would set the number of descendant generations searched to 2. The search process for identifying relatives is invoked using program option F3.

V.F.3.a Creating a RELATIVE Work File

When you press F3 to create a Relative Work File, the program asks you for the Base ID. This is the ID number for the Name Record of the individual whose relatives are to be located. You will also be asked to give the name of the Relative Work file that is to be created. The program then begins the search, recording information about the located relatives in the WRK file. The progress of the report is shown in work file statistics in the middle of the screen. This “work” dataset does *not* have to be recreated each time a relative report is printed if there is no change to the family file that would change the relationships recorded in it.

The maximum numbers of generations of ancestors and of descendants that are to be searched appear as options for the Detail Relative Report. Another option allows you to choose whether or not adoptive relationships are to be included in the search for relatives. You can also specify whether the relative search is to be limited to locating ancestors/descendants of just females, just males, or of all descendants. Program option F4 can be used to modify the option settings before creating the work file.

V.F.3.b RELATIONSHIP LABELS

An optional piece of information that may be included in the relationship reports is a label describing the relationship of the relative to the “Base ID”. While you may elect to show this label in any of the “relationship” reports (ancestor, descendant or relative), it is more significant in the relative report because this report includes not only direct ancestral/descendant relationships, but “indirect” relationships as well, that is: aunts, uncles and cousins. In this case, there are two popularly used rules for describing “cousin” relationships. In one, the “civil law” rule, the child of a “first cousin” is a “second cousin”. In the “common” rule, the child of a “first cousin” would be called a “first cousin once removed”.

Some of the relationship labels used by these programs are:

Child, gChild, ggChild, g2gChild (great,great grandchild) etc.
Father, Mother, ggFather, ggMother, g3gFather (great,great,great grandfather) etc.
Brother, Sister, Niece, Nephew, gNiece, g2gNephew, etc.
Aunt, Uncle, ggAunt, g4gUncle, etc.
Cousin, 2Cousin, 3Cousin (third cousin), 4Cousin, etc.
1C1R (1st cousin, once removed), 2C3R, 4C11R, etc.

These labels are particularly useful for getting over that “bloodline barrier” that sometimes makes relatives seem more distant than they really are.

V.F.3.c Detail Relative Report (F2-A-3-F6-1)

The Detail Relative Report is a combination of the ancestor and descendant reports that have been described previously. In fact the ancestor and descendant reports are “special cases” of the relative report as follows:

- the Ancestor report is a relative report in which the number of “descendant” generations searched is 0
- the Descendant report is a relative report in which the number of “ancestor” generations located is 0.

All three types of reports are produced by the same program. (You can use program option F7 to switch among the different report styles: Ancestor, Descendant, Relative, without having to return to the Main Menu program)

The relative report is like a combination of the descendant reports of the “base” individual and all the located ancestors. These individual descendant reports are presented in the lineage number sequence of the ancestors. If an individual occurs in more than one descendant report (for example the father will appear as a child in the descendant report of each paternal grand-parent) then the descendants of the individual will only appear within the descendant report for the ancestor of lowest lineage number. In subsequent “descendant” reports, only a single line of information will appear for the individual with a reference to the page and line number of the next previous reference to the individual in the relative report. This has the effect of eliminating much of the redundancy that results when producing separate and complete descendant reports for each of your ancestors.

If you have not recorded any grandchildren for ancestors, apart from the line that leads to the “Base ID”, then you may find an “objectionable” amount of redundancy resulting from the children of ancestors appearing separately in

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the report under entries for each of the parents. I have not yet provided an option for eliminating this because I feel that the female's record of descendants should be treated equally to the male's record in the reports. As more cousins are recorded in the file, the entries for the female ancestors become more separated from those of their husbands and the "redundant" listing of their children becomes less noticeable.

Agl\Rgl	-4	-3	-2	-1	0	+1	+2	Tot	Acc
					*	C	gC		
-0					1	4	2	7	7
				P	S	NN			
-1				2	3	7		12	19
			gP	UA	1C	1C1R	1C2R		
-2			4	8	10	15	4	41	60
		ggP	gUA	1C1R	2C	2C1R			
-3		7	10	17	12	8		54	114
	g2gP	ggUA	1C2R	2C1R	3C	3C1R			
-4	12	17	26	18	10			83	197
Total	12	24	40	45	36	34	6	197	

Report 1: Relationship Summary Table

V.F.3.d RELATIONSHIP SUMMARY TABLE (F2-A-3-F6-2)

The summary report produced from a relative work file is in a different format than the ones described previously for the Ancestor and Descendant work files. Because of the mix of Ancestor and Descendant relationships in a relative work file, it is better represented by a "two dimensional" table than by a simple sequence of generations. This report therefore takes the form of a "relationship table" with the "relative generation levels" across the top and the "ancestor generation level" down the left side. Each entry in the table represents a "relationship category" and is labeled by an abbreviated "relationship literal" representing the category, such as: C (children), S (siblings - brothers and sisters), NN (nieces and nephews), 1C (first cousin), 2C1R (second cousins once removed), g2gP (great great grand parents), gUA (great uncles and aunts). The labels can be constructed either using the "Common" or "Civil Law" rules. (Under Common rules, the child of a first cousin is a first cousin once removed... under Civil Law the child would be a second cousin)

An example of a Relationship Summary Report is shown below.

The "*" relationship category in the first row represents the individual upon whom the relative work file is "based". The "Tot" column on the right gives the total of all numbers in the row and the "Acc" column gives the Accumulated total of the numbers in that row and all previous rows. The "Acc" number represents the number of descendants of all ancestors at that particular generation level. The "Total" line on the bottom gives the total of all numbers in each column, that is, the number of relatives in each relative generation level.

You may find it interesting to Select all persons in the file with a particular surname (using the Search/Select/LIST option) and then print a relative table to see how that surname is distributed around it.

Please note that relative files that span a very large number of generations may extend beyond the borders of a single printed page. If this happens, then only the number of columns that will fit on a single page of the report will be printed and you will be given the opportunity to print additional "strips" of the chart when the first printing is complete. The complete set of portions of the chart may then be pieced together to form a large wall chart, or if each "strip" only uses a single sheet of paper, you may place them in a binder.

V.F.4 FAMILY GROUP REPORTS (Main Menu Options F2-B-1, F2-B-2)

The FAMILY GROUP REPORT produced by the system provides a complete listing of information on record for an individual. Information that may be printed includes: personal information (name, birth/death dates and places), parents, spouse(s), spouse's parents, children, child's (latest) spouse, and all residence information for the individual. The report may also show the "other" types of information from Event, Medical, Educational, Work and Military records. In addition, all addresses and comments relating to these records can be included in the report. You may

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also include a line which shows the Relationship and Lineage of the subject of the report based upon a supplied relationship work file.

When first introduced in the Family History System, the Family Group Report had the appearance of a “worksheet” with special areas for each information type. If you had recorded only partial information for an individual, portions of the report would appear as “blank” lines which could be completed as information was discovered. This style report required a printline of 132 characters, making it necessary to use a compressed (small) font for printing on standard (8 1/2”) paper.

In March 1990, a new “free form” style of group report was introduced in which information was printed in blocks of text or as “paragraphs”. There were no “blank” lines for missing information, and the report could adjust to “forms widths” of 80 characters or less, allowing the use of more readable type styles. The former “worksheet” style of family group report is now called the “fixed format” Group Report.

NOTE: *When the “Free Format” style of reports was introduced, I was unable to put all the instructions for both “old” and “new” report styles in a single program. Therefore you had to choose between the report styles when you selected the Family Group report option from the Main Menu. Now both reports are produced by a single program, but the choice of styles was left in the Main Menu program, for continuity. Within the Group Report Program, you can “toggle” between the two styles by using F7 without having to go back to the Main Menu.*

This (1997) update introduces a type of “group” report that includes features of a standard style of report called a “Register”. While it is similar to the free form merged group report that will be described later, it has some unique characteristics that warrant treating it separately. The Register report will be described more fully in section V-V.F.5 on page V-26. You will probably want to produce a Family Group report for each of your ancestors (male and female) and any of their descendants who have maintained separate households. To help simplify the task of printing the many Family Group reports that you will want to be saving, you are given several options for BATCH printing of family group reports. You may enter a list of ID #'s for reports that you want printed, or you can instruct the program to read a relationship file (Ancestor/ Descendant/Relative Work file) or a SELECT.WRK file to determine which reports are to be printed. It is therefore relatively easy to print reports for all ancestors of an individual or for all descendants or relatives of a given individual.

When printing reports using one of these lists of ID#'s, you may request to BYPASS the printing of reports for children whose own group report contains no information that is not found on the one being printed for a parent or for wives whose own family group report contains no information that is not found on the one being printed for the husband. (The last option may sound a bit sexist, but I believe it probably conforms to a common procedure for maintaining files of family group reports)

Program option F6 requests the printing of reports for the selected individuals. When printing reports for ID's in a list (either entered individually or read from a file) you may specify whether to print the reports in ID# sequence, in Relationship sequence, or in the order specified by an INDEX file. (Creating an INDEX file is one of the extended options for the system) Further, you may request that the reports be printed separately or that they be merged into a single report with a line of asterisks separating individual reports. In the MERGED report, pages are numbered sequentially and line number indicators may be placed in the margin to assist in locating the source of references in the report indexes produced by one of the system's extended options. The merged family group report is intended to simplify the task of producing booklets of family information.

V.F.4.a IDENTIFYING GROUP REPORTS TO BE PRINTED

Group reports that are to be printed are identified by giving the program the ID # of the primary subject of the report. Program option: “F3 Change SELECT Type or ID's” allows you five ways of entering these ID's. When you press the F3 key you will be asked to:

Select: 1)Single ID 2)ID List 3)REL Work File 4)Select File 5)Full File

If you choose “1”, you will be asked to enter a single ID number (in the middle of the screen where it says: “Processing ID #”). The Name record corresponding to the ID # will be retrieved and the name found there will be displayed to confirm your selection.

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If you choose SELECT option “2) List of ID’s”, the bottom line of the screen will be formatted with an “option line”, and the blinking cursor will appear near the middle of the screen to the right of the label “Processing ID #:”. You can enter a list of individual ID numbers by typing each one on the screen and pressing the enter key. After entering an ID#, the corresponding name record will be retrieved and the name found in the record will be displayed to the right of the ID#. You can enter a range of ID #'s by pressing the F2 key and following the prompts that appear on the bottom line of the screen. Pressing the F3 key will delete the currently displayed ID from the list.

All ID #'s entered are kept in a list in ID# sequence and you may use the PGUP and PGDN keys to move up and down the list to review previously entered ID's. The CTRL+PGUP and CTRL+PGDN key combinations will move you respectively to the lowest and highest ID #'s in the list. Near the right center portion of the screen the number of ID #'s currently in the list and the total number of name records in the file are shown. You may press the F10 key to SAVE the list in a SELECT Work file for later reuse. After you have finished adding all the ID #'s to the list that you want, press the F1 key to terminate the process. You can return to change a previously entered list of ID #'s by pressing the F3 key and then the SPACE bar.

If you choose SELECT options “3”, “4” or “5” then the relationship work file, the SELECT work file or the full name file respectively, will be used to determine the ID #'s for which family group reports are to be printed. The name record for the first ID (the lowest ID #) in the resulting list will be retrieved and the individual's NAME displayed. The number of reports selected for printing and the total number of name records in the file will be displayed at the right center part of the screen. You may then proceed to change the list just as described in the previous paragraph.

V.F.4.b GROUP REPORT OPTIONS

Program Option F4 is used to view and modify the various options for printing group reports. Among these options are ones which are used to identify the types of information that are to be included in the group reports. The table at right, a portion of the RPTOPTS system table, shows these option entries. Other report options are described on page V-7.

Some of the options in this table allow you to identify whether a type of information will be included in the report, while others allow you to specify the Minimum number of entries of that type that will be included. The “Min #” will apply only if the information has been chosen to be included in the report. When “filled in” group reports are being printed, all information of an included type will be shown even if the number of occurrences exceeds the “Min #” of entries for that type. If a “Min #” has a “+” sign before the number, then the report will include that number of “blank” entries in addition to any “filled in” entries of that type.

DEFAULT	DESCRIPTION
-	--- Group Report Sections ---
Y	Print Children (Y/N)
1	Min # Child Entries
N	Print Child's Comments (Y/N)
Y	Print Spouse(s) (Y/N)
+1	Min # Spouse Entries
Y	Print Residence Entries (Y/N)
+1	Min # Residence Entries
A	Print Comments (Y/N/A)
2	Min # Comment Lines
Y	Print Events (Y/N)
1	Min # Event Entries
Y	Print Education Info (Y/N)
1	Min # Education Entries
Y	Print Military Info (Y/N)
1	Min # Military Entries
Y	Print Medical Info (Y/N)
1	Min # Medical Info
Y	Print Work Info (Y/N)
1	Min # Work Info
Y	Print Other Addresses (Y/N)
1	Min # Other Addresses
Y	Print Other Comments (Y/N)
2	Min # Other Comment Lines

Notice that there are several options controlling the printing of comments. The first controls the printing of comments under children. The second controls the printing of comments for the Name record, Marriage records and Residence information. The last item for the printing of comments applies only to the “Miscellaneous” types of information: Medical, Military, Educational, and Health information and Events, as well as any associated addresses that may be printed for those types of information.

There are several other report options that address specific features of the Family Group Reports. These include:

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- The option for underlining blanks, which only occurs among the options for Fixed Format group reports. If the value is “N”, then missing information in the report will appear as “blanks”, otherwise the missing information will be filled with “underscore” characters
- The “H” value for the “Print ID Numbers” option will result in the ID number only being printed for the “subject” of the group report in the heading of the report
- The option for “Print Subject Lineage” allows you to include a line showing the Relationship and Lineage of the subject of the report. If you select this option, then a relationship work file must have been previously created by Main Menu selections F2-A-1,2,3 or F2-C-1. The relationships and lineage that appear in the report will be determined from that work file
- The option for “Blank Line Between” allows you to request that a blank line be inserted between children in the group report. This came at the suggestion of a user who felt that it would make it easier to read the child information. I agree with her, but it also takes extra paper, so you are given the choice. (This option also controls the printing of a blank line before and after the separating line of “*”s in the merged group reports)
- When printing family group reports from a list of ID’s, you are given an opportunity to eliminate the printing of certain reports whose information duplicates that found on another report that is being printed. This is done by entering “C”, “W” or “B” next to the “Use Bypass Logic” option.

A value of “C” for “Use Bypass Logic” tells the program to eliminate the printing of a report for a “C”hild whose parent’s group report is being printed and for whom there is no information being printed in the child’s report beyond that which appears in that of the parent(s). For instance, if you are printing family group reports for all descendants of an individual this option would allow you to skip printing Family Group Reports for the many persons (including minor children) who have simply been listed as a child on one Family Group Worksheet but for whom you have never received or had need to create a separate Family Group Worksheet of their own.

A value of “W” for “Use Bypass Logic” tells the program to eliminate the printing of a report for a “W”ife if the husband’s report is to be printed and her own group report would have no information on it beyond that that appears on the group report of her husband.

V.F.4.c PRINTING FAMILY GROUP FORMS AND REPORTS

Program option F6 is used to print blank Family Group Worksheets (in the fixed format Group Report only) as well as the “filled in” Family Group Reports. When you press F6 in the “fixed format” Group Report program, you will be asked to:

Select 1) Blank Forms or 2) Filled in Forms/Report

If you select “1”, you will be asked how many blank forms to print (1-9). The blank forms will include sections for the types of information you have selected among the report options and will provide the number of entries within each section that you have indicated in the “Min” options.

When you are printing “filled in” family group reports for a list of ID#’s, you will be asked to:

Select 1) ID# Sequence 2) Relationship Sequence 3) INDEXed Sequence

If you choose “2”, you will be asked to identify a previously created Ancestor/Descendant/Relative work file which will be used to determine the printing sequence. The reports will be printed so that the Subjects of the reports are in the sequence determined by the relationship work file. If you choose “3”, then you will be asked to identify a previously created INDEX File. The reports will be printed so that the Subjects of the reports are in the sorted sequence determined by the INDEX File. Creation of an INDEX file is one of the functions provided by the extended version of the software.

You are then given two format options for printing family group reports from a list of ID’s as you are asked to:

Select 1) Separate Reports 2) Merged Reports

If you enter “1” then separate Family Group Reports will be printed for each ID in the ID List (unless bypassed using one of the Bypass settings) just as if you had printed them separately and individually. The “Merged Report” option will result in all family group reports being printed continuously with a line of “* * *” separating them. The pages

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in the “merged” report will also be sequentially numbered. In effect, this provides you with still another type of report... one that can show ALL information in the file for each individual.

When printing “Fixed Format” Group reports in a “merged report”, the MINimum counts of the types of information to be included will be assumed to be zero (sections will be shown for information of a given type only if it is to be INCLUDED and there actually is information in the file for the individual whose family group report is being printed).

One of the options in the extended part of the system allows you to produce a printed index for these reports with the page and line numbers for each reference to each individual in any of the family group reports printed.

V.F.5 REGISTER REPORTS (Main Menu Option F2-B-3)

The Register style of report was introduced as a part of FHS in this (1997) update to provide a means of printing family booklets in a style that is widely recognized. While the program and reports are similar to the Family Group Report program and reports described in the previous section (in fact that program was the “beginning point” for the register report program), many of the options of the Family Group Report program were eliminated to accommodate the more specific characteristics of the Register report. In particular:

- A Register is only printed as a “Free Form Merged Group Report”
- The name records whose group reports are printed always consist of a collection of related records, identified by a relationship work file
- The group reports are always printed in a “relationship” sequence, determined by the work file used. For Ancestors, it is the order of the lineage (or ahnentafel) number assigned to ancestors; for descendants or relatives it is the same as the order of individuals in a descendant or relative report which groups descendants “by generations”.

The special features that are associated with a “register” style of report include:

- Each record for which a group report is printed is assigned an identification number (alternatively, you can assign an identification number to each individual in the group of relatives being reported). In Ancestor registers, the identification number is just the lineage (or ahnentafel) number of the ancestor. For descendants or relatives, the identification number (or “register number”) is just a counting number (beginning with 1 and incremented by 1) assigned sequentially to the individuals in the order that they appear in the relationship sequence. The identification number is used for “cross references” within the report instead of using page and line numbers as in the family group report program
- The “relationship sequence” of group reports in a family register is such that reports for individuals who are in the same generation level will be grouped together. A prominent heading will be printed at the beginning of each generation grouping.
- Children are numbered using lower case Roman numerals
- If a child is assigned a register number, then the register number will appear at the beginning of the line for the child. If all entries in the relationship work file are being assigned register numbers, then a “+” will be placed before the register number of a child who is also the “subject” of a group report that is being printed
- The “lineage” that can be optionally printed following the name of the subject of a group report in a descendant or relative register is formatted differently than the “lineage” of the earlier merged group report. Recall that a descendant lineage was a sequence of numbers within parentheses, with one number for each generation that separated the individual from the “root” of the group of descendants. For example, the sequence (4,1,3) would indicate that the individual was the “third child of the first child of the fourth child” of the “root” for the descendants. In a register report this would be printed as: (iii, i, iv), with the child numbers appearing as lower case roman numerals and the generations arranged in the reverse order. Another, more standard form of the lineage would use the register number and first name of the parent in place of the child number at each generation level. For example: (38 Michael, 15 Mary, 1 Edward) indicating that the individual was the child of Michael (reg #38) who was the child of Mary (reg #15) who was the child of Edward, the “root” for the descendant register.. This program allows you to optionally include any of these data items (child number, parent register number and first name of the parent) in the lineage. An example of a lineage that uses all three might be: (iii.38 Michael, i.15 Mary, iv.1 Edward)

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In publications, the “register” style of report is almost always used for recording the descendants of an individual. The “Ancestor Register” printed by this program is more commonly called an Ahnentafel report, while the “Relative Register” is a combination of these reports as follows:

- A “Relative Register” is printed in two parts: an Ancestor Section and a Descendant Section
- The Ancestor Section of a “Relative Register” is just a “reduced” form of an Ancestor Register. The entry for each ancestor only includes the “subject information” portion of the group report, omitting the marriages, children and other optional parts of the group report. Each Ancestor is labeled with both the lineage (or ahnentafel) number and a “register number” that will be assigned to the ancestor in the Descendant Section of the report. The register number appears within parentheses before the name of the ancestor and can be used to locate the full group report for the ancestor in the descendant section of the report
- The Descendant Section of a “Relative Register” consists of a “descendant register” for each of the ancestors. Each of the descendant registers is preceded by a heading identifying the ancestor whose descendants are being recorded. The individual registers are arranged in the sequence of the ancestors in the ancestor section and register numbers are incremented continuously across all descendant registers
- Each generation grouping within a descendant register is preceded by a heading identifying the generation level, just as in a single descendant register report, however you may optionally request that the relationship that appears in the label represent the relationship to the “base record” for the entire group of relatives instead of the relationship to the “root” of the descendant register. That is, the second generation descendants of a great grand parent might be preceded by a heading of “1 COUSIN 1 REMOVED” instead of “GRAND CHILDREN”
- Wherever an ancestor appears as the subject of a group report, as the spouse of a subject, or as a child in the Descendant Section of a relative register, the ancestor’s name will be preceded by the lineage number for the ancestor, within square brackets. When “lineages” are printed in the register, the lineage number of the ancestor whose descendant register is being printed will appear at the right of the lineage, within square brackets. A lineage of this form might be: (iii.124 Michael, i.72 Mary, iv.16 Edward) [4]

While the “Relative Register” described here may not be as familiar as the Ahnentafel and Descendant Register Reports, it is a natural extension of the two and should be useful for preparing personalized booklets for members of your family.

V.F.5.a Printing Register Reports

The Register Report program is selected using Main Menu option F2-B-3. You are also asked to identify the type register report you wish to print by responding to the message:

Select: 1) Ancestor 2) Descendant 3) Relative

While all three types of register reports are produced by the same program, it is necessary to identify the type of work file that will be used by the program before it begins. Once you have begun working with the register report program, you may change to another of the three “modes” of operation by pressing the F7 key. The type of work file that is being processed, which is the type of register that will be printed, is identified by a label preceding the work file information near the middle of the screen.

NOTE: *Unlike the Relative Report program which also produces three types of relationship reports, the Register Report program does not use separate screen formats for the three modes of operation. As a result, the information about the relationship work file is designed to show statistics for the most complex of the work file types, the Relative work file. You will see that there are statistic fields that do not apply to some work files. For instance, the number of ancestors is not applicable to Descendant work files, and the Hi Descendant GL is always 0 for an Ancestor work file.*

V.F.5.a.1 Create a Relationship Work File

Prior to printing a Register Report, it is necessary to create a relationship work file which will be used to identify the individuals in the register, to define the sequence in which the records will be printed, to assign register numbers, and to format lineages when those are included in the report. The relationship work file is identical to ones created by the Ancestor/Descendant/Relative report program and the Ancestor Chart program. If you have previously created a

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work file of the desired type and there has been no change to the relationships recorded in it, then you do not have to reCreate the work file here. The information lines near the middle of the screen should help you to determine if the work file contents are appropriate for the register that you want to print. Option F3 can be used to Create or reCreate a work file within this program.

The parameters that are used to build a work file (except for the ID number of the base record) are shown among the Register Report options in the lower right portion of the screen. Although the maximum number of generations to be searched for Ancestors and Descendants are both non-zero, if you are creating an Ancestor work file then the number of descendant generations searched will be set to 0 by the program. Similarly, if you are creating a Descendant work file then the number of ancestor generations searched will be set to 0 by the program. The Search Order for descendant searches is set to 1 (Search by Generations) because Register Reports always process descendants by generations. You may use work files created using descendant searches “by Families” but they may produce unexpected results if there are “crossed” relationships in the file (that is, if a descendant appears on more than one line of descendancy because the parents have common ancestors).

V.F.5.a.2 Change Report Options

Program option F4 can be used to set appropriate values for the Work file parameters as well as other options for printing the Register Reports. Most of these options should be familiar to you by now. There are several that relate particularly to the printing of Register Reports. They are:

Use Bypass Logic (W/C/B/N) - This option may be used to omit the printing of group reports for certain individuals in the relationship work file. Recognized values for the option are:

W - requests bypassing the report for a wife if the husband's report is being printed and the wife's report contains no additional information

C - requests bypassing the report for a child if a parent's report is being printed and the child's report contains no additional information

B - applies rules for bypassing Both wives and children

N - omits the bypassing of any group reports; group reports will be printed for every individual in the work file.

Count All in Workfile (Y/N) - This option affects the assignment of register numbers to individuals in the report. If the option setting is “N” then register numbers will only be assigned to individuals who are the subjects of group reports in the register. If the option setting is “Y” then register numbers will be assigned to all individuals in the reference file. If the “Bypass Logic” option setting is “N”, then all individuals will be assigned register numbers independent of this setting

Print Subject Lineage (Y/N) - This option controls the printing of the lineage of a descendant who is the subject of a group report. The next three options identify the types of information that will appear in the lineage

Show Child # in Lineage (Y/N) - Requests showing the Child Number in each entry of the lineage

Show Reg Num in Lineage (Y/N) - Requests showing the Register Number of the parent in each entry of the lineage

Roman Numerals in CAPS (Y/N) - Requests that roman numerals for child numbers be formatted with all upper case characters. This only affects the I and V characters as the X, L and C characters are always shown in upper case

Show Names in Lineage (Y/N) - Requests showing the First Name of the parent in each entry of the lineage

Show Relation in Headings (Y/N) - This controls the type heading that will appear before generation groupings in the descendant section of a Relative Register. A value of “Y” for the option will cause the generation heading to show the relationship of the descendants to the base record for the relative work file, otherwise the heading will show the relationship of the descendants to the ancestor whose descendant register is being printed.

One other option that may require explanation is the one labeled: “*Show Relationships (Y/N)*”. A value of “Y” for this option will cause a line to be printed at the beginning of each group report showing the relationship of the subject

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of the report to the base record for the relative work file. In this case, the lineage will be printed on that line as well, instead of being printed following the name of the subject.

NOTE: *There is only one entry in the Report Definition File for a Register Report (the “REGR” entry) instead of a separate report definition for each type of Register as in the case of the relationship reports (the Ancestor/Descendant/Relative reports). Therefore there is only one set of option settings to cover all three-register types. If experience proves that separate option settings would be appropriate, then additional report entries will be used.*

V.F.5.a.3 *Print the Register*

Program option F6 is used to print the Register. If you are printing a Relative Register then you will be asked whether you want to print all of the Register or just one of the sections by the message:

Select 1) Ancestor Section 2) Descendant Section 3) Both

If you print both sections and you are using the report option for ending reports on even numbered pages, then each of the sections of the report will end on even numbered pages.

V.F.6 Printing CHARTs (Main Menu Option F2-C)

The Family History System provides several options for printing charts that graphically represent relationships between individuals. Charts are provided that hilite either Ancestral or Descendant relationships. Another type chart, the “Family Path” chart, provides a graphical representation of the line of relationships joining two related individuals. Main Menu option F2-C is the entry point to all of the graphical chart options.

V.F.6.a ANCESTOR CHARTS (F2-C-1)

Ancestor Charts can be printed in a variety of styles. Traditional horizontal tree charts can be printed as blank forms, for gathering information, or as sets of linked, filled in charts showing all recorded ancestors. An Ancestor MAP is a generalization of the standard chart, which shows all (up to 53 generations) ancestors in a single chart. You can also print two styles of ancestor “box” charts.

V.F.6.a.1 *Standard Ancestor Charts and MAPs (F2-C-1-1)*

The system produces Ancestor Charts for an individual in the traditional “horizontal tree” format, with an individual appearing on the left (center) of the page and the parents appearing to the right above (father) and below (mother) the line on which the individual is identified. You can print either “formal” ancestor charts, showing 4 or 5 generations of ancestry on each chart, or an Ancestor MAP with up to 53 generations of ancestors in a single continuous chart.

Before printing either the Ancestor Charts or Maps, you must first create an ANCESTOR Work file using program option F3. Options controlling the Ancestor search appear in the lower right corner of the screen and may be modified using program option F4. These options include the maximum number of ancestor generations that will be searched and whether adoptive relationships will be included in the search. When you press F3 to create the ancestor work file, you will be asked for the BASE ID for the work file, which is the ID number of the individual whose ancestors are to be charted. When the process is complete, the statistics for the work file will be displayed in the middle of the screen. The Ancestor work file created here is identical to the one created in the Ancestor Report program. The work file does not have to be recreated every time an Ancestor Chart or Map is produced. It need only be recreated when the base ID changes or there have been changes to the family file that affect the relationships recorded in the work file.

The charts are printed using program option F6. When you press the F6 key you will be asked to:

Select 1) Blank Forms 2) Standard Charts 3) All Generation MAP

Selection “1” is used to print blank ancestor charts for recording information prior to entering it into the system. You may print from 1-9 blank charts at one time. Blank charts can be printed in either 4 or 5 generation styles. The “Standard Charts” and “All Generation MAP” are described in the following paragraphs.

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V.F.6.a.1.a Standard Ancestor Charts (4/5 Generation) (F2-C-1-1-F6-2)

If you choose to print “Standard Charts” you will be asked to:

Select Style 1) 4 Generation 2) 5 Generation

Because only 4 or 5 generations of ancestors (comprising 16 - 32 individuals) may appear on a single “formal” chart, several charts may be required to show all ancestors on file for an individual. The Family History System has been designed to produce as many “subcharts” as are required to show all recorded ancestors. In doing so, it is necessary to employ some scheme to show how to proceed from one chart to the next in a set. To accomplish this, a “chart-ID” is assigned to each of the charts produced. This chart-ID consists of the generation level of the ancestor appearing to the left on the chart, and the number of that ancestor within that generation level. Some chart-ID’s would be 0-1 (the first chart of a set), 4-1, 4-2, 4-3,...,4-16,8-1,8-2,...,8-256, etc. This method of identifying charts has the advantage that charts, which are not printed, because they are empty, can be printed at a later time (when information does appear on them) and they will have a natural place in the sequence of charts, without affecting the previous Chart ID’s.

Charts will be printed only if an ancestor has been recorded on the chart. If an ancestral line may be continued beyond one of the charts in the series, then the chart-ID for the appropriate continuation chart will be shown on the right side of the chart to be continued. (You may optionally request that chart linking be done using the page numbers assigned to the charts during the printing process. This would normally be done only for a fixed set of charts that are to appear in a publication)

NOTE: *Although the 5 Generation style of chart has entries for 16 additional ancestors in that 5th generation, the information for the 5th generation ancestors consists only of the name and birth/death dates. As a result, the chart linked to from the 5th generation will begin with that 5th generation ancestor to allow for showing additional information (birth/death places and marriage date and place). Therefore the total number of linked charts required for showing complete information for a set of ancestors is the same with either the 4 or 5 generation styles. However, if an ancestor at the 5th generation level does not have any ancestors or any information to show except the birth/death dates, then the chart will not be printed which has that ancestor in the first entry.*

Individual entries on a chart may be numbered from 1 to 16 (32) on each chart, or you may choose to label each entry with the lineage number of the ancestor recorded on the line.

If a parent-child relationship is an adoptive one (indicated by an “*” to the right of the parent ID in the child’s name record), the adopted parent will be noted on the ancestor chart with an “*” in the first position of the NAME field.

The “Spouse of Entry #1” appearing in the lower left corner of each chart is the most recent spouse of the individual listed in entry #1 and may not be the “paired” ancestor on the chart.

V.F.6.a.1.b All Generation Ancestor MAP (F2-C-1-1-F6-3)

You may also print an ALL GENERATION Chart, which, though not as formally presentable as the Standard Charts, has the advantage of providing a complete overview or MAP of ALL (up to 53 generations) of the recorded ancestors for an individual in a single report. The format of this report is such that:

- the information for each ancestor occupies a single line (although you may optionally request that information be placed on two or three successive lines;
- no lines are produced for “missing” ancestors
- the line for the father of an individual on the report is above the line of information for the individual
- the line for the mother of an individual on the report is below the line of information for the individual
- the information for ancestors is offset 4 spaces to the right for each generation level
- all parent-child relationships are graphically represented by lines connecting the child to the parent(s).
- The information shown for each ancestor includes:

The lineage number of the ancestor

(Optionally) the ID # of the ancestor, within parentheses

The ancestor’s NAME

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(Optionally) the birth/death dates and age, in the format b. 7 Apr 1863,d.10 Feb 1937 at age 73

(The age is shown only if both birth and death years are known. If either date's month and day are unknown an "?" will appear to the right of the age)

(Optionally) the birth/death places.

This ALL GENERATION Ancestor Chart or MAP is printed continuously in a single long report. Up to 20 generations of ancestors may be printed using compressed print on 8 1/2" wide paper. Reports, which exceed the width of the available paper, can be printed out in 2 or more strips.

V.F.6.a.2 Ancestor Box Charts - Vertical Format (F2-C-1-2)

The Family History System can also produce graphical charts of ancestors with information in "boxes" connected by "relationship lines". An ancestor chart may include up to 99 generations. Large charts can be printed in "strips" which can be joined together to make a "wall chart" or you can print the full chart to a file for special processing by any (sideways or other) printing utilities you may have. (The 4PRINT utility produces nice looking charts on Laserjet or Deskjet printers)

This chart format arranges ancestors by "generation levels" with information on ancestors in the same generation level recorded in boxes that are in the same column of the chart. The father (mother, if father is unknown) of each individual is recorded in a box to the right of the individual and in the same row of the chart. If both parents are known, the mother's information box will appear in the same column but below the father's. You may request that the ancestors of each ancestor in the chart be printed before the row containing the next ancestor in the same generation, or you may permit the program to "nest" the entries together whenever possible, producing a more compact chart. (See page V-32 for an illustration of "nested" charts)

Charts can be printed as either "Mini Charts" for which each entry on the chart is a small "box" containing a single character indicating whether the entry represents a "M"other or "F"ather, or as a "Standard Chart" in which each chart entry shows information about the individual represented by the box.

The information shown for each entry may include name, birth and death dates and places, marriage dates and places, spouses' names and spouses' birth and death dates and places. All boxes of information are the same width, which you may specify. If the width is not sufficient to show the information that is to appear on a line, the data will be truncated to the size of the box. (The option "Combine Data Lines" allows placing multiple data items on a single line when the data width used for the chart permits it. See page V-16)

In addition you may request that names be shown on 2 lines, with surname and given names on separate lines. (You can request that either surname or given name will be first, and you may ask that the surname be converted to ALL CAPS for emphasis)

Another chart option allows you to print charts "without Box Boundaries". These charts have the same placement of entries on the chart, with adjoining lines, but omit the lines representing the "outlines" for the information boxes. Charts printed in this manner should require fewer lines of print.

As with other relationship reports, "crossed" family lines are noted and an ancestor that is repeated on the chart will have a "back reference" to the earlier occurrence and the ancestry will be continued only for the earliest occurrence of the ancestor on the chart. Back references are of the form: (Same as xxx,yyy) where xxx is the generation level of the earlier occurrence and yyy is the line number. Please note that the left most "generation level" is the "0" level, the next is "1", etc.

Realizing that it may be difficult to locate particular individuals on a large chart, you can create a REFERENCE file, which identifies the generation level and line number on which each individual's name appears. An extended option can then print a Chart Index from information in the REFERENCE file.

V.F.6.a.3 Ancestor Box Charts - Horizontal Format (F2-C-1-3)

This is another style of Ancestor Chart in which the information for each ancestor is contained in a rectangular "box" with boxes joined by lines of relationship. In this style of chart the arrangement is such that information boxes for ancestors in the same generation level will be in the same horizontal row. Because of the similarities of this chart to

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the descendant and Family Path charts of the same style (they are all produced by the same program), see the section on the “Generalized Box Chart Program” on page V-33 for a description of this and the other charts.

V.F.6.b DESCENDANT CHARTs (F2-C-2)

The Family History System can also produce graphical charts of descendants with information in “boxes” connected by “relationship lines”. A descendant chart may include up to 99 generations. Large charts can be printed in “strips” which can be joined together to make a “wall chart” or you can print the full chart to a file for special processing by any (sideways or other) printing utilities you may have. (The 4PRINT utility described in Section VIII produces nice looking charts on Laserjet or Deskjet printers)

The chart format groups descendants by “generation levels”. The two styles of descendant charts are identified by the manner in which the generation levels are arranged. The “Vertical style” chart arranges the generations vertically so that information boxes for ancestors in the same generation level are in the same column. The “horizontal style” chart arranges the generations horizontally.

V.F.6.b.1 Descendant Box Charts - Vertical Format (F2-C-2-1)

The “Vertical Format” Descendant Box Chart arranges the “information boxes” so that individuals in the same generation level are represented by boxes which are in the same column of the chart. The first child of each descendant is recorded in a box to the right of the parent and in the same row of the chart. Information boxes for other children will be placed below it in the same column. The parent’s box is joined to each of the child’s boxes by “lines of relationships”. Children are sequentially numbered and an adopted child is denoted by an “*” to the right of the child number. You may request that the descendants of each individual in the chart be printed before the row containing the next sibling or cousin, or you may permit the program to “nest” the families together whenever possible, producing a more compact chart. (See page V-32 for a description of the “nesting” option.)

Charts can be printed as either “Mini Charts” for which each entry on the chart is a small “box” containing only the child number, or as a “Standard Chart” in which each chart entry shows information about the individual represented by the box.

The information shown for each entry on the chart may include name, birth and death dates and places, marriage dates and places, spouses’ names and spouses’ birth and death dates and places. All boxes of information are the same width, which you may specify. If the width is not sufficient to show the information that is to appear on a line, the data will be truncated to the size of the box. When the chart’s “data width” option is large enough, multiple data items can be placed on a single line. (See the “Combine Data Lines” option on page V-16)

In addition you may request that names be shown on 2 lines, with surname and given names on separate lines. (You have the option of having either surname or given name first, and surnames can be converted to ALL CAPS for emphasis)

As with other relationship reports, “crossed” family lines are noted and individuals which appear more than once on the chart will have their descendants shown only for their earliest appearance in the chart. Subsequent chart entries for the same individual will have a back reference of the form: (Same as xxx,yyy), where xxx is the generation level of the earlier occurrence and yyy is the line number. Please note that the left most “generation level” is the “0” level, the next is “1”, etc.

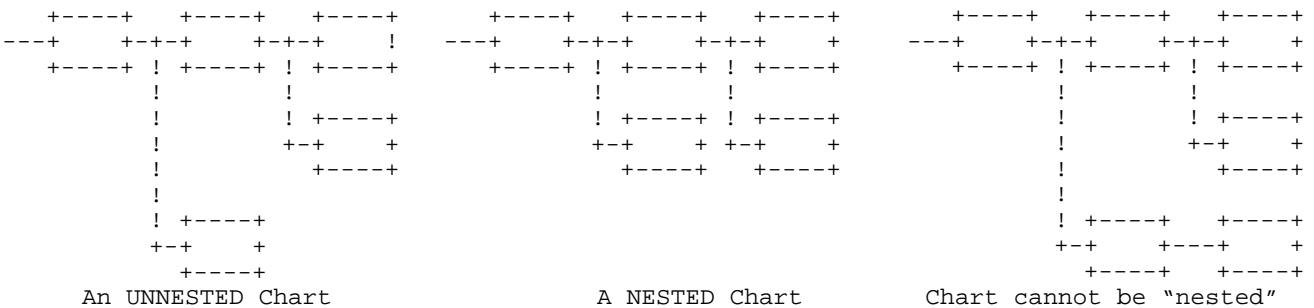
If “Show ID Numbers” is chosen as a chart option, then the ID number of each name record will appear, within parentheses, at the beginning of the formatted name. If marriages are also to be shown then the ID number area of each descendant who has another parent recorded will be in the form: (xxx:yyy) where the first number is the ID for the child’s record and the second number is the ID number for the parent that is NOT among the descendants charted. This may be one of the spouse’s of the parent on the chart (this may be determined by looking at the information box for the parent) or it may be the ID number of someone who was never married to the parent. If the ID of the other parent is shown, then an “*” will appear to the right of the ID if it is an adoptive relationship.

The “Allow Nesting” option controls whether or not the chart entry for a younger sibling can be placed in the chart before all the descendants of an older sibling have been charted. See the diagrams below for a comparison of nested and un-nested charts. In the charts that I have tried, nested charts require 20%-30% fewer lines than un-nested ones

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for the same group of descendants. Of course this is very much dependent on the pattern of relationships being charted.

Note that the chart at the right is the same whether nesting is chosen or not. The second child in the first generation cannot be placed on the chart earlier because of the space required for his/her own child.



Realizing that it may be difficult to locate particular individuals on a large chart, you can create a REFERENCE file, which identifies the generation level and line number on which each individual's name appears. An extended option can then print a Chart Index from information in the REFERENCE file.

V.F.6.b.2 Descendant Box Charts - Horizontal Format (F2-C-2-2)

This is another style of Descendant Chart in which the information for each descendant is contained in a rectangular "box" with boxes joined by lines of relationship. In this style of chart the arrangement is such that information boxes for descendants in the same generation level will be in the same horizontal row. Because of the similarities of this chart to the Ancestor and Family Path charts of the same style (they are produced by the same program), all three charts are discussed in the section describing the "Generalized Box Chart" program on page V-33.

V.F.6.c Family Path Charts (F2-C-3)

This style of chart was created to simplify the task of trying to determine the "path of relationships" joining two related individuals. Recall, two individuals are "related" if they share a common ancestor. Therefore there is a "line of descendants" joining each of the relatives to that common ancestor. A "path of relationships" from one relative to another would go *up* one "line of descendants" to the common ancestor and then *down* the "line of descendants" to the other relative. One way of accomplishing this would be to determine a common ancestor for the two relatives using the Relationship Calculator of the File Update Program (Main Menu selection F1-F5). Print a descendant report or chart for that common ancestor, and then determine the lines of descendency to each relative from the report or chart.

The Family Path Chart option automates this procedure by accepting the ID numbers for the two relatives, locating the "nearest" common ancestor (if any), and constructing a "path of relationships" joining the two relatives through that common ancestor. The "Family Path Chart" is actually a *portion* of the descendant horizontal "box" chart for the common ancestor showing the lines of descendency to the two relatives. The chart can be limited to just the individuals on the direct paths from the ancestor to the relatives or it can include the siblings of the descendants along the two paths. (**NOTE:** If one individual is an ancestor of the other, then the family path chart consists of the one line of descendency from the ancestor to the relative who is a descendant) When siblings are included, then the information boxes along the family paths are hilited by being drawn using the "double line" box symbols among the chart drawing symbols of the printer setup being used.

V.F.7 GENERALIZED "BOX" CHARTS (F2-C-1-3, F2-C-2-2 and F2-C-3)

Subsequent to introducing the graphical descendant chart option (vertical format) described on page V-32, I received several suggestions regarding it. Some asked that there be an option for printing more "conventional" charts in an "organization chart" format with generation levels running horizontally instead of vertically, and others have requested similar "box" charts for ancestors. At least one user, referring to the ancestor map, asked if the base record

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might be placed on the other side of the chart so that the ancestor tree would branch in the opposite direction. The “Generalized Box Chart” program described here was written as a response to these requests.

This program, selected from the Main Menu by entering F2-C-1-3 (Ancestor Horizontal Box Chart), F2-C-2-1 (Descendant Horizontal Box Chart) or F2-C-3 (Family Path Chart), will print charts of ancestors or descendants (though not both at the same time) with generation levels arranged horizontally. The base record may be placed at either the Top or Bottom of the chart. For descendant charts, a parent may be aligned with the first or last child or centered between the first and last child. (For Ancestor Charts, the child may be aligned with the father, mother or centered between) Finally, children may be arranged from first to last or from last to first on the chart (or for Ancestor Charts, parents may be arranged either in “Father Mother” or “Mother Father” sequence).

The “Family Path Chart” was designed to show just the part of an ancestor or descendant chart that is necessary to display the “path of relationships” connecting two related persons. It has the appearance of a descendant chart for the (nearest) common ancestor of the two, in which the only lines of descendancy shown are the ones leading to the two chosen relatives. You may optionally include the siblings of path members on the chart.

V.F.7.a CREATING A NODE WORK FILE

Before printing a horizontal box chart, it is necessary to create a “NODE Work File” which identifies the individuals that are to be charted and the row and column of the chart in which their information boxes (or “chart nodes”) will be placed. Program option F3 allows you to create the work file. For Ancestor or Descendant charts, you will be asked to enter the ID number of the “Base Record”, that is the person whose ancestors or descendants are to be charted. For “Family Path” charts, you will be asked to enter the ID numbers for the two relatives whose connecting relationship path is to be charted. In this case, you will also be asked whether you wish to include the siblings of path members in the chart. Chart options control the number of generations of relationships that will be included in the Node Work File. These options appear in the lower right corner of the screen and can be updated using program option F4.

You must also identify the type of “alignment” that is to be used in placing nodes or boxes on the chart. A chart’s “alignment” refers to the rule to be followed for placement of a parent with respect to the children in a descendant chart (or of the parents with respect to a child on an ancestor chart). You may choose the alignment to be:

1) First 2) Center or 3) Last

for descendant charts, or

1) Father 2) Center or 3) Mother

for ancestor charts. If you press any other key, then the alignment is “None”, which may result in slightly more compact charts than the other options. Each type of alignment may prove appropriate in different circumstances. The centered alignment is probably most appropriate for a wall chart and alignment with the first child is likely to be best for placing a very wide chart in a booklet (See the next page for examples of the types of alignment)

The node work file does *not* have to be recreated every time you print a chart, although it must be recreated if the base record changes or there have been changes to the relationships being charted. You may also use F3 to simply change the alignment of an existing node work file without having to perform the ancestor or descendant search again.

After the work file has been created, information about the work file is displayed in the middle of the screen, including the number of nodes (relatives) recorded, the number of generations searched, the maximum extent of the chart (that is the number of boxes that could be placed in the widest part of the chart) and the type of alignment that was used in placing the nodes.

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The small charts below illustrate the types of alignment for horizontal box charts:

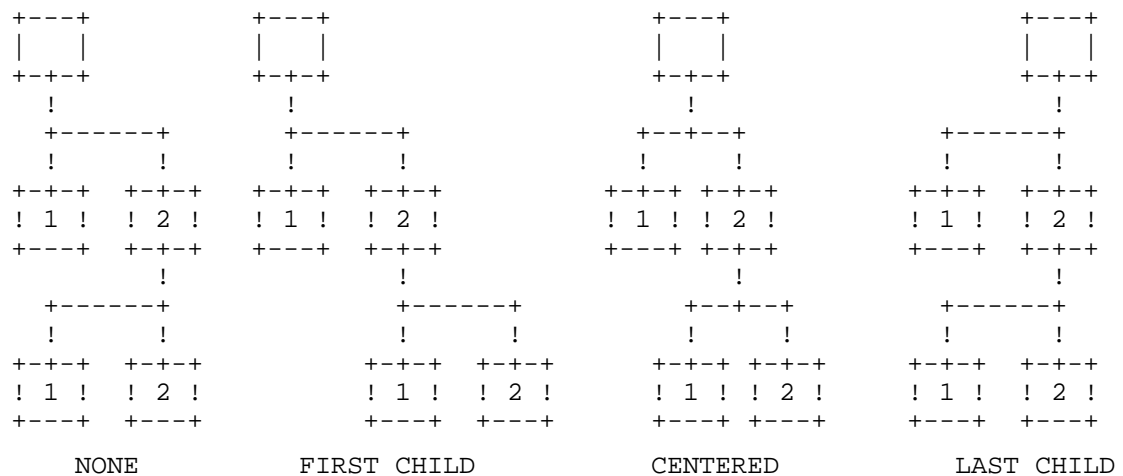


Figure 1: Types of Box Alignment

V.F.7.b *PRINTING SUMMARY REPORTS and CHARTS*

Program option F6 is used to print the charts. When you select this option you will be asked to:

Select 1) Summary Report 2) Chart

If you choose to print a “Chart”, then you will be further prompted to:

Select 1) Mini Chart 2) Standard Chart

Each of these report/chart options will be described more fully in the following sections.

V.F.7.c *BOX CHART SUMMARY REPORT*

To help you to determine the “shape” and extent of a chart, you may select to print a brief report about a horizontal format chart that could be printed from the node work file. In addition to the information about the node work file that appears on the screen, this report will tell you the width of the chart in printed characters, based upon the values of “Data Width” and “Box Separation” among the chart options in the lower right corner of the screen. It will also tell you how many strips are required for printing the entire chart based upon the current settings of the form width and margin.

The chart summary report for a “Family Path” chart will include lines identifying: the common ancestor, the original IDs (the terminal ends of the family path), and the choice for charting siblings.

Included in the summary report is a diagram showing the basic “shape” of the chart. For each generation level, there will be a line showing the generation level, the columns of the first and last boxes on the chart at that generation level, the number of total boxes on the chart at that generation level, and a line of symbols which represent the distribution of boxes at that generation level. Boxes are represented by O’s and X’s. The O’s represent one or more boxes at that approximate location, and the X’s represent at least one box at that location for a relative that also appeared at another location in the chart (as the result of crossed family lines).

Options for printing the summary report are similar to those for printing the charts themselves. You may request that the base record be placed at the top or bottom, and you may request that children (or Father-Mother) be arranged from left to right, or from right to left.

V.F.7.d *“MINI” and STANDARD BOX CHARTS*

Horizontal Box Charts can be printed either as “mini charts” or as “standard”, full size charts. The “Mini Chart” option will produce a chart in which each box has a single line of information of 1 to 4 characters. The resulting

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chart provides a very concise representation of the ancestor or descendant tree structure. The “Standard” chart format shows detailed information about individuals represented by information boxes on the chart. The information that may be shown includes the individual’s name, birth/death dates and places, and marriages. When printing either style of chart, you are asked to select additional formatting and printing options including:

- Placement of base record at top or bottom of the chart
- Arrangement of children from left to right or from right to left
- (on ancestor charts this choice affects the placement of the father-mother pair on the chart... the “normal” ordering would place the father to the left of the mother on the chart)
- Destination of the report, chosen from among: screen, printer and file. When the full width of the chart exceeds the screen or forms width and output is to the screen or printer, then the chart can be printed in as many “strips” as will be required to produce the full chart. The printing of each “strip” requires processing every node on the chart, although only a portion of the chart is actually routed to the final destination. If the destination is a file, you will be prompted to enter the name of the file that is to receive the report output. When printing to a file you are given the option of printing the chart “Full Width” or in strips. When printing “Full Width” each line is printed for its full length (which may be thousands of characters) but only one “printing” of the chart is required.

If the print destination is the screen or printer and the full chart width is wider than the screen or forms width, then you will be prompted prior to the printing of each strip whether to:

Print Strip mm of nn (Y/N/A/E/O)

If you reply “Y” then the strip will be printed and you will be prompted again for printing of the next strip. If you reply “N” then the strip will not be printed, but you will be asked whether to print the next strip (if any). If you reply “A” then the current strip and all subsequent strips will be printed without further prompting, until you pause the printing by pressing a key. The “E” and “O” options are used for “duplex” printing of the chart strips. The “E” option requests printing only “E”ven numbered strips and the “O” option requests printing only “O”dd numbered strips. If you press the ESCape key then the printing will be terminated.

V.F.7.e Horizontal Box Chart Options

In addition to the options selected at the time a chart is printed, there are several others, which may be set using program option F4. The procedure for examining and changing these options and the meanings of individual options are described on pages V-7 through V-16. The following paragraphs call attention to several of these options that may warrant special attention:

- The “Combine Data Lines” option controls the placement of birth/marriage/death dates and places on the same data line (when allowed by the box data width being used). This may be used to reduce the number of lines required to print a chart. A value of “Y” for this option allows birth/death dates and places to be placed on the same line, except that birth place and death date will not be placed on the same line. A value of “A” for the option removes that exception. A value of “N” for the option will result in birth/death dates and places occupying separate data lines in the information box
- The “Show MARRIAGES” option is used to request that the names of spouses appear in the information box. The spouse information will be preceded by a horizontal line separating it from the prior information in the box
- If you choose to “Show ID Numbers” and “Show MARRIAGES” when printing a descendant chart, then the ID of a child for whom both parents are known will appear as: (xx:yy) where “yy” is the ID number of the parent who is NOT among the descendants on the chart. This allows you to determine which (if any) of the spouses of the charted parent was the “other” parent of the child
- The “Print Child SEQ Number” option allows you to control whether the number of each child (as children of the charted parent in a descendant chart) is to be printed preceding the name of the child in the information box
- The “Print Parent CODES” option provides a similar type of control for the printing of ancestor charts. The “parent Code” is usually “F” for Father and “M” for mother. The symbols used are the abbreviations for the Father and Mother relationship that appear in the RELATION global table of the Report Definition File

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- The “Box Separation” option gives the minimum number of blank print positions that will be between adjacent boxes in the chart
- The “Stem length” refers to the minimum lengths of the line segments that join each box to the horizontal line between generation levels. A non-zero value will result in additional lines being printed between generation levels.

V.F.8 SEARCH/SELECT/LIST Program (F2-D)

This program has been provided to permit more extensive file searching than is currently available using the search option of the file maintenance program and to allow you to produce printed lists of individuals that meet the search criteria. Besides detail lists, you can produce a variety of summary reports for selected records as well. The results of the "search" procedure may be stored in a work dataset, "SELECT.WRK", which may be used in other programs to identify records that are to be processed (e.g. for updating in the file update program, for printing family group reports, for exporting to a GEDCOM file, etc.)

The figure on the next page shows the Main Screen Display that appears when you select the Search/Select/LIST option, Main Menu selection F2-D. As in other programs, you see the current Family File Setup and Printer Setup. In the middle of the screen is some information about the records that have been selected for processing. Below that is a list of program options that can be selected by pressing the indicated Function key.

When you first enter this program, the “Selection Base” will be pre-selected as the “Full File” and the total number of Name records will appear as “Primary Selections”. If you wish to print reports based upon all the records in the file, you can skip ahead to the section: “Printing Reports for Selected Records (F6)” on page V-42.

The line below the “Selection Base” indicates the number of “Selection Rules” that have been defined and the numbers of “Primary” and “Secondary” selections that have been made. This calls attention to the fact that it is possible to distinguish two groups among the selected records. Within this program, “Secondary Selections” are usually records that have been selected based upon some family relationship to records among the “Primary Selections”.

Family History System	
* * * Search/Select/LIST Program * * *	
Family File Setup: _____	# Names: _____
Printer Setup: _____	
Form: Width: _____ Length: _____	
Selection Base: A.Full File B.Select File C.Relation WRK File D.None	
Rules: _____	Primary Selections: _____ Secondary: _____
Select Program Option	
F1	Change FILE Setup
F2	Change PRINTER Setup
F3	Select Records to Print
F4	Change Report OPTIONS
F6	Print Report
F7	SAVE/LOAD/MERGE Select File
F9	Return to Main Menu

View 2: Search/Select/LIST Program Display

V.F.8.a *Selecting Records to Print (F3)*

Program option F3 permits you to restrict the records to be printed in a variety of ways. When you press the F3 key, the viewing area in the lower right corner of the screen is cleared and reformatted with the fields that are used to define selection rules. A message is also written on the bottom line of the screen showing the options that you have for selecting records. The message invites you to:

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Select: 1)Base Set 2)Change RULE 3)Apply RULE 4)2ND Select 5)Edit LIST

Basically, the selection process consists of:

- Identifying the set of records to which the selection process is to be applied
- Modifying the selection rule(s)
- Applying the selection rule(s) to the “base” set of records to obtain a *new* base set
- Extending the selection set to include related records
- Viewing the selected records, adding or removing individual records as appropriate.

The following paragraphs will describe each of these steps in more detail.

V.F.8.a.1 Choosing the Selection BASE

The first step in selecting records for printing is to simply decide upon the “major” group of records from which any further selection may be made. This may be the entire file, or it may be restricted to those individuals recorded in an ancestor, descendant or relative work file. It may even be those individuals who have been previously selected by some other procedure or by a previous execution of this program and whose ID's have been saved in a SELECT file. This initial group of individuals is called the “Selection Base”. In some cases it may be the exact set of records you want to print so that you will not have to follow up with any searches to refine the set further.

When the option “1)Base SET” is selected, the following message appears at the bottom of the screen:

Select: 0) Current A) Full File B) Select File C) Relative Work File D) None

The meanings of these options are:

- 0) *Current* - Select the Current Set of Selected Records...the purpose of this option is to allow applying some “set operations” to the current collection of records. When you select this option the following message will appear at the bottom of the screen:

Select: 1) Only Primary 2) Only Secondary 3) Both 4) Complement

If you choose “Only Primary” then the “Secondary Selections” will be removed from the selection set. Choosing “Only Secondary” will remove the current Primary Selections and make the current Secondary Selections into Primary Selections. If you choose “Both” then the current Primary and Secondary selections will be combined and become the new Primary Selections.

The “Complement” option causes the Primary Selections to be changed to include all records which are neither Primary nor Secondary selections... the Secondary Selections remain the same.

- A) *Full File* - this option causes the Primary Selections to be all records in the file. There will be no Secondary Selections
- B) *Select File* - this option provides the same choices as the primary program option F7. (See page V-44)
- C) *Relative Work File* - this option allows you to bring the records identified by an Ancestor/ Descendant/ Relative WRK file into the selection process. When you choose this option, the following message will appear at the bottom of the screen:

Select 1) Load 2) Merge 3) AND 4) Exclude

The “Load” options requests that the WRK file records be made the Primary Selections (and the Secondary Selections be set to 0). The “Merge” option requests that the WRK file records be combined with the current Primary Selections (the Secondary Selections remain unchanged except that any new primary selections which had been secondary selections will be removed from the secondary selections). The “AND” option requests that the Primary Selections become the current Primary Selections which are also WRK file records and that the Secondary Selections become the current Secondary Selections which are also WRK file records. The “Exclude” option requests that the Primary Selections become the current Primary Selections which are NOT in the WRK file and the Secondary Selections become the current Secondary Selections which are NOT in the WRK file.

After selecting any of these sub-options you will be prompted to enter the name of a previously created Ancestor/Descendant/Relative WRK file to be used during this operation.

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- *D) None* - this option requests that both Primary and Secondary selections be set to 0. This would ordinarily be used prior to using the "Edit LIST" option to "manually" add individual records to the selection list.

After pressing a valid character key, the choice will be recorded in the "Selection BASE" part of the screen format by displaying the character in a "reverse-video box" next to the description of the base chosen. The numbers of ID numbers among Primary and Secondary selections is also adjusted and redisplayed. At this time, the "Selection BASE" becomes the "Current Selection Set" of records to be processed.

V.F.8.a.2 Defining Selection Rules

While the "Selection Base" may be the exact set of records for which you want to print information, you may actually be interested in some subset of that collection of records. To accomplish this, you may define some "selection rules" which can be "applied to the selection base" during a "search" procedure to restrict the records in the manner prescribed by the rules. The search criteria, as shown in the viewing area in the lower right corner of the screen, may consist of up to 9 of those "selection rules".

When you select the option "2) Change RULES", the hilited border is moved to the lower right corner of the screen where the selection rules are displayed. The top line of the view gives the number of the rule and how many rules have been previously defined. The latter number may be less than the former if the currently displayed rule has not yet been added to the set of rules. In the following discussion, a "null rule" is one in which none of the displayed selection fields have been changed from their default values.

Selection Rule #_ of _	
____<= ID <=____	SEX=_ F:_ M:_
Surname:_____	
Given:_____	
00-00-0000<= Birth Date <=00-00-0000_	
Birth Place:_____	
00-00-0000<= Death Date <=00-00-0000_	
Death Place:_____	
Married:_ (Y/N/C)	Children:_ (Y/N)
Address:_ (Y/N/C)	Comments:_ (Y/N)

View 3: Selection Rules

Each rule is made of:

- upper and lower bounds on ID#
- gender (or sex code)
- values for the Mother and Father "status" fields ("?"=questionable, "*"=adoptive relationship)
- substring or soundex values for surname, given name, and birth & death places
- upper & lower bounds on birth and death dates
- values for birth or death date "status" fields (to the right of the date representing the upper bound for the birth/death dates...the values entered may be: "?"=questionable, "!"=documented fact)
- and whether or not an individual has a spouse, child, residence or (name record) comments recorded in the file.

NOTE: Rules concerning the existence of marriage or residence information are established by entering "Y", "N" or "C" in the appropriate place in the RULES display. The "C" requests that only individuals who have CURRENT information of that type be selected; that is, those for whom the termination date of the most recent marriage or residence is zero.

Using these conditions, you may define rules, which would restrict the records selected to:

- persons who are still living (Death Date <= 00-00-0000)
- persons who are deceased (00-00-0001 <= Death Date)
- persons who were living on a given date, e.g. those living on 04-10-1943 would be selected by specifying:
(Birth Date <= 04-10-1943 and 04/10/1943 <= Death Date)
and a second rule with (Birth Date <=04-10-1943 and Death Date <= 00-00-0000)
- persons born in Indiana (birth place substring of "IN" or "Ind")... the success of searches of this type will depend upon your consistently entering place "codes" in the same way.

When applying these rules, an individual is selected if at least one of the rules is satisfied. A rule will be satisfied for an individual only if all conditions in the rule are true for that individual.

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The procedure for updating information in the displayed rule description is the same as that followed for updating other full screen displays in the system, with the following additions:

- The PGDN & PGUP keys are used to move to later or prior rules in the set
- Function key F2 will clear all fields in the currently displayed rule; ALT+F2 will delete all rules in the set
- Function key F3 will place all fields currently displayed in a hold area; These values may be restored to the display (after subsequent update of the displayed rule or after moving to another rule) by pressing the F4 key
- Pressing the RETURN key, the PGUP or PGDN keys, or the F1 key will cause the currently displayed rule to be added to the set of rules (if it is a “non-null” rule)
- Pressing the ESCape key will result in the fields in the currently displayed rule being restored to the value that they had the last time the RETURN key or a special function key was pressed;

The process of defining the rules is terminated by pressing the “F1” function key. All null rules are removed from the set, the first rule of the set is redisplayed, and options for Selecting Records to Print are redisplayed on the bottom line of the screen.

NOTE: *The conditions that can be placed upon names and places are much more flexible than simple searches for exact matches. Please see "Performing Substring and Soundex Searches of Names and Places" on page V-45.*

V.F.8.a.3 Applying the Rules

The procedure of “Applying the Rules” consists of examining each record among the current Primary Selections and determining whether it satisfies any of the selection rules. A record will be selected if it satisfies any one of the rules. Well, actually, a record will be removed from the selection set if it fails to satisfy every selection rule. As a result, if no selection rules have been defined, then no record will fail any selection rule and so all records in the current selection set will “survive” the search process. Also, if the process of applying the rules is interrupted (by pressing the ESCape key) the selected individuals will include not only those who passed the rules test (so far), but those in the original selection set who have not yet been tested.

You begin the search process by selecting the option: “3) Apply RULE”. If there are currently both Primary and Secondary selections you will be asked whether to:

Apply to: 1) Primary Selections Only 2) Secondary Only 3) Both

The results of applying the rules to one of the groups will remain in the group to which it originally belonged. If a group (Primary or Secondary) is not chosen for applying the rules then it will remain unchanged at the end of the process.

When the process of applying the rules begins, the message: “Applying RULES to BASE” will appear on the bottom line of the screen and you will note your disk drive become active. During this process you may press the space bar at the bottom of the keyboard to get the progress report:

“Processing ID# nnn at hh:mm:ss”

This does not cause the process to wait. If you wish to terminate the procedure before normal completion, press the ESCape key.

After the process is complete (or if it has been terminated by pressing the ESCape key), the number of records that remain in the “Primary Selections” and “Secondary Selections” will be shown on the screen. If the procedure has been interrupted, the number of records “selected” will include not only those which have passed a selection rule but those in the selection base which have not yet been tested.

V.F.8.a.4 Making Secondary Selections

“Secondary Selections” are persons who are closely related to selected individuals (they appear on the individual's family group worksheet) and may include the parents, siblings, children, spouse, spouse's parents, and child's (latest) spouse. When you choose the option: “4) 2ND Select”, the viewing area in the lower right corner of the screen will be cleared and a list of optional “categories” of secondary selections will appear there. The following message will also be displayed at the bottom of the screen:

Secondary Selection Options	
A.	Parent of Selected Individual
B.	Sibling of Selected Individual
C.	Child of Selected Individual
D.	Spouse of Selected Individual
E.	Parent of Spouse
F.	(Latest) Spouse of Child

View 4: Secondary Selection Options

“Type A-F to toggle secondary selections (Enter to Continue)”

Pressing one of the allowed character keys will cause the corresponding character next to the chosen category to be “hilited” (indicating that the category of individual's is to be chosen) or to have “hiliting” removed. The term “toggle” refers to this “on/off” effect when pressing the A-F character keys. After all desired categories have been selected, press the RETURN key to proceed. If there are currently both Primary and Secondary selections you will be asked whether to:

Apply to: 1) Primary Selections Only 2) Secondary Only 3) Both

Individuals found as a result of searching for “secondary selections” of either of the groups and who are not among the current Primary Selections will become “Secondary Selections”.

When the search process begins, the message: “Searching for Secondary Selections” will appear on the bottom line of the screen. During this process you may press the space bar at the bottom of the keyboard to get the progress report:

“Processing ID# nnn at hh:mm:ss”

This does not cause the process to wait. If you wish to terminate the procedure before normal completion, press the ESCape key.

After the process is complete (or has been terminated) the number of “Secondary Selections” will be updated in the middle of the screen.

V.F.8.a.5 Edit Selection List

The fifth option for “Selecting Records to Print” allows you to view information about each of the individuals who are in the current selection list, whether Primary or Secondary selections. When you select the option: “5) Edit LIST” the viewing area in the bottom right portion of the screen will be cleared and reformatted as shown at right. Information about the first individual (lowest ID #) in the list will be shown. The type entry (Primary or Secondary) will be hilited and the total numbers of Primary and Secondary selections in the current selection set will be shown.

Selected Record ID: _____	
Name: _____	
Birth Date: _____	Sex: _
Place: _____	
Death Date: _____	Age: _____
Place: _____	
Father ID: _____	Mother ID: _____
Type: Primary (_____)	
Secondary (_____)	
F1 End F2 Add ID's F3 Remove F4 Type	

View 5: Edit Selection List

From this view you can Add single ID's or a Range of ID's to the list, delete single ID's from the list, or change the type entry from Primary to Secondary or from Secondary to Primary. You can move up and down the list by pressing the PGUP and PGDN keys. Pressing CTRL+PGUP or CTRL+PGDN will move the current entry to, respectively, the First or Last entry in the list. If you type an ID number into the updatable “Record ID” field and press the Enter key, information about that ID number will be shown. If the ID is in the current Selection Set, the position in the list will move to that entry. If the ID number is not in the list, it will be added to the list as a Primary Selection.

If you press “F2 Add”, you will be prompted to:

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Enter Range of ID's: First= _____ Last= _____

After typing the numbers for the "First" or lowest and "Last" or highest ID numbers in the range of ID's, press the Enter key. The ID's in the range which are not currently among the Primary or Secondary selections will be added to the list as Primary Selections and information about the "First" record in the range of ID's will be shown in the viewing area. The number of Primary Selections will be updated to reflect the additions to the list.

If you press "F3 Remove", the current displayed ID is removed from the Selection list. The count of Primary or Secondary selections will be updated and the information about the next ID in the list will be shown.

Pressing "F4 Type" will cause the selection type for the currently displayed entry to be changed from "Primary to Secondary" or from "Secondary to Primary". The count of Primary and Secondary selections will be updated accordingly.

After you have completed viewing and modifying the selection list, press the ESCape key to return to the list of options for "Selecting Records to Print".

V.F.8.b Printing Reports for Selected Records (F6)

Program option F6 allows you to print a variety of reports, including detail lists in ID# or indexed sequence, indexed summary reports and relationship summary reports. The relationship summary reports are in the same format as those described previously on pages V-18, V-20 and V-22, except the records summarized are limited to those relatives who are among the current primary and secondary selections.

When you press the F6 key you will be prompted to:

Select 1) Detail Report 2) Summary Report

The detail reports will be described later (see page V-43). If you choose to print a Summary Report then you will be asked to:

Select 1) Indexed Summary 2) Relationship Summary

The Indexed Summary reports will be described in the next section. If you choose to print a Relationship Summary then you will be asked to:

Select 1) Ancestor 2) Descendant 3) Relative

The Relative Summary Report is in the form of the Relationship Table, described on page V-22, except the numbers in the table will represent the number of relatives in that relationship category who are among the selected records. Only lines of the table, which have at least one non-zero entry will be printed.

If you choose to print an Ancestor or Descendant summary report, then you will be prompted to:

Select Style: 1) Horizontal 2) Vertical

The Horizontal format prints the items of information for a generation level on a single line. The Vertical style of report prints the items of information for a generation level in a column. The numbers in the report represent Ancestors/Descendants who are among the records that have been selected with program option F3. Lines (or columns) for generation levels that have no representatives among the selected records will not be printed in the report.

V.F.8.b.1 Indexed Summary Reports.

Indexed Summary reports are similar to Ancestor/Descendant summary reports in the items of information that are summarized, however the grouping of records, instead of being determined by relationship levels, is based upon the high level index field for an Index File. The creation of index files is an extended option provided to registered users of the Family History System and appears as Main Menu selection F3-F in registered versions of the software. Index fields can be selected from among the data items: Given Name, Surname, Birth Date, Birth Place, Marriage Date, Death Date, Death Place and Sex or Gender code.

The date fields can be sorted in orders described by the symbols:

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YMD, MDY, DMY, YM, MD, Y, M, D

Where Y=Year of the date, M=number of the Month of the date, and D= the number of the day of the date. As indicated, the dominant sort field for the date can be Year, Month or Day, and some sort orders only use a portion of the date for sequencing the records. For instance, if the high level index for the index file used to print an Indexed Summary Report is "Birth Date" and the sort sequence is "YM" then individuals who are born in the same month of the same year will be grouped together in the report and the summary lines for the groups will be printed in Year and Month sequence.

The text fields (Names, Places and Gender Code) can be sorted in Alphabetic Sequence either as full text fields or they can be sorted by the Soundex Code for the data item. If the high level index field for the index file is, for example, Surname, and the index file uses the actual value of the Surname for sorting the information, then individuals with the same Surname will be grouped together for summarizing in the report. If the Soundex Code for the Surname is used to create the Index File, then Individuals will be grouped together by the Soundex Code of the surname, placing those with different but "similar sounding" surnames together. When grouping by Soundex Code, the summary report line will begin with the Soundex Code for the field but a "representative value" for the field will also appear after the Soundex Code. The "representative value" is the actual value of the field found in the first record of the group (as they are processed in sorted sequence).

The data items that can appear in an Indexed Summary Report (in addition to the data item used for grouping the records) are:

- #M, #F - the numbers of males and females
- TOT# - the total number of individuals in the group (an "*" to the right of this number indicates that it is greater than the sum of the numbers of males and females. This means that there are records with sex code other than "M" or "F")
- BP - the number of birth places recorded
- BY>0 - the number of records with birth year greater than 0
- LoBY,HiBY - the low and high values recorded for non-zero birth year
- MAR - the number of name records with at least one marriage or spouse record
- #MAR - the total number of marriage/spouse records (if both spouses are in the group being summarized then the single marriage record will be counted once for each of them)
- MP - the number of marriage/spouse records with place of marriage recorded
- MY>0 - the number of marriage/spouse records with marriage year>0
- LoMY,HiMY - the low and high values recorded for non-zero marriage year
- DY>0 - the number of records with death year>0
- DP - the number of records with place of death recorded
- DY<9 - the number of records with 0<death year<9999 (this ignores those records which have the value 9999 for death year indicating that the person is deceased but that the year is unknown)
- LoDY,HiDY - the low and high values recorded for year of death (among those records counted under "DY<9").

The choice of data items included in a summary report is determined by the report option settings. These options can be viewed and modified using program option F4.

V.F.8.b.2 Detail Listings of Selected Records

The detail listings produced by this program are similar to the detail "Relationship Reports", described on pages V-18, V-19 and V-21, except that the individuals are listed here in ID # or Indexed sequence instead of being listed in "relationship" sequence. The reports can be produced in three styles. In fact, the first thing you are asked when you choose to print a Detail List is:

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Select Style: 1) Fixed Format 2) Free Format 3) LifeLine Format

See page V-6 for a description of these report styles.

To determine the order in which the selected individuals are to be listed in the report, you are asked to:

Select: 1) Indexed Sequence 2) ID# Sequence

If you choose to print in "Indexed Sequence", you will be prompted to:

Enter Index File Dataset Name: FAMILY.NDX

The printing of records in Indexed Sequence requires the use of a previously created "Index File" which contains a list of all ID numbers sorted in the desired sequence. The creation of Index Files is accomplished using an extended option (Main Menu selection F3-F) provided only to registered users. Those who are using the basic set of FHS programs will only be able to print lists in ID sequence.

You will then be asked to:

Enter Subject: _____

The text that you enter on this line should describe the purpose of the report and will be assigned to the SUBJECT system variable, which can be used to place the description line into the report heading. The default heading for Detail Lists places the text line, centered, on the second line of the report heading. If you choose to record the report in a REFERENCE work file, this text will be placed in the REFERENCE file as the report title, which would then appear in a Table of Contents printed from the REFERENCE file.

If you are printing an Indexed Report, then the data item for the primary sort field of the index will be the first data item on the line. Other items of information that can be included in (Fixed or Free format) listings include: the Name, Birth/Death dates and places, Age, Gender, Relationship, Number of Children, Comments, and (most recent) Residence Address. You can choose to print just the date (and place) of the most recent marriage, or you can choose to print a detail line for each marriage record showing detail information about the spouse. (Detail spouse information is selected by setting the "Marriage" option to "A"II)

You can choose to place a blank line between the line(s) of information for a selected individual in the detail list. If you do not choose to separate individuals by a blank line and you have chosen to show detail information for marriages, then the spouse lines will be indented to easily distinguish them from the detail lines for selected individuals in the report.

If you are printing a Fixed Format report and the total data length for the selected items on a data line is less than the Forms Width of the Printer Setup being used, then spaces will be inserted between the columns of information to cause the information line to "expand" to fill the area between the margins. If the total data length for selected items (together with the margins) requires a greater Page Width than the Forms Width of the Printer Setup and "Addresses" is one of the data items, then the Address information will be printed on a second data line. If the required page width is still greater than the Forms Width, then you will be asked:

"Page Width is xxx but yyy is required... Continue? (Y/N)"

If you choose to continue, the line will be truncated according to the values of the forms width and "offset". (You may subsequently print the report again to get the truncated information by using the OFFSET field among the Report Options.)

V.F.8.c Using the Selection Work File (F7)

A "Selection Work" dataset (default name = SELECT.WRK) is used to save the results of a Search/Select procedure for later use by this program or by another program in the system (for example, the EXPORT program may use this dataset to determine which individuals' information is to be written to the GEDCOM format dataset).

Processing of the selection work dataset is requested by program option F7. Choices presented to you are:

- SAVE the current selection table and rules in the dataset

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- **LOAD** the selection table and rules information from the dataset
- **MERGE** the selection table in the dataset with the current selection table (this may be used to construct more complex selection tables, for instance one containing the ancestors, descendants or relatives of two unrelated individuals). The resulting selection table (in memory) will mark individuals who were selected in EITHER the previous selection table OR the SELECT work file
- **AND** the selection table in the dataset with the current selection table. The resulting selection table (in memory) will mark individuals who were selected in BOTH the previous selection table AND the SELECT work file
- **EXCLUDE** the selected individuals in the work dataset from the selected individuals in the current table. The resulting selection table (in memory) will mark individuals who were in the previous selection table but were NOT in the SELECT work file.

V.F.8.d Performing Substring and Soundex Searches of Names and Places

In early versions of the Family History System (prior to Feb 1987) the only method of searching name and place fields was to look for occurrences of an entered string of characters within these fields. For instance, a request to search a surname field for “Br” would locate surnames “Brown”, “Braun”, “Bryan”, etc. These searches were case sensitive (a lower case character would not match an upper case character and vice versa) and matches could be found anywhere in the name field (the above request would locate a surname of “VonBraun”). However there was no option for performing “soundex” searches, which is a popular procedure for looking for names that “sound alike”.

In Feb 1987 the procedure for performing name and place searches was considerably expanded to allow not only soundex searches, but “mismatch” and “exact match” requests as well. The purpose of this section is to describe these new search options.

The first character of a Surname, Given Name, Birth/Death Place string that has been entered into one of the search rules determines the type of search that will be performed as follows:

- If the first character of a Name/Place search request is not one of the special characters: “~”, “^”, “=” or “#” then a sub-string search is performed just as before
- A “tilde” character, or “~”, requests that a soundex search be performed; the string of characters following the “~” symbol will be called the “keyword” for the soundex search. During a soundex search, the “soundex code” for the keyword is computed and the corresponding Name or Place field is searched for words that have soundex codes that match it. The character strings that are examined are those that begin with the same “upper case” letter as the keyword soundex code and are terminated by a non-alpha character (such as spaces, commas, semi-colons, etc.). (**NOTE:** The tilde character is used in mathematics to indicate “similarity” which is why it was chosen to represent a search for similar sounding character strings)
- A “circumflex” or “^” character placed before a substring or soundex search extends that search to also look for substrings which begin with a lowercase letter but otherwise match the string or keyword soundex which follows the “^”. Using this, you can find “similar sounding” strings of characters which are at the end of a name. For example a search for “^~Mary” would locate “Rosemarie”
- A double “circumflex” or “^^” before a soundex search request will extend the search further to locate similar sounding strings at the beginning or in the middle of a name. (**NOTE:** The circumflex was chosen to represent these extended search options because it is sometimes used to indicate the insertion of a character or string of characters in the middle of another string of characters)
- An “equal sign” or “=” character indicates that the search must produce an “exact match” to the following characters. In this case, a search of Given Name “=Mary” would not yield a match for “Mary Jane” or “Ida Mary”, but only if the given name was simply “Mary”
- A “pound sign” or “#” character indicates that the search will be considered successful only if the search string that follows it does NOT result in a selection when the corresponding name or place field is searched. This might be called a “mismatch” search option. (**NOTE:** The “#” sign was chosen because it looks like a mathematical symbol for “not equal”)

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The following examples are intended to indicate what you might expect from using the above search options. The results were obtained by performing the indicated search against my own family file of 1750+ name records.

Search String	#Found	Typical Names found
1. Mary	40	Mary, Hester Mary
2. mary	1	Rosemary
3. ^Mary	41	(all in #1, #2)
4. ~Mary	66	Marie, Maria, Myra, as well as those in #1
5. ^~Mary	77	Those in #4 as well as Rosemary and Tamara. I also picked up Elmer, Homer, Omar, Emera etc., but most of the "way out" variances were eliminated when I restricted the search to Females.
6. ^^~Mary	165	After restricting the search to females, the 88 additional names found over #5 above were reduced to 44, including: Marella, Meriam, Merris, Marabelle, Marlene, Marvia, Marjorie, Myrtle, ...
7. A search for "#^~Mary"		applied to the selection set resulting from #6 above will select just those 88 names that were found in #6 but not in #5. This shows how a "Mismatch" search can be used to reduce the results of previous searches.

At one time I felt that the original substring searches provided by this program should be adequate for most purposes. But I do find the new options described above to be at least intriguing... perhaps even useful. I encourage you to experiment with them to find out just what search strategies provide the most meaningful information for you.

V.F.9 TINY TAFEL Reports (F2-E) - an Extended Option for Registered Users

In the April-June 1986 issue of "Genealogical Computing", Paul Andereck proposed a format for "concisely...expressing the contents of a family database". The representation, which he called a "TINY-TAFEL", consisted of a list of surnames, showing for each surname the range of dates covered by the surname (in a lineage linked chain) and the comparative interest level which the surname held in his family research. The range of dates was determined by the earliest and most recent birth dates in the family line and the interest level was shown by 0-3 stars (or asterisks), with 3 stars indicating a "main-interest line".

In April of 1987, I added the Surname Summary Report (an Indexed Summary Report with Surname as the primary sort field for the index) as an extended option of the Family History System. It was designed somewhat around the idea of the Tiny-Tafel, but extended to show more statistics about each surname group. The additional information included the Soundex for the surname, the numbers of males, females and total records with the surname, the number of records with birth, death or marriage dates recorded and the ranges of those dates.

In the April-June 1987 issue of Genealogical Computing, Paul Andereck reported that COMMSOFT, the publishers of ROOTS II (and now ROOTS V) software, had extended the Tiny-Tafel description as well. Their format added Soundex codes and the birth places of the earliest and most recent individuals in the family line. They also added some additional information describing the "owner" of the database. More importantly though, they set up a "Tafel Matching System" which connected many genealogy BBS's (electronic Bulletin Board Systems) together into a network in such a way that persons who placed a Tiny Tafel on one of the BBS's would be notified of anyone with similar interests on that or any of the other BBS's in the network.

The Tiny Tafel format became popular for placing family interests on other bulletin board systems outside that network. As a result, there was interest in having a "Tiny Tafel generator" which could extract the information from a family file. COMMSOFT's own ROOTS software was the first to offer such a utility, and others followed, including at least one that was written to produce a Tiny Tafel file from a PAF format GEDCOM file. Of course the latter utility could produce a Tiny Tafel from FHS data, after using the FHS to PAF GEDCOM export option, but there was also interest in a self-contained FHS utility. Main Menu selection F2-E, added in February 1991, now provides that function.

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A sample Tiny Tafel Report is shown at right. Here, the lines beginning with “N”, “A”, “T”, “S”, “B”, “R” and “F” are optional “Header” lines that give the Name, Address, Telephone, Communications Service, BBS, and Remarks. These identify the “owner” and source for the data and are entered in the viewing area in the lower right corner of the screen when executing the FHS Tiny Tafel option. The “F” line indicates the “File Format” of the database in which the family information is stored. The name of the FHS “Name” file from which the information was taken is shown in parenthesis at the end of this line. The required “Z” line shows the number of “data” lines that follow it. The required “W” line at the end gives the date on which the information was extracted.

The 2 lines following the “Z” line in the sample Tiny Tafel are the “data lines”. They show: the Soundex of the family name, the earliest birth year and the most recent birth year of the family, the surname, and the birth places of the oldest and youngest members of the family. To distinguish the birth places (either or both of which may be absent from the data), the birth place of the oldest family member is preceded by a “\” and the birth place of the youngest is preceded by a “/”.

The characters to the right of the two “year” fields represent the “interest level” for each end of the surname line. The character to the right of the first year indicates the level of interest in the ancestral end of the surname line and the character to the right of the second year indicates the level of interest in the descendant end of the surname line.

The symbols that are used to express the levels of interest are:

space	indicating very little interest	(level 0)
.	indicating low interest	(level 1)
:	indicating moderate interest	(level 2)
*	indicating highest interest	(level 3)

To provide you with the ability to save interest levels from one execution of the program to another, I have made use of an unused portion (1/2 character) of the name record to store this information, if you wish. The ancestor interest level will be saved in the name record of the individual with earliest birth date for the surname group. The descendant interest level will be saved in the name record of the first individual with the most recent birth date in the surname group. If you update your file in a way that affects the identity of the “extremes” for the surname group, then the interest level will have to be reestablished in this program. These saved values are not used by any other programs in the system at this time.

In addition to the interest levels, I have provided some other ways for you to restrict the information to the more “significant” family names in your file. For instance, you may restrict the records that will provide input to the Tiny Tafel to: the Full File; the records identified by an Ancestor, Descendant or Relative work file; or the records identified by a

SELECT work file created by the “Search/ Select/ LIST” option or one of the family group report programs. You are also given the opportunity to assign a minimum size for a surname group to be reported in the “Tiny Tafel”. A value of 1 will show all surnames among the records being summarized. A higher value will likely eliminate many surnames that are only minimally represented in the file.

The steps for generating a Tiny Tafel are:

```
N Phillip E. Brown
A 834 Bahama Drive
A Tallahassee, FL 32311
T (123)456-7890
S GENIE
B Genealogy
R This is a sample TinyTafel
R produced with FHS.
F Family History System (C:RUSSELL .NAM)
Z 2 M=25 T=234 F=1971
R240 1787*1971:Russell\OrangeCo.,Virginia/Indiana
W420 1832:1973.Willcox/Fort Wayne,Indiana
W 25 Jan 1991
```

Report 2: Tiny Tafel

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- 1 Use Main Menu option F3-F to create an index file in which Surname is the primary (number 1) sequence field. If you have previously created a surname sequenced index file and have not added new records to your file or changed any surnames since that time, you may use that index file. It is probably best not to use the option for substituting a married woman's surname with her husband's when building this index. If you do use this option, then a married woman will be counted in the surname group of the husband (unless her "Surname Use" value is "Y")
- 2 (Optional) If you wish to restrict the records which provide input to the Tiny Tafel to those in a particular relationship group, use main menu option F2-A-(1,2 or 3) to generate an appropriate WRK file (ANCESTOR, DESCNDNT, or RELATIVE). You may also consider using main menu selection F2-E to create a SELECT.WRK file of selected records
- 3 Select Main Menu option F2-E, the TINY TAFEL Report option
- 4 Use program option F3 to create a table of Surnames that are to be reported. You will be asked to identify the "BASE set" of name records to be used to build the table. This may be either "A", the full file, "B", the records in a SELECT.WRK file which you have created or, "C", the records in a relationship WRK file you have created.

You will also be asked to: Enter Min Interest Level: ____

This permits you to only gather information for those surnames for which you have previously entered an interest level (and saved it in the Name file).

Finally, if you include all interest levels (by entering "0" for the minimum interest level) you will be asked what should be the minimum size "surname group" that will be recorded in the table. While the table is being built, you can check on the progress by tapping the "space bar". You can terminate the process prematurely by pressing the ESCape key

- 5 (Optional) Use program option F4 to change report options
- 6 (Optional) Use program option F5 to browse the Surname table, enter "interest levels", and "remove" individual surnames from consideration for a Tiny Tafel. The viewing area in the lower right corner of the screen is used for this operation. You will be shown the number of records (in the BASE set) with the surname, the range of birth dates, and the Surname.

The numbers on the right side of the top line in the viewing area represent the table entry number for the first surname shown and the total number of entries in the table. You can browse the table using PGUP and PGDN, jump to the end with CTRL+PGDN, or jump to the beginning with CTRL+PGUP or CTRL+HOME. If you press the ALT key and an alphabetic character key at the same time, the surname group on the top line of the display will jump to the first surname whose SNDX begins with the character.

If you put any character in the first position of a line (under "DEL"), the entry will not be included in a TINY TAFEL generated from the table. When you press the ALT+"0" (zero) keys, the program will, alternately, either place an "X" in the DEL column, or remove all "X"'s from the DEL column of entries which have zero dates. This makes it easier to remove all zero date entries from a report while still permitting you to include selected ones by manually removing the DEL indicator for those you wish to include in the report.

The "Ancestor Interest Level" is entered in column "AIL" and the "Descendant Interest Level" is entered in column "DIL". The characters that represent the various interest levels are shown on the bottom line of the display.

Press F1 when you are through. If you have made any changes to the interest levels, you will be asked if you want to: Update Name File with Interest Level Changes? (Y/N)

If you reply "Y", then the changes you made will be saved in the appropriate name records.

(F2) REPORTS AND CHARTS

- 7 Use program option F6 to generate the Tiny Tafel. You will have an opportunity to enter information in the "Header" identifying yourself as the source of the information in the file. You have the option of producing the Tiny Tafel in either Surname or Soundex sequence. If you select Soundex sequence, the program will take a few seconds to resequence the table of surnames. You will also be asked what should be the minimum interest level to be included in the TINY TAFEL. If you allow all levels (by entering "0" or simply pressing the space bar), then you will be asked again what should be the minimum size group for surnames to be included. If you enter a value which is smaller than that used to build the table, then it will be ignored.

The "Z" line in the TINY TAFEL that is created will show some additional "statistics" besides the count of data lines. If you have set the minimum interest level to a value greater than 0, it will be shown as "I=n" on the "Z" line. If all interest levels are included but you have set the minimum group size to something greater than 1, it will be shown as "M=xxx" on the "Z" line. The Total number of individuals in all reported groups will be shown as "T=yyyy" and the total number of ID's in the entire file will be shown as "F=zzzz".

Some other characteristics of the Tiny Tafels generated by this new FHS option:

- The first date is the earliest birth date found for any record with the surname. It may not be that of a "terminal ancestor" of the family. If there is an "ancestral birthplace" shown, it is that of the first person in the surname group with that earliest birth date
- The second date is the most recent birth date found for any record with the surname. It may not be that of a "lowest level" descendant. If there is a "descendant birthplace" shown, it is that of the first person in the surname group with that most recent birth date
- There may be no direct relationship between the two individuals who represent the extreme dates. The likelihood that they are related is increased if the records which are searched for the information (that is, the BASE set) are carefully selected. For instance, if they are the ones identified in an ANCESTOR, DESCNDNT or RELATIVE work file, then they are more likely to be directly related.

I hope you find this option useful for sharing your interests with others. Please let me know if you have any comments, criticisms or suggestions concerning it.

V.F.10 REPORT INDEXES (F2-F) - a System Extension for Registered Users

If you have been patiently adding name records to your family files, you should have been gratified to find your set of ancestor charts growing to encompass several subcharts, all nicely "chained" together. You have probably also observed the descendant report for that very remote ancestor growing to several pages filled with all manner of vaguely familiar names of distant cousins. Although direct lines of ancestry or descendancy are easy enough to follow on each of these reports, you have probably had some problems locating particular individuals whose relationship to you is not well known. (I sometimes have problems finding myself on the descendant report of one ancestor, which now extends to more than 25 pages with spouses) The program described in this section is intended to make it easier to overcome this problem. It produces a Report Index, which is a sorted list of individual's names that have appeared in reports or charts that you have printed with an indication of where each occurrence of the name can be found in those reports or charts.

Main Menu option F2-F invokes the Report Index Program which makes use of an Index file and a Report Reference file to produce printed indexes for ancestor, descendant or relative reports, sets of Family Group reports, merged family group reports, Detail Lists, sets of ancestor charts and ancestor "maps", descendant charts, and the generalized "box" charts. For most reports, references to an individual are noted by the page and line number on which the reference occurs. References to entries on ancestor charts note the chart-ID and entry number where the name occurs. Entries in the "Box" charts are identified by the column number and line number where the indexed name appears.

A single Reference File can include entries from multiple reports or charts. In addition to the indexes, the program can print a "Table of Contents" listing the Titles and beginning page numbers of reports and charts whose references are in the Reference file.

NOTE: *The ability to print Report Indexes is an Extended option of the Family History System which is only provided to registered users of the software.*

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Upon entry to the Report Index Program, you will see a display similar to the one below. It will show the Family File Setup being used, the current Printer Setup and Form size, the name of the Reference File being used, and statistics about the Reference file, including the number of Reports/Charts whose references are in the file, the number of unique ID numbers referenced, and the total number of references for all ID's.

The bottom half of the screen will show a list of the reports/charts whose references are recorded in the Reference file. For each report you will see:

- the identifying Report CODE (from the REPORTS System Table)
- the TITLE of the Report
- the Date and Time that the report was produced
- the Beginning and Ending page numbers for the report
- the number of unique ID's appearing in the report, and
- the total number of references recorded from the report.

The last report listed will be for the Report Index that you could print from the Reference work file.

The program options are shown on the last line of the upper half of the screen. They include the standard options for choosing a Family File Setup (F1) and Printer Setup (F2). Option F3 allows you to select a different Reference File. (All Reference files are in the WORK File Directory of the Family File Setup being used)

Program option F4 is used to view and change the options for report indexes printed by the program. If you press the F4 key a viewing area in the lower right portion of the screen will be formatted with a list of the options and it will become the "active viewing area". You can use the UP/Down cursor keys and press Enter to select an option to change. Press the ESCape key to remove the option display and re-display the report list in the bottom portion of the screen.

Option F5 is used to change the TITLES that appear for the reports/charts listed in the lower half of the screen. These are the titles that will identify the reports in the Table of Contents printed by the program. If you press the F5 key, the lower half of the screen will become the "active viewing area" and an option line will be shown on the bottom line of the viewing area. The first report sequence number will be hilited in "reverse video". Use the Up/Down cursor control keys to move the hiliting to the report whose title you want to change and press the Enter key. The title field

Family History System Report/Chart Index Program													
Family File Setup: RUSSELL My Family				# Names: 2108									
Printer Setup: DEFAULT EPSON Standard													
Form: Width: 137 Length: 72													
Reference File: REPINDEX.REF				Reports: 2	#Ids: 217	#Refs: 226							
F1	Family File	F2	Printer	F3	REF File	F4	Options	F5	Titles	F6	Print	F9	Main Menu
RPT CODE	Title			Date	Time	Bgn	End	IDs	Refs				
1	DRPT Descendant Report for Fra>			03-26-1997	21:02	1	15	174	174				
2	ARPT Ancestor Report for Jane >			03-26-1997	21:10	17	18	52	52				
3	NDXR Report Index										19		

View 6: Report Index Program

will then be updatable. If you attempt to enter a title longer than the area supplied on the screen, the text will scroll horizontally to allow you to continue typing. The title may be up to 100 characters long. If the title extends beyond the area allowed for the title on the screen, then a ">" symbol will appear to the right of the truncated title. Press the Enter key when you have finished typing the title and you will then be able to select another title to change. Press the F1 or ESCape key to return to the primary option menu for the program.

Program option F6 is used to print the Table of Contents and Report Index. You will be prompted to select the type report you want to print. If you choose to print a Report Index, then you will be prompted to

Select 1) Column Style 2) Free Form

(F2) REPORTS AND CHARTS

The Free Form style of report will allow you to print more references on a report line, if there are multiple references for an individual, but the Column Style may be easier to browse for names and dates. Try each of them to find out which you prefer.

You will also be asked to enter the Name of the Index File Dataset that will be used to sequence the names appearing in the report index. The Index File must have been previously created using Main Menu option F3-F. (The ability to create Index Files is one of the extended options provided only to registered users)

If you have chosen the report option for showing Relationships in the index report, you will be asked:

For Relationships Use: 1) Reference File 2) Relationship WRK File

If you choose “1”, then relationships will be determined from the information that is stored in the Reference File for the first reference of each individual listed. This may result in some inconsistent relationships if there are references from both Ancestor and Descendant type reports in the Reference File. Also, for spouse entries (identified by a “sp” after the reference entry), a relationship may be reported but the relationship should be understood to be an “in-law” relationship rather than a “blood” relationship. For instance, the *spouse* of a sister will show up as a “Brother” in the index, but the “(sp)” after the REference should make it clear that this is a “Brother-in-law”.

If you choose “2) Relationship WRK File” as the source of relationships, then you will be asked to:

Enter Relationship File Dataset Name: RELATIVE.WRK

where the name entered here is that of a previously created Relationship Work file (an Ancestor, Descendant, or Relative WRK file). In this case, all relationships will be consistently expressed relative to a single individual (the BASE for the Relationship Work file used). For example, you could be indexing a descendant report for a distant ancestor but use a Relative WRK file that you’ve created having your own ID# as the Base. Then the relationships will be the Aunt, Uncle, Cousin, etc. relationships relative to yourself instead of the Child, GrandChild, etc. relationships that would have been recorded in the Reference Work File.

V.F.10.a Report Index Options

As noted previously, program option F4 allows you to change some optional features of Report Indexes. In particular, you can optionally include ID numbers, Gender Codes, Birth and Death dates, and Ages. Further, when dates are included, you can request that only the year of the dates be shown. You can also request that a relationship literal, when applicable, be shown for each indexed name. (See the previous page for a description of other options available when relationships are shown.)

Another option allows including a symbol in report references showing the type report entry, which the reference represents. For most reports or charts the only types of entries are “standard” entries and entries for Spouses. However, the Family Group Report has several different types of entries in which an individual’s name could appear. The symbols that are used to identify the different types of entries are shown in the table on page V-15.

Normally a Report Index will be printed using an Index File, which orders the names in Surname-Given Name sequence. (A more natural order for the ROYAL sample file would be in Given Name-Surname sequence) The information concerning an individual that is listed in the report index includes the formatted name. You can choose to print the name with the Surname first or last and with the Surname in CAPS, for emphasis. **NOTE:** *If you choose to substitute a husband's surname for a wife's when creating the index file that is being used, then this procedure will also be followed when producing the index report unless the wife's "Surname Use" field has a value of "Y". If a husband's surname is used for a woman, then her own surname will be appended to her given name.*

V.F.10.b Creating a Reference File after Printing a Report

If you have already printed a report without creating the Reference work file and want to print a Report Index, you can still create the Reference work file without actually having to “print” the report again. Return to the option for printing the report, set up all printer parameters and report options as before but set the report option for the “Page to begin printing” to a very large number, for example “9999”. When you “print” the report this time, request that references be placed in a Reference Work file and select “Printer” to receive the output. The program will go through all the work of formatting the report lines and creating the entries in the Reference Work file, but no report lines will be sent to the printer because you will never reach page 9999. (The process for creating a Reference work file for ancestor charts without actually printing the charts is a little different. In this case, when you are asked whether you

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wish to print each chart, you may now respond with “Y”, “N”, “A” or “R”. The “R” indicates that you do NOT want to print the chart, but that you want to Record all References in the Reference work file. You will have to respond “R” for each chart that you want indexed but not printed.)