

# Using FTM and MS Word to Publish a Genealogy Book

Ancestry Detectives

July 18, 2012

David Stewart

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## **Why use FTM and MS Word to publish a genealogy book?**

Show FTM.

- Family Tree Maker 2012 has “The Good, The Bad, and The Ugly” in its Book function. FTM is a great research tool and provides a nice platform upon which to organize the bones of your book.
  
- By their own admission, the FTM word processor is not very robust. (This is an overstatement. You cannot edit any information in their reports.) Some reports are the weak link in this product. When you export some reports, FTM puts page breaks in reports, reformats some line justifications, changes some font sizes, inserts some of the material in text boxes, and the default settings in the reports and charts exceed many printer boundaries. That’s not all. The “ugly” part is that FTM Book cannot place family pictures and/or captions and hold them in that location. In order to alter anything in the reports, you need to use Word or some other word processor. So why use FTM for a book? If you like their formats and can print any pictures separately; FTM produces a fast, good looking book that is relatively easy to assemble.
  
- Both books can be printed at home or professionally printed and emailed to a friend.
  
- We are first going to produce a short book using FTM. Don’t worry if the charts and reports don’t match. We are looking at the PROCESS of HOW to do a FTM book. After we do the FTM book, we will do a book in Word. Again, the emphasis is on the process. There is a “Companion Guide” under the “Help” tab in FTM. This is an excellent guide about how to use the Book feature. You can always go there for help. Show the John Strobel Descendants Book.

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## Part One – The Family Tree Maker Book

### Pros of an FTM Book:

- A. No lengthy editing of reports.
- B. All names in charts and reports will be picked up by the Index of Individuals. Page numbers will be included.
- C. Automatic Table of Contents.
- D. Automatic Index of Individuals.

### Cons of an FTM Book:

- A. You cannot edit the reports. You cannot change any formatting.
- B. When a person has multiple spouses, you must make sure the spousal order is correct before you do a report. You cannot change it after the report is produced.
- C. You cannot have pictures.
- D. You must be able to print with top and bottom margins of .5 inches or you must use .pdf to print your book.
- E. FTM tends to have margin problems that add blank pages to your book. This throws off your index numbering system if you discard that blank page.

**1.** Before you start your book, you need to develop some charts and reports so you can place them in your book later. Let's take a look at how to prepare the charts and reports.

- A.** Set the person. Click on the person you are making the chart or report for. Click on the "Publish" tab then Collection. Choose John N. Strobel.
- B.** Choose which chart or report you want to prepare. We will do a Descendant Report first. Genealogy Reports – Descendant Report. You can also change the main person on the chart or report by going back to the "People" tab and clicking on a new person. Then go back to the "Publish" tab. Before doing a report where any person has more than one spouse, make sure the spouse order is correct. Click "Person" (in small top tool bar), select Set Spouse Order, highlight the spouse to move and use the up/down arrows then click Okay or click the spouse

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button for a person and select Set Spouse Order. Use the Up/Down arrows.

**1)** BEFORE you make the chart or report, set font type and size, margins, paper orientation, titles, etc. The first icon in the upper right pane lets you choose what items to include. The more you add, the bigger the chart or report. The 2<sup>nd</sup> icon (Aa) lets you choose font type and size. Check each item in the box on the left. For charts, the 3<sup>rd</sup> icon is for box and line styles. Generally these are okay. You may want to change box width and height if you have long names or lots of data. The next icon is page layout. Here is where you set margins, portrait/landscape, etc. The next icon is to save your settings. If you do not save your settings, you have to reset everything for the next chart. The next icon is for Use Saved Settings. This is useful when you change your mind. You can go here and select Use Default Settings to start over again. When you are satisfied with your chart or report, click the last icon at the top to save your chart or report. **IT IS EXTREMELY IMPORTANT TO SET ALL THESE VARIABLES BEFORE YOU MAKE AND SAVE YOUR CHART OR REPORT!!!**

**2)** Below the icons are fields that allow you to alter the composition of your chart or report. Generate the report and save it.

**C.** Descendant Reports and Outline Descendant Reports are basic genealogical reports. Highlight on the person. Go to Publish and select Genealogy Reports and then Outline Descendant Report. Set all the variables (what to include, font, orientation of the paper, number of generations, etc.) then click Generate Report. Save to FTM (last icon).

**D.** Now we will do some charts. A chart is a graphic picture that shows your data in boxes. A pedigree chart is common so we will make one here.

**1)** Select the person then choose Publish. Choose Charts and double click the Vertical Pedigree Chart (or other chart).

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- 2) Set icon settings and make changes to the fields as you want.
- 3) The chart will probably not look like what you want in the end. You need to move people and boxes. You can move by generations, pick multiple people, or move just one person. You can remove a person or multiple people from the chart. You may want to magnify the view to help align the boxes. (Remember to set it back to 100%.) You can "Mark" and highlight certain boxes for emphasis. (Box and Line Styles – 3<sup>rd</sup> icon.)
- 4) Save the chart.
- 5) After a chart is saved in FTM you have the option to "Share". You may want to "Share" the chart by exporting it as a .jpg file to a folder with your photos. This allows easy access to the chart if you plan on using MS Word or something else to publish your book. You may also share your chart as a one page .pdf file. Example: A wide vertical pedigree chart may be shared (exported) as a one page .pdf file and taken to a print shop to be printed on wide paper. If you do this, click the box "Boxes overlap page breaks."
- 6) You can also delete people from charts by clicking that box then right clicking it. Choose which option you want and click okay.

**2.** Creating the FTM book. Once you have finished the charts and reports (you can always go back and do more), you are ready to create the FTM book.

- A.** Click "Publish", "Books", "Genealogy Book". Name the book and save.
- B.** Set the book properties. (First icon.)
- C.** Add a title page. You can either type on their title page or add a Smart Story page for the title page. Set the book item properties. Save. Set margins by clicking "File", "Page Setup".
  - 1) If you want any graphic images you must use Smart Story and Word. Develop the title page in Word. Copy and paste

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into the Smart Story page. Check the margins. Save. If you want to use a "watermark" or graphic images, save a copy without the watermark in FTM. FTM cannot handle watermarks or graphics. You will need to print this from Word.

- 2)** When you use FTM, you can "Format" text font and size.
- D.** Add a Smart Story page for the foreword and/or a preface if you want them. Set the book item properties. Create the foreword and preface in Word. Copy and paste into FTM. Save. If you put a chart in a foreword or preface, you must insert the chart as a picture into a word document. Otherwise, FTM will treat it as a chart and put a page number on it (throws off your numbering system).
- 1)** Foreword. A foreword may include any number of options. You may want to explain what the book contains (so the reader does not waste their time if the material they want is not included), thank those who helped in the development of the book or in your research, explain anything that is non-standard in your work, accept any blame for errors, shortcomings, etc. Use the Book Item Properties icon (2<sup>nd</sup>) to set this name and deselect header. Select footer. Roman numerals will be used if this is before the TOC.
  - 2)** Preface. A Preface page is a little different than a title page. It typically shows a little more information for the reader. Since FTM allows only one Title Page, use the Smart Story (text) option and call it a Preface. You may want to use Word to produce this page. Copy and paste into FTM. Use the Book Item Properties icon (2<sup>nd</sup>) to set this name and deselect header. Select footer. Roman numerals will be used if this is before the TOC.
- E.** Add a Table of Contents (TOC). Set the book item properties.
- F.** Add charts and reports. Set the book item properties for each one. Make sure footers are selected. Save.

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- G.** Add Smart Stories as needed. Set the book item properties. Make sure footers are selected. Create the stories in Word. Copy and paste into FTM. Save.
  - H.** At any place in your book you may want to hold a space for something to be inserted later. Click the "+" icon, choose Other and Place Holder. It can be deleted or changed to a Smart Story (text) later.
  - I.** To move items in your book to a different location, highlight the item in the left pane then use the up or down arrows.
  - J.** To delete an item from your book highlight the item in the left pane and select the red "X". Be careful. This is permanent.
  - K.** Pictures/captions cannot be used in FTM. They are not stable. If you want pictures to be added throughout any narrative report or added at the end in large groups, you must use Word or something else. You can use Word to print several pages of pictures and add them at the end of the narrative before binding. This has the advantage of allowing a reader to go directly to pictures rather than wade through the book looking for them.
  - L.** When you work on reports and items using text, save your work frequently. All programs have gremlins that cause the program to unexpectedly stop running.
  - M.** You may preview your book at any time by clicking the Preview Book button at the bottom of the left panel.
  - N.** It is a good idea to occasionally go to the Main FTM Screen and Select "Tools" and "Compact" your program. This reduces the file size but also gets rid of program errors.
  - O.** Backup your work.
  - P.** Add the Index. Set the book item properties. Save.
- 3.** Review, edit, spell check, add, delete, move item locations, etc.
- 4.** Print what you can from FTM. You may print the entire book or print specific pages. Print options:
- A.** Your printer directly from FTM.

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- B.** Your printer from a .pdf file.
  - C.** Commercial printer. Take a .pdf file to them on a flash drive.
  - D.** If you think you might use FTM to print your book, your printer must be set to allow top and bottom margins of .5 inches (for page numbers). You can check your printer driver by:
    - 1)** In FTM Book, click on the Print icon (upper right). (Leave your printer OFF so you can cancel the print.)
    - 2)** If you get an error message that says something like "Some edges are outside the printer margins. Do you want to continue?" You must "Share" your book in a .pdf format and print from the .pdf file. Make sure "FIT" is selected.
    - 3)** If you get no error message you can print directly from your FTM book.
  - E.** Print the pages you developed in Word that cannot be handled by FTM. (e.g. Title page with watermark, pages of pictures, etc.) Print any special charts (wide).
- 5.** You can "Share" your book as a .pdf file and email it to a friend.

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## Part Two – The MS Word Book

### Pros:

- A. Greatest flexibility for formatting and editing.
- B. Easiest to print small sections or individual pages.
- C. Can include pictures with stories.
- D. Easy to email book to friends.
- E. Automatic Table of Contents (TOC) with page numbering.
- F. Can add or remove items/people from reports.
- G. Can highlight certain people (direct line).
- H. You can manually index names found in charts and reports.

### Cons:

- A. Index has to be handmade (first print the FTM index, remove the page numbers, and use the “Find” feature of Word to find names and the page numbers).
- B. Reports require a lengthy process of conversion to a Word format. Not hard – just lengthy.
- C. In order to get a good index of individuals, you need to save charts and reports (without any editing) into an FTM book. This is a good way to help organize the book.

**1.** If for any reason you want to change a report (you want pictures included in your stories, you don't like the report formats, you want to change data from place to place, you want to delete blank notes, highlight direct chain relatives, etc.) you must use MS Word instead of FTM. In order to do this, first develop the book using FTM (you do not need a title page, foreword, preface, or TOC as you will develop these in Word. You need the charts, reports, and index. Show the pedigree book.

**2.** In Word, create a special folder for your book. Save all reports and other work in this folder and subfolders.

**3.** Create your charts and reports in FTM. Save them before “Sharing”. Charts and reports must be placed to a “dummy” FTM book (for the Index).



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- A.** Charts should be saved then "Shared" and exported as an image (.jpg). Put them in a folder with your pictures and crop them to an area just big enough for the chart. Save. This will allow you room for a heading on the page when you insert the picture/chart into your Word document (necessary for the TOC).
  - B.** Reports need to be saved then "Shared" as an .rtf file.
    - 1)** Save this .rtf file in a special subfolder in Word for .rtf files (so you can easily erase it later). Open the .rtf file.
    - 2)** Open Notepad. Copy and paste the .rtf file into Notepad. (This strips away all formatting codes.) "Select All" and copy the file in Notepad. Paste into a new Word document. Edit, change font sizes, subscripts or superscripts, etc. This will be time consuming. If you want a break, save your work so you can come back to it. Watch your subject and verb tenses. Be consistent. When editing, click the paragraph symbol. This helps see what needs to be erased. Become friends with the undo arrow at the top. Save the report file in Word.
    - 3)** Place a "Heading" at the beginning of the report for TOC purposes. Save. Heading 1 is for level 1 (primary) chapters in the TOC. Heading 2 is for subsequent levels within each chapter. You will probably have a Heading 1 with several Heading 2 pages under it. Then another Heading 1 with several Heading 2 pages, etc.
- 4.** Create your book in Word. Use the same folder your reports are in. (You will need to create a dummy book in FTM that holds your charts and reports so that FTM will create an index of names.)
- A.** Create the title page. Save. Since each page is added to the next, save as frequently as you like.
  - B.** Create your foreword and preface if desired. Save.
  - C.** Add the Table of Contents (TOC). Go to "References" and insert a TOC. Once the book is finished, "Update" the TOC. Word will automatically look for headings and apply page numbers.

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**D.** Add charts and reports as needed to tell your story.

- 1)** Charts. Put a heading (1 or 2) at the top of the page for TOC purposes. Insert the chart from your saved picture folder. (You should have "Shared" your charts to your picture folders. Choose the chart you want to insert.) Set "Text Wrapping" to "Tight".
- 2)** Reports. Open a saved Word report. Select all, copy, and paste the report into your book. Put a heading at the top of the page if not already there.
- 3)** Sources. Save sources related to each report so the subscripts don't get mixed. A URL it may not appear highlighted as a hyperlink. By adding a space after the last letter will show it as a hyperlink (underlined and in blue).

**5.** Review and make any changes in the book. Edit, spell check, etc. Watch your subject and verb tenses. Be consistent.

**6.** Add an Index of Individuals. This must be done last just before you print. If you change data, the page numbers may not be accurate.

- A.** Go to the dummy FTM Book. Add an "Index". Click on the Index page you added. FTM will create an index that includes all names found in charts and reports in FTM. Disregard the page numbers shown here. (You do not need a TOC in the dummy FTM book.)
- B.** Since FTM will not let you copy the index directly, "Share" the book and export into an .rtf document. Save that file to your .rtf folder.
- C.** Open the .rtf file. Select the index pages, copy, and paste into Notepad (just like you did with a report).
- D.** Select the index pages in Notepad, copy, and paste into a new Word document. Save.
- E.** Put the index into two columns. Erase the page numbers because they will not match your Word Book. Save.
- F.** Print the index pages in Word without page numbers.

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- G.** Copy and paste your incomplete index at the end of your Word Book. Make sure you include a heading at the top.
  - H.** Go to the "Reference" tab and "Update" the TOC.
  - I.** After the TOC is updated, go through the book and add page numbers to your printed index. Look for names in charts and record these page numbers. Then use the "Find" feature for each name in your index. This will show you the pages where each person is located. Type these page numbers into the index. Save. Do not index names in the sources as these are already referenced by the subscripts.
- 7.** Print the book. Print any special charts (wide charts). Print options:
- A.** Your printer directly from Word.
  - B.** Commercial printer. Take a Word or .pdf file to them on a flash drive.
- 8.** Bind the book.

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## Part Three – Homework

Homework assignment. Make a SMALL FTM or Word book by August. Nothing elaborate. This exercise is for learning the process not content.

Contents:

- A. Title page
- B. Foreword
- C. Table of Contents (TOC)
- D. 1 Vertical pedigree chart
- E. 1 Descendant chart
- F. 1 Descendant Outline Report
- G. 1 Descendant report
- H. Index
- I. Include sources on item G (Descendant report).
- J. Who to include: You, your children, and your parents.

Not graded or evaluated. Done for the experience. Come back in August for more individual help.