

Pedigree Forge User Manual

Version 0.8.19

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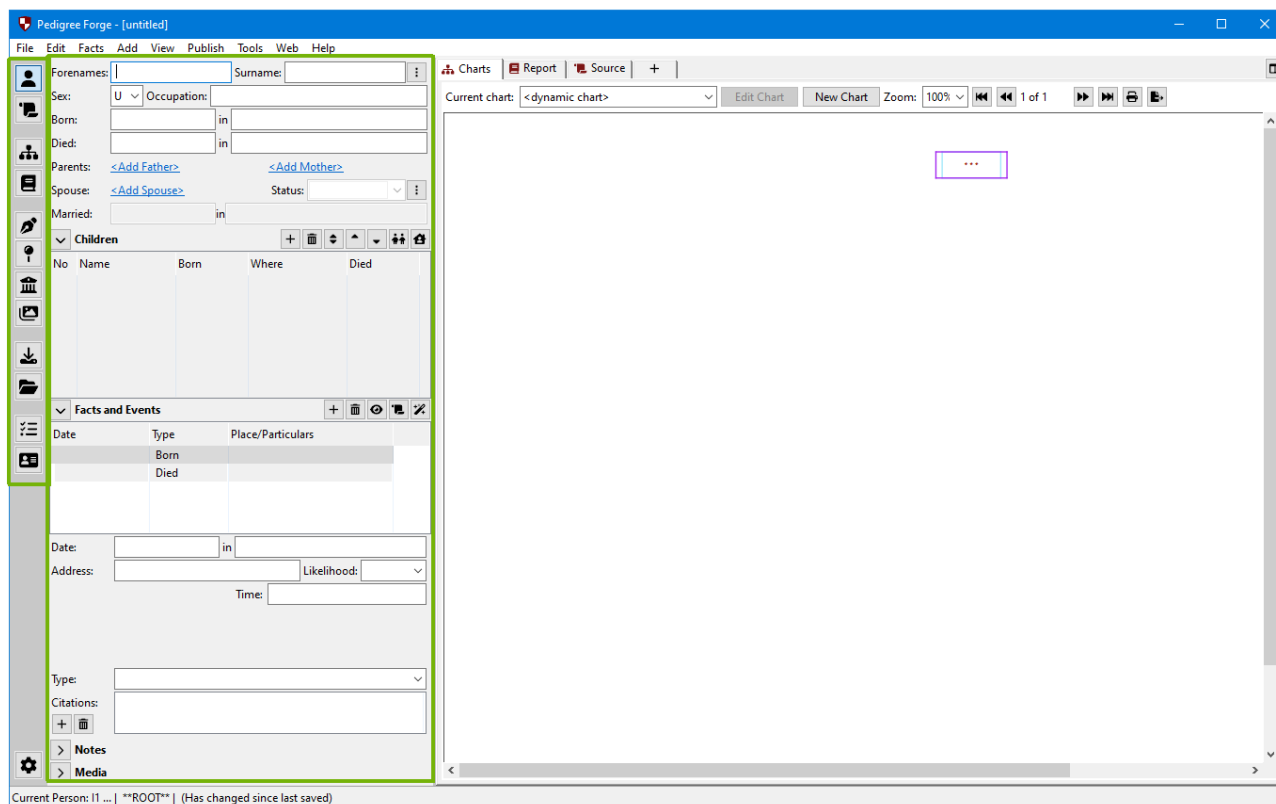
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Getting started

When you open Pedigree Forge you can start entering information straight away. The program is ready for you to enter the first person:

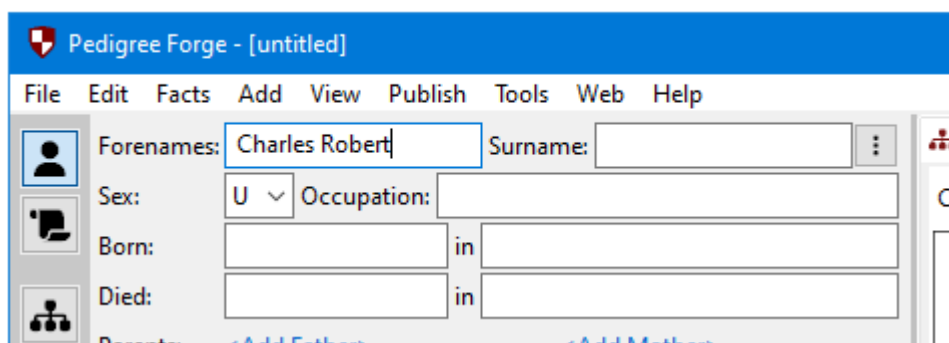


The “Action Bar” runs down the left side of the Pedigree Forge’s main window giving access to various editing screens. The top button (person icon), allows you to enter and edit information on the currently selected person. The main information is added in the panel to right of the action bar.

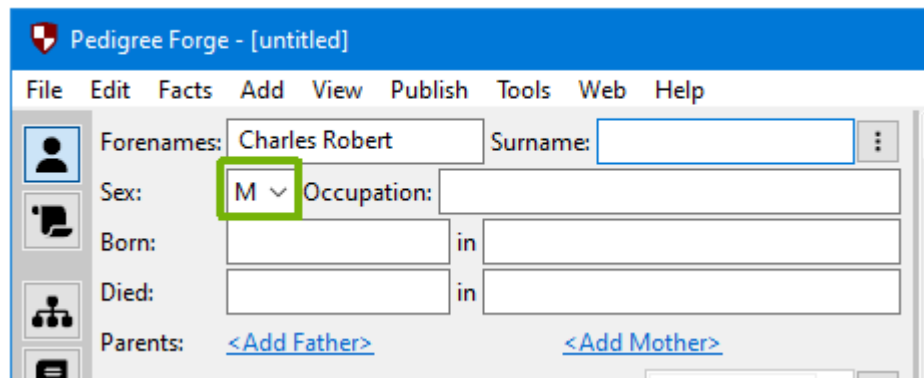
Clicking the same Action Bar button again will hide the editing panel; click it again will show the editing panel.

Add the first person

Enter the first person’s name. When you start Pedigree Forge for the first time, forenames and surnames are entered separately. Advanced users familiar with other family history software might prefer to edit these in a single box (this can be changed in the options).



When you move to the next field, Pedigree Forge will try and set the person's sex automatically. It has a large database of names, based on traditional usage, but this isn't infallible, you can change it if you want to, or set it manually if it hasn't recognised the name.



Pedigree Forge - [untitled]

File Edit Facts Add View Publish Tools Web Help

Forenames: Charles Robert Surname:

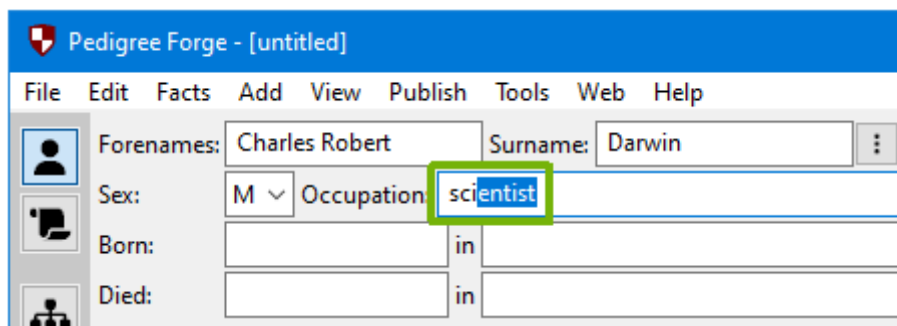
Sex: M Occupation:

Born: in

Died: in

Parents: <Add Father> <Add Mother>

If you want, you can add an occupation. Pedigree Forge has a database of common occupations, and will try and auto suggest for you.



Pedigree Forge - [untitled]

File Edit Facts Add View Publish Tools Web Help

Forenames: Charles Robert Surname: Darwin

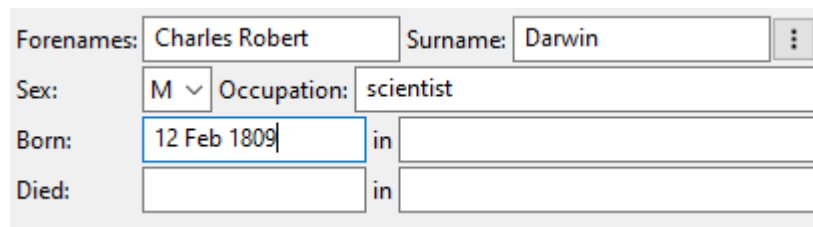
Sex: M Occupation: scientist

Born: in

Died: in

If you want to accept the suggestion, press the [ENTER] key. If you continue typing, your own text will overwrite the suggestion. Pressing the [DELETE] key will stop a suggestion from showing.

Next, you can enter the date of birth. At the simplest level, dates should be entered as "dd mmm yyyy", that is the day (in numbers), a space, then the first three letters of the month's name, then a space, then the year. For example:



Forenames: Charles Robert Surname: Darwin

Sex: M Occupation: scientist

Born: 12 Feb 1809 in

Died: in

Pedigree Forge accepts a wide variety of date formats (see later sections of guide), but this covers the basics. If only the year is known, that can be added by itself, for example 1809. If a date isn't recognised, it will be shown in red:

2 Jany 1840

You can then enter the place where the person was born. Pedigree Forge has a growing databases of places (currently on for the England, Scotland, Wales and Australia), which it will suggest to help you choose the place. It is recommended that the place information is the town or village name, followed by the county. The country isn't needed, as it can be inferred from the county. You don't have to use one of the suggestions, you can entered whatever you like.

Forenames:	Charles Robert	Surname:	Darwin
Sex:	M	Occupation:	scientist
Born:	12 Feb 1809	in	Shrew
Died:		in	Shrewbridge, Cheshire Shrewley, Warwickshire Shrewsbury, Shropshire Shrewton, Wiltshire
Parents:	<Add Father>		
Spouse:	<Add Spouse>		
Married:		in	
<input checked="" type="checkbox"/> Children			

Whilst we have been entering this information, Pedigree Forge has been updating the chart, which is in the "Charts" tab in the content section to the right of the editing panel.

The "dynamic chart" is useful whilst you are entering or editing information, but other charts of more fixed design can be created too.

Pedigree Forge - [untitled]

File Edit Facts Add View Publish Tools Web Help

Forenames: Charles Robert Surname: Darwin

Sex: M Occupation: scientist

Born: 12 Feb 1809 in Shrewsbury, Shropshire

Died: 19 Apr 1882 in Down, Kent

Parents: [<Add Father>](#) [<Add Mother>](#)

Spouse: [<Add Spouse>](#) Status:

Married: in

☒ Children

No	Name	Born	Where	Died
----	------	------	-------	------

Charts Report Source +

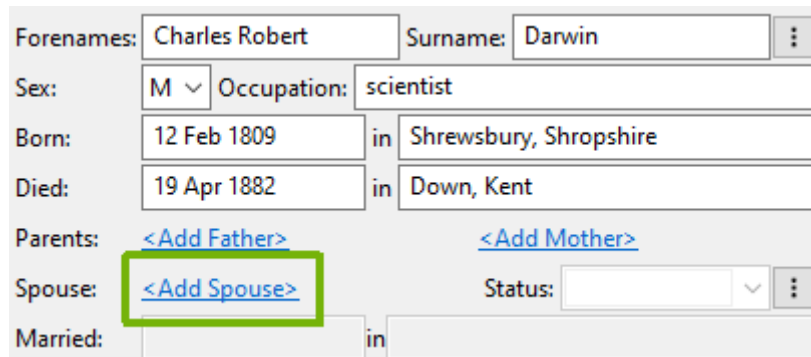
Current chart: <dynamic chart> Edit Chart

Charles Robert Darwin

scientist, born 12 Feb 1809 Shrewsbury, Salop., died 19 Apr 1882 Down, Kent.

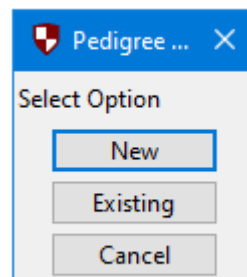
Add a spouse

We can now add a spouse. The easiest way to do this is to click on the “<Add Spouse>” link in the editing panel.



Forenames:	Charles Robert	Surname:	Darwin	⋮
Sex:	M ▾	Occupation:	scientist	
Born:	12 Feb 1809	in	Shrewsbury, Shropshire	
Died:	19 Apr 1882	in	Down, Kent	
Parents:	<Add Father>		<Add Mother>	
Spouse:	<Add Spouse>		Status:	▾ ⋮
Married:		in		

You will then be asked to either create a new person, or select another person from the people already in the file. We are going to create a new person:



Pedigree ... X

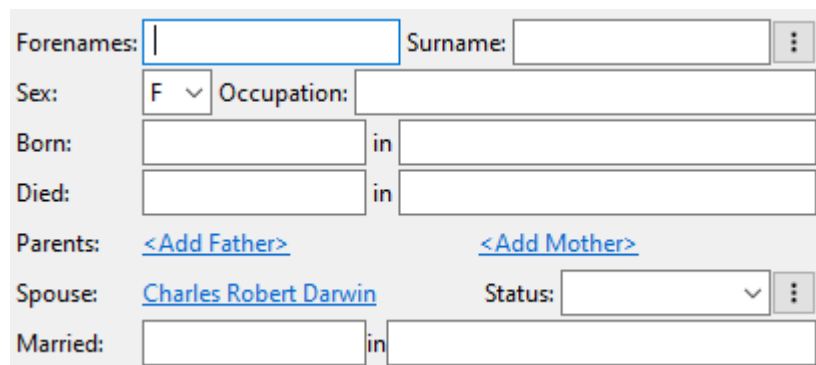
Select Option

New

Existing

Cancel

The new spouse is now the current person, and the edit panel is ready for you to enter their information:



Forenames:		Surname:		⋮
Sex:	F ▾	Occupation:		
Born:		in		
Died:		in		
Parents:	<Add Father>		<Add Mother>	
Spouse:	Charles Robert Darwin		Status:	▾ ⋮
Married:		in		

By default, the spouse will be added as the opposite sex. Pedigree Forge fully supports same-sex relationships, so change the sex to the correct value if the default isn't applicable.

Information can be added as before. It is usual practice in genealogy to enter ladies with their maiden surnames. Although the sex has been automatically populated, it can be changed to allow same-sex relationships. In the example below, we have also added the date and place of the marriage, and the dynamic chart has automatically added the information too.

Forenames:	Emma	Surname:	Wedgewood
Sex:	F	Occupation:	
Born:	2 May 1808	in	Maer, Staffordshire
Died:	2 Oct 1896	in	Bromley, Kent
Parents:	<Add Father> <Add Mother>		
Spouse:	Charles Robert Darwin		
Married:	29 Jan 1839	in	Maer, Staffordshire

Charles Robert Darwin scientist, born 12 Feb 1809 Shrewsbury, Salop., died 19 Apr 1882 Down, Kent.	Emma Wedgewood born 2 May 1808 Maer, Staffs., married 29 Jan 1839 Maer, died 2 Oct 1896 Bromley, Kent.
--	--

Add a child

We are now ready to add the children. The easiest way to do this is from the Children table of the editing panel. Click on the “+” button at the top of the children grid. As when adding a spouse, you will be asked if you want to add a new child, or select an existing person, and then the child will become the active person being edited.

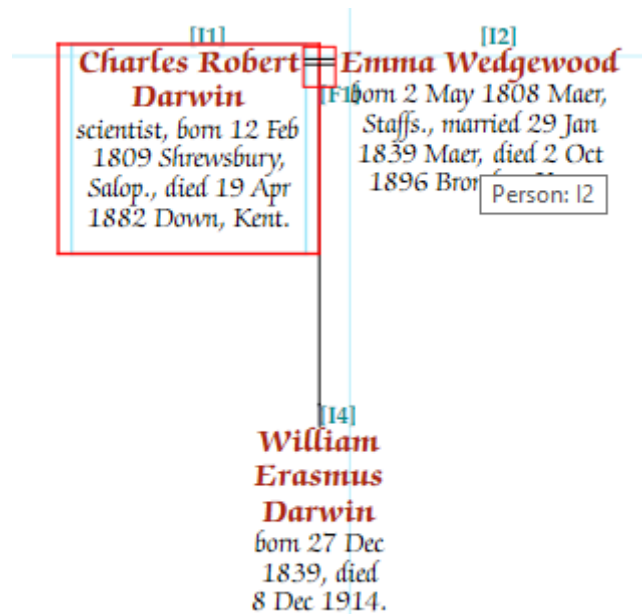
Forenames:	Emma	Surname:	Wedgewood	
Sex:	F	Occupation:		
Born:	2 May 1808	in	Maer, Staffordshire	
Died:	2 Oct 1896	in	Bromley, Kent	
Parents:	<Add Father> <Add Mother>			
Spouse:	Charles Robert Darwin			
Married:	29 Jan 1839	in	Maer, Staffordshire	
<div> <div>Children</div> <div> <div>+</div> <div>🗑️</div> <div>⬆️</div> <div>⬇️</div> <div>⬇️</div> <div>👤</div> <div>🏠</div> </div> </div>				
No	Name	Born	Where	Died

Navigating between people

Now that there are a few people in our database, we might need to move between them. There are various ways to do this, but clicking on the various links in edit panel is one of the quickest.

Forenames:	<input type="text" value="William Erasmus"/>	Surname:	<input type="text" value="Darwin"/>	:
Sex:	<input type="text" value="M"/>	Occupation:	<input type="text"/>	
Born:	<input type="text" value="27 Dec 1839"/>	in	<input type="text"/>	
Died:	<input type="text" value="8 Dec 1914"/>	in	<input type="text"/>	
Parents:	Charles Robert Darwin		Emma Wedgewood	
Spouse:	<Add Spouse>		Status:	<input type="text"/> ⌵ ⋮
Married:	<input type="text"/>	in	<input type="text"/>	

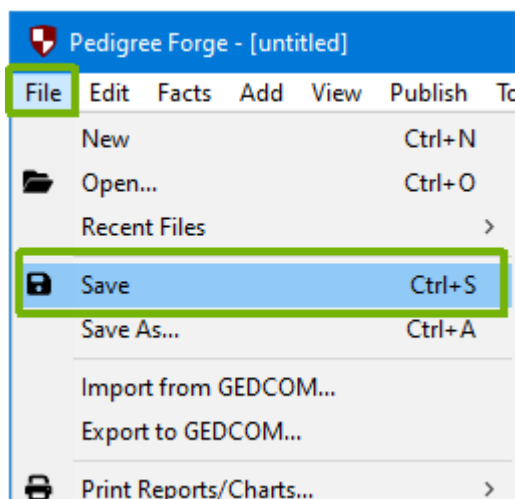
Alternatively, you can click on the anyone in the dynamic chart to make them the active person:



This was a quick tour of some of the basic features of editing people in Pedigree Forge. Please refer to the Editing People section for more detailed information.

Saving the project

Pedigree Forge works much the same as other desktop applications. You save the file somewhere on your computer. The method is the same too: select “File” from the menu bar and then “Save”. If it is the first time you are saving the file, then you will be prompted to select the name and location on your computer.



By default, Pedigree Forge files have the extension “.ped”, which is short for Pedigree.

Files can be re-opened using the “Open” item on the “File” menu; Recent files are stored in the “Recent Files” list, also located on the “File” menu.

Pedigree Forge offers a "Database mode" for users working with larger files—see later in the guide for more information.

Where to save your project

You should choose a folder on your computer where you want to save your project. For most users, this will be somewhere in their documents folders. It is recommended that you have a folder for each Pedigree Forge project, as this will help you organise files that belong with it, like source documents.

Auto saving

Once you have saved your file for the first time, Pedigree Forge will automatically create a saved backup every 2 minutes. This is useful in case your computer crashes since you last saved the file manually. Note: the auto saved copy is only used if the program shut down unexpectedly. If you exited the program normally, but without saving your work, then any changes will be lost.

Backups

By default, you will also be prompted to create a backup of your file when you exit Pedigree Forge. This is useful for longer term backups.

Editing People

The very basics of entering and navigating people is covered in the Getting Started section above, but families are complicated, and you will want to do a lot more with your family tree.

Entering facts and events

The Getting Started section covered how to enter dates and places of birth, death and marriage, but if you want to add more detail about these events, or add other events and facts, then this is possible too, using the “Facts and Events” section on the editing panel.

The screenshot shows a web-based form for editing a person's profile. The form is divided into several sections:

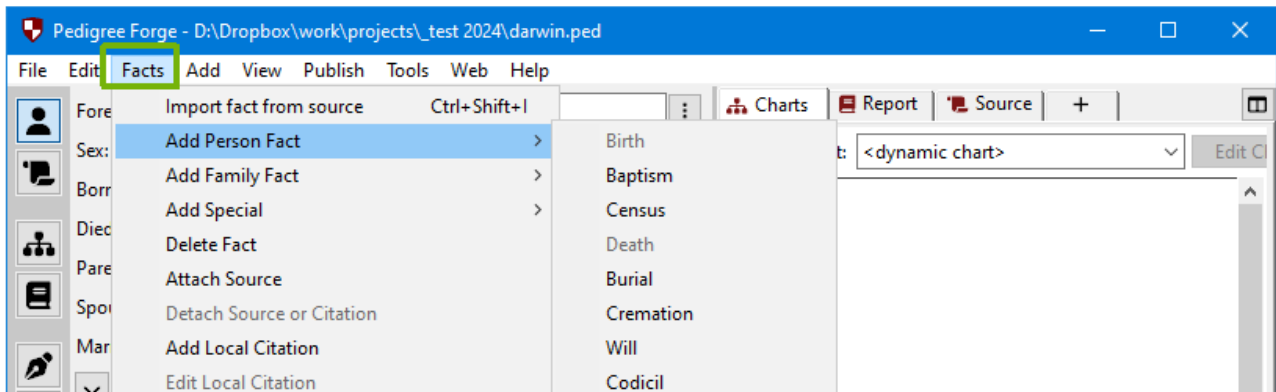
- Personal Details:** Forenames: Charles Robert, Surname: Darwin, Sex: M, Occupation: scientist.
- Birth and Death:** Born: 12 Feb 1809 in Shrewsbury, Shropshire; Died: 19 Apr 1882 in Down, Kent.
- Parents:** Robert Darwin, Susannah Wedgewood.
- Spouse:** Emma Wedgewood, Status: (dropdown menu).
- Married:** 29 Jan 1839 in Maer, Staffordshire.
- Children:** A table listing four children: William Erasmus (born 27 Dec 1839, died 8 Dec 1914), Anne Elizabeth (born 21 Mar 1841, died 23 Apr 1851), Mary Eleanor (born 23 Sep 1842, died 16 Oct 1842), and Henrietta Emma (born 25 Sep 1843, died 17 Dec 1927).
- Facts and Events:** A table listing events for the person and their children. The events include the person's birth, marriage, and the births of their four children.

No	Name	Born	Where	Died
1	William Erasmus	27 Dec 1839		8 Dec 1914
2	Anne Elizabeth	21 Mar 1841		23 Apr 1851
3	Mary Eleanor	23 Sep 1842		16 Oct 1842
4	Henrietta Emma	25 Sep 1843		17 Dec 1927

Date	Type	Place/Particulars
12 Feb 1809(Su)	Born	Shrewsbury, Shropshire
29 Jan 1839(Tu)	*Married*	Maer, Staffordshire
27 Dec 1839	Child born	William Erasmus /Darwin/
21 Mar 1841	Child born	Anne Elizabeth /Darwin/
23 Sep 1842	Child born	Mary Eleanor /Darwin/

The facts and events table lists all facts and events that have been entered for the active person (or a couple in which they are a spouse/partner), along with some that are generated automatically. In the example above, we have entered the birth and marriage, but the births of the children are automatically populated too.

The buttons at the top of the Fact and Events grid allow you to add or delete facts and carry out other common tasks. Note: more options (including other facts types) are available on the “Facts” menu bar item. These includes a greater variety of facts.



Clicking on one of the items in the facts and event list will show more detailed information below:

 A screenshot showing a list of 'Facts and Events' with columns for Date, Type, and Place/Particulars. The first entry, '12 Feb 1809(Su) Born Shrewsbury, Shropshire', is highlighted. Below the list, a detailed form for this event is shown, including fields for Date, Address, Likelihood, Time, Type, and Citations.

Date	Type	Place/Particulars
12 Feb 1809(Su)	Born	Shrewsbury, Shropshire
29 Jan 1839(Tu)	*Married*	Maer, Staffordshire
27 Dec 1839	Child born	William Erasmus /Darwin/
21 Mar 1841	Child born	Anne Elizabeth /Darwin/
23 Sep 1842	Child born	Mary Eleanor /Darwin/

 Detailed view for the selected event:

Date: 12 Feb 1809 in Shrewsbury, Shropshire

Address: Likelihood:

Time:

Type:

Citations:

The available fields will depend on the fact being edited. For example, a death event has the option to enter a cause and age, but these don't make sense for births.

Place vs. address

The “in” field should be used for the town or village, and county. The “Address” field should be used for the specific address where the event took place. For example, Charles Darwin died in the village of Down, but the address was “Down House”:

Facts and Events

Date	Type	Place/Particulars
15 Jan 1850	Child born	Leonard /Darwin/
13 May 1851	Child born	Horace /Darwin/
6 Dec 1856	Child born	Charles Waring /Darwin/
19 Apr 1882(We)	Died	Down, Kent

Date: 19 Apr 1882 in Down, Kent

Address: Down House Likelihood:

Age: 73y Time:

The address field can also be used to specify the particular church/cemetery/hospital etc, as there may be more than one place in the particular town or village, where the event took place.

19 Apr 1882(We) Died Down, Kent

Date	Type	Place/Particulars
19 Apr 1882(We)	Buried	Westminster, Middlesex

Date: in Westminster, Middlesex

Address: Westminster Abbey Likelihood:

Age:

Likelihood

The likelihood drop down box can be used to flag that a fact isn't confirmed. It is recommended that you do this if you are unsure if this is the correct event.

Address: Down House Likelihood:

Age: 73y Time:

Cause: lived at in

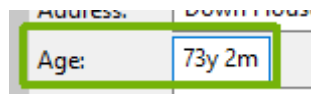
possibly
probably

Facts flagged as “possibly” or “probably” are shown on charts with a question mark, and included in reports with similar caveats.

Ages

Ages can be recorded for many types of events and facts. It is recommended that they are entered as they appear on the relevant source document, even if that is wrong or suspect. Ages that are whole years can be entered just as the number (a “y” is appended automatically to the end to indicate this is in years).

If a more precise age was recorded, then use “m” for months “w” for weeks and “d” for days, for example “73y 2m” would indicate 73 years and 2 months.



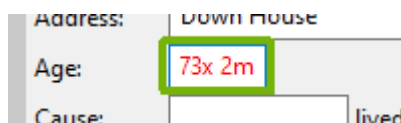
Address: Down House
Age: 73y 2m

Ages were often recorded on documents imprecisely, and so we want to reflect that in our record. It is wrong for us to assume that “infant” meant a particular age. For that reason, the follow other ages are also accepted:

- “full”: Often used to indicate 21 or over, but can be much older.
- “infant”: Often recorded on burials of very young children
- “child”: Often recorded in old burial records, with no further clarification
- “minor”: Usually implies under 21.

A less than “<” or greater than “>” character can also be used to imply that someone was recorded as less than, or greater than the given age.

If the age isn’t recognised, it will be displayed in red:



Address: Down House
Age: 73x 2m
Cause: lived

Citations

Recording *where* a piece of information comes from is very important. When you enter facts and events, you should record how you know that information is correct.

Pedigree Forge supports two flavours of citations: full links to a source document, or a “local” citation. Both can be added, or deleted from the Citations list, using the “+” or trash buttons.



Type: [dropdown]
Citations: [S2] Death Certificate for Charles Darwin, 1882
+ [button] [trash icon] [button]
> Notes

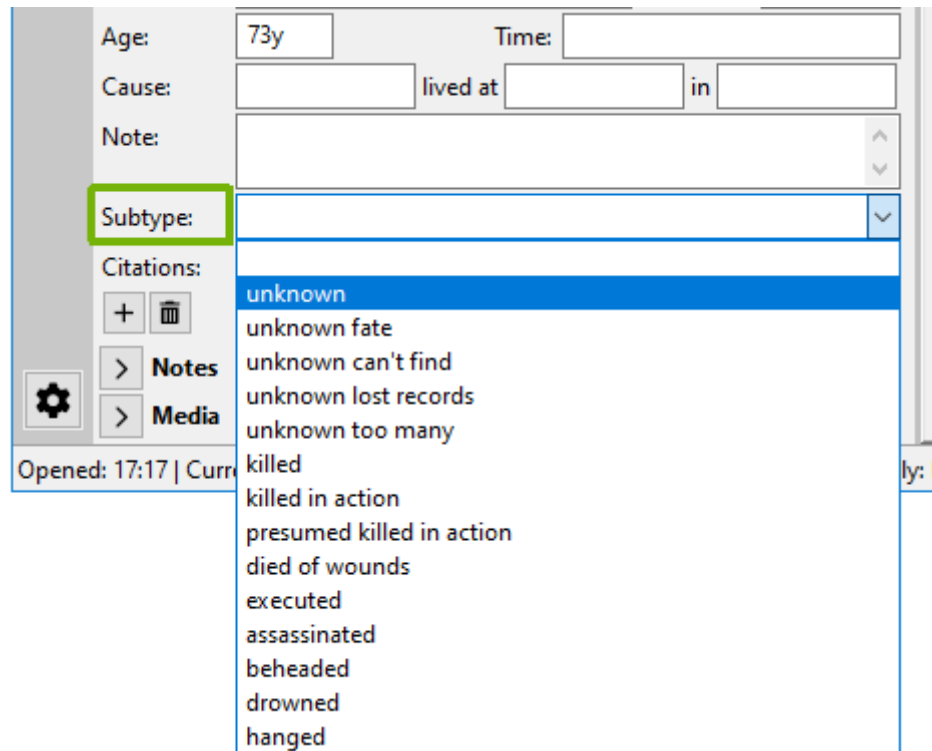
The above is a citation linked to a record of Charles Darwin’s death certificate—for more information, see the section on “Working with sources”. The [S2] is the record identifier.

Local citations can be free-form text, although there are some templates to help you create these, and more information can be found in the “Working with sources” section.

Fact and event subtypes

Some facts allow you to choose a subtype, which help clarify the situation surround the fact or event.

For example, the death fact has the following subtypes:



The screenshot shows a form for recording a fact. The 'Subtype' dropdown menu is open, displaying a list of options. The 'unknown' option is selected and highlighted in blue. The list of subtypes includes: unknown, unknown fate, unknown can't find, unknown lost records, unknown too many, killed, killed in action, presumed killed in action, died of wounds, executed, assassinated, beheaded, drowned, and hanged. The form also includes fields for Age (73y), Time, Cause, Note, Citations, and a sidebar with icons for Notes and Media.

Age:	73y	Time:	
Cause:		lived at	
Note:			
Subtype:	unknown		
Citations:			
+ -			
> Notes			
> Media			

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Marriage facts have subtypes such as: “civil partnership” “common law” and “clandestine”; Birth facts have a subtype “stillborn”.

Time

Some fact types, in particular, birth and death, have a time field, as these might be recorded on old documents—times of births are often recorded for multiple births, and times of death are recorded on Scottish Statutory Register death records. These are free form fields, so you can enter the information as you wish.

Cause

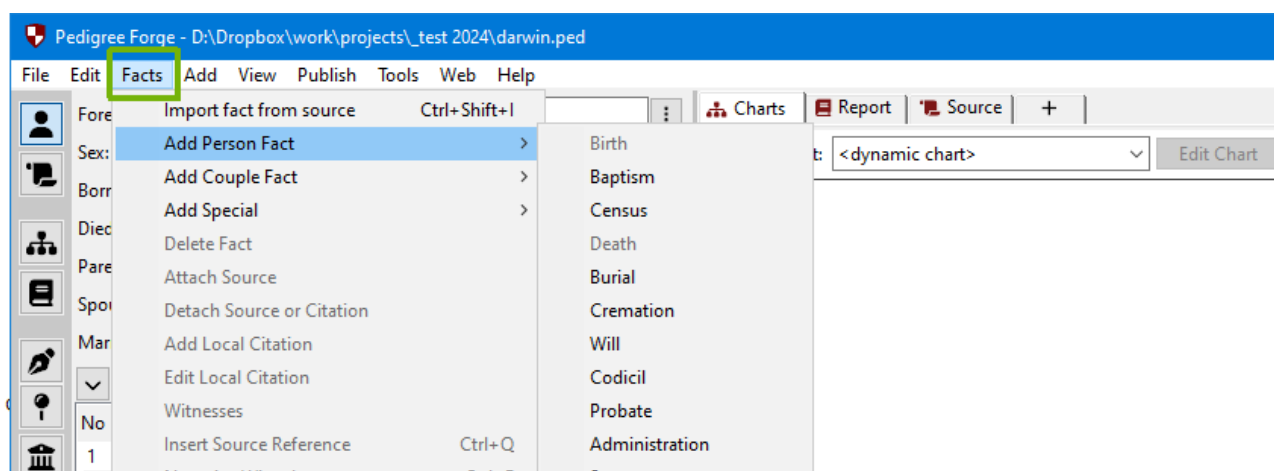
Cause of death is often written on documents, and can be recorded on death facts. Pedigree Forge will suggest some common causes as you type. To get the most from the reporting functions of Pedigree Forge (narrative reports), it is recommended that you choose something that sounds reasonable when prefixed with “of” for example “bronchitis”, reads nicely as “of bronchitis”, but “heart attack” would sound better if written as “a heart attack”, so the narrative would read: “of a heart attack”.

Notes

Notes can be entered for certain kinds of facts. They are used the narrative reports, so you may want to experiment with how you enter the information to get the best results if using narrative reports.

Person or couple facts and events

Some facts pertain to a person, for example, birth, baptism and death. Whereas others, for example marriage, relate to a couple. This is why there are options to add either person or couple facts. If the active person had more than one partner or spouse, then care must be taken that the correct partner is the active partner before adding fact them. Please see the section on multiple spouses and partners for more information.



Different facts and events

The available facts cover a wide range of the options available to you, and if possible, you should record the information one of the standard fact types—this allows Pedigree Forge to understand what the data means. The following facts/events are available (some are only available from the “Facts” menu):

Individual: Birth, Baptism, Census, Death, Burial, Cremation, Will, Codicil, Probate, Administration, Seat, Floruit, Adoption, Education, Graduation, Ordination, Emigration, Immigration, Barmitzvah, Confirmation, Residence, First Communion, Naturalisation, Retirement, Blessing.

Couple: Marriage, Marriage Licence, Marriage Banns, Divorce, Engagement, Annulment, Divorce Filled.

Sometimes, although perhaps not quite obvious, a fact of a more generic kind, can represent a more specific kind (see the section of further type information above). For example, a marriage has a sub-type of a civil partnership.

Most of the types should be obvious. The following is guidance on particular types:

Seat Fact

On old documents, a particular person might sometime be described as being “of X”; this is often their “main” or long term residence. The seat fact allows you to enter this information, which will then be used in charts and reports.

Flourit

On family trees that extend back a long way, it isn’t uncommon to find a “flourit” date (often abbreviated as fl. on charts). This is when approximate dates of birth aren’t known, but reflect the period in which the person was known to be alive. The date is often a range, that is between two dates.

Custom Facts and Events

If none of the predefined facts or events meet the information you want to record, then you can add a custom fact, either to an individual, or two a couple.

Date	Type	Place/Particulars
15 Jan 1850	Child born	Leonard /Darwin/
13 May 1851	Child born	Horace /Darwin/
6 Dec 1856	Child born	Charles Waring /Darwin/
1859	Other	[Wrote "On the Origin of Species"]
19 Apr 1882(We)	Died	Down, Kent

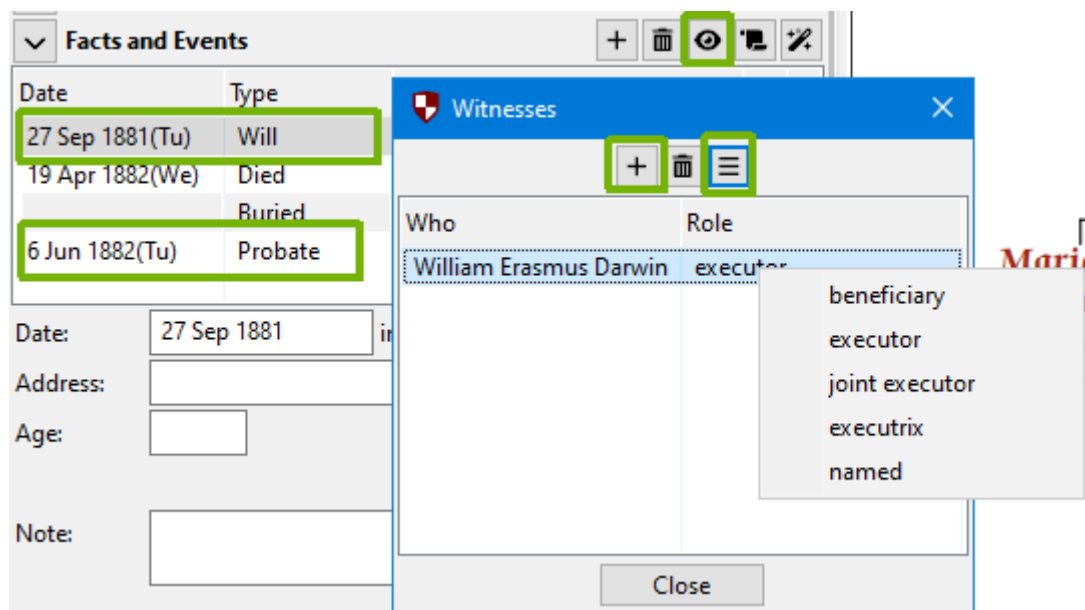
Date:	1859	in	
Address:			Likelihood: <input type="button" value="v"/>
Age:	<input type="text"/>		
Type:	Wrote "On the Origin of Species"		

In the example above, we have added a custom person fact to Charles Darwin. The “Type” box can be used to record what the fact or event was.

Witnesses to facts/events

We can record that a certain person had some involvement in a fact or event of someone else. For example, they might have been the witness at a marriage, the beneficiary in a will, or the informant on a death certificate.


Charles Darwin wrote his will on 27 September 1881; probate was granted after his death, on 6 June 1882. We have added a “Will” fact and a “Probate” fact to the list of facts for him. If we click on the “eye” button, the witnesses dialog appears. This will allow us to select a witness or witnesses, and set their role/roles, or delete them from the list.

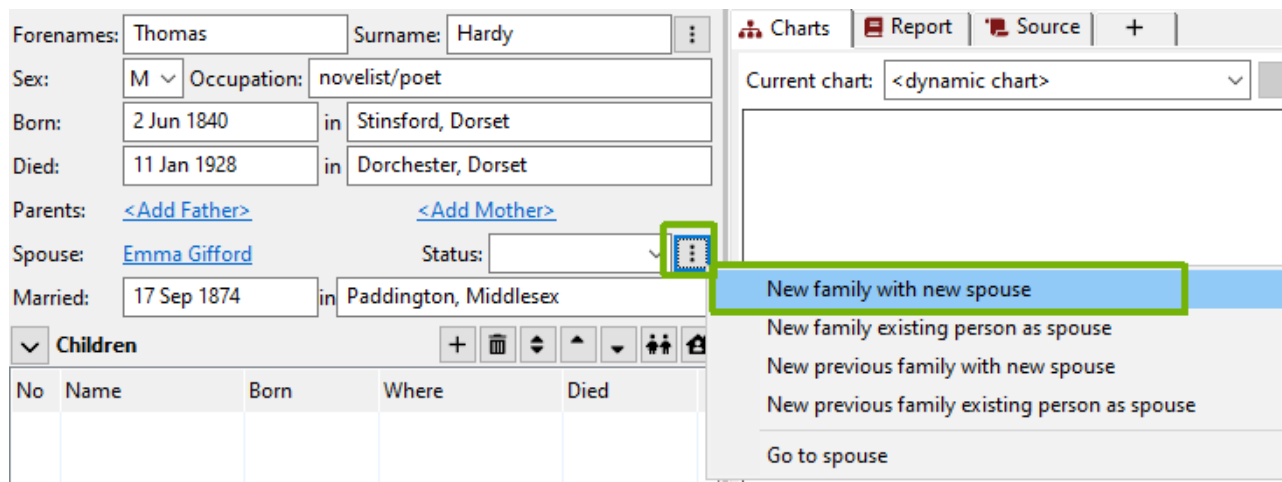


Once a witness has been added, the event appears in their own list of facts too, although it isn't editable from there. The following is William Erasmus Darwin's fact list:

Facts and Events		
Date	Type	Place/Particulars
27 Dec 1839(Fr)	Born	
27 Sep 1881	> executor	WILL of Charles Robert Darwin
8 Dec 1914(Tu)	Died	

Multiple partners or spouses

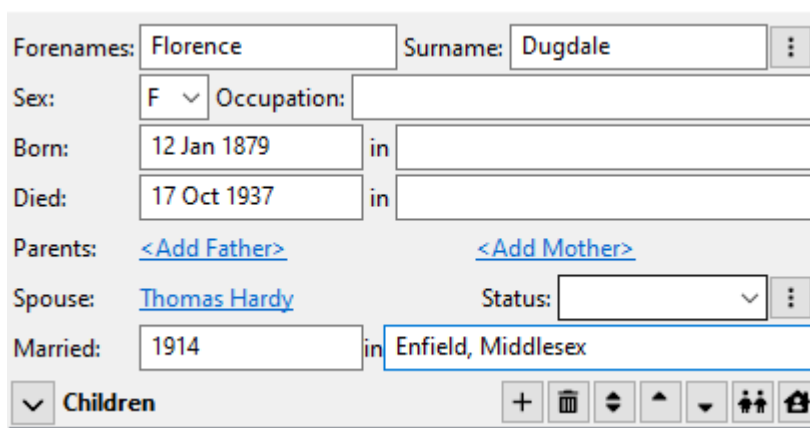
Pedigree Forge easily handles multiple spouses or partners. In the following example, we already have one spouse, and are going to add a second. Clicking on the  button next to the "Status" box, gives various options to add a new spouse.



The screenshot shows the 'Person' form for Thomas Hardy. The 'Spouse' field is set to Emma Gifford. The 'Status' dropdown menu is open, showing options to add a new spouse or existing person as a spouse. The 'New family with new spouse' option is highlighted.

No	Name	Born	Where	Died

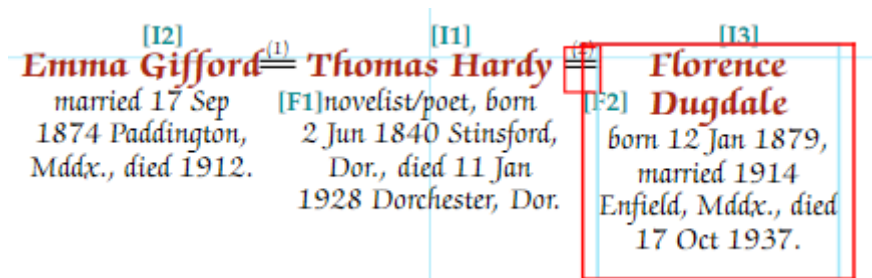
We can then add the information on the new spouse:



The screenshot shows the 'Person' form for Florence Dugdale. The 'Spouse' field is set to Thomas Hardy. The 'Status' dropdown menu is open, showing options to add a new spouse or existing person as a spouse. The 'New family with new spouse' option is highlighted.

No	Name	Born	Where	Died

The dynamic chart will now show both spouses. As is the convention, they husband is flanked by the two wives:



If we navigate to make Thomas Hardy the active person again, we can see that he now has two spouses showing:

Forenames: Surname:

Sex: Occupation:

Born: in

Died: in

Parents: [<Add Father>](#) [<Add Mother>](#)

Spouse: Status:

Married: in

Children

At present, Florence is the active spouse. We can use the drop-down list to make Emma the active spouse again.

Forenames: Surname:

Sex: Occupation:

Born: in


Died: in

Parents: [<Add Father>](#) [<Add Mother>](#)

Spouse: Status:

Married: in

Children

Spouses or partners should be in chronological order. In the above example, Florence Dugdale is 2 of 2 and Emma is 1 of 2. The current spouses can be “moved up”, or “moved down” in order using the  button, next to the “Status” drop down.

Both marriages are shown in Thomas’ fact and event list. The one for the active spouse is shown with asterisks around e.g. **Married**, whereas the other is shown without:

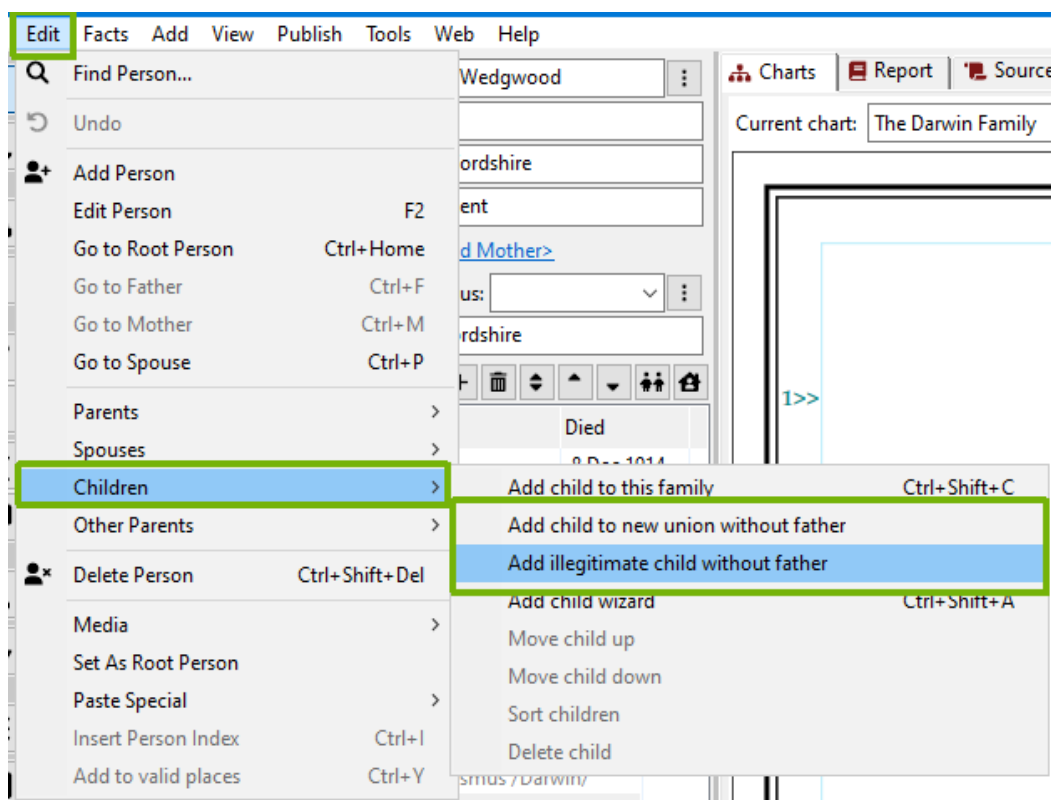
Facts and Events		
Date	Type	Place/Particulars
2 Jun 1840(Tu)	Born	Stinsford, Dorset
17 Sep 1874(Th)	<i>*Married*</i>	Paddington, Middlesex
1914	Married	Enfield, Middlesex
11 Jan 1928(We)	Died	Dorchester, Dorset

Date: in

Adding illegitimate children or children where only one parent is known

Related to multiple spouses is the occasion where a person has had children out of wedlock. Here you might want to add a child without creating the other parent. In historic genealogy terms, it is just a fact that this more usually occurs that the mother is known, but the father isn't.

To easily handle this option, select "Children" from then "Edit" menu whilst you are editing the known parent, then select "Add illegitimate child without father". The option will be worded slightly differently if the selected person isn't female. This will create a new "family" in which the mother is one of the parents, but won't create a record for the other parent. A new child record will be added to this "family". The status of the "family" will also be set to "Never Married" and the child's linkage in the family will be set as illegitimate.



A similar situation can occur where you just don't want to create a record for the other parent, but the child isn't illegitimate. In this case, there is a similar option on the "Children" item of the "Edit" menu, that creates a new "family" where the active person is a parent, but doesn't create the other parent, and then adds the child to this "family". The status however isn't set to "Never Married", nor is the child flagged as illegitimate.

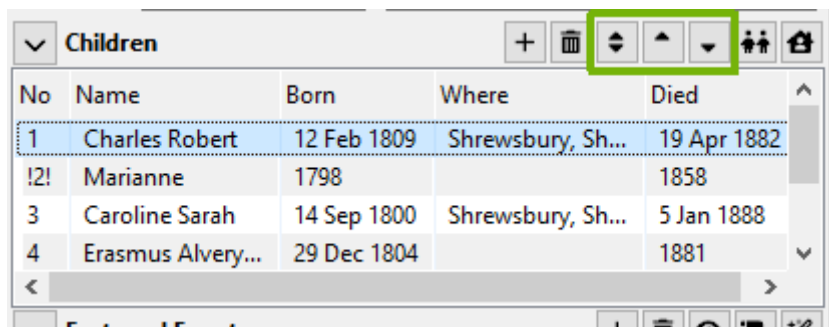
If you need to add more children to either, use the "Add child to this family" option, with the known parent as the active person

Arranging children

Children can be added and deleted, from the Children grid, below the main person details. **Note:** The list of children is specific to those with the active spouse (see section on Multiple Partners and Spouses).

It is best practice in genealogy that children are shown in birth order. This is often obvious if we have the dates of birth for them. However, it isn't necessarily obvious in the case of twins. Also, particularly with older genealogies, the birth order might be known (for example children are often listed in seniority in wills), but years of birth aren't.

There are tools in Pedigree Forge to help you identify children that may not be in birth order, automatically sort them, or manually move them up and down if required.

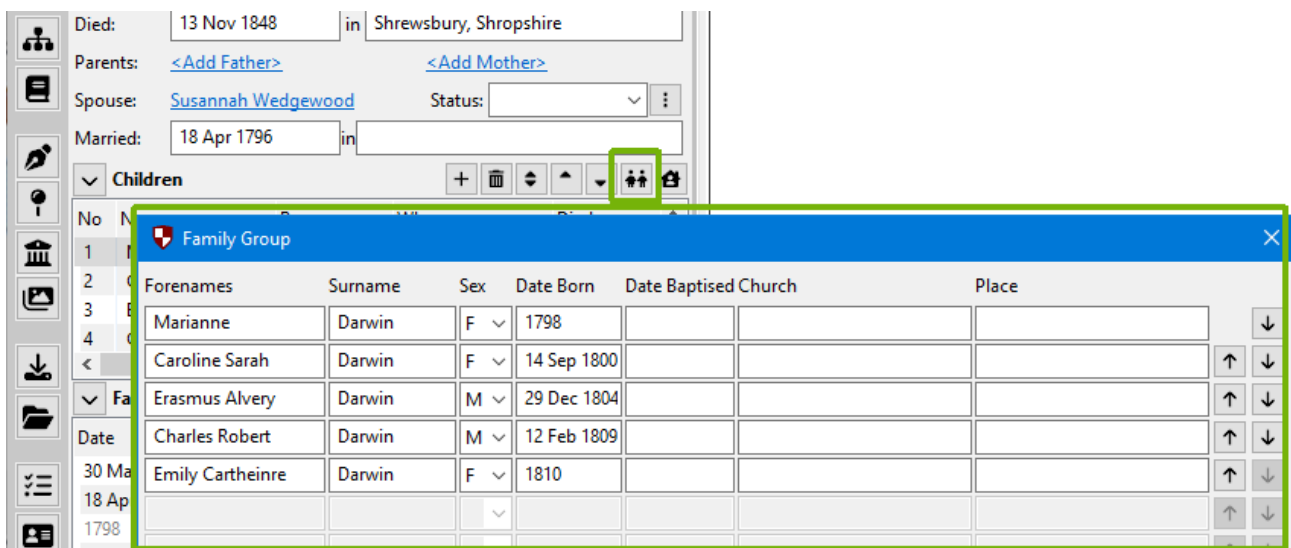


No	Name	Born	Where	Died
1	Charles Robert	12 Feb 1809	Shrewsbury, Sh...	19 Apr 1882
2!	Marianne	1798		1858
3	Caroline Sarah	14 Sep 1800	Shrewsbury, Sh...	5 Jan 1888
4	Erasmus Alvery...	29 Dec 1804		1881

In the example above, Pedigree Forge has noted that Marianne is shown after Charles, and as their dates of birth are known, there is an error in the ordering (Marianne has exclamation marks around her order number).

The “up and down” arrow button will automatically sort the children into chronological order—so long as the dates of birth are known. The in individual up and down arrows will move the selected child up or down manually.

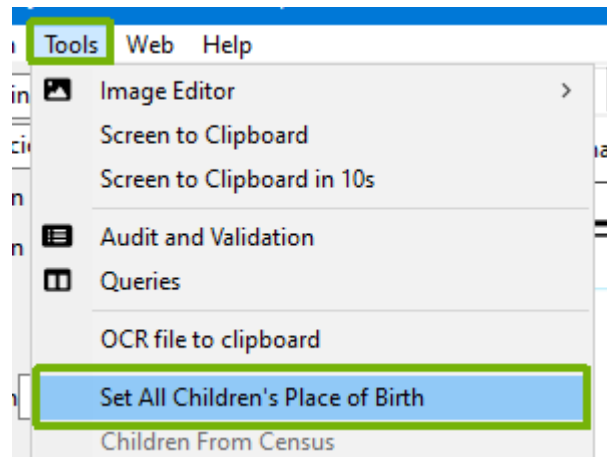
It is a common task, particularly before the start of civil registration, to add children based on baptisms from a particular church, and these are often extracted at the same time. To help with entering this information, the “Family Group” dialog can be shown by clicking on the two children button, above the children grid:



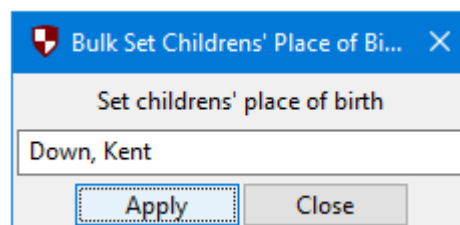
No	Forenames	Surname	Sex	Date Born	Date Baptised Church	Place
1	Marianne	Darwin	F	1798		
2	Caroline Sarah	Darwin	F	14 Sep 1800		
3	Erasmus Alvery	Darwin	M	29 Dec 1804		
4	Charles Robert	Darwin	M	12 Feb 1809		
5	Emily Cartheinre	Darwin	F	1810		

This allows dates of birth, and baptism to be edited together in a single place. The final button can be used for creating children from a census transcript. See the section Working with Sources section, for further information.

It wasn't uncommon for ancestors to have had a large number of children, all of whom were born in the same village. If you have added a number of children, with approximate dates of birth, but no place of birth, these can all be set at once. First, ensure that you have the correct parents selected, with one of them as the current person in the edit panel, and the other as the selected spouse. Then click on the "Set All Children's Place of Birth" option from the "Tools" menu:



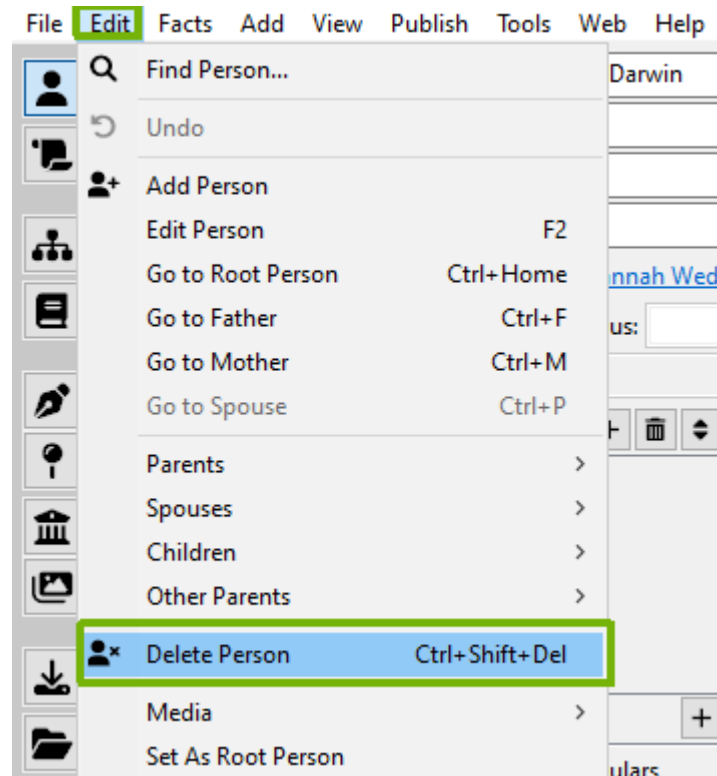
The "Bulk Set Children's Place of Birth" dialog will allow you to enter the place of birth, and Apply will do the bulk change.



Note: only children with no place of birth for the current couple will have the information added. If a child already has a place of birth, it will not be added.

Deleting people

Sometimes you will have made a mistake, and need to delete a person from the project. There are various ways you can do this, but one way is by making sure the person you wish to delete is the currently selected person (i.e. it is them that is shown in the edit panel). Then select “Delete Person” from the “Edit Menu”:



You will be prompted to confirm:



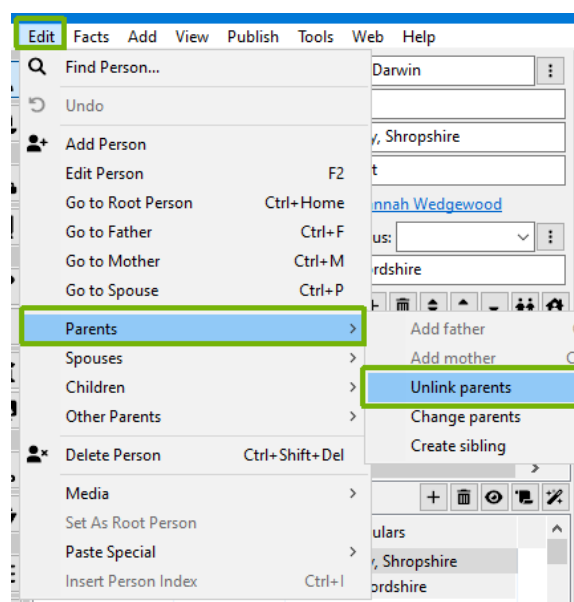
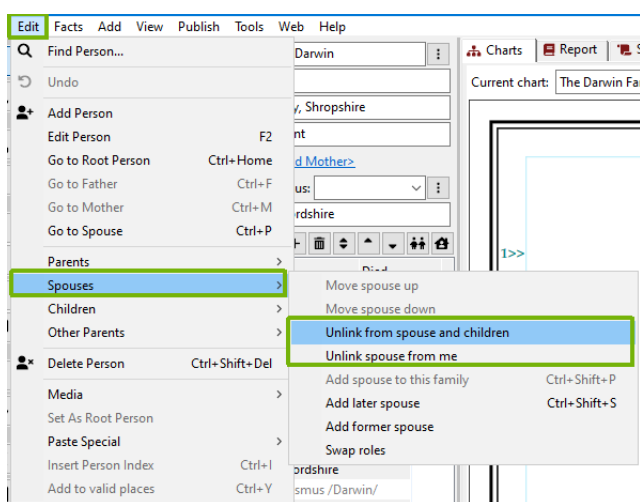
Click “OK” will delete the person from the database. If you realise you have made a mistake, before having made any other changes, you can use “Undo” from the “Edit” menu.

Unlinking people from spouses or parents

If you have linked to people together, either as spouses, or as parents, by mistake, you can unlink them. This will remove them either from being a spouse in the currently selected couple, or from the family in which they appear as child.

Ensure the person you wish to unlink is the active person, i.e. they are the person who appears in the edit panel. Then select the option required from the “Edit” menu. For example, to unlink from the current spouse, choose “Spouses” > “Unlink...”.

Note: there are two options: “Unlink from spouse and children” will unlink the currently selected person from this family with a spouse/and or children; “Unlink spouse from me” will unlink the spouse from this couple, leaving the current person still linked to any children.

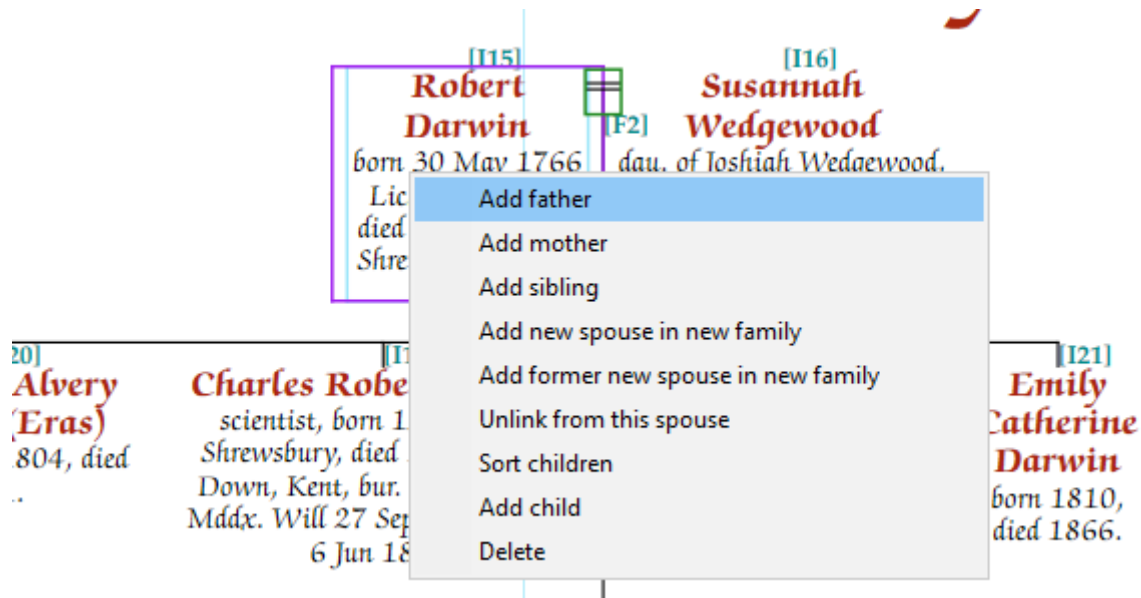


You will be prompted with a dialog to confirm you are sure, and then the unlink will be applied.

If you have made a mistake, you can use “Undo” from the “Edit” menu to undo the unlink, so long as you haven’t made any other changes in between.

Editing visually via the family chart

Many editing actions can be done in more than one place. It is often convenient to edit people from the on-screen family charts. To do this, right clicking on someone in the chart (when the chart isn't in edit mode), will display a pop-up menu with various options:

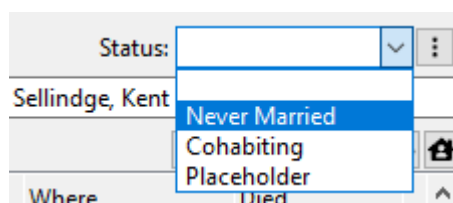


Couple status

The status of a couple is a complicated thing—perhaps more so in modern times than when entering ancestors.

By default, when you enter two people as a couple, the assumption made by Pedigree Forge is that they are married, and will be referred as such in reports. This is because that was the most normal situation in the past. So, a couple are assumed to have married, even if a marriage fact hasn't yet been added.

If a couple had never married, then select “Never Married” from the “Status” drop-down, next to the spouses name:

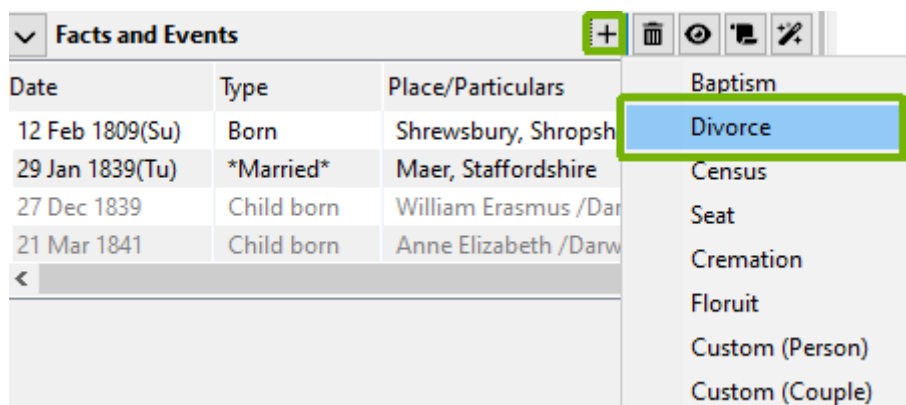


Couples that never married are shown on charts with an “x” symbol, rather than an “=” symbol.

In modern times, people are more likely to choose not to marry, and so “Cohabiting” can be selected. They are shown on charts with the usual “=” symbol, which is more polite, but reports will use terms like partner, rather than stating a marital relationship.

The “Placeholder” options is used if you know someone had several children, but you aren't sure by which spouse they were conceived.

To indicate that any couple separated, or a married couple divorced, add a separation or divorce fact to their facts and events:



Date	Type	Place/Particulars
12 Feb 1809(Su)	Born	Shrewsbury, Shropsh
29 Jan 1839(Tu)	*Married*	Maer, Staffordshire
27 Dec 1839	Child born	William Erasmus /Dar
21 Mar 1841	Child born	Anne Elizabeth /Darw

The date can then be added, and citations linked, like other facts or events.

Marriage annulments can also be added as a fact/event, but as this is an uncommon type of fact, it has to be added from the “Add Couple Fact” section of the “Facts” menu.

The use of the word “marriage” is a generic umbrella term that covers more than just traditional marriages. Subtypes of “marriage”, for example: “civil partnership”, “common law”, can be selected from the fact editing section:

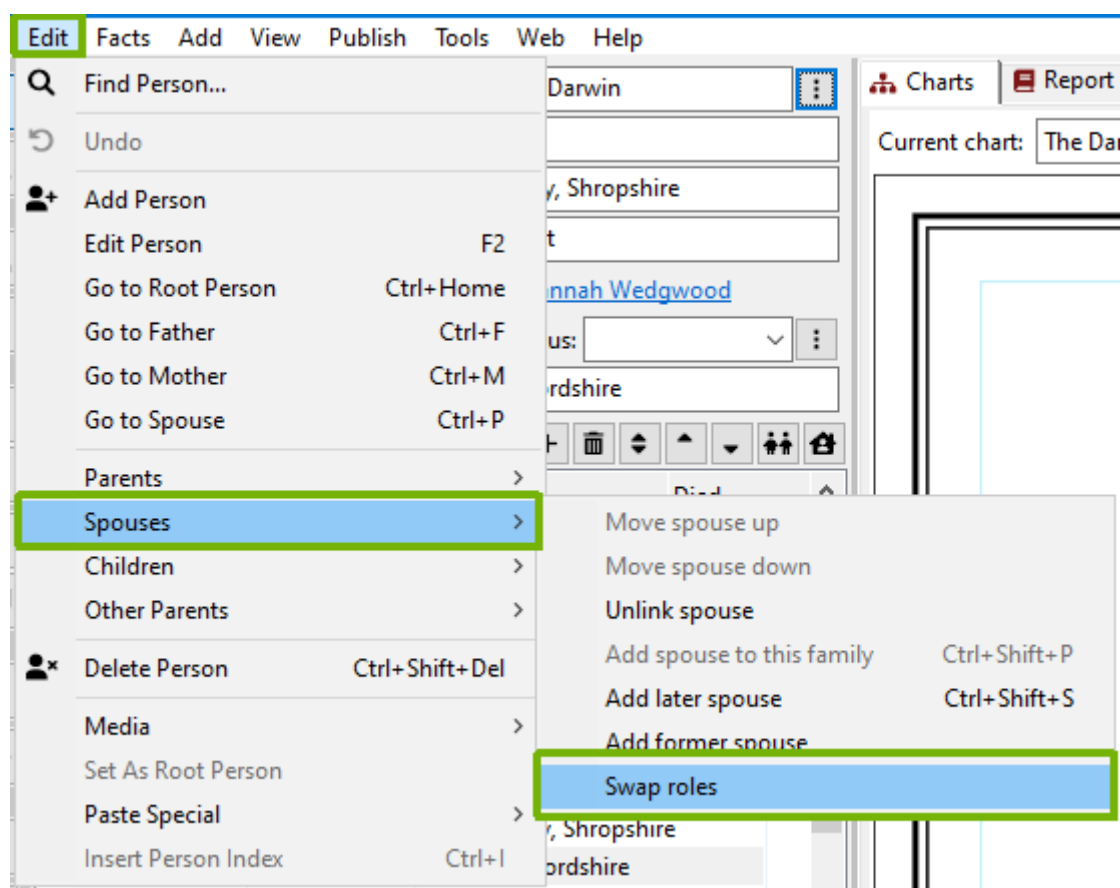
Husband or wife

Pedigree Forge allows same-sex couples, and doesn't usually distinguish between the "husband" or "wife", except in one specific scenario, as outlined below. The "husband" can be female and the "wife" can be male so "Partner 1" and "Partner 2" might be better terms.

Traditionally on family charts, the husband is placed to left of the wife, unless there is more than one wife, in which case the husband is flanked by the wives. Pedigree Forge uses "husband" and "wife" for this placement when creating charts.

By default, when creating a couple, the male is set as the "husband" and the female as the "wife". If no sex has been assigned, the first of the couple is set as the "husband" and the other as the "wife".

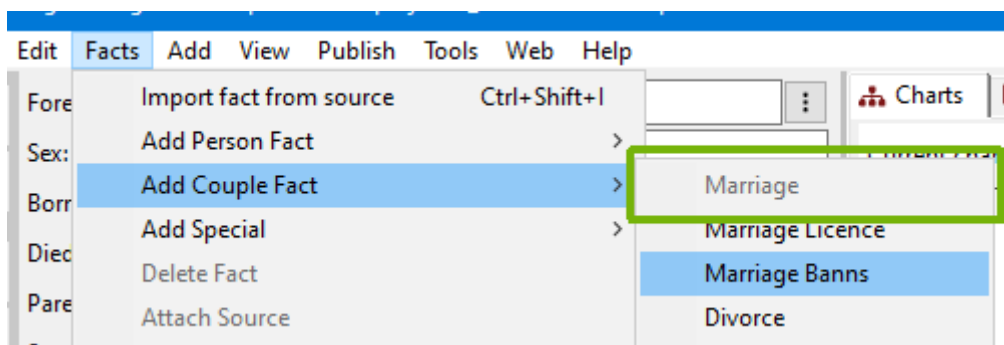
You are able to switch the roles for the active couple, if you prefer them to be represented the other way round on charts. First, ensure that the person being edited is one member of the couple, and the current spouse is the one who you wish to swap. Use the "Edit" menu to selected "Spouses" and "Swap roles".



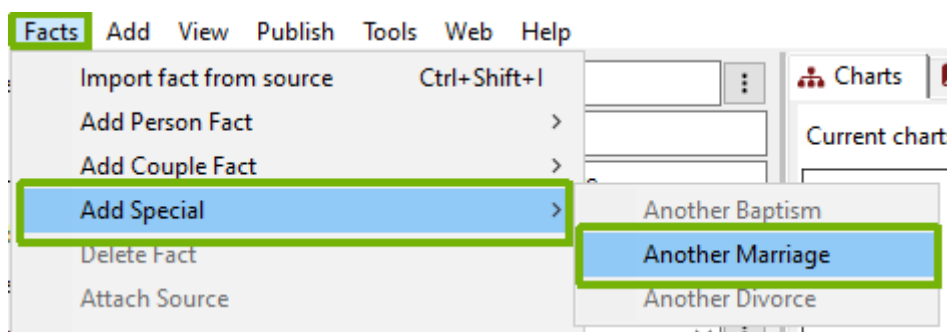
Technical note: these roles are also used when importing and exporting to GEDCOM, i.e. the "husband" is exported as the HUSB tag and the "wife" as the WIFE tag, likewise, when importing from GEDCOM, these tags are imported in this way. This is an historic artefact of the GEDCOM format.

Multiple facts and events that usually only occur once

Two help prevent common errors, Pedigree Forge, by default, will only allow one occurrence of a fact or event that *usually* happens once. For example, *nearly* always, the same couple only married once, so if you go to add a second marriage for the same couple, Pedigree Forge will stop you as it is *probably* a mistake. In the example below, the active couple already have a marriage fact, so the option to add another is unavailable (greyed out text) from the facts menu:



However, some couples did marry more than once. It isn't unheard of for a couple to marry, get a divorce, and then later remarry. For situations such as this, where you do really want to add a second marriage event, use the "Add Special" option from the "Facts" menu.



The following example is for Elizabeth Taylor, who was married several times, including twice to the same man, Richard Burton. When Richard is the active spouse, there are two marriage events (1964 and 1975), both for the current couple. We can set one of these as the "preferred" date, i.e. that which will be shown in charts and used by default. To do that, right click on the item in the list then select "Make preferred marriage".

Forenames: Elizabeth Rosemond Surname: Taylor

Sex: F Occupation: actress

Born: 27 Feb 1932 in London

Died: 23 Mar 2011 in Los Angeles, California

Parents: <Add Father> <Add Mother>

Spouse: 5/7 Ricahard Buton Status:

Married: 1964 in

> Children

▼ Facts and Events

Date	Type	Place/Particulars
1957	Married	
1959	Married	
1964	*Married*	
1975	*Married*	
1976	Married	

Date: 1964 in

Address:

Age: Trade:

Lived at:

By:

Citations:

+ -

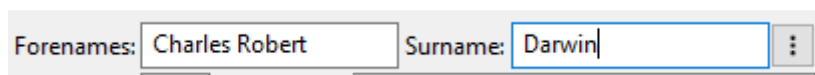
> Notes

> Media

- Add Baptism
- Add Divorce
- Add Burial
- Add Cremation
- Add Will
- Add Seat
- Add Custom
- Delete
- Witnesses
- Add source citation
- Add local citation
- Import fact from source
- Make preferred marriage

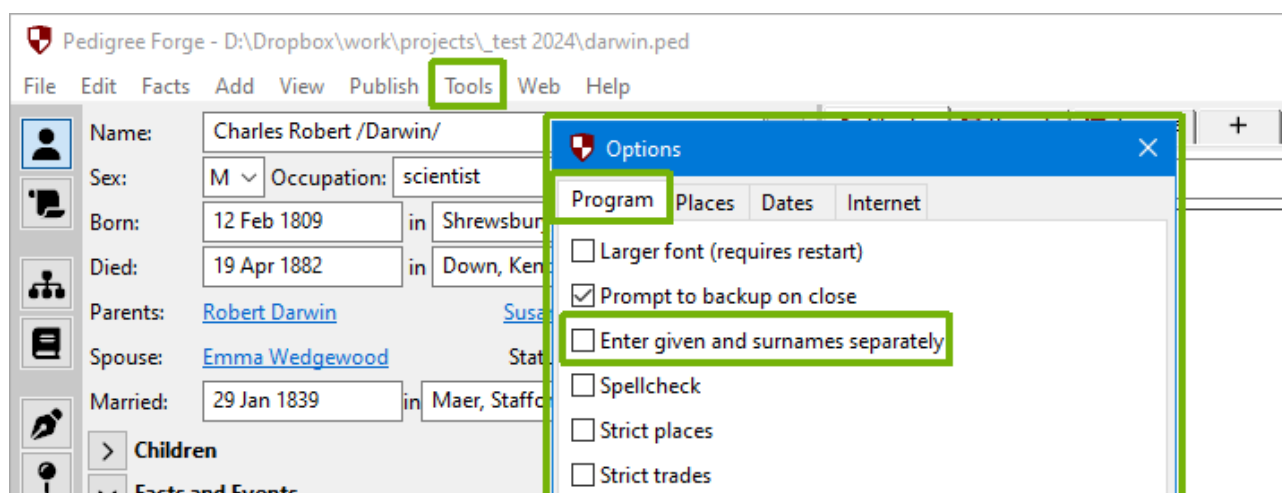
Personal names

By default, Pedigree Forge allows names to be entered as Forename(s) in one field, then a surname in the next:

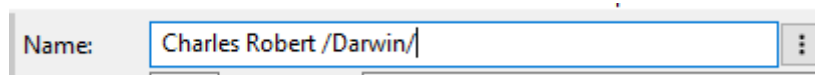


Forenames: Surname: ⋮

For users familiar with other genealogy software, you may prefer to enter names in a single field, with the convention that the surname is enclosed in forward slashes. To switch modes, select “Options” from the “Tools” menu. The option is on the “Program” tab:



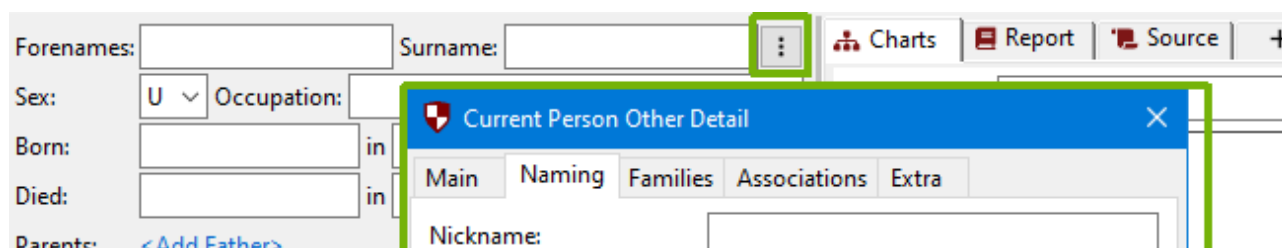
Names can then be entered in the combined single field:



Name: ⋮

This preference is saved, so you only have to do it once.

More naming options can be found on the “Current Person Other Detail” dialog, accessed from the ⋮ button, next to the name:



Nicknames

It is quite common for someone to be known by a nickname. Charles Darwin's brother, Erasmus Alvery Darwin, was allegedly known as "Eras". The above example shows how the nickname can be entered.

Entering a name here will then show it as a nickname on charts and in reports for example:

Name: Erasmus Alvery /Darwin/

Sex: M Occupation:

Born:

Died:

Parents:

Spouse:

Married:

> Chil

✓ Fact

Date

Current Person Other Detail

Main Naming Families Associations Extra

Nickname: Eras

First name unused: ☐

Call name:

Prefer nickname: ☐

Civic/Noble Title:

Name Prefix:

Charts

Current ch

[I20]

Erasmus Alvery Darwin (Eras)
born 29 Dec 1804, died 1881.

Usually, in reports, people are referred to by their full given name. However, if the "Prefer nickname" check box is set, then the full given name is only used in titles, and in normal narrative text, the nickname is used.

Although there are no hard rules, a nickname is usually something other than one of the formal given names, or possibly a shortened variant of one of them. Someone called John, might have a nickname of Jack for example, or Elizabeth, might have a nickname of Betty.

Known by second given name

It isn't uncommon for someone to be better known by their second given name. The "First name unused" check box on the Current Person Other Detail dialog, can be checked to indicate if this is the case:

Name: Joseph Rudyard /Kipling/

Current Person Other Detail

Main Naming Families Associations Extra

Nickname:

First name unused: ☒

Call name:

Prefer nickname: ☐

(Joseph) Rudyard Kipling
journalist/poet, born 30 Dec 1865 Bombay, India, died 18 Jan 1936 Fitzrovia, Mddx.

The full name will be used in narrative reports in formal situations, but the next given name will be used most of the time.

Call name

A call name is the name someone was commonly known as, but more formal than a nickname, or not just dropping of their first middle name, although the distinctions are blurred. The call name is used in most occasions within narratives, after they have been introduced by their full name.

Surname variants

It isn't uncommon to find an ancestor's surname written in a variety of ways. These variations are sometimes simple mistakes made by the clerk, but can vary quite a lot on occasions, and it is useful to document them. Christopher Marlowe, for example, had his baptism recorded as *Marlow* and on one document, signed his name as *Marley*. If we wanted to record this, we can use the surname variants box, on the "Naming" tab of the Current Person Other Detail dialog:

edigree Forge - [untitled]

Edit Facts Add View Publish Tools Web Help

Name: Christopher /Marlowe/

Sex: M Occupation: playwright

Born: abt 1564 in Canterbury, Kent

Died: 30 May 1593 in Deptford, Kent

Parents: <Add Father> <Add Mother>

Spouse: <Add Spouse> Status:

Married: in

Children

No	Name	Born	Where	Died
----	------	------	-------	------

Facts and Events

Current Person Other Detail

Main Naming Families Associations Extra

Nickname:

First name unused: ☐

Call name:

Prefer nickname: ☐

Civic/Noble Title:

Name Prefix:

Name Suffix:

Alias name:

Alias type:

Alias text:

Surname variants: Marlow, Marley

Surname certainty or type:

Translated name:

(in language):

New Chart Zoom: 112% 1 of

Christopher Marlowe
also written Marlow or Marley,
playwright, born c. 1564 & bapt.
26 Feb 1564 Canterbury, Kent,
died 30 May 1593 Deptford,
Kent.

Multiple variants can be entered, separated by commas.

Surname certainty

It is convention to enter ladies with their maiden surname. For more distant ancestors, we sometimes don't know this for certain. For example, we may know that a lady was a widow (as she was recorded as such when she married), but we don't know her original maiden surname. Commonly, prior to the start of civil registration, the source of the mother's surname is based on a marriage, and we might have found a possible marriage, but not be certain it is the correct one, and so unsure of the mother's surname. We can use the Surname certainty or type box to indicate this. The surname is then treated with caution in narrative reports, and shown with a question mark on charts, if applicable.

Surname variants:

Surname certainty or type:

Translated name:

(in language):

Pronouns to use:

possible
probable
possible maiden surname
former married

Alias names

Alias names are full names that a person was also known by. For example, they may have changed their name, either due to legitimate reasons, or adopted an alias to try and intentionally hide a former identity. If a child was born before his or her parents married, then their birth might have been registered under the mother's maiden name. It wasn't uncommon for people to change names when they emigrated to another country, to integrate with the local population.

The screenshot shows the 'Current Person Other Detail' dialog box in Pedigree Forge. The 'Naming' tab is active, showing fields for various name-related information. The main window in the background displays the profile of a person named Angelo/Soliman/, born around 1721 in Cameroon and died in 1796 in Vienna, Austria. The 'Naming' tab includes fields for Nickname, First name unused, Call name, Prefer nickname, Civic/Noble Title, Name Prefix, Name Suffix, Alias name (Mmadi Make), Alias type (birth), Alias text, and Surname variants. A preview of the name card on the right shows 'Angelo Soliman' with birth and death details.

An alias name and type, can be selected from the “Naming” tab of the “Current Person Other Detail” dialog, accessed from the button, located next to the name field.

Pedigree Forge only currently supports one alias per person.

Translated name

Pedigree Forge is designed to mainly work with British conventions. It is possible to enter a name in a different language, which will then be shown in charts and listed in reports (subject to support in system fonts).


In the example below, a Hebrew name has been entered, and is shown on the accompanying charts.

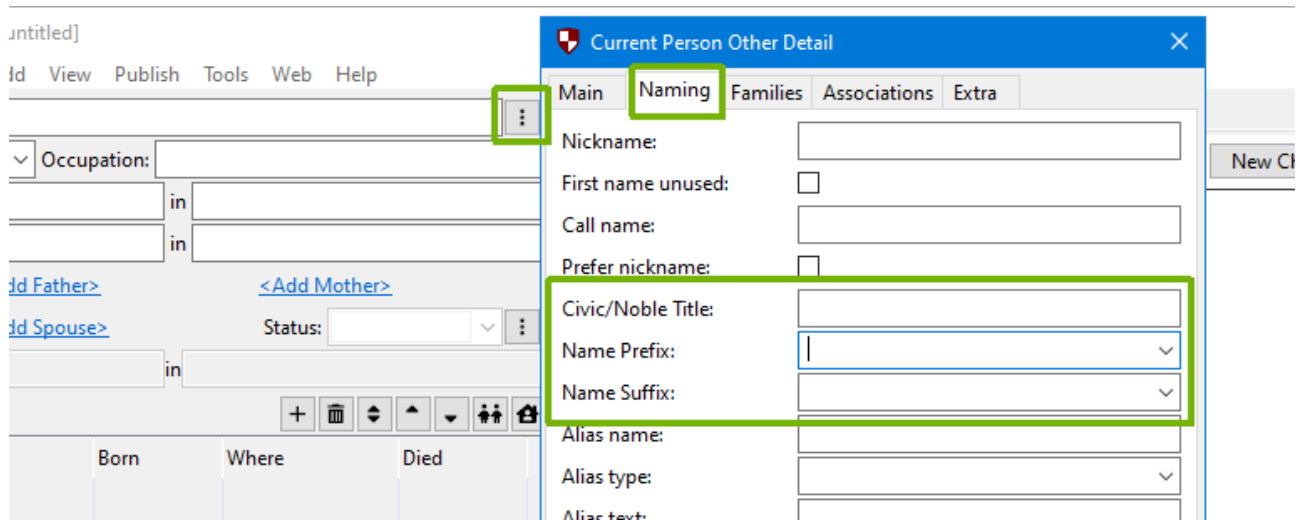
Note: Hebrew is a right-to-left language—entering text in Hebrew will insert each letter at the left end of

The screenshot shows the 'Current Person Other Detail' dialog box in Pedigree Forge. The 'Naming' tab is active, showing fields for various name-related information. The main window in the background displays the profile of a person named Moses Haim /Montefiore/, born on 24 Oct 1784 in Tuscany and died in 1885 in Ramsgate, Kent. The 'Naming' tab includes fields for Nickname, First name unused, Call name, Prefer nickname, Civic/Noble Title, Name Prefix, Name Suffix, Alias name, Alias type, Alias text, Surname variants, and Translated name (חיים בן יוסף). A preview of the name card on the right shows 'Sir Moses Haim Montefiore' with birth and death details.

the text, which is the opposite of entering English text. This is the only place that Pedigree Forge will handle bi-directional text correctly.

Formal titles, name prefixes and suffixes

Formal titles, name prefixes and suffixes can be added and are then used in charts and narratives. These are added in the same place: The naming tab of the “Current Person Other Detail” dialog, accessed from the  button, located next to the name field.



The screenshot shows the "Current Person Other Detail" dialog box with the "Naming" tab selected. The background form shows fields for Occupation, in, in, Status, and Born/Where/Died. The dialog box has tabs: Main, Naming, Families, Associations, Extra. The Naming tab contains the following fields:


- Nickname:
- First name unused: ☐
- Call name:
- Prefer nickname: ☐
- Civic/Noble Title:
- Name Prefix:
- Name Suffix:
- Alias name:
- Alias type:
- Alias text:

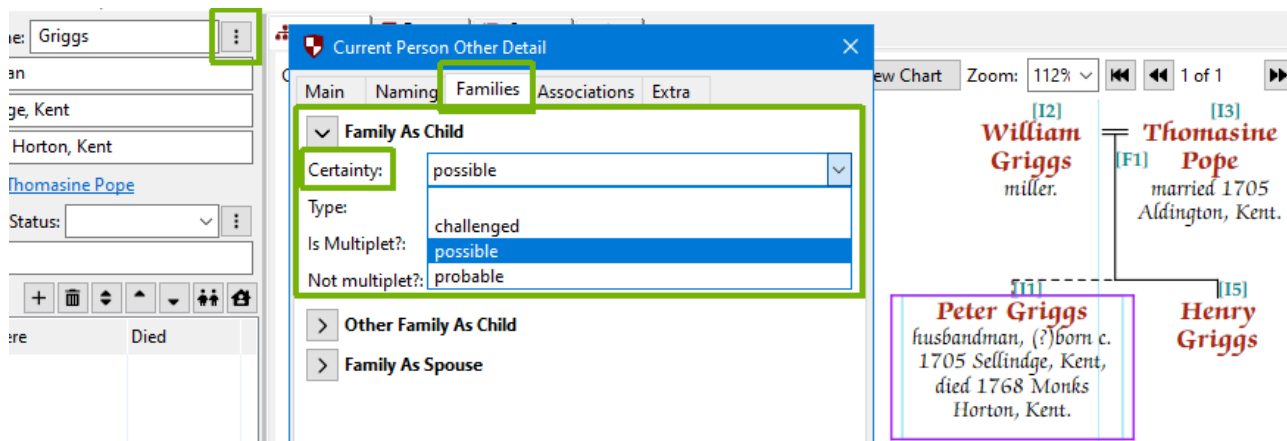
The Civil/Noble Title field is completely free form. Some suggestions might be: “Mayor of London”.

The Name Prefix and Suffix fields have a pre-populated list of some common prefixes and suffixes from which to choose, but also allow you to enter your own if you need something from outside this list.

Some example of prefixes include: “Dr.”, “Rev.”, “Sir”, “Capt.”, “Lady”. Some examples of suffixes include “MBE”, “MD”, “Senr.”


Uncertain parentage

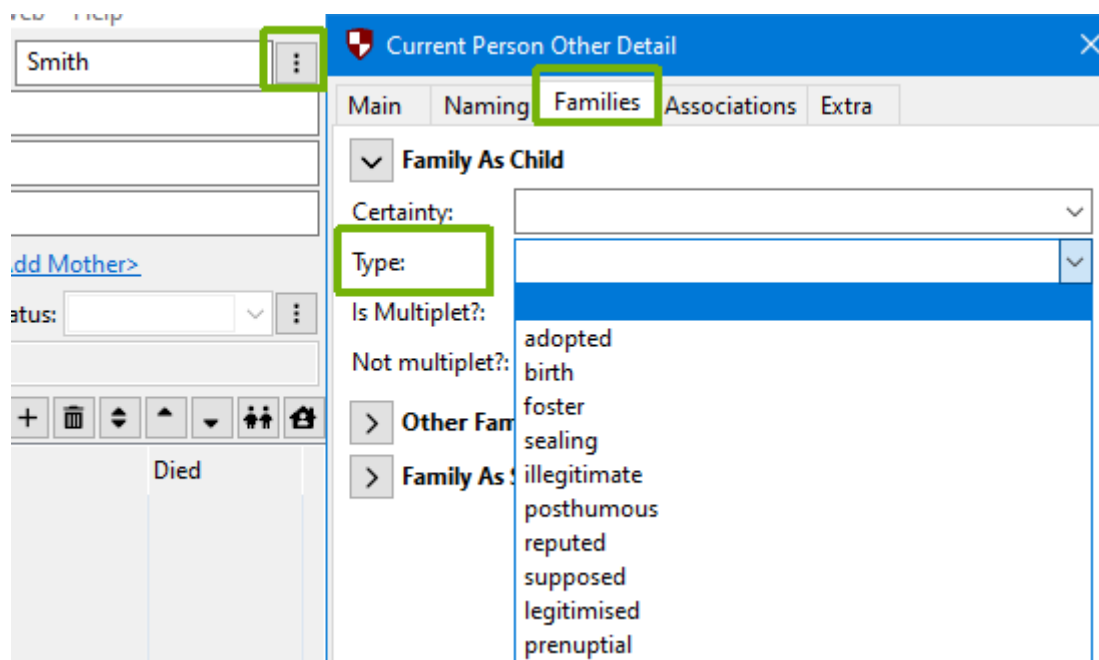
Even after thorough research, sometimes someone's parentage might be uncertain. Conventions have developed that this sort of information is useful to capture (as the proof might one day be forthcoming), but to distinguish that there isn't enough proof to be sure. These connections are often shown on family charts with dashed or dotted, rather than solid, lines. This can be set via the "Certainty" box on the "Families" tab, of the "Current Person Other Detail" dialog, accessed from the  button, located next to the name field.



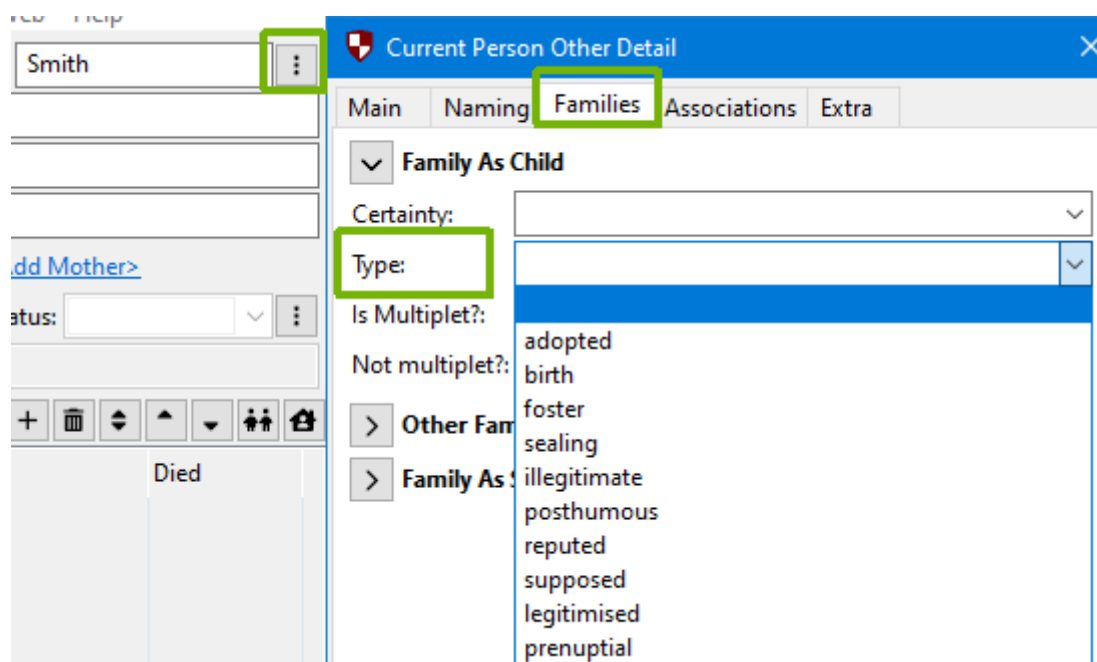
In the example above, the "Family As Child" certainty has been set to possible, and so the connection between Peter and his parents is shown with a dashed line, rather than a solid line.

Parental linkage

Not all parental situations fit into the two biological parents scenario, with step-parents, foster-parents, adoptive parents, all potentially needing to be recorded. More information on adoption can be found in a separate section, but different types of linkage can be recorded in the "Type" drop down box of the "Families" tab on the "Current Person Other Detail" dialog, accessed from the  button, located next to the name field.



The use of these will effect how narratives are written. Suggest uses are as follows:



Adopted: Use for the adopted parents of an adopted person—see section on adoption for more information.

Birth: Use for the birth parents of an adopted person—see section on adoption for more information. It is suggested that this isn't used for non-adopted persons, as birth linkage is assumed to be the default.

Foster: Use for the foster parents.

Sealing: Do not use—included for GEDCOM compatibility only.

Illegitimate: Use to record that the child was born out of wedlock. It is suggested that this is only used in historic scenarios, for example, when it was recorded in a parish register. This is mentioned in narrative reports.

Posthumous: Born after the death of the father. This is mentioned in narrative reports.

Legitimised/prenuptial: Use to record that the child was born before marriage, but that the parents subsequently wed. In narrative reports, the wording would reflect that the child was born to a couple that later married.

Supposed: It isn't uncommon in genealogy to be certain about a child's mother, but there may be some doubt about the father. Supposed is used to show that there is quite a lot of doubt about the child's paternity. Also see "Reputed" and "Nominal".

Reputed: It isn't uncommon in genealogy to be certain about a child's mother, but there may be some doubt about the father. Reputed means that the father seems to accept the child as their own, even if the evidence isn't strong enough to be certain. Also see "Supposed" and "Nominal".

Nominal: It isn't uncommon in genealogy to be certain about a child's mother, but there may be some doubt about the father. Nominal means that the father is named as such on some documents, perhaps a

marriage certificate, but evidence suggest that he may not be the biological father, perhaps the step-father. If the man is definitely the step-father, then the records should be created to reflect that, i.e. the child should be linked to the mother only, and the step-father relationship implied by her being married to the said man. Also see "Reputed" and "Supposed".

Pedigree Forge will usually automatically recognise that a child was part of a multiple birth—so long as the dates of birth are the same. The convention on family charts is that multiple births are drawn linked to their parents from a common stem, whereas other siblings have a stem each:

Thomas Hoare
born 1816
Wendover, Bucks.,
died 1882
Hastings, Ssx.

Emma Elizabeth Bird
born 1826,
died 1909.

Emma Jane Hoare
born 1846.

James Rolfs Hoare
born 1847,
died 1922.

Alice Anne Hoare
born 1849.

Thomas Hoare
born 1851.

Arthur Hoare
born 1853.

Wilson Noble Hoare
born 1854.

Kate Edith Hoare
born 1856.

Grace Maud Hoare
born 1856.

Sydney Hoare
born 1857.

Ethel Rolfs Hoare
born 1859,
died 1936.

Mary Beatrice Hoare
born 1860.

Herbert Hoare
born 1864.

Reginald Hoare
born 1865.

Ivy Mabel Hoare
born 1868.

```

graph TD
    TH[Thomas Hoare  
born 1816  
Wendover, Bucks.,  
died 1882  
Hastings, Ssx.] --- EH[Emma Elizabeth Bird  
born 1826,  
died 1909.]
    TH --- EH
    TH --- E1[Emma Jane Hoare]
    TH --- J1[James Rolls Hoare  
died 1922.]
    TH --- A1[Alice Anne Hoare]
    TH --- T1[Thomas Hoare]
    TH --- A2[Arthur Hoare]
    TH --- W1[Wilson Noble Hoare]
    TH --- K1[Kate Edith Hoare]
    TH --- G1[Grace Maud Hoare]
    TH --- S1[Sydney Hoare]
    TH --- E2[Ethel Rolls Hoare  
died 1936.]
    TH --- M1[Mary Beatrice Hoare]
    TH --- H1[Herbert Hoare]
    TH --- R1[Reginald Hoare]
    TH --- I1[Ivy Mabel Hoare]
  
```

The screenshot displays the FamilyTreeBuilder software interface. On the left, a form for 'Current Person Other Detail' is visible, showing the name 'Kate Edith' and surname 'Hoare'. The 'Families' tab is selected, and the 'Family As Child' section is active. The 'Is Multiplet?' checkbox is checked. Below this, there are options for 'Other Family As Child' and 'Family As Spouse'. On the right, a family tree diagram is shown. The central figure is 'Kate Edith Hoare' (I-10), highlighted with a green box. She is connected to 'Thomas Rolfs Hoare' (I-11) and 'Emma Elizabeth Bird' (I-12). Below Kate, her children are listed: 'Arthur Hoare' (I-18), 'Wilton Noble Hoare' (I-19), 'Kate Edith Hoare' (I-10), 'Grace Maud Hoare' (I-11), and 'Sydney Hoare' (I-12). The diagram uses red text for names and black text for birth and death dates. The interface includes various navigation and editing tools.

The “Not multiplet” check box can be used in the reverse situation—to stop Pedigree Forge from joining too children together as a multiplet—perhaps we only have approximate years of birth for two children which were within the same year (Pedigree Forge would assume they were twins), but if we know that isn’t the case, we can flag them as not a multiplet.

Adopted persons

Adoption is a complex and sensitive subject. Different adoptees have different views about how they want to trace and document their ancestry, and will often want to explore both their biological and adoptive family history. That said—particularly with the increasing use of DNA in genealogy—there is a need to distinguish genetic from adoptive relationships.

How best to document and cater for adoptees is on going work in Pedigree Forge, and so if you have personal experience, please make contact, as it would be great to hear your thoughts.

The way adoption is handled in Pedigree Forge will depend on how central it is to the family being researched.

At the most simplistic level, someone can be flagged as being adopted by setting the “Parental linkage” to adopted—see the section on Parental linkage. This will then show adopted on family charts and in narrative reports.

The screenshot shows the 'Current Person Other Detail' dialog box with the 'Families' tab selected. The 'Family As Child' section is expanded, showing the 'Type' dropdown set to 'adopted'. The 'Is Multiplet?' dropdown is set to 'adopted' and the 'Not multiplet?' dropdown is set to 'birth'.

[I1]
John Smith
(adopted), born 1 Jan
1920.

If more information is known about the adoption, then an adoption fact/event can also be added, using the “Fact” menu, then selecting “Add Person Fact” and “Adoption”. Adoption facts allow storing information about the adoption, such as dates, and links to sources.

Facts and Events

Date	Type	Place/Particulars
1 Jan 1920(Th)	Born	
1927	Adopted	

Date: 1927 in

Address: Likelihood: ▾

Age: By: ▾

Family: [F1 Hugh Jones & Mary Evans](#)

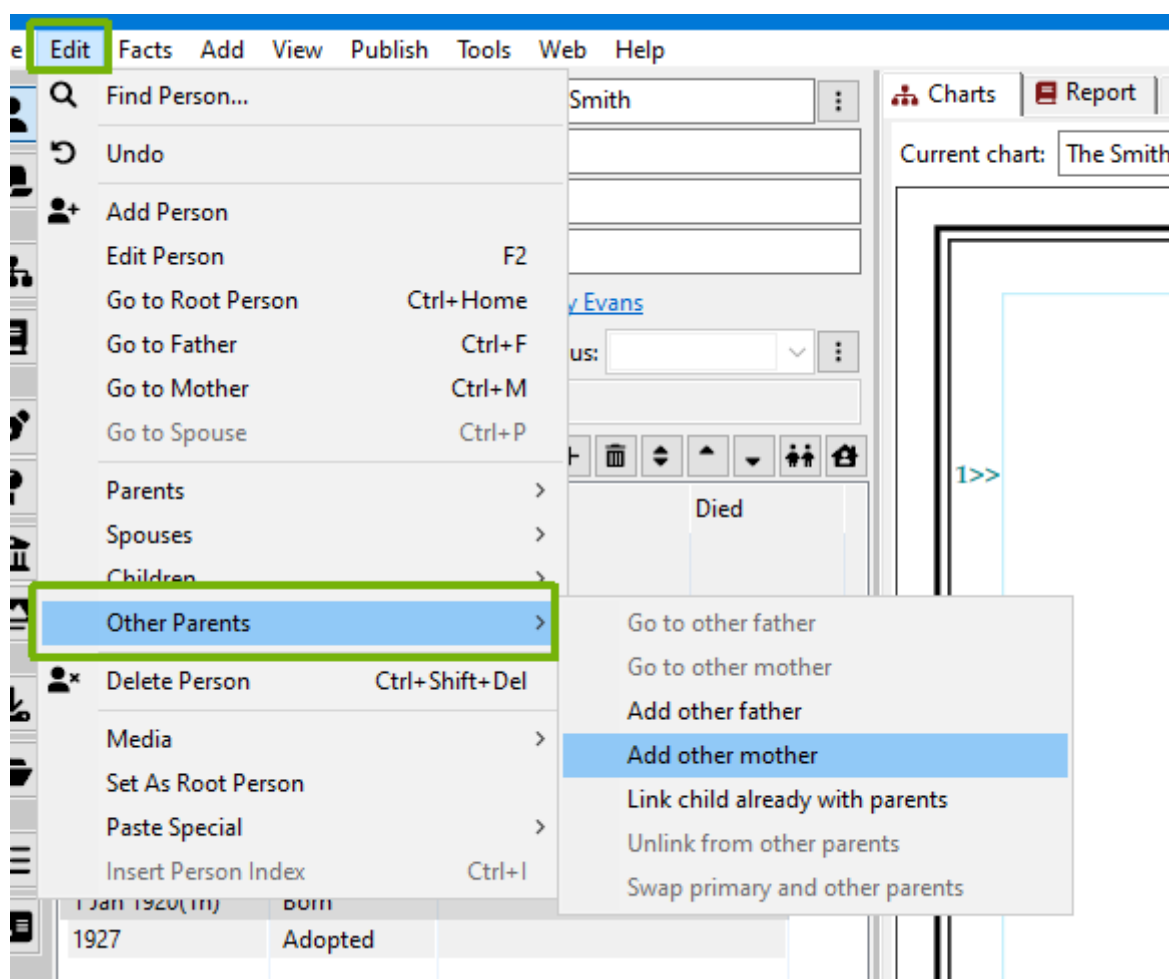
Citations: + -

Adoption facts also allow the family adopting the child to be specified and which (or both) of the couple adopting the child. (This is based on the mechanism in GEDCOM).

Note: A child with an adoption fact still needs to be linked to parents in the usual way. Setting the family in the adoption fact doesn't create linkage to the parents.

The above only cover the case where only one family: either the adoptive or the biological family is being followed. Pedigree Forge does allow a person to be linked to two families where they are a child, and so both can be explored.

To add another parent or set of parents to a person, use the "Other Parents" item on the "Edit" menu, whilst editing the adoptee.

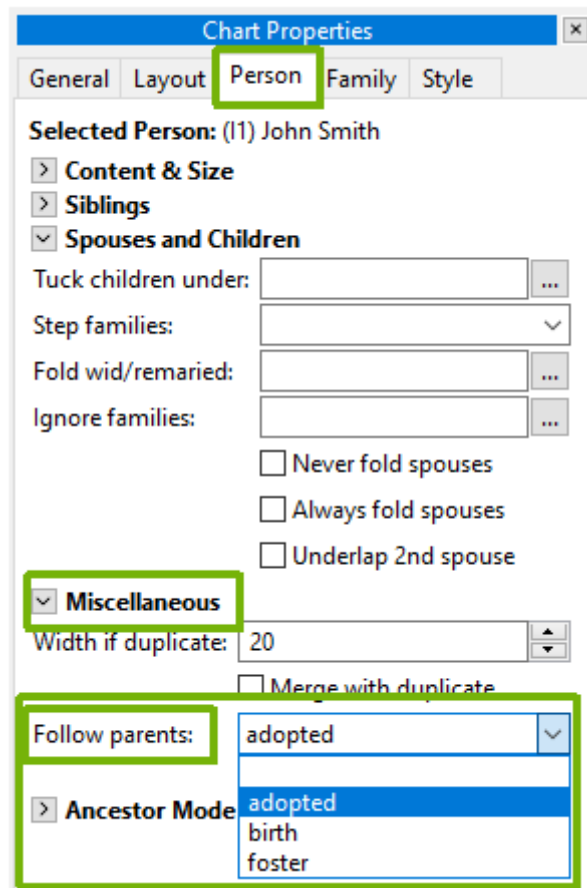


The definition of which are the “primary” and which are the “other” parents can be changed—the “primary” parents are those currently being worked on, and this allows easier navigation. The “other” parents are those not currently being worked on. Use the “Swap primary and other parents” option on the menu to switch between them.

Assuming that one set are birth parent(s), and the other are adoptive parent(s), then the relevant linkage should be set for each set, i.e. “birth” or “adopted”, as described at the start of the adoption section.

When drawing descendant type charts, and lists of children in narratives, the adoptee will be shown on those for both sets of parent(s).

When building charts that follow ancestry back (for example birth briefs), there is an option available on the “Chart Properties” panel that show which (adopted, birth or foster) should be followed on that particular chart. This is in the “Miscellaneous” section on the “Person” tab:




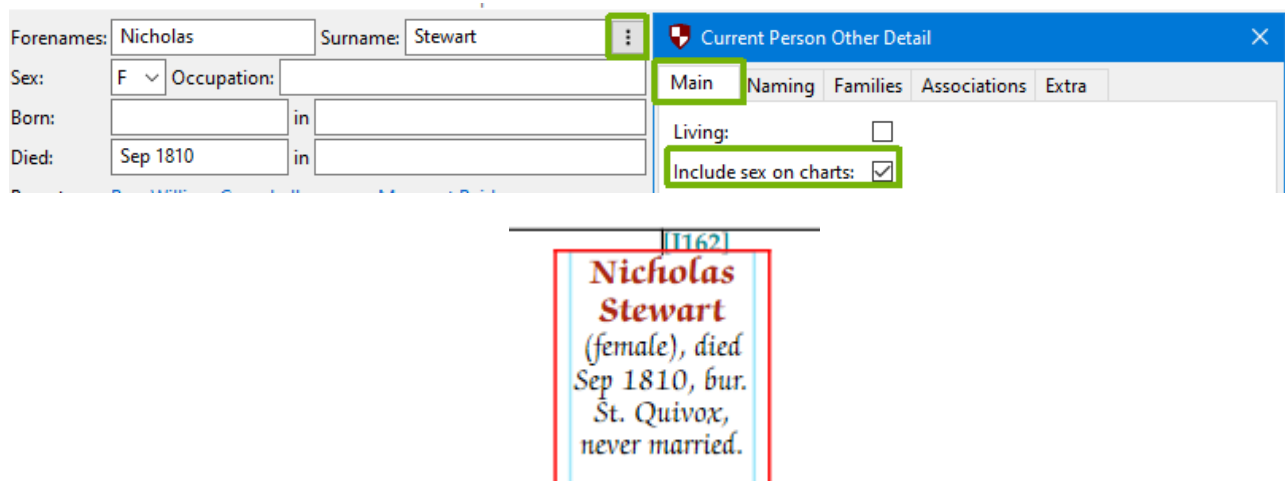
When building reports, configuration can be set to follow the birth then adopted/adopted then birth, only adopted, or only birth families—see section on reports.

Technical note: At present, Pedigree Forge only supports two sets of parents. This keeps the user interface as simple as possible, for something that is already complex. Future extensions may allow more families to be supported.

Including sex on family charts

Typically, sex isn't included on a family chart, but there are a few occasions when it is useful. For example, where a child died very young, and wasn't named, or if someone had a given name that people are more familiar with being of the opposite sex. For example, Philip and Nicholas are traditional mostly male names, but both have been used as female names in the past.

This can be set on the "Main" tab of the "Current Person Other Detail" dialog box, accessed by clicking on the  button next to the name box.



The screenshot shows the 'Current Person Other Detail' dialog box with the 'Main' tab selected. The 'Include sex on charts' checkbox is checked. Below the dialog box, a snippet of a family chart is shown for individual I1621, Nicholas Stewart, with the text '(female), died Sep 1810, bur. St. Quivox, never married.'

This flag also includes the sex when listing children in reports.

Pronouns

Pedigree Forge allows you to specify pronouns for individuals to promote inclusivity and respect for modern identities. By default, pronouns are not displayed on family charts, and narratives use pronouns based on the individual's recorded sex. However, you can enter custom pronouns—subject (e.g., "he/she/they/xe/ze"), object (e.g., "him/her/them/xem/zir"), possessive (e.g., "his/her/their/xyrs/zirs") and reflexive (e.g., "himself/herself/themselves/xemself/zirself"). If at least the subject and object pronouns are entered, they will appear on family charts and be used in narratives.

This feature is primarily designed for modern people where pronoun usage is applicable. For historical ancestors, pronouns are optional and need not be specified unless relevant. This ensures that modern values are respected without imposing them on those from different historical or cultural contexts.

To set pronouns, use the "Naming" tab in the "Current Person Other Detail" dialog. Thoughtfully consider whether pronouns are important for the individual in question, and complete the fields as needed to reflect their identity accurately. Tooltips are shown above each field to show which tense of pronoun should go in each box:

- [untitled]

Facts Add View Publish Tools Web Help

me: Alex /Doe/

s: M Occupation:

rn: 25 Mar 2004 in London

ed: in

rents: <Add Father> <Add Mother>

ouse: <Add Spouse> Status:

married: in

Children

Name	Born	Where	Died

Facts and Events

Date	Type	Place/Particulars
Mar 2004(Th)	Born	London

te: 25 Mar 2004 in London

Current Person Other Detail

Main Naming Families Config Associations Extra

Nickname:

First name unused: ☐

Call name:

Prefer nickname: ☐

Civic/Noble Title:

Name Prefix:

Name Suffix:

Alias name:

Alias type:

Alias text:

Surname variants:

Surname certainty or type:

Translated name:

(in language):

Pronouns to use: they them their **themselves**

Ok

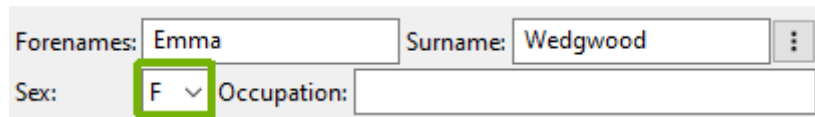
New Chart Zoom: 1

Alex Doe
they/them,
born 25 Mar
2004 London.

Technical note: Some people use different pronouns at different times. It isn't clear how this could be incorporated into reporting functionality, where decisions about which pronoun to use in which context might apply.

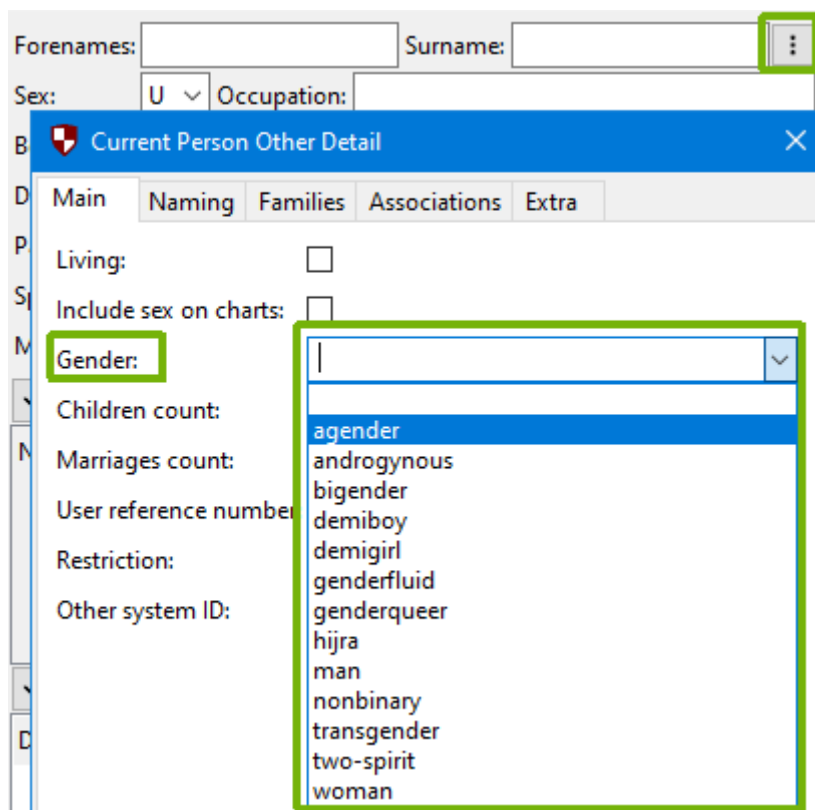
Gender and sex

The sex of each person in your Pedigree Forge project is set as one of the first fields entered after their name, from the main person editing panel. This is designed to relate to the official sex of the individual.



Forenames: Surname: ⋮
Sex: Occupation:

Gender, whilst often aligned to sex, is not the same, and can be recorded separately. This field is accessed on the “Current Person Other Detail” dialog, which is shown by clicking on the ⋮ button next to the current person’s name:



Forenames: Surname: ⋮
Sex: Occupation:

Current Person Other Detail ✕

Main | Naming | Families | Associations | Extra

Living: ☐
Include sex on charts: ☐
Gender: ⌵
Children count:
Marriages count:
User reference number:
Restriction:
Other system ID:


- agender
- androgynous
- bigender
- demiboy
- demigirl
- genderfluid
- genderqueer
- hijra
- man
- nonbinary
- transgender
- two-spirit
- woman

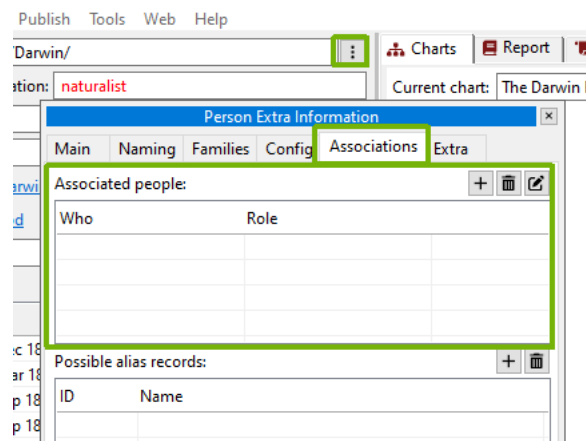
There is a list of some frequently used genders, but other values can be entered if none of these are appropriate.

Also refer to the section on pronouns.

Associations between people

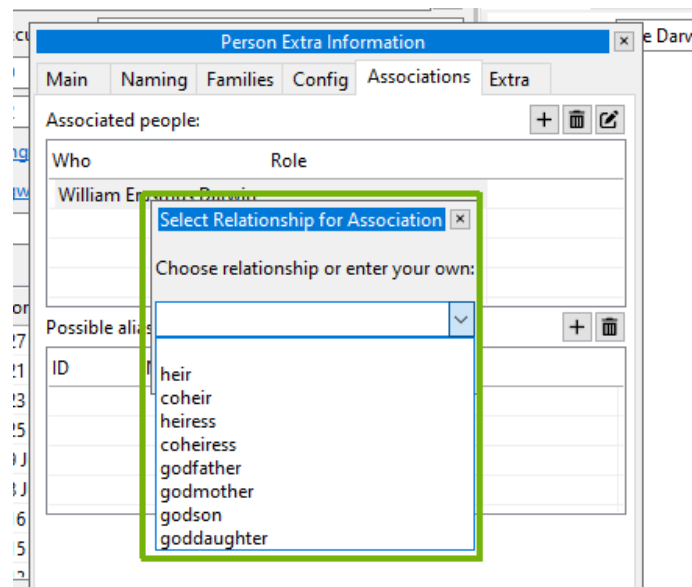
Family relationships are entered by linking people as children or parents, building a tree. For example, the relationship between grandparents and grandchildren is inferred because they are linked via the parents between. There are some types of association between people that might not be genetic, or might vary. For example, you might wish to record who the Godparents of someone were, or who was an heir to a title. These associations are added independently.

To associate two people in this way, use the “Current Person Other Detail” dialog, which is shown by clicking on the  button next to the current person’s name, then select the “Associations tab”:

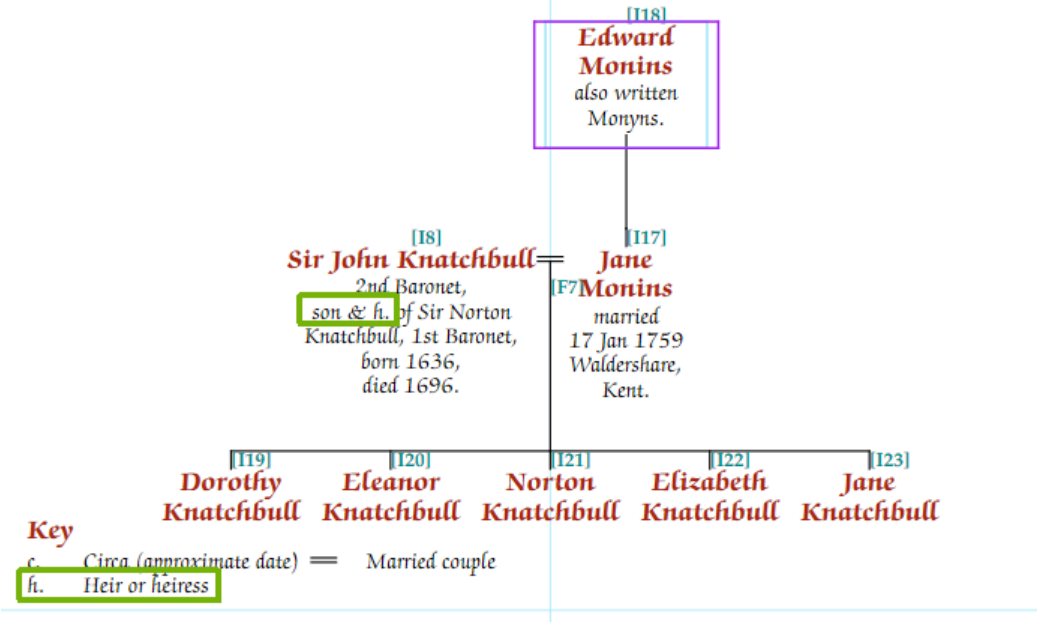


Use the buttons at the top of the grid to select people to associate, delete an association, or edit its details.

When adding/editing an association, the description of the association can be selected from the pre-populated list, or you can use your own:



Most relationships are for your own reference. Currently, those related to inheritance, i.e. heir, coheir, heiress and coheiress are used by the reports and charts. They are intended to show inheritance of a title as was often shown in old pedigrees, and will expand phrases such of “son of” or “daughter of” to “son and heir of” or “daughter and coheiress of” in certain circumstances:



Dates

The Basics

Dates should be entered into the relevant fields in the form “dd mmm yyyy” for example:

1 Jan 1940

The date input fields are more flexible than this, and can also recognise various other versions, for example 1/1/1940 or 1.1.1940, but will be corrected to the normal form as shown above. Dates can also be entered as only a year, or month and year.

Some dates aren't known exactly, for example, you might have an estimated year of birth. So dates can be entered as approximate:

Abt 1940

Will be interpreted as “about 1940”. This will be shown on charts as “c.1940”, for circa 1940. NB: alternatives for approximate are Cal (for calculated) and Est (for estimated). These are still shown on charts as “c.” but might be useful for documenting how a date was arrived at.

It is quite common to have an age at a particular date. To help enter this situation quickly, the date fields allow a basic formulae to be entered, starting with the = symbol. For example:

= 1921-8

will be corrected to

Abt 1913

Sometimes, a date is a range. This can be entered using “From” and “To”, or either alone. For example:

From 1 Mar 1852 to 10 Mar 1853

Dates can also be entered as before, after, or between:

Bef 1850

Aft 1860

Bet 1850 and 1860

Delving Deeper

Dates can also be entered in various other formats, which can convey particular meaning.

General Register Office Quarters

The General Register Office have used a long established system of indexing dates of birth, marriage and deaths by the quarters in which the event was registered: M (March), J (June), S (September) D (December). Often, these are the most precise date we have for an event, if the original certificate or extract hasn't been obtained. The GRO quarters can be entered followed by the year, for example:

M1852

Would infer that the event was *registered* in the March quarter of 1852. This doesn't mean that the event took place in that quarter—as births could be registered up to six weeks after the event, so a birth registered in M1852, might have taken place between mid-November 1851 and late-March 1852. Technical note: this isn't supported in GEDCOM, so on export to GEDCOM there is a loss in precision.

In addition to M/J/S/D, “early”, “mid” and “late” are also supported.

Decades

Sometimes a year is a too precise for an estimate, so approximate dates can be entered as a decade. For example:

1910s

Would indicate that the event took place in the 1910s.

Decades can also be prefixed with “early”, “mid” or “late”.

NB: Not supported in GEDCOM—there will be a loss of precision on exporting to a GEDCOM file.

During the Reign Of

Very old genealogies have very approximate dates; often only as accurate as the reign of an existing monarch. An example is shown below:

Temp Hen VII

Would mean in the reign of Henry VII. NB: Not supported in GEDCOM.

School terms or legal periods

Some events might be dated in scholastic or legal “terms”, for example, matriculating at a university. These can be entered with the term and year, for example:

Michaelmas 1580

The supported terms are: Michaelmas, Epiphany, Hilary, Trinity, Lent, Easter, Summer, Candlemas.

The Gregorian (New Style) and Julian (Old Style) Calendars

The calendar used in the west today is the Gregorian calendar, also known as *New Style* (NS). However, this wasn't always the case. The Gregorian calendar was adopted on different dates in different countries, for example, 1582 in most of Catholic Europe, but 1752 in Britain and its dominions; prior to this the Julian or *Old Style* (OS) calendar was in use.

The Gregorian Calendar was adopted to correct errors in the Julian Calendar, whereby the choice of leap years (compared to the earth's journey around the sun), had caused the dates to slip back compared to the seasons. By the 1500s, this amounted to around 10 days. When countries adopted the Gregorian Calendar, they also skipped days to bring them back in line.

The varying dates of adoption in different countries, regions or city states, means that it isn't enough to know a date of when an event occurred, but also the calendar in use at the time.

It is customary in genealogy, and best practice in history works generally, to record the calendar date as per the system in use at the time, and not make any adjustments for skipped days.

Pedigree Forge allows the entering of Old Style and New Style dates using the suffixes OS and NS as appropriate. For example:

1 Sep1600 OS

Would be interpreted as 1 September 1600, as per the Old Style (Julian) calendar, and is equivalent to 11 September 1600 in the Gregorian (New Style) Calendar.

1 Sep 1600 NS

Would be interpreted as 1 September 1600, as per the New Style (Gregorian) calendar, and is equivalent to 22 August 1600 in the Julian (Old Style) calendar.

When no specific calendar is specified, then Gregorian (NS) is assumed. It is possible to change this assumption from the "Dates" tab of the options dialog (from the menu bar: Tools > Options). This only changes the interpretation of the dates, no data is changed.

New Style and Old Style dates can also be combined with dual years, which indicate Modern Style, see below.

Technical Note 1: OS and NS dates are imported/exported to GEDCOM with the @#DGREGORIAN@ and @#DJULIAN@ escape sequences (GREGORIAN and JULIAN in version 7.0). If no calendar is given in the data, then no assumption is made on import/export—the date is left as was written.

Technical Note 2: It would be desirable to reject the "skipped" dates when the change was made from old style to new style calendars, but this is different depending on when the change was made and even knowing if the date is OS or NS doesn't help—we also need to know *where* the event was recorded. For example, in Britain, 2 September 1752 was followed by 14 September 1752, the intermediate 11 dates not being valid, whereas in Spain, these dates did "exist", the "missing" dates being 5 October to 14 October 1582 inclusive. Dates that don't make sense are accepted (because they do exist in some places). Warnings are shown in "balloon tips", and in validation reports, which are also combined with knowledge on where the event took place. General warnings are issued if the place can't be determined, or if there is no knowledge of the convention in a particular place.

The First Day of the New Year (Modern Style) vs. Other Styles

Sometimes conflated with old and new style dates—possibly because in England the two were both adopted around the same time—is the day on which the new year began. The west now use 1 January as the first day of each year, which is term *Modern Style*. This wasn't always the case; prior to 1752 in England, the new year started on 25 March. This is termed *Annunciation Style* or *Lady Day Style*. Scotland adopted the Gregorian calendar in 1752, but had started using Modern Style year numbering in 1600. As with new style, dates, modern style year numbering began in different times in different places, for example, in France, the Edict of Roussillon stated that from 1564, the new year was to start on 1 January—prior to that it had been reckoned differently in various regions of the country, some including: Christmas Day, 1 January (the Feast of the Circumcision), 25 March, Holy Sunday and Easter. To make matters more complicated, as Easter moved each year, if it was later the following year, than the previous, some dates between occurred twice in the same year.

Even in England, sometimes certain people had adopted the modern style numbering early than 1752, so the only way to tell is from context in an original document, such as when the year changes in a range of parish register entries.

To allow for modern style, vs. the various other styles, it is customary to use dual years, so it is clear that this has already been taken into consideration. This was even sometimes done at the time.

Pedigree Forge allows entering of both years, for example:

2 Feb 1644/5

Would indicate that this event took place in 1645 modern style, but is recorded in the original document as 1644. If only a single year is given, it is assumed the conversion to modern style has already been applied.

Technical Note 1 Dual dates are supported in GEDCOM in the Gregorian calendar, but they are only really used with the Julian calendar, which is an error in the GEDCOM specification. Pedigree Forge dual dates are exported and imported to GEDCOM in either calendar. Version GEDCOM version 7 does not support dual dates. When version 7.0 export is requested, the dual date is exported as a phrase, and the modern (generally higher) year is used. Dual dates are not automatically converted to “Old Style” as this risks automatic conversion of only around a quarter of the dates, which would potentially cause logic errors compared with the non-dual dated (and therefore non-converted) dates.

Technical Note 2 It would be desirable to reject when dual years are given after 25 March 1752, and only for dates between 1 Jan and 24 March, but this is an over simplified view, and is location dependent. These dates are therefore accepted, but warnings are issued in the form of “balloon tooltips” and in validation reports, which also take into consideration knowledge of the place where the event took place. General warnings are issued if the place can't be determined, or if there is no knowledge of the convention in a particular place.

Technical Note 3 Most of the dates used for the first day of the new year are “after” 1 January, so modern style is the year with the higher value, for example 14 February 1600/01. However, in “Christmas Style”, i.e. new year before 1 January, the modern year is the lower of the two values. This isn't covered by the GEDCOM spec, but the logical extension is that it is the second year that is the “modern” style year, and the first year that is the “original” year. So, a “Christmas Style” date would look like: “27 Dec 1532/1”. This is

how Pedigree Forge handles “Christmas Style” years. Warnings are always issued when the second year (modern) is lower than the first (local).

Technical Note 4 Leap year dates are validated correctly and rejected. This does prevent 30 February 1712 from being accepted—it is an illegal date in both Gregorian and Julian calendars but is a legal date in the Swedish calendar, due to the way that the transition was first handled.

French Republican Calendar

Pedigree Forge allows entering dates using the French Republican Calendar, in use from 1793 to 1805. Years are numbered from 1 to 14 (1793 to 1805), and the months have different names. For example:

4 Vend 1 FR

Would be 4 Vendémiaire in Year 1.

11 Nivo 14

Would be 11 Nivose, in Year 14.

The recognised month abbreviations are: Vend, Brum, Frim, Nivo, Pluv, Vent, Germ, Flor, Prai, Mess, Ther, Fruc, Comp.

The FR is optional, French Republican dates can be recognised by the month names.

Technical Note 1 French Republican Calendar dates are imported/exported to GEDCOM with the @#DFRENCH R@ (FRENCH_R in version 7).

Hebrew Calendar

Pedigree Forge allows entering dates using the Hebrew calendar, with the suffix HE, for example:

20 Csh 5636 HE

The abbreviations for the month names are: Nsn, Iyr, Svn, Tmz, Aav, Ell, Tsh, Csh, Ksl, Tvt, Shv, Adr, Ads

The HE is optional, Hebrew dates can be recognised by the month names.

Technical Note 1 Hebrew Calendar dates are imported/exported to GEDCOM with the @#DHEBREW@ (HEBREW in version 7).

Dates Before the Common Era

Dates “before the common era”, can be entered with the suffix BCE.

Technical Note 1 This feature will export and import from GEDCOM, but isn’t often used in western genealogy, so isn’t well tested.

References

[1] *The New Oxford Style Manual*, Oxford University Press, p.201-203.

[2] *A Practical Guide to Dating Systems for Genealogists*, Kenneth K. Smith.

[3] *Dates and Calendars for the Genealogist*, Cliff Webb.

[4] *The Gedcom Standard Release 5.5.1*, Family History Department, The Church of Jesus Christ of the Latter-day Saints, 15 November 2019.

[5] *The FamilySearch GEDCOM Specification, 7.0.15*, The Church of Jesus Christ of the Latter-day Saints, 3 September 2024.

Places

Describing where an event took place consists of two parts: the **place** (which is the town/village etc.) and the **address** (the actual house, farm or street address). Pedigree Forge follows this convention, and allows both to be entered when creating events.

The address is usually only shown in detailed reports, whereas the place is usually shown on charts too (charts generally only contain a summary of information).

In the example below, Luddenham, Kent, is the “place” and Oare Mill, is the address:

The screenshot shows a software interface for entering genealogical data. It features a table with three columns: 'Date', 'Type', and 'Place/Particulars'. The first row contains the data: '12 Jun 1869(Sa)', 'Born', and 'Luddenham, Kent'. Below the table, there are input fields for 'Date:', 'Address:', 'Likelihood:', and 'Time:'. The 'Date:' field contains '12 Jun 1869', followed by the text 'in', and then a field containing 'Luddenham, Kent'. The 'Address:' field contains 'Oare Mill'. The 'Likelihood:' field has a dropdown arrow. The 'Time:' field is empty.

Date	Type	Place/Particulars
12 Jun 1869(Sa)	Born	Luddenham, Kent

Date: 12 Jun 1869 in Luddenham, Kent

Address: Oare Mill Likelihood: ▼ Time:

Pedigree Forge will accept any value in the places field, although it will warn you if it doesn't understand the place, or it isn't in its database (yet).

The recommended way to enter places (and the way that they are suggested by the auto-complete) is as two parts: the town or village, then a comma, then the county/region/state/department eg:

Ashford, Kent

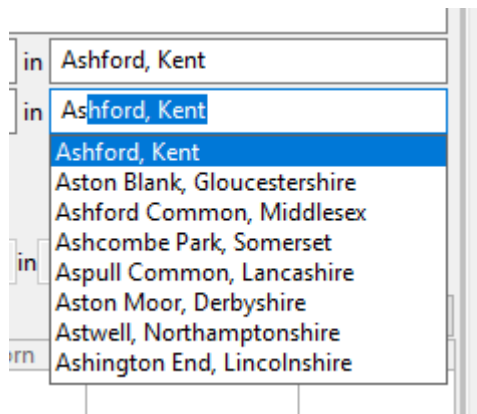
They can also be entered with the country on the end too:

Ashford, Kent, England

Pedigree Forge knows that Kent is in England, and so can infer the country, without it being entered. However, both will be accepted in the place fields, and one won't be changed to the other, so will remain as you prefer.

It is not sufficient to just use Ashford, England because there is more than one Ashford in England.

Once you have used a place which is recognised, this will be the top-auto completed suggestion when you begin to type the stem in other place boxes during the session whilst you are using Pedigree Forge. Other suggestions will be shown below in a drop down list:

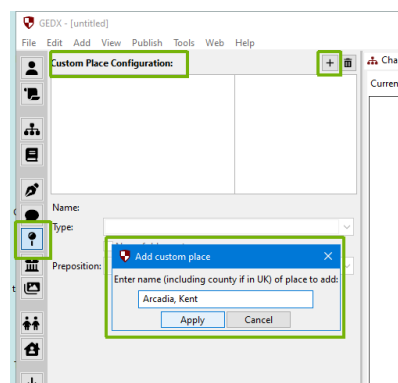


If Pedigree Forge doesn't recognise a place (it isn't in its database), it will appear in red:

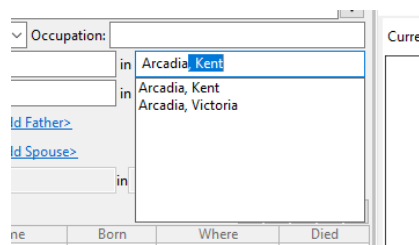


A place can be added to the database via the "Places" panel (select the map-pin icon from the left-hand action bar).

Tip: You can also add an unrecognised place to the database directly from a place field on the person panel with the keyboard shortcut Ctrl + Y (or by selecting this option from the "Edit" menu).



The place will then be considered as verified, appear as suggestions, and not show in red when entered:



Note: A few places can be entered just by themselves. This is usually when there is one specific place that is really well-known. There might be other places with that name, but they would always need clarification. For example, "Paris" alone would imply Paris in France; if you wanted Paris in Yorkshire, you would need to enter "Paris, Yorkshire" This is the way we talk in natural conversation.

TO DO: Allow adding “regions/departments etc.”

Famous Cemeteries

There is one occasion when the place only, not the address being shown on a chart doesn’t make so much sense, which is the place of burial. In particular, there are many large London cemeteries, particularly the “Magnificent Seven”. The place in which they are located is perhaps less of interest than the name of the cemetery. When Pedigree Forge can identify this, the place of burial is shown on the chart as the name of the cemetery, rather than the place. For example, “Abney Park Cemetery” is really an address, but is more informative than “Stoke Newington, Middlesex”.

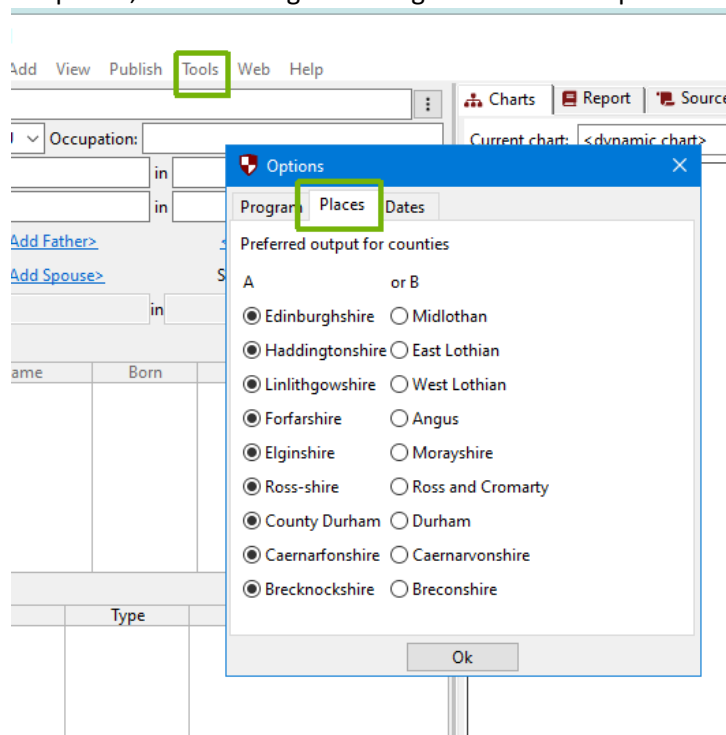
TO DO: Allow a mechanism for users entering these folded places

Which County?

When working with British records, the counties as appearing in Pedigree Forge are the *Historic Counties*. The use of these has gradually eroded over the years, as modern Council Authorities have been confused the matter. The problem being that these modern council areas are forever changing, whereas the historic counties are as they have always been. It is recommended that you consider using the Historic Counties, when recording places in the British Isles.

This does cause some confusion however, particularly in regard to London, which has absorbed a lot of the surrounding places, originally in a different county. For example, Southwark is in the historic county of Surrey, and much of the area of “London” north of the Thames is in the historic county of Middlesex.

Some counties are, or have, been known by more than one name, or by variations in spelling. Either are accepted and recognised by Pedigree Forge, but the way that they are output in reports, and charts, or suggested from the list of places, can be configured using “Tools” then “Options” from the main menu bar:



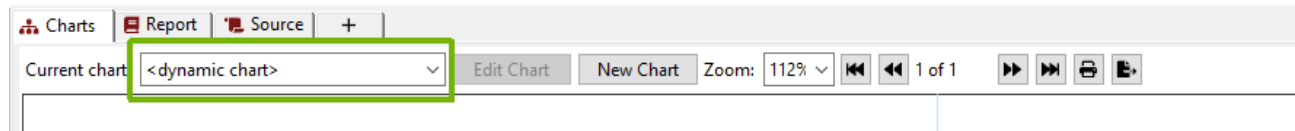
Suggestions for Region in Other Countries:

- Australia: States
- Canada: States
- France: Departments
- United States of America: States

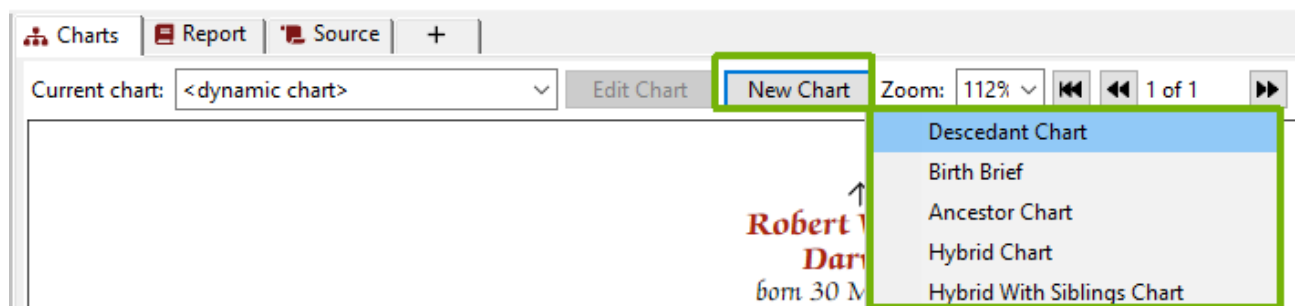
[1] *The Historic Counties Standard*, The Historic Counties Trust <https://historiccountiestrust.co.uk/standard>

Charts

When you first create a new project, the only chart available is the “dynamic chart”. This follows the currently selected person and their immediate family. The current chart is shown (and can be changed) via the “Current chart” drop-down list, located on the “Charts” tab:



You can't edit the dynamic chart, because it is created automatically for you, and changes as you select different people in your project.



To create a chart to your own specification, click on the “New Chart” button, also located on the “Charts” tab. This will show a pop-up menu to select the mode of chart to create. The simple examples will work with “Descendant Chart”.

The screenshot displays the FamilyTreeBuilder software interface. The main window shows a family tree titled "The Darwin Family". The tree structure is as follows:

- Robert Waring Darwin** (I115) and **Susannah Wedgwood** (I116) are the top-level couple.
 - Robert Waring Darwin: born 30 May 1766 Lichfield, Staffs., died 13 Nov 1848 Stretwbury, Salop.
 - Susannah Wedgwood: dau. of Josiah Wedgwood, potter, born 3 Jan 1765, married 18 Apr 1796, died 15 Jul 1817.
- Their children are **Emma Wedgwood** (I121) and **Charles Robert Darwin** (I122).
 - Emma Wedgwood: born 2 May 1808 Maer, Staffs., married 29 Jan 1839 Maer, died 2 Oct 1896 Bromley, Kent.
 - Charles Robert Darwin: born 12 Feb 1809 Shrewsbury, died 19 Apr 1882 Down, Kent, bur. Westminster Abbey, Will 27 Sep 1881, proved 6 Jun 1882, Scientist.
- Emma Wedgwood and Charles Robert Darwin are married, with their children listed below:
 - William Erasmus Darwin** (I141): born 27 Dec 1839, died 8 Dec 1914.
 - Anne Elizabeth Darwin** (I151): born 21 Mar 1841, died 23 Apr 1851.
 - Mary Eleanor Darwin** (I161): born 23 Sep 1842, died 16 Oct 1842.
 - Henrietta Emma Darwin** (I171): born 25 Sep 1843, died 17 Dec 1927.
 - George Howard Darwin** (I181): born 9 Jul 1845, died 7 Dec 1912.
 - Elizabeth Darwin** (I191): born 8 Jul 1847, died 8 Jun 1926.
 - Francis Darwin** (I201): born 16 Aug 1848, died 19 Sep 1925.
 - Leonard Darwin** (I211): born 15 Jan 1850, died 26 Mar 1943.
 - Horace Darwin** (I221): born 13 May 1851, died 29 Sep 1928.
 - Charles Waring Darwin** (I231): born 6 Dec 1856, died 28 Jun 1858.

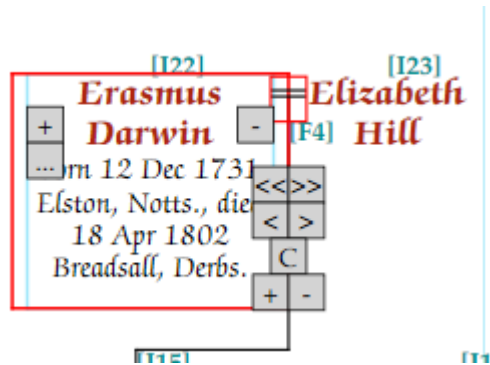
A **Key** at the bottom left explains symbols:

- bur. Buried
- c. Circa (approximate date)
- dau. Daughter
- = Married couple

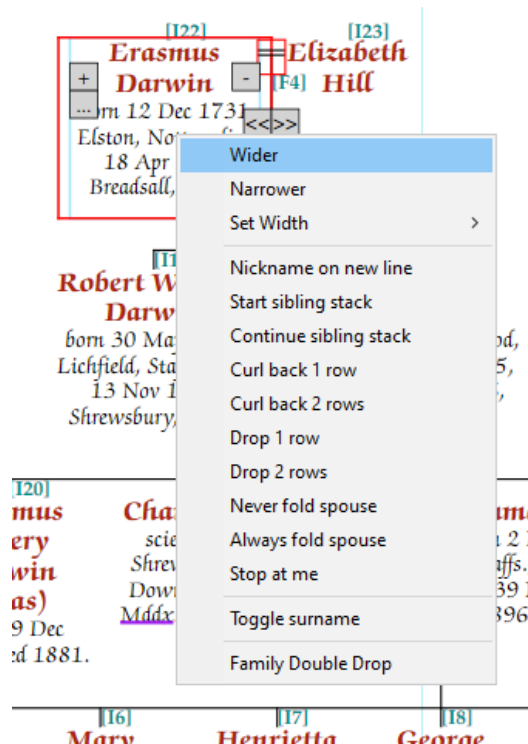
The right sidebar shows **Chart Properties** with the following settings:

- General** tab selected.
- Parameters**: Mode: descendants, Start With: I115, Generations: 7, Detail: full.
- Advanced Parameters**: Page: Auto, Size: Custom, Width: mm, Height: mm, Orientation: Landscape, Border: thick/thin.
- Title**: Title: The Darwin Family, Subtitle: N, Position: N, Custom: X: mm, Y: mm, Font size: 40, Radius: 1000, Ornaments: checked.
- Title On Back**: checked.
- Key**: Include key? checked.

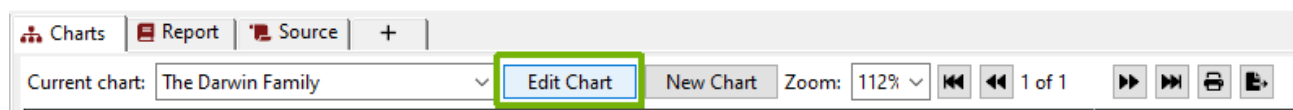
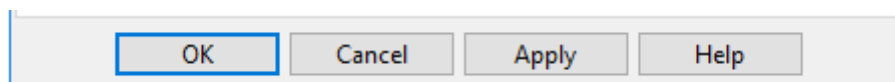
You can change properties of the chart using this panel, and many features can also be actioned on the chart itself, using keyboard short-cuts or clicking on the small grey buttons shown for the active family:



Many features are also available by right-clicking with the mouse on a person too, and then selecting options from a pop-up menu:



When you have finished editing the chart, you can click “OK” to exit and apply the changes, or “Cancel” to cancel the changes that have been made whilst in editing mode, or since the last-time the “Apply” button was pressed:

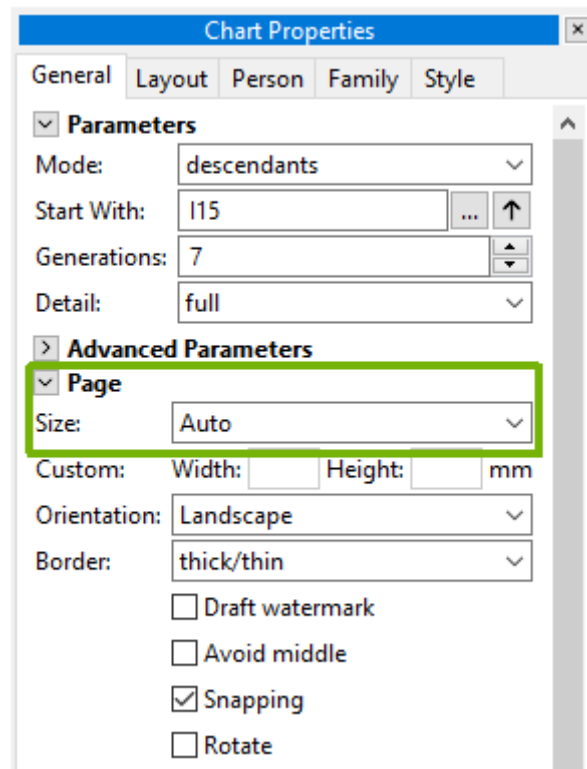


You can return to editing mode by selecting the chart you want to work on and using the “Edit Chart” button on the “Charts” tab:

When a family chart is created, the default layout will often create a rather wide chart. However, very quickly, charts tend to become too wide, and would require printing out on many sheets of paper.

Pedigree Forge gives you many tools to make your chart fit a particular paper size. This is the better option from a design perspective.

If you are happy with a wider chart, then just leave the page size as “Auto”. The page size will be made as wide (and tall) as necessary.



Read on if you want to make your charts look better...

The inspiration for how to arrange family charts is taken from two main sources, which are highly recommended if you wish to create well presented charts.

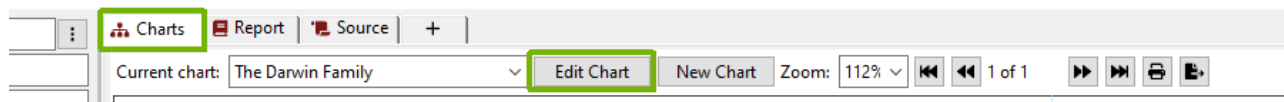
1. *Family Trees, A Manual for their Design, Layout & Display*, by Marie Lynskey.
2. *Laying out a Pedigree*, by Eve McLaughlin. This is also incorporated as a section in *Further Steps in Family History*, by the same author.

Important Concept

Some information, for example, names, dates of birth, who they married, etc. resides in the database, and is changed there through editing the person's facts and attributes in the database. This would show through on any charts on which they appear.

Other settings are about the display of that person in a particular family chart, or the parameters of what belongs in a particular chart, and this is changed when a chart is in editing mode.

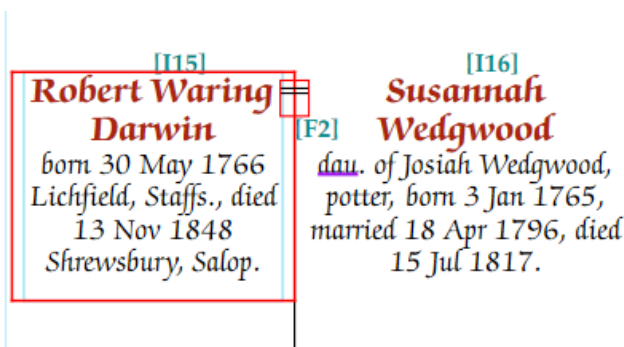
To edit a chart (enter edit mode), use the "Edit Chart" button from the "Charts" tab of Pedigree Forge.



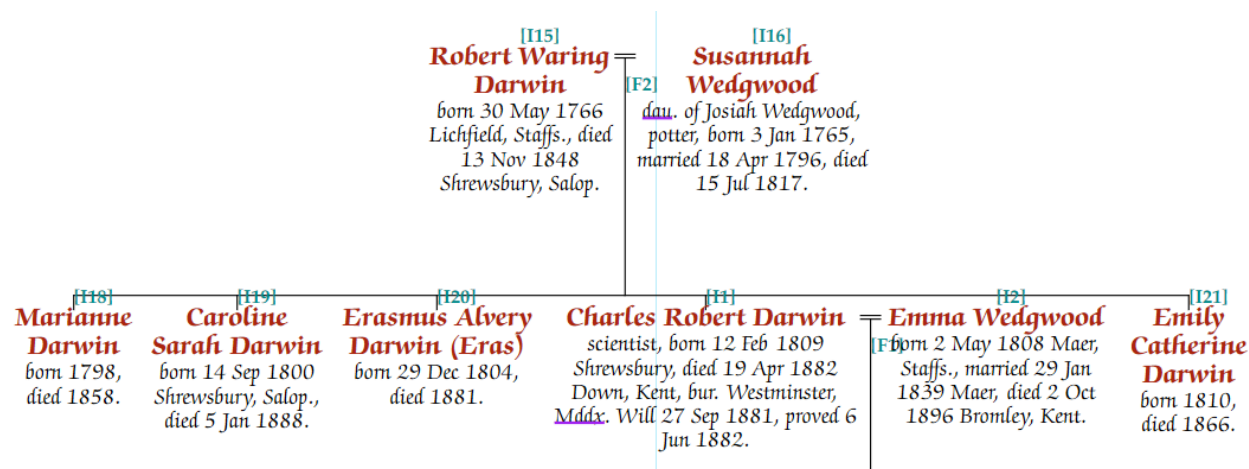
ID numbers

Every person in the database has an ID number. If they are created in Pedigree Forge (and most of the time if the data is imported from a GEDCOM file), the ID of a person will start with the letter "I" and include a number. For example, "I15".

These numbers are shown when editing charts in teal. The current person being edited is highlighted on the chart. In the following example, Robert Waring Darwin is the current person, and his ID number is I15. His wife, Susannah Wedgwood, has the ID I16.



"Families" also have an ID number. A family consist of one or more parent and optionally, any number of children. Family ID numbers usually being with an F, and are followed by a number.



In the above example, the family of Robert Waring Darwin and Susannah Wedgwood is F2. This also includes their children: Marianne, Caroline, Erasmus, Charles Robert and Emily.

People belong to both the family in which they are a child, and one or more families in which they are a spouse/partner. Charles Robert Darwin is a child in family F2 and a partner in family F1.

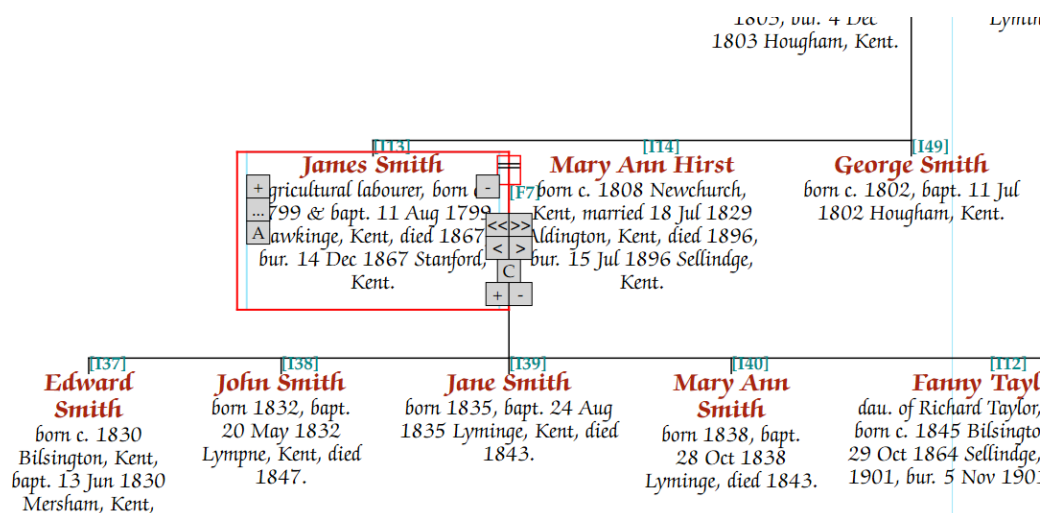
ID numbers are often useful to refer to particular people or families when editing charts, although you don't need to use them directly.

Basic position and width of people on charts

A quick way to help reduce the width of a chart is by altering the position of parents above their children.

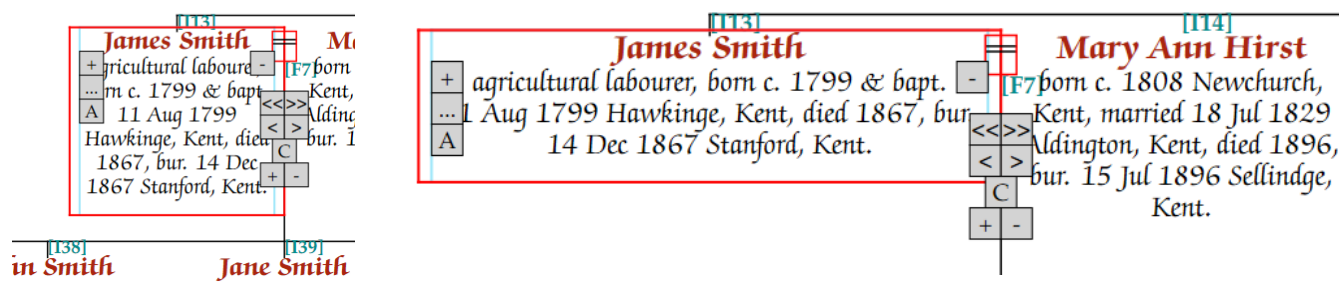
The following is a basic chart, where the parents are centred above their children, which is the default

When in editing mode, if someone is selected, then a range of grey buttons appear around them as shown below:



These grey buttons allow you to size and position them.

The “+” and “-” either side of the person’s box will make them wider (“+”) or narrower (“-”). By pressing these several times, we can make someone much wider or narrower:



Instead of pressing the buttons, the following keyboard keys can be used instead.

[+] Makes them wider

[-] Makes them narrower

To return to auto width for that person, use the “A” button or press [A] on the keyboard. This button only appears when the width of a person has been changed.

The arrow buttons (“<<”, “>>”, “<” and “>”) position the person or more precisely, the line that links them to their children, either left, or right. The double arrows “<<” “>>” move them keeping aligned to the children below them, the single arrows “<” and “>” give smaller movements between.

The “C” button centres them above their children.

The “+” and “-” buttons change the default width of their children. Note: if any of the children have had their width manually set already, then these buttons only effect the widths of children still at their default width.

The “...” button gives access to a pop-up menu, with more options, which will shall cover soon.

The following keys can also be used, rather than having to click on the buttons:

[Shift] [+] Make children in a family wider (if their widths haven’t already been overridden)

[Shift] [-] Make children in a family narrower (if their widths haven’t already been overridden)

[Left Arrow]: Move the parent(s) to the left by one large space, snapping above other nodes

[Right Arrow]: Move the parent(s) to the right by one large space, snapping above other nodes

[Shift] [Left Arrow]: Move the parent(s) to the left by a small amount

[Shift] [Right Arrow]: Move the parent(s) to the left by a small amount

[C]: Return the parents(s) to their default position above the children

[Home]: Move the parent(s) to above the left most child

[End]: Move the parent(s) to above the right most child

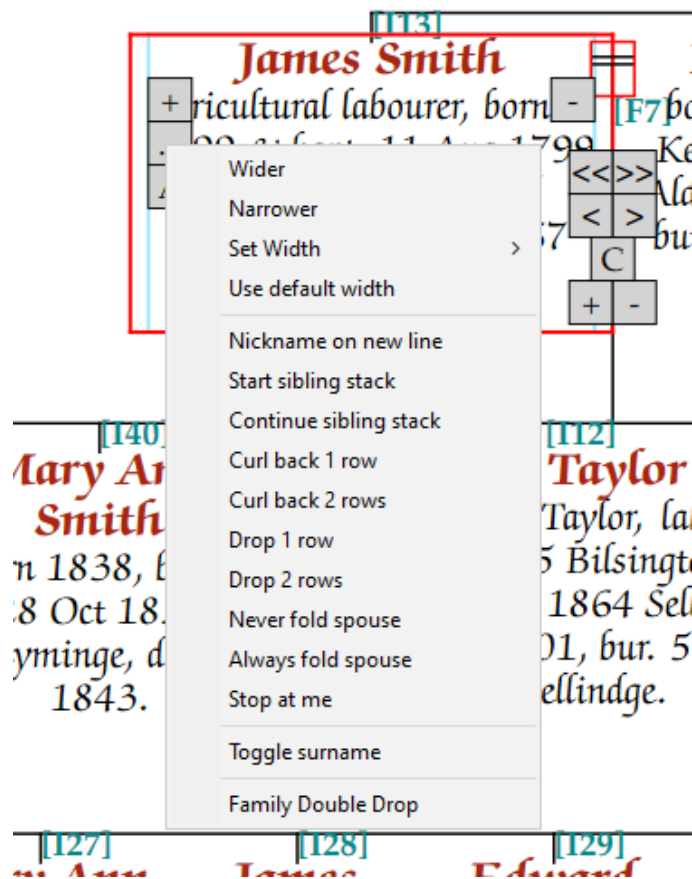
Reducing width

Family tree charts have a tendency to be too wide. Pedigree Forge includes a number of ways to help you reduce the overall width of a chart. The first tool is as covered above, changing the positioning and width of individuals.

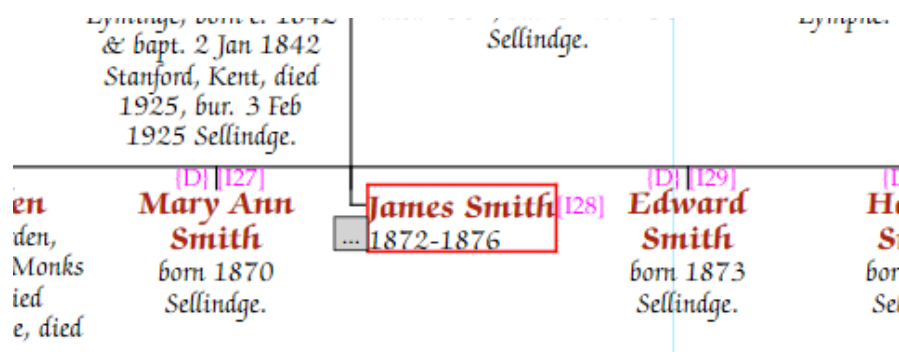
Often, the width of a chart is due to families with a lot of siblings. There are a number of ways that the width of siblings can be reduced. A combination of things might be needed to get the best chart.

Stacking siblings

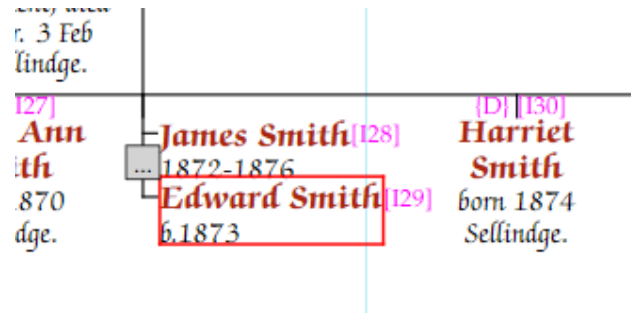
One way to reduce the width is by stacking siblings on top of one another. You would tend to do this if there are particular siblings whom not much was known, or aren't so important in a particular chart. To do this, click on the person in question, so they are active, then either click the "..." grey edit button, or right-click on them. This will cause the following menu to pop-up.



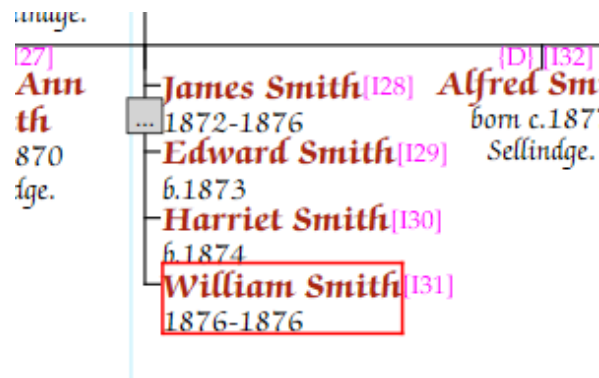
If "Start sibling stack" is selected, the person will change to a stacked view.



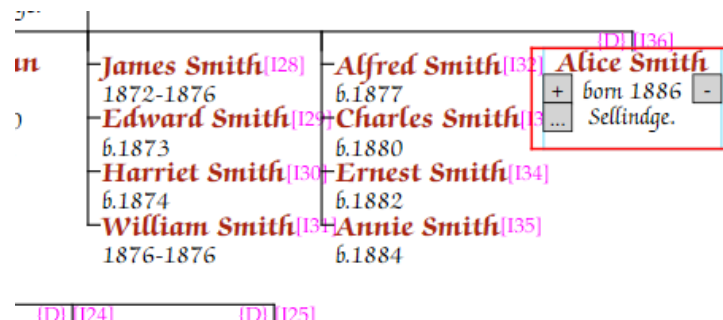
Then select the next sibling, click their “...” button, or right-click on them, and on the pop-up menu select “Continue sibling stack”.



Do this for the next few children, will save quite a lot of space.



You might need more than one sibling stack to accommodate all of the children. You can start another sibling stack by using the same method, but selecting another “Start sibling stack”.



Siblings can be un-stacked, but again using the “...” button, or right-clicking, and selecting “Don’t stack sibling”.

Sibling curl back

Another way of dealing with too many siblings is “curl back”, that is whereby after a certain point, the remaining siblings are curled back to another row below.

In chart editing mode, click on the sibling that you want to be the first curled back, then click on their “...” button, or right-click on them. From the pop-up menu, select “Curl back 1 row”.

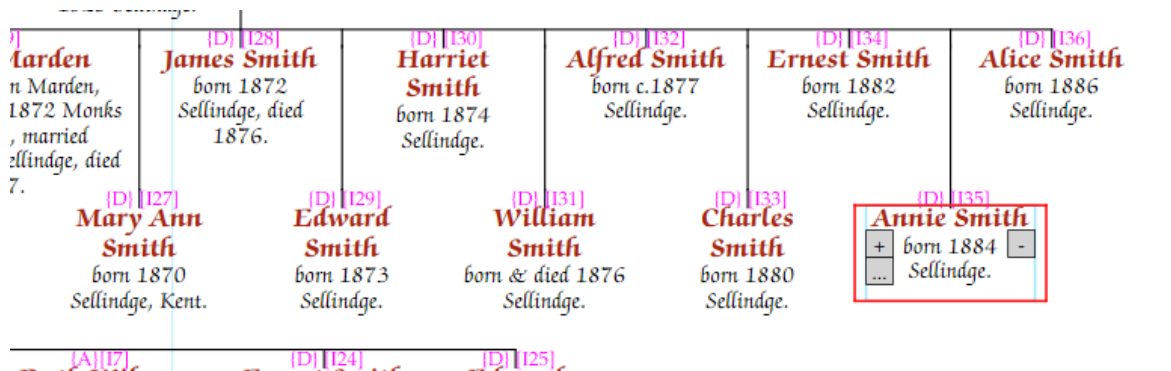
		1925 Sellindge.			
Smith) ourer of Jun 1869 bapt. 5 Sep f 1949.	Eleanor Marden [A][19] F4 dau. of William Marden, labourer, born c. 1872 Monks Horton, Kent, married 21 May 1892 Sellindge, died c.1937.	Mary Ann Smith [D][127] born 1870 Sellindge.	James Smith [D][128] born 1872 Sellindge, died 1876.	Edward Smith [D][129] born 1873 Sellindge.	
	Harriet Smith [D][130] + born 1874 Sellindge, Kent. -	William Smith [D][131] born & died 1876 Sellindge.	Alfred Smith [D][132] born c.1877 Sellindge.	Charles Smith [D][133] born 1880 Sellindge.	Ernest Smith [D][134] born 1882 Sellindge.
				Annie Smith [D][135] born 1884 Sellindge.	Alice Smith [D][136] born 1886 Sellindge.

The selected sibling will then be dropped down to the next row, the siblings continued in the original order.

To cancel the curl back, again click on the “...” or right-click on the sibling to get the pop-up menu, then click “Clear curl back”. The siblings should again return to the same row.

Staggered siblings

Siblings can be made to be staggered, with some one row down as usual, and others another row down. As before, select a sibling, and use the “...” button, or right click, then click “Drop 1 row” from the pop-up menu. You would probably do this for every other sibling:



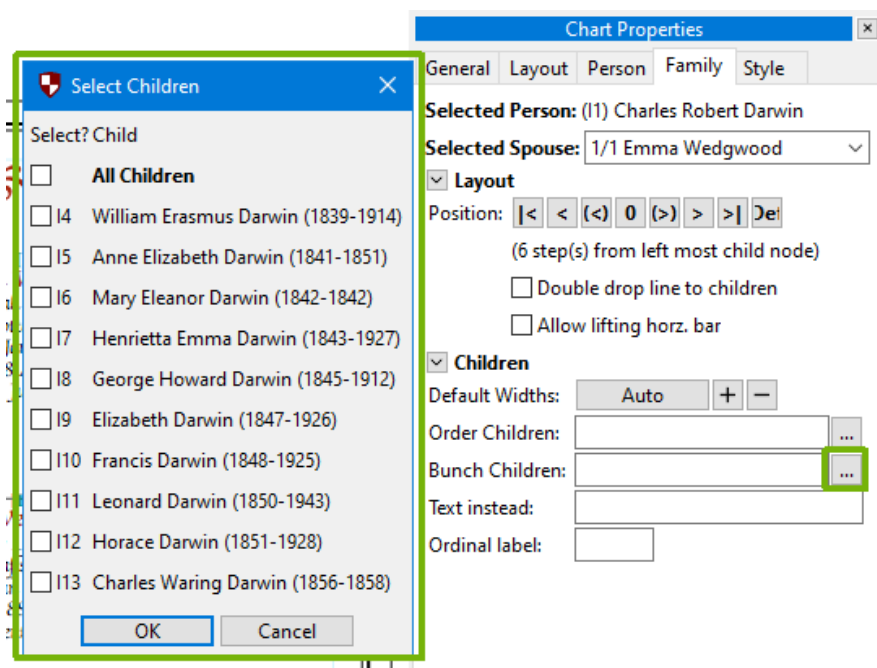
This can be cancelled by using the “...” button/right-clicking and “Clear extra drop” from the menu. It is often useful to also change the row height (see relevant section).

Bunched siblings

There are (probably rare) occasions, where there might be so many children, and most are not of interest, or space is so tight, that rather than naming some of the siblings, it might be better to just refer to them as something like “3 sons + 1 daughter”. This is called bunching.

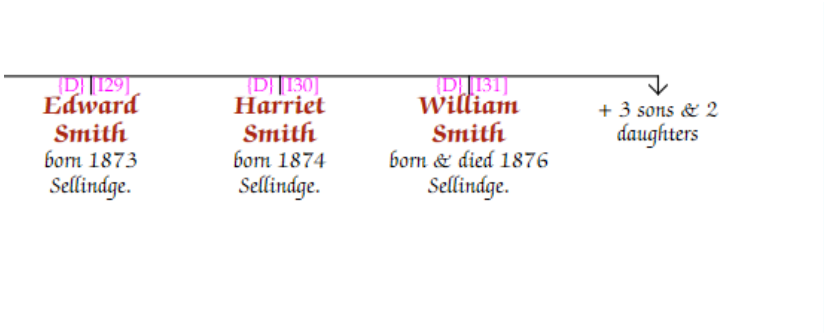
To bunch some of the siblings, click on the parent node, so that the drop line linking the parent to the children is selected.

Click on the “Family” tab of the “Chart Properties” Panel, which appears when in chart editing mode, and then click on the “...” button to the right of the “Bunch Children” text box.



A small dialog will appear, allowing you to select which children to bunch.

When you close the bunch dialog, the chart should update, bunching the children together.

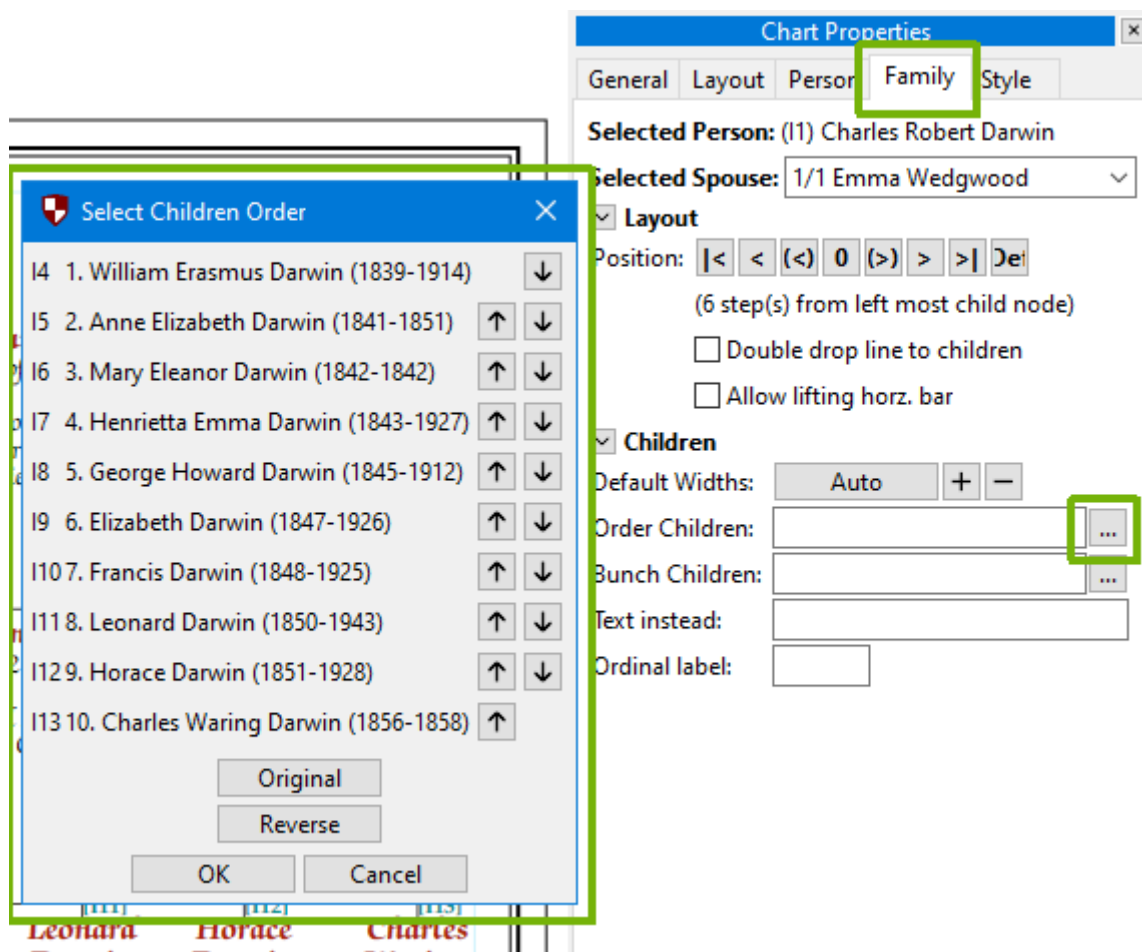


To clear the bunching, use the same process, but de-select all of the children.

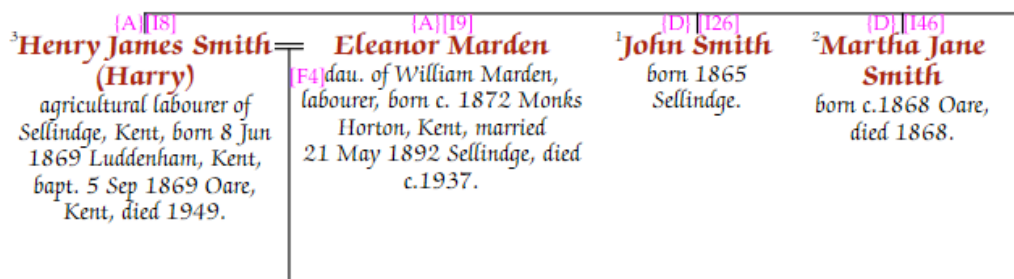
Siblings out of sequence

It is best practice for children to be included in order of seniority, from left-to-right (you can sort them whilst adding children to the database). However, sometimes, it might be more visually pleasing to draw children out of sequence. This is usually only done if some had children of their own, and it is the children of the siblings that are causing extra width or wasted blank space.

To draw siblings out of sequence, make sure the family to which they belong is selected as the active family, then choose the “Family” tab of the “Chart Properties” panel, which appears when in chart editing mode, and then click on the “...” button to the right of the “Order Children” text box.



The “Select Children Order” dialog box will appear. You can use the arrows to change in which order the children will be drawn on this chart only.

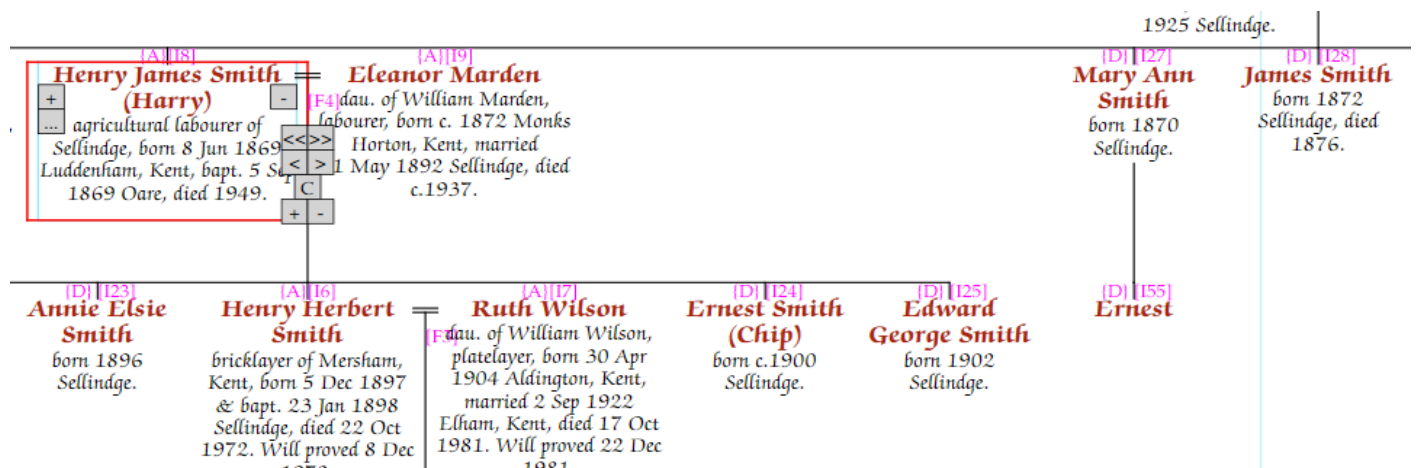


Note: when siblings are drawn out of sequence, small numbers appear next to their names on the charts, which indicate that they are out of sequence.

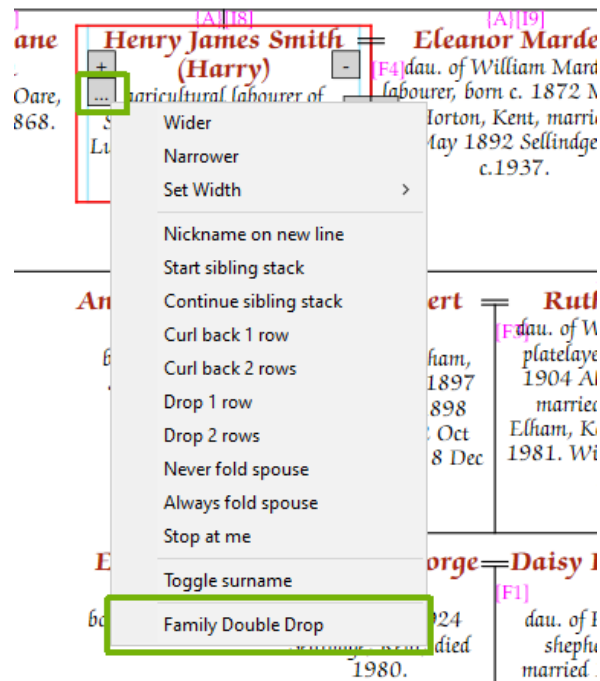
Family double drop

A very useful feature to save space is to “double drop” the descent line from a family, placing the children down 2 rows from the parents, rather than one.

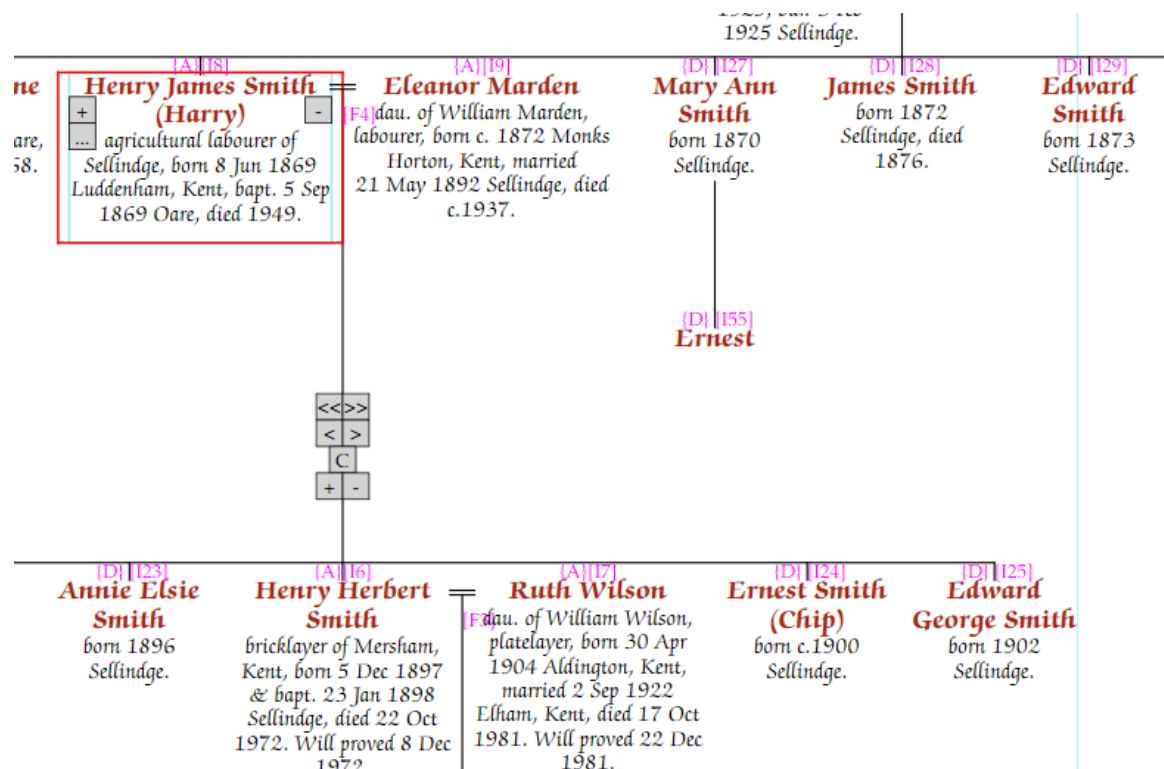
In the following example, the child “Ernest”, son of Mary Ann, means that Mary Ann herself, and her other siblings, are all pushed to the right. However, if we double drop the descent line from Henry James Smith and Eleanor Marden, then Ernest (and consequently Mary Ann and the younger siblings), can all slide left, reducing the width.



Select the family to double drop, in this case it is Henry James Smith and Eleanor Marden. Then either click on the “...” for whichever parent is selected, or right-click on them, so that the pop-up menu will appear.

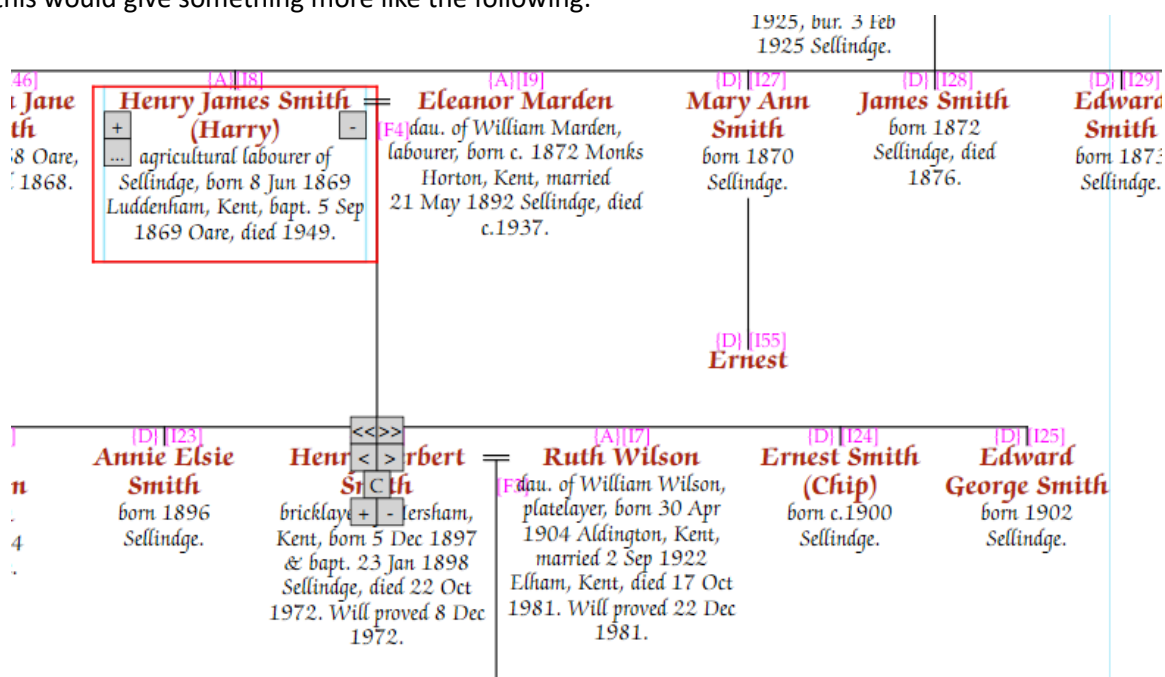


The children of Henry and Eleanor will then double drop, and Ernest will slide right, as will his mother and all the later siblings.



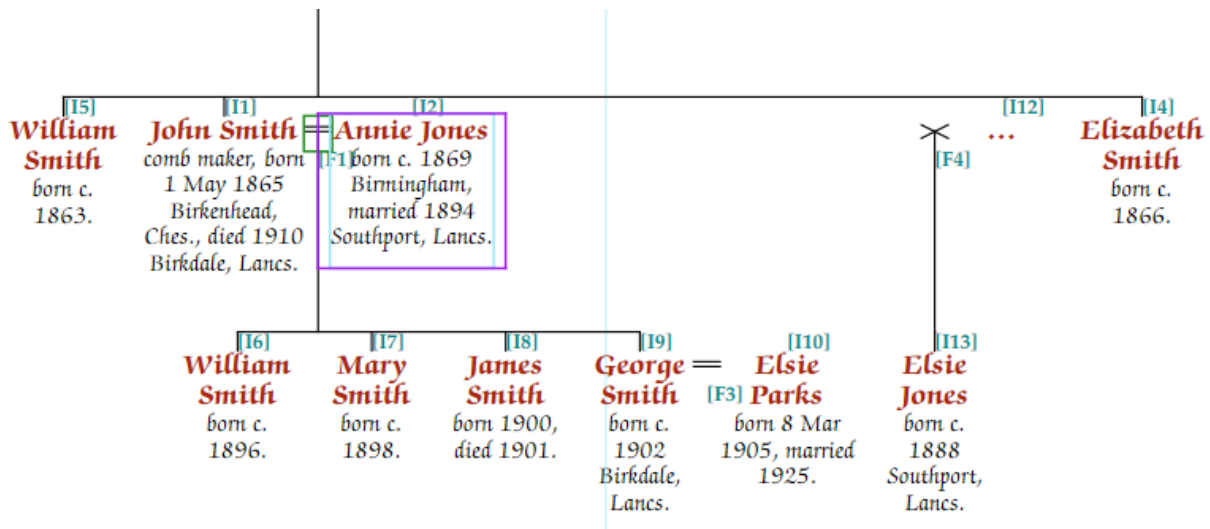
Double drop can be cleared by again making sure the family is selected, using the “...” button, or right-clicking and then selecting “Cancel Family Double Drop” from the pop-up menu, which will appear instead of “Family Double Drop” for a family already double dropped.

When using double drop, it is often worth changing the row height, for which see the section “Row height”, this would give something more like the following:



Lifting family bar for better spouse spacing

In the example below, Annie Jones had had a daughter, Elsie, before she married John Smith. To prevent the horizontal family lines from clashing, by default, The “X” and drop line, which represents Annie’s first partner (name unknown), has been pushed some distance from Annie herself, even though the family has been moved as far to the left as possible (see positioning section).



There is an option that allows closer spacing, by lifting up the horizontal line linking the “X” symbol to the daughter. This can be found on the “Family” tab of the chart properties panel. When “Allow lifting horiz. family bar” is checked, with the correct family selected, Pedigree Forge can lift the line up and place Annie closer to the first partner. This also gives more space on the row above.

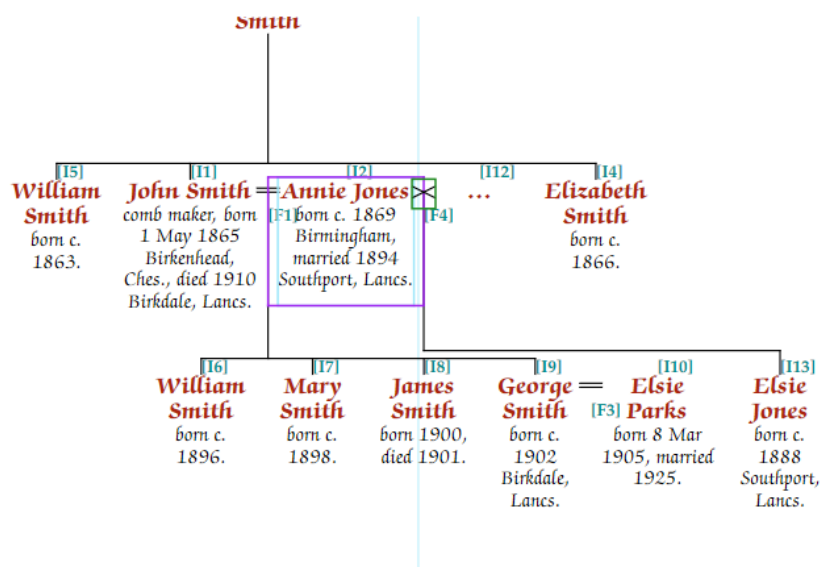


Chart Properties

General Layout Person **Family** Style

Selected Person: (I2) Annie Jones

Selected Spouse: 1/2 ...

☒ Layout

Position: |< < (<) 0 (>) > |> De

(As far left as possible)

☐ Double drop line to children

☒ Allow lifting horz. bar

☒ Children

Default Widths: Auto + -

Order Children: ...

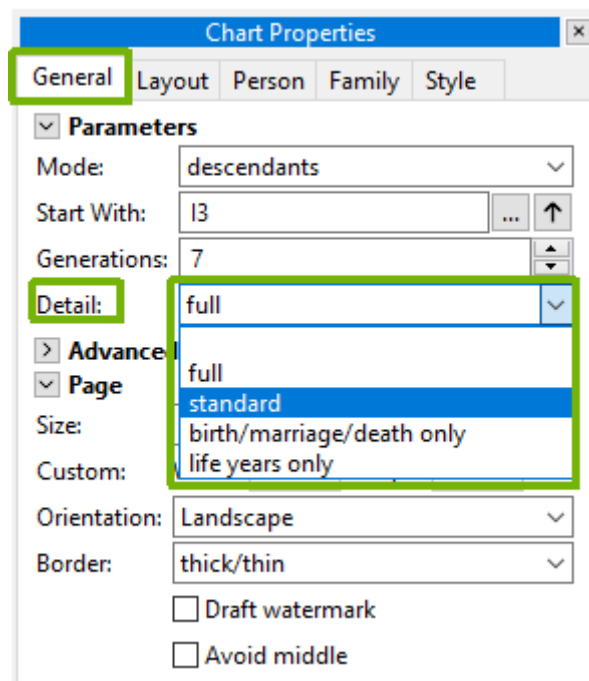
Bunch Children: ...

Text instead: ...

Ordinal label: ...

Default amount of detail to show.

Depending on the use of your chart, you might wish to show more, or less information about everyone. Use the “Detail” drop down list from the “General” tab of the chart properties to adjust the default amount of detail on a chart.



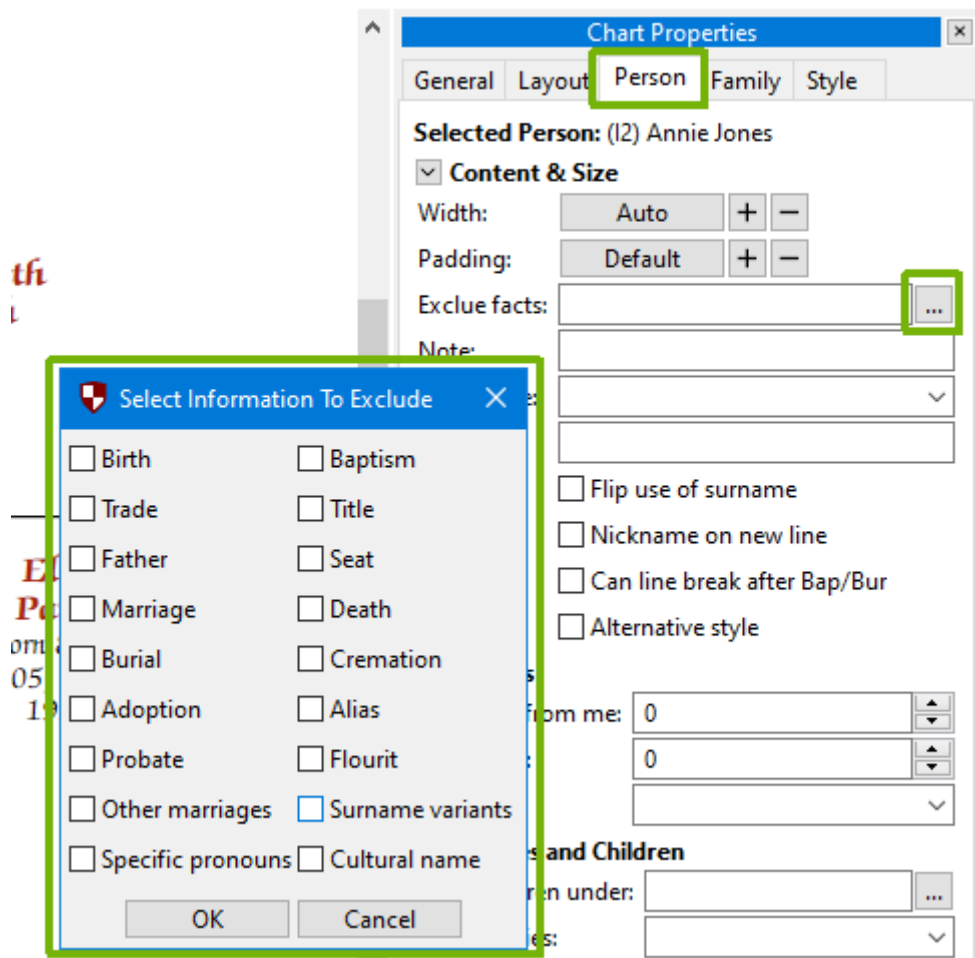
Amount of detail included for a specific person

By default, quite a lot of information is included for each person in a tree (assuming that it has been added to the person).

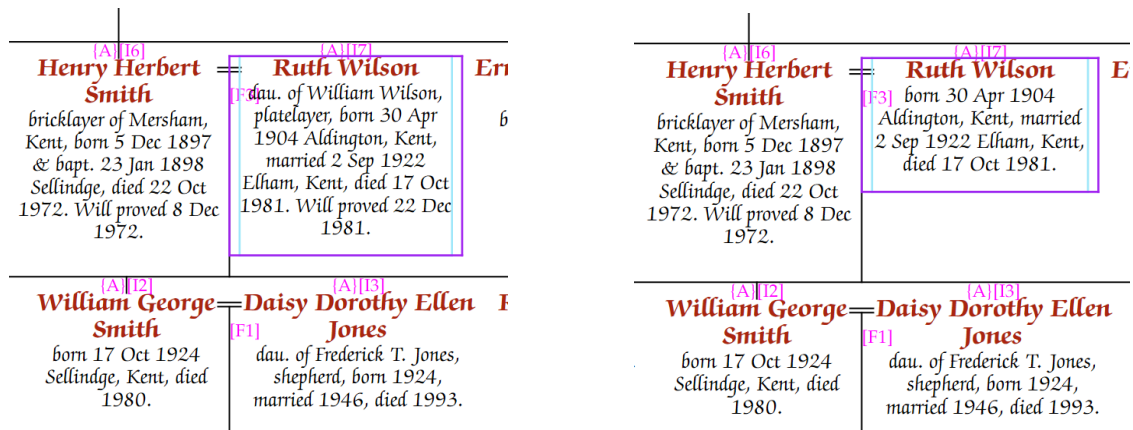
If less detail is desired for a particular person is desired, possibly to save space, then it particular events/information can be turned off.

Firstly, select the person and enter chart editing mode.

Then, go to the “Person” tab of the “Chart Properties” panel, and click on the “...” button to the right-hand side of the “Exclude fact(s)” text box. This will show the “Select Information to Exclude” dialog.



Click on the fact or facts you wish to exclude for this person. In the example below, “Father” and “Probate” were selected.



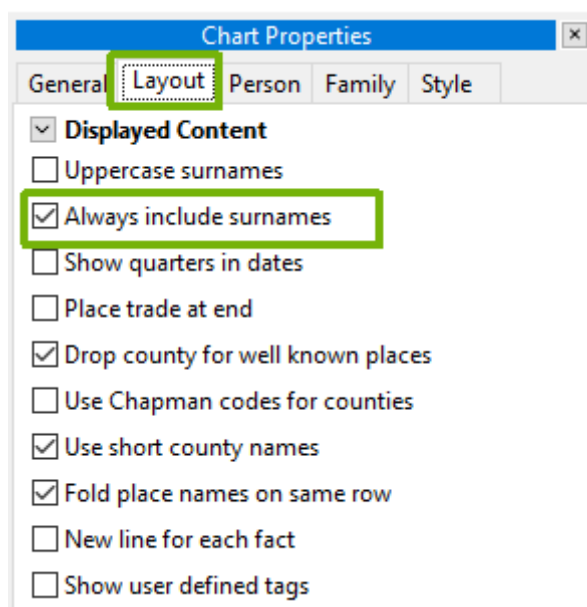
Showing/hiding surnames

By default, surnames are shown for everyone in the tree (as long as they have been entered).

If you need to save space, then a surname can be hidden for a particular person. To do this, click on the relevant person in edit chart mode. Then click on the “...” button, or right-click on them.

Select “Toggle Surname” from the pop-up menu that appears.

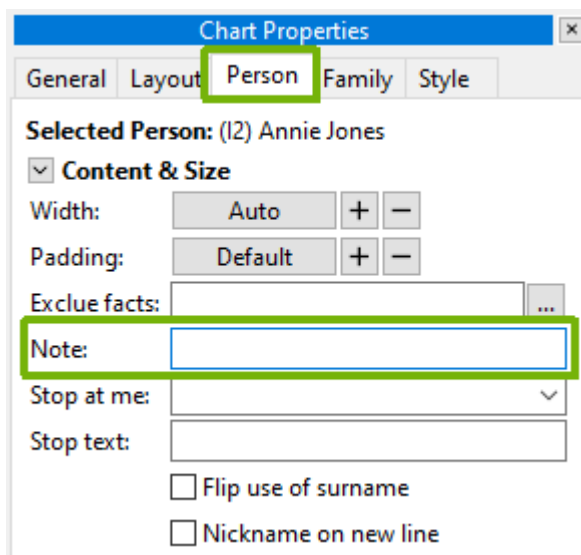
Alternatively, if space is tight throughout the chart, then most surnames can be turned off in one action. In chart editing mode, select the “Layout” tab from the “Chart Properties” panel. Then turn off the “Always include surnames” check box. Most surnames will then disappear on the chart. The rule that those who have children will have their surnames included.



Note: If the “Always include surnames” is turned off, the step described first, i.e. toggling a surname will have the opposite effect, it will toggle a surname on, if it were usually off!

Person specific notes

If specific notes are required on a chart for particular people, these can be added in the “Note” text box of the “Person” tab of the “Chart Properties” panel:

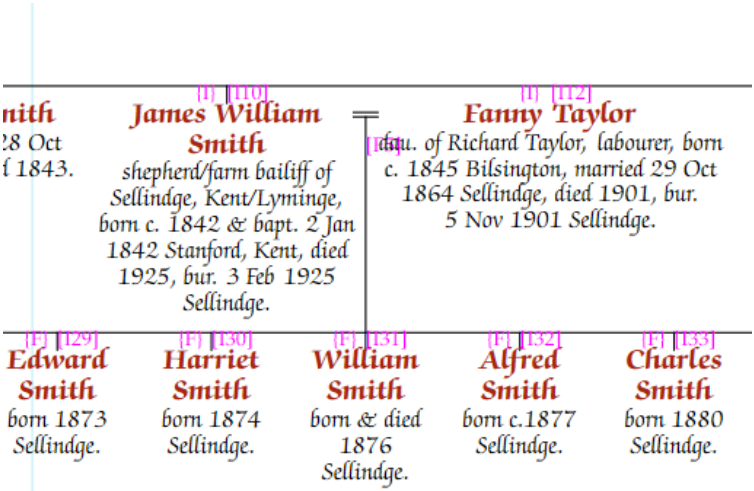


Robert [A117] Ruth Wilson Eri
 born 30 Apr 1904 Aldington, Kent, married 2 Sep 1922
 Elham, Kent, died 17 Oct 1981. <<<Note will appear here>>>.
 22 Oct 1898
 8 Dec

Any notes entered here apply to this person, on this chart only.

Tucking children under their parent

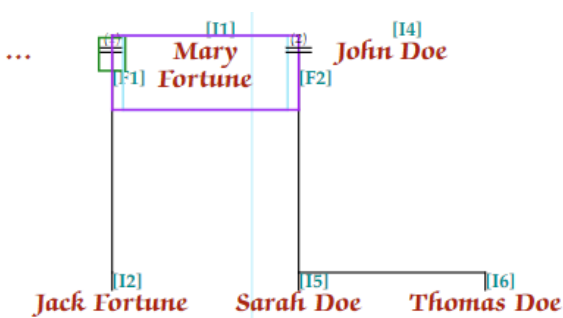
By default, children are shown linked from their parents by a line that drops down from the “marriage” symbol, if such symbol appears (also refer to “Folding or not folding spouses”).



If there is only one parent of a child included in the database, and that parent had no other spouses included, then the children are shown as descending directly from that person:

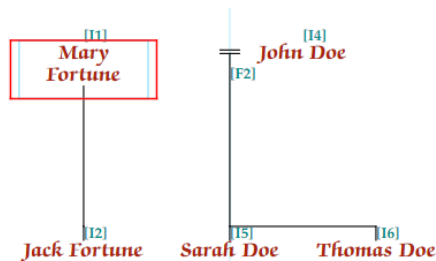


However, if the parent later married someone else, then the children are split out to descend from the relevant family.



If the status of Mary's first family (i.e. that in which she had Jack, is set to "Never Married", then Jack will be shown as descending from her, rather than an unknown first partner:

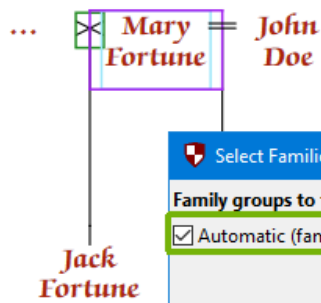
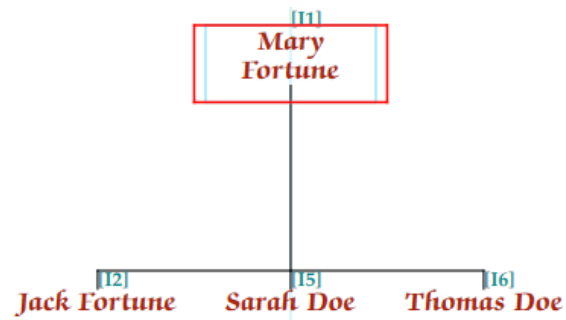
Forenames:	<input type="text" value="Mary"/>	Surname:	<input type="text" value="Fortune"/>	⋮
Sex:	<input type="text" value="F"/>	Occupation:	<input type="text"/>	
Born:	<input type="text"/>	in	<input type="text"/>	
Died:	<input type="text"/>	in	<input type="text"/>	
Parents:	<Add Father>		<Add Mother>	
Spouse:	<input type="text" value="1/2 <none>"/>		Status:	<input type="text" value="Never Married"/>



Also see the section on adding illegitimate children for how this can be achieved directly when adding a child.

Which children (by family group) that are tucked under one of their parents can be overridden from the "Person" tab of the "Chart Properties" panel, whilst editing a chart.

First, uncheck the "Automatic" checkbox, then click on which family groups should be tucked under. In this example, if we selected both families, all of the children would be tucked under Mary:



Select Families To Tuck Under Me

Family groups to tuck under me:

☒ Automatic (families where single parent and flagged never married)

☐ F2 ... & Mary Fortune
Jack Fortune

☐ F1 John Doe & Mary Fortune
Sarah Doe
Thomas Doe

OK Cancel

Chart Properties

General Layout **Person** Family Style

Selected Person: (11) Mary Fortune

☒ Content & Size

Width: Auto + -

Padding: Default + -

Exclude facts: ...

Note: ...

Stop at me: ...

Stop text: ...

☐ Flip use of surname

☐ Nickname on new line

☐ Can line break after Bap/Bur

☐ Alternative style

☒ Siblings

Curl back from me: 0

Drop rows: 0

Stack: ...

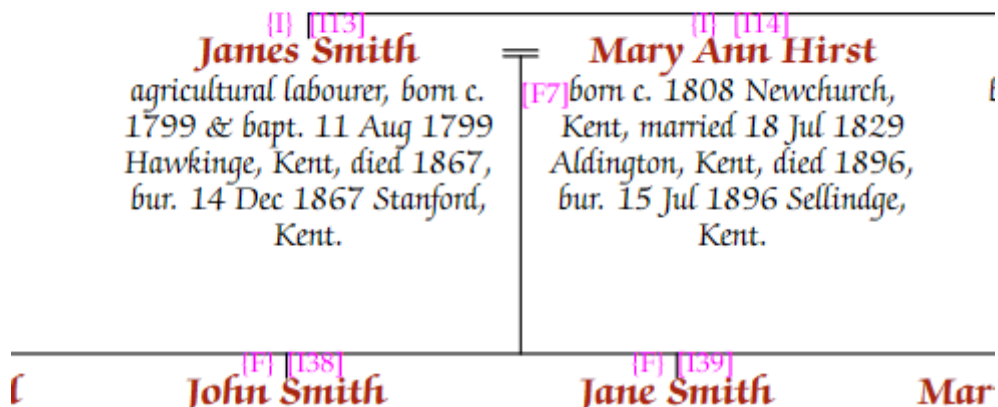
☒ Spouses and Children

Tuck children under: ...

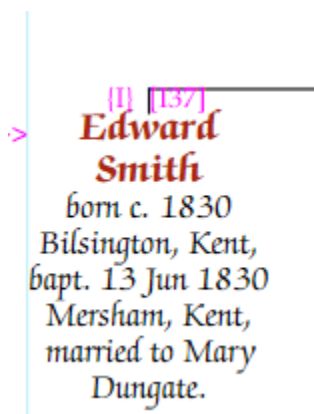
Step families: ...

Folding or not folding spouses

By default, spouses are shown next to each other if they have any children, or if there is any information on the spouse.

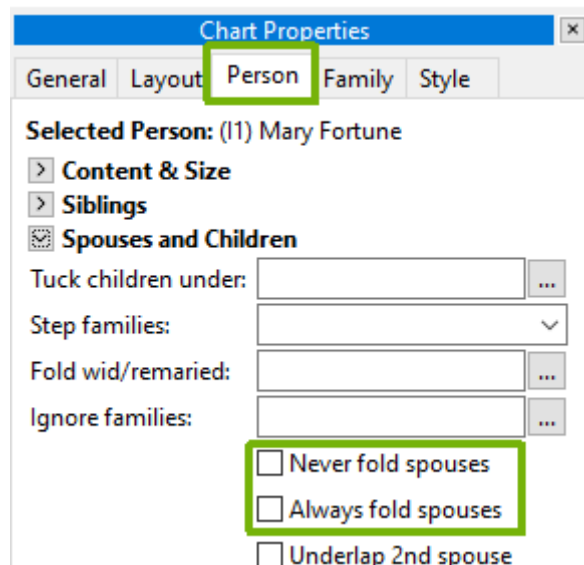


If there are no children AND the only information about the spouse is their name, then they are folded and appear in the same entry, for example:

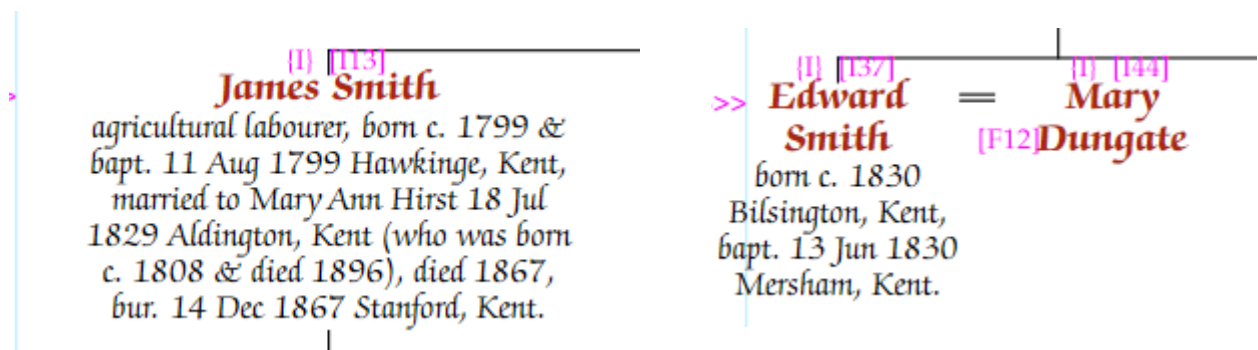


However, spouses can be forced to always be folded, or to never fold. Folding spouses can save space.

First, (in chart editing mode), click on the person who is the descendant on the chart (i.e. person who is linked to their parents above. Then, either click on the “...” button or right click on them to show the pop-up menu. Then select “Never fold spouse” or “Always fold spouse”. These options can also be cleared in the same way, or, use the check boxes on the “Person” tab of the “Chart Properties” panel:

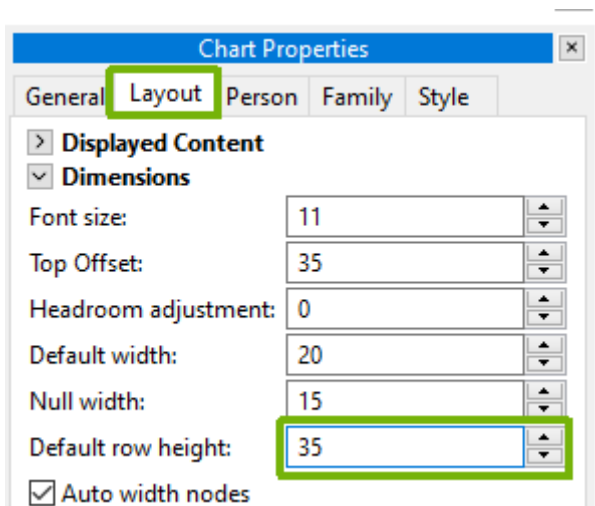


The two examples above would show as follows:



Row heights/top offset

By default, all rows on a descent family tree chart are the default row height. This can be found, or adjusted by going into edit chart mode. On the “Chart Properties” panel, select the “Layout” tag, then use the arrows to change the “Default Row Height” box.



This can also be done from the keyboard, When in “Edit Chart Mode”, and the chart is selected, the following keyboard codes will work:

[Shift][Down Arrow]: Make the default row height larger

[Shift][Up Arrow]: Make the default row height smaller

The following also work:

[Down Arrow]: Move the “top offset” of the chart downwards, i.e. moves the whole chart down

[Up Arrow]: Move the “top offset” of the chart upwards, i.e. moves the whole chart up

Sometimes it might be desirable to change the height of certain rows. For example, giving extra height to a row can help preserve horizontal space, by allowing you to make the people in that row narrower. Reducing the height of rows where generations have been made to span more than one row (see “Family double drop” and “Staggered siblings”) can also help highlight to the user that a generation spans more than one row. Also, if very little is known about those in a particular generation, perhaps that at the very top of the tree, then making that row shorter helps keep visual balance and save vertical space.

To specify the height of particular rows, use the “Individual Row Heights” section from the “Layout” tab of the “Chart Properties” panel. The values entered are in millimetres. The row numbers to which they relate are drawn on the edge of the chart:

The screenshot shows the 'Chart Properties' dialog box with the 'Layout' tab selected. The 'Individual Row Heights' section is expanded, showing a table with 'Row Override' and 'Height' columns. Rows 1 and 2 are checked for override and set to 30 mm. Rows 3 and 4 are not checked and set to the default 30 mm.

Row	Row Override	Height
1	<input checked="" type="checkbox"/>	30
2	<input checked="" type="checkbox"/>	30
3	<input type="checkbox"/>	30
4	<input type="checkbox"/>	30

To override a particular row, check the “Override” checkbox for the row, and adjust the height.

Note: If extra rows are added (for example by implementing other double drops, or adding more generations back further, it will be necessary to manually update any row heights.

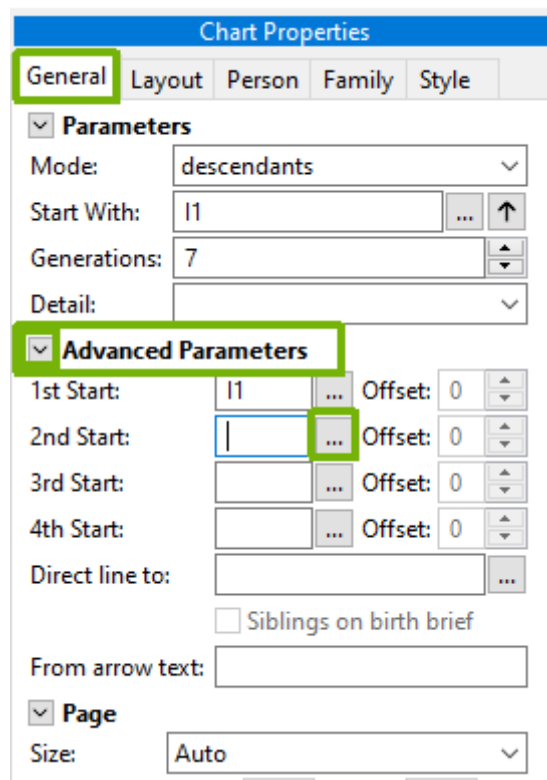
Starting charts with multiple people

Most descendant charts start with one person (or family) at the top. That is, they generally show descendants of a particular person. Usually, this is the clearest way of organising a descent chart.

It is possible to start with more than one person, and then to have the charts join. Theoretically, Pedigree Forge can handle many starting people, but in practice this becomes hard to work with the more that are added.

First, create a descendant chart, starting with the first person who should head the chart as usual.

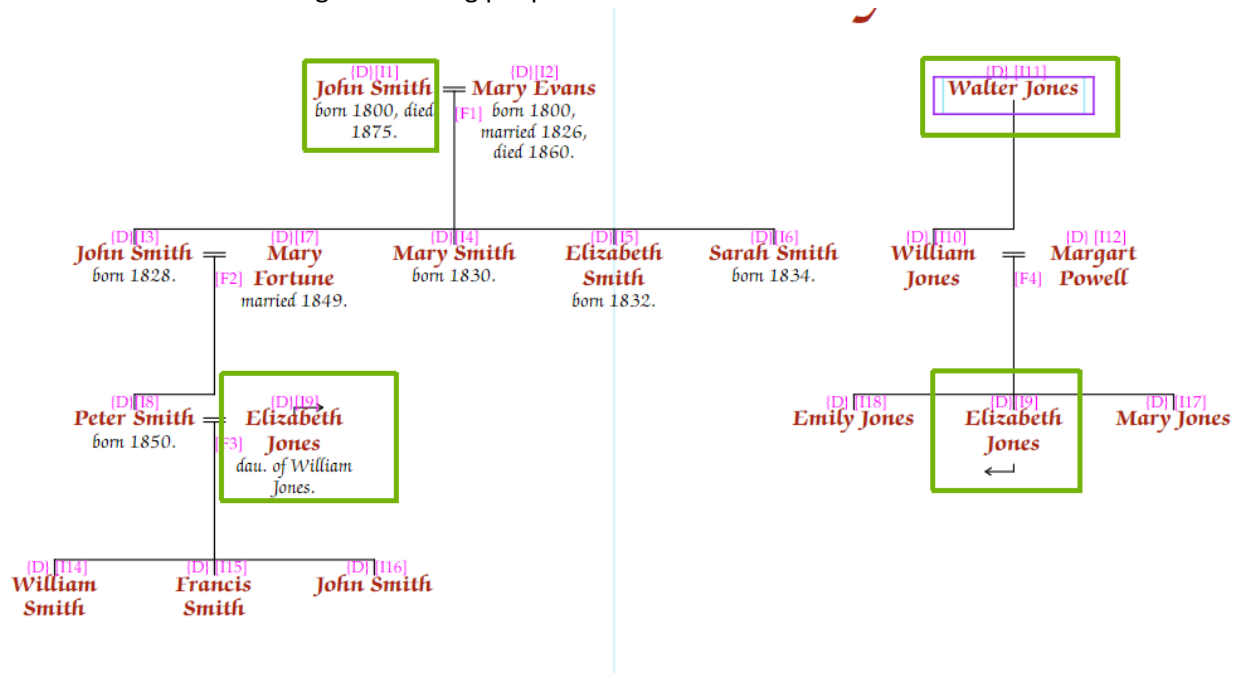
Select the “General” tab from the “Chart Properties” panel, and then open the “Advanced Parameters” section by clicking on the little arrow:



Clicking on the “...” button for the 2nd start person will enable you to select a second person to start from.

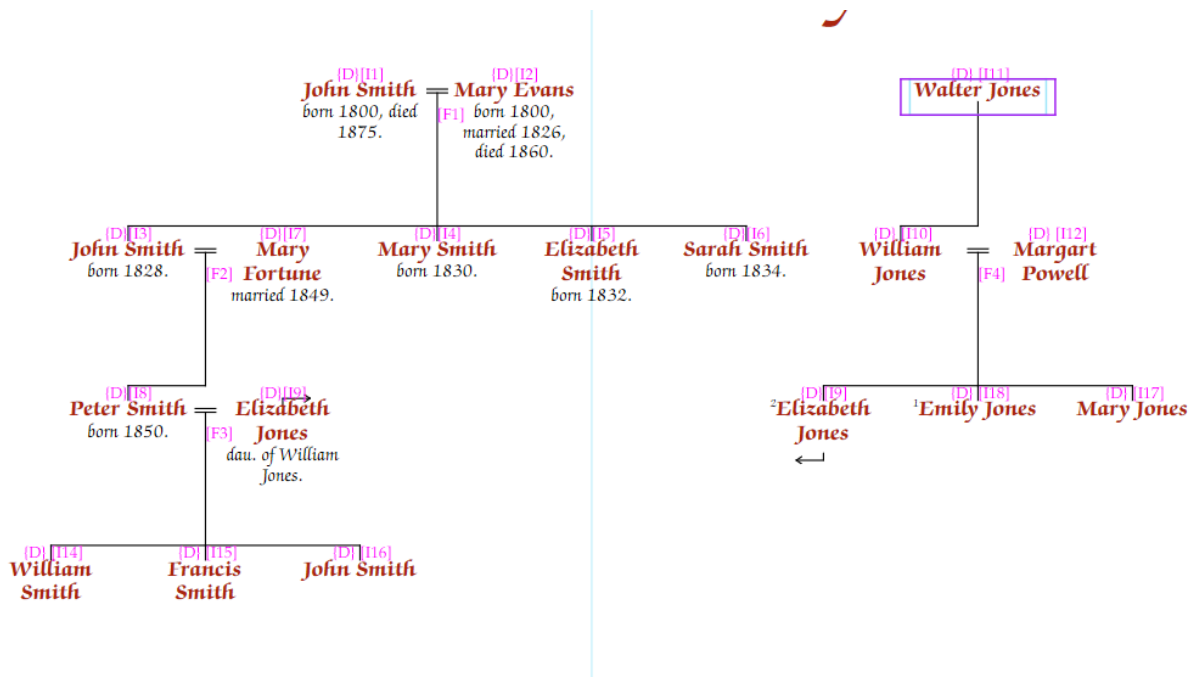
Select the person from the list of people in the database, and click “Ok”.

The chart should redraw showing two starting people.

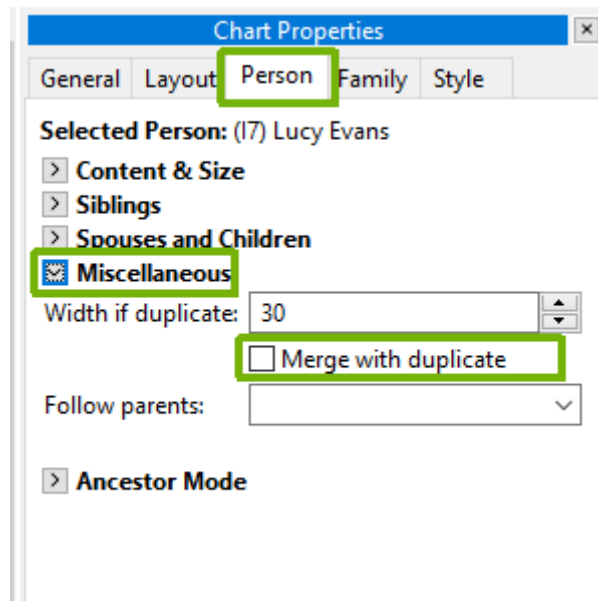


In the above example, John Smith was the original start person for the chart, and Walter Jones (ID I11), was the 2nd start person. As Elizabeth Jones appears on both charts, she is shown twice, connected with arrows.

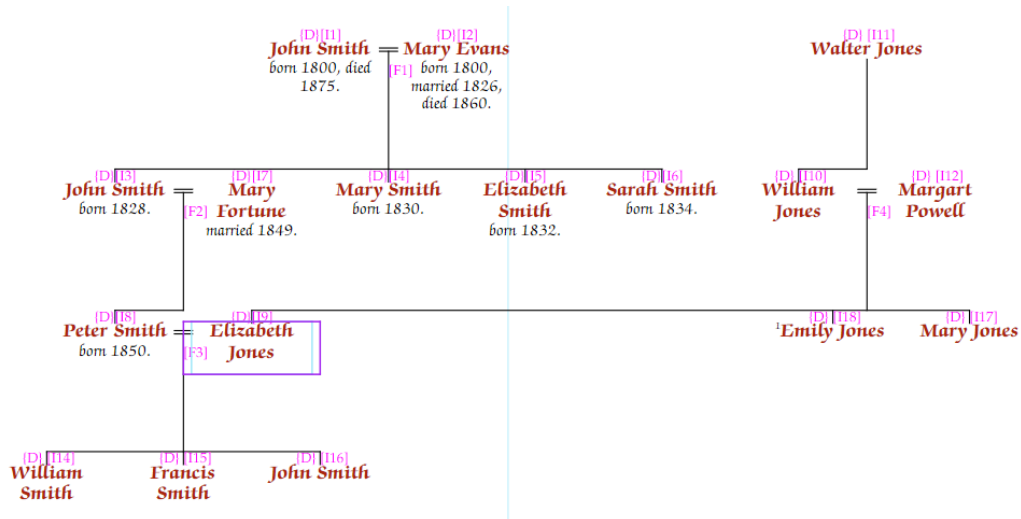
This is one of the occasions when it might be better to draw children out of sequence, i.e. the chart would benefit from Elizabeth Jones being the first one drawn (see Siblings out of sequence). So we can move her to the left-most sibling of her family:



In situations such as that above, we can merge Elizabeth Jones' entry into a single person. To do this, make sure that Elizabeth is the selected person, and on the "Chart Properties" panel, select the "Person" tab, and check the "Merge with duplicate" check box, which is in the "Miscellaneous" section:

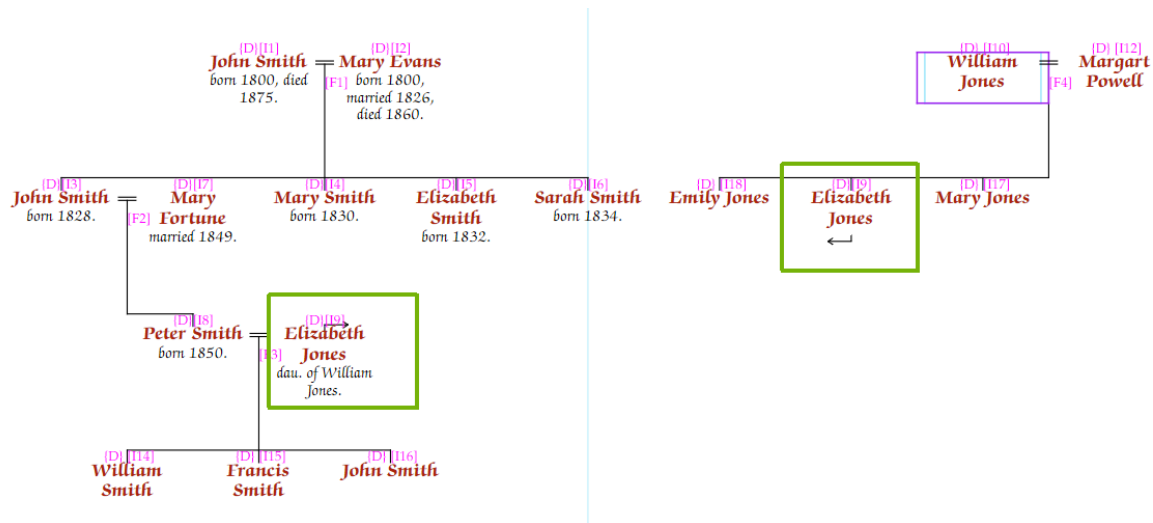


Elizabeth Jones' entry will then be merged:



Important: The merge duplicate will work even if Elizabeth Jones' wasn't the first sibling, or if there were other people between her and her husband. This is one of the few occasions on which Pedigree Forge will fail to layout a chart properly, and might cause lines to cross in error.

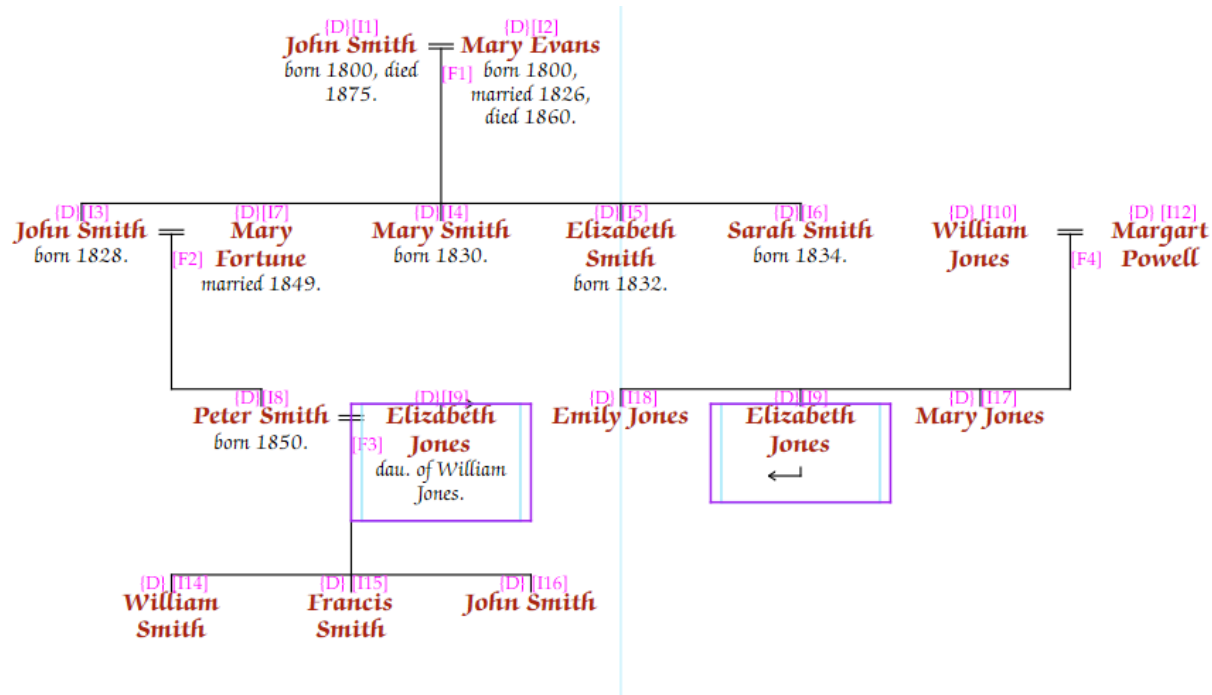
In the simple case above, the two starting people and the person who appears on both charts, are at the same number of rows from the top. However, if the Jones family only started with William Jones, it would create a strange looking chart.



To overcome this, one or other of the starting people can be offset by a number of generations (or rows). To do this, from the “Chart Properties” panel, select the “General” tab, and use the “Offset” boxes to adjust.

Chart Properties			
General			
Parameters			
Mode:	descendants		
Start With:	I1	...	↑
Generations:	7	...	↓
Detail:	...		
Advanced Parameters			
1st Start:	I1	...	Offset: 0
2nd Start:	I10	...	Offset: 1
3rd Start:		...	Offset: 0
4th Start:		...	Offset: 0
Direct line to:	...		

In the above example, offsetting the 2nd start person by 1 generation (row), will once again align Elizabeth Jones, and we can merge her entry as before:

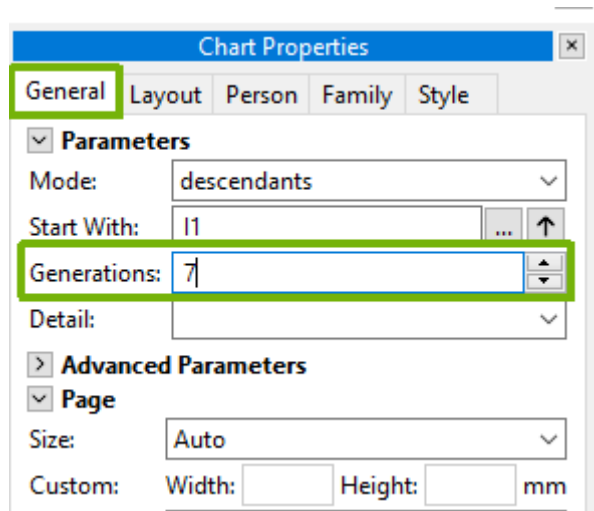


Constraining who appears on charts—stop charts from getting too big.

By default, a descendant chart starts with the selected person, and continues down 7 generations, or, if there aren't 7 generations of descendants, will stop earlier.

Number of generation on a chart

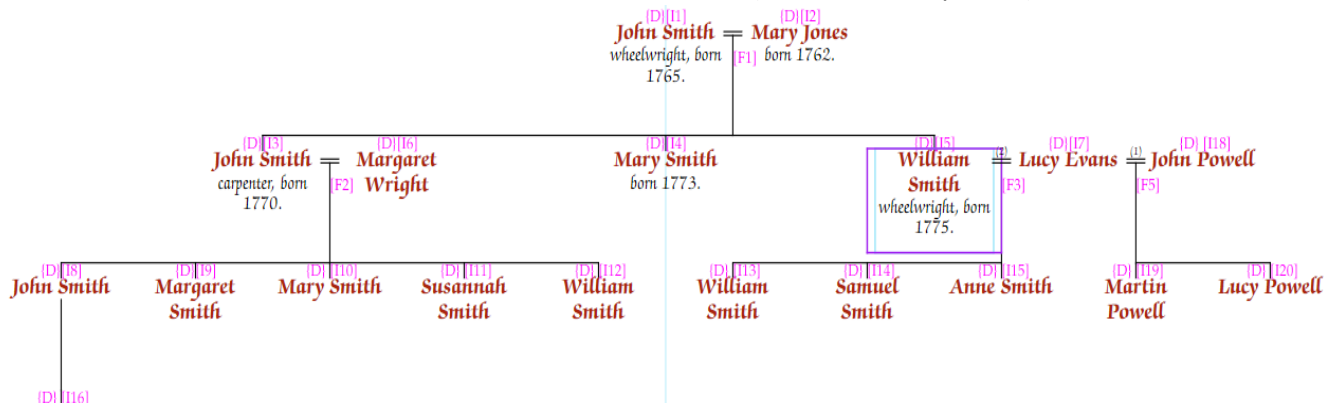
The number of generations to include, can be set from the “General” tab of the “Chart Properties” panel:



Other ways to stop following branches

It is also to have more fine-grained control of stopping who appears on charts. For example, on a particular chart, you may not want to include the descendants of a particular person, even if they are in the database. There are various ways that this can be done.

Starting with the following chart, we will look at ways various ways to stop the chart from show William's descendants, or reduce the levels of detail on him or his wife (and her other spouses).

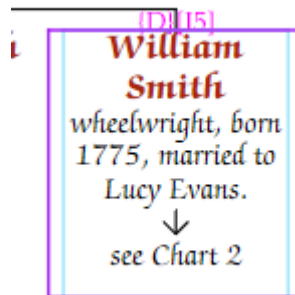


First, make sure that the person who you want to stop at is selected (in the above case, William Smith who married Lucy Evans), and go to edit the “Chart Properties” panel, and select the “Person” tab.

The screenshot shows the 'Chart Properties' dialog box with the 'Person' tab selected. The 'Selected Person' is (I7) Lucy Evans. The 'Content & Size' section is expanded, showing options for Width (Auto), Padding (Default), Exclude facts, Note, Stop at me, and Stop text. The 'Stop text' field is highlighted with a green box.

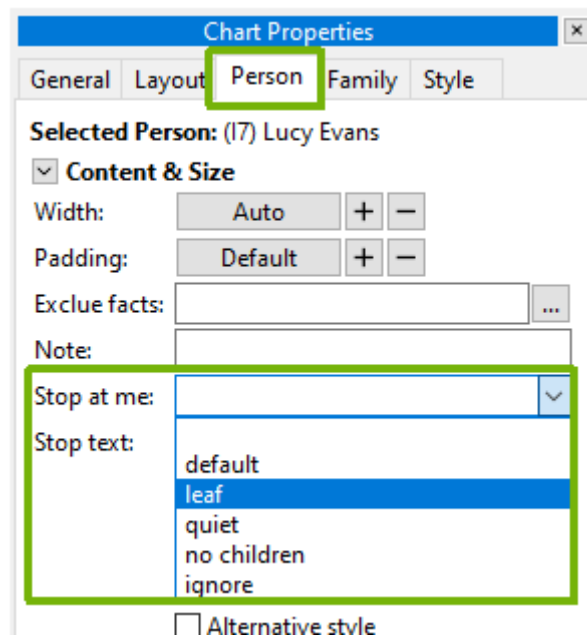
Property	Value
Width	Auto
Padding	Default
Exclude facts	
Note	
Stop at me	
Stop text	

If we enter text in the “To Text(stops)” box, the chart will not follow William’s spouses/descendants at all, but will instead draw a down arrow and the relevant text:

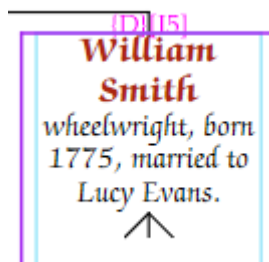


This is useful if you want to break a large chart into multiple smaller charts.

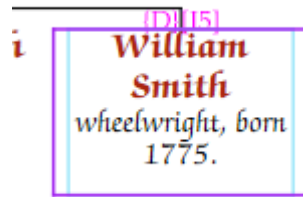
We can also use the “Stop at me:” drop down box to set various other ways in which the chart should stop with William.



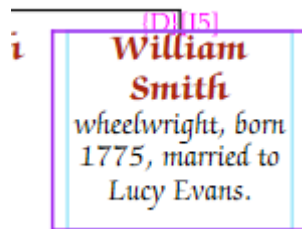
Default: Stops with William, but shows his wife folded into his entry and the symbol used to indicate that there were children not shown here.



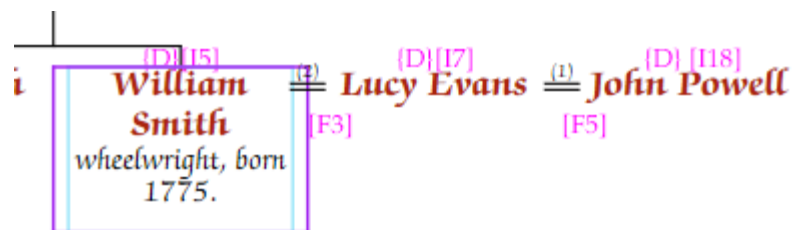
Leaf: Just shows information on William, ignores any spouses or children.



Quiet: Includes the spouse (folded), but ignores children.



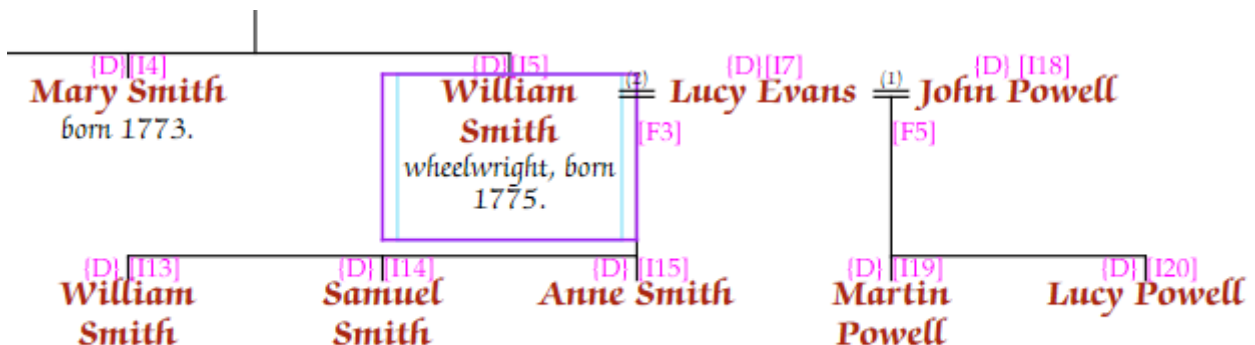
No children: Includes the spouses and step-spouses, but ignores children.



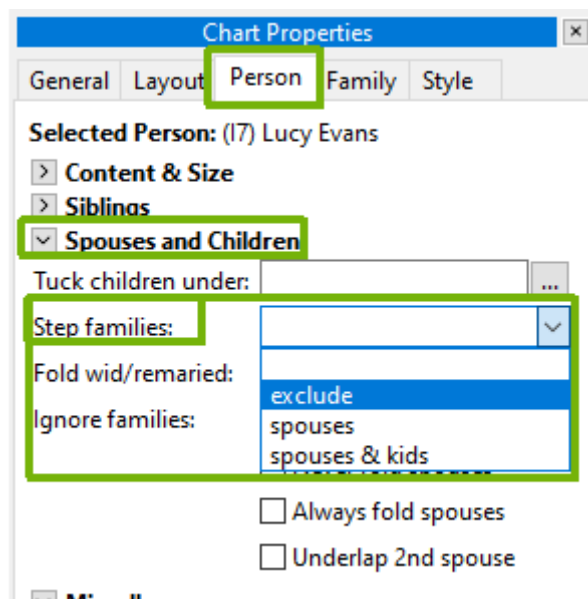
Ignore: The selected person is completely ignored, as though they don't exist. The person in question, nor any spouses or children, is not shown on the chart at all (no picture, as William isn't included at all!)

Amount of detail on step families or other spouses of spouses.

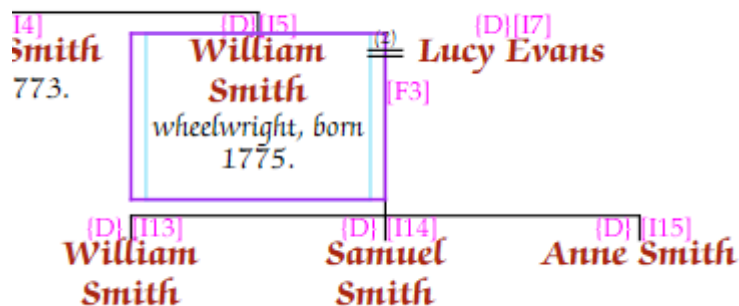
It is also possible to control if a step-family, or other spouses of spouses, are shown.



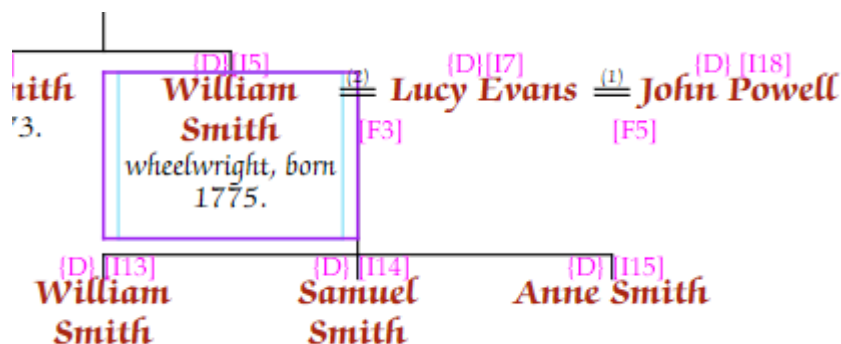
Using the example from above, with William Smith (who married Lucy Evans), selected and in chart editing mode. Select the “Person” tab of the “Chart Properties” panel. Then select the “Step Families” drop down box (in the Spouses and Children section) to select various options.



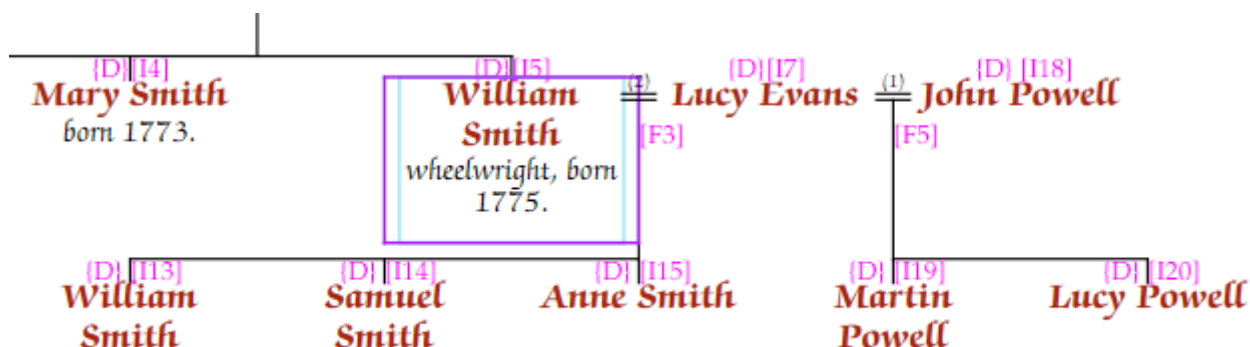
Exclude: The step-family is excluded completely



Spouses: The other spouses are included, but not their children.

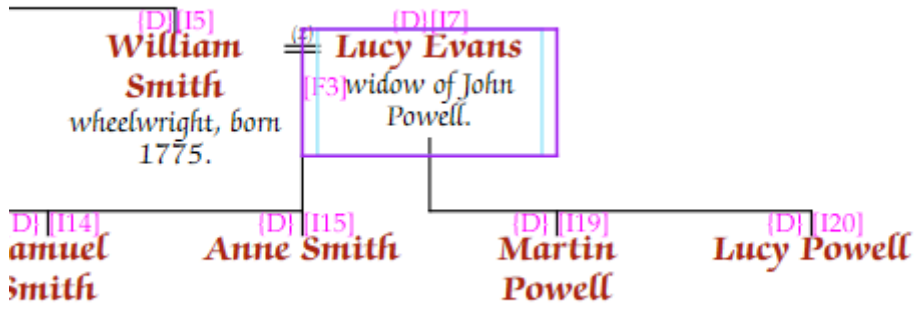


Spouses & Kids: This shows the step family, with spouses and kids (the same as the default).



Sometimes, a neater way is to not give the other spouse (John Powell) their own box, but show that Lucy was either a widow or, or remarried to, someone else. To do this, select the spouse of the main ancestor on the chart, in this case, Lucy Evans. Make a note of the family number for the other spouse in question (in the example above, F5). Then from the "Chart Properties" panel, select the "Person" tab, and use the "..." button to the right of the "Fold wid/remarried" text box. This will allow you to select which family to fold.

This would then fold John Powell into Lucy’s entry, and state that she was either his widow, or remarried to (depending on what order her family with John Powell is in her record):



Text instead of kids

It is possible to stop a chart from the drop line of a parents. To do this, select the family from which you wish to show the text, and enter chart editing mode. From the “Chart Properties” panel, select the “Family” tab, then the “Text instead of kids” text box.

Chart Properties

General Layout Person **Family** Style

Selected Person: (I1) John Smith

Selected Spouse: 1/1 Annie Jones

Layout

Position: |< < (<) 0 (>) > >| Del

(4.4 step(s) from right mode child node)

☐ Double drop line to children

☐ Allow lifting horz. bar

Children

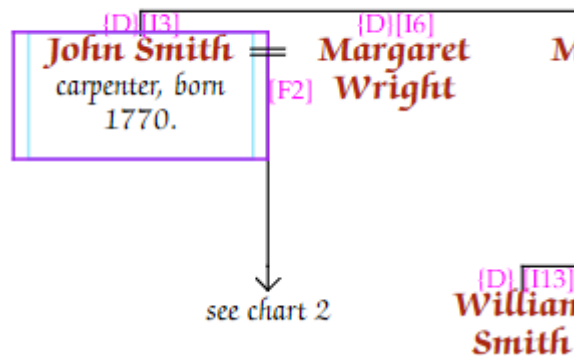
Default Widths: Auto + -

Order Children: ...

Bunch Children: ...

Text instead:

Text entered here will be shown instead of the children of this family



From arrow at top of chart

If some text, with an arrow is wanted at the top of a chart, for example to indicate that the information continues from another chart, this can be entered in the “From Arrow text” text box of the “General” tab of the “Advanced Parameters” section of the “Chart Properties” panel.

Chart Properties

General Layout Person Family Style

Parameters

Mode: descendants

Start With: I3

Generations: 7

Detail: full

Advanced Parameters

1st Start: I3

2nd Start:

3rd Start:

4th Start:

Direct line to:

Siblings on birth brief

From arrow text:

Page

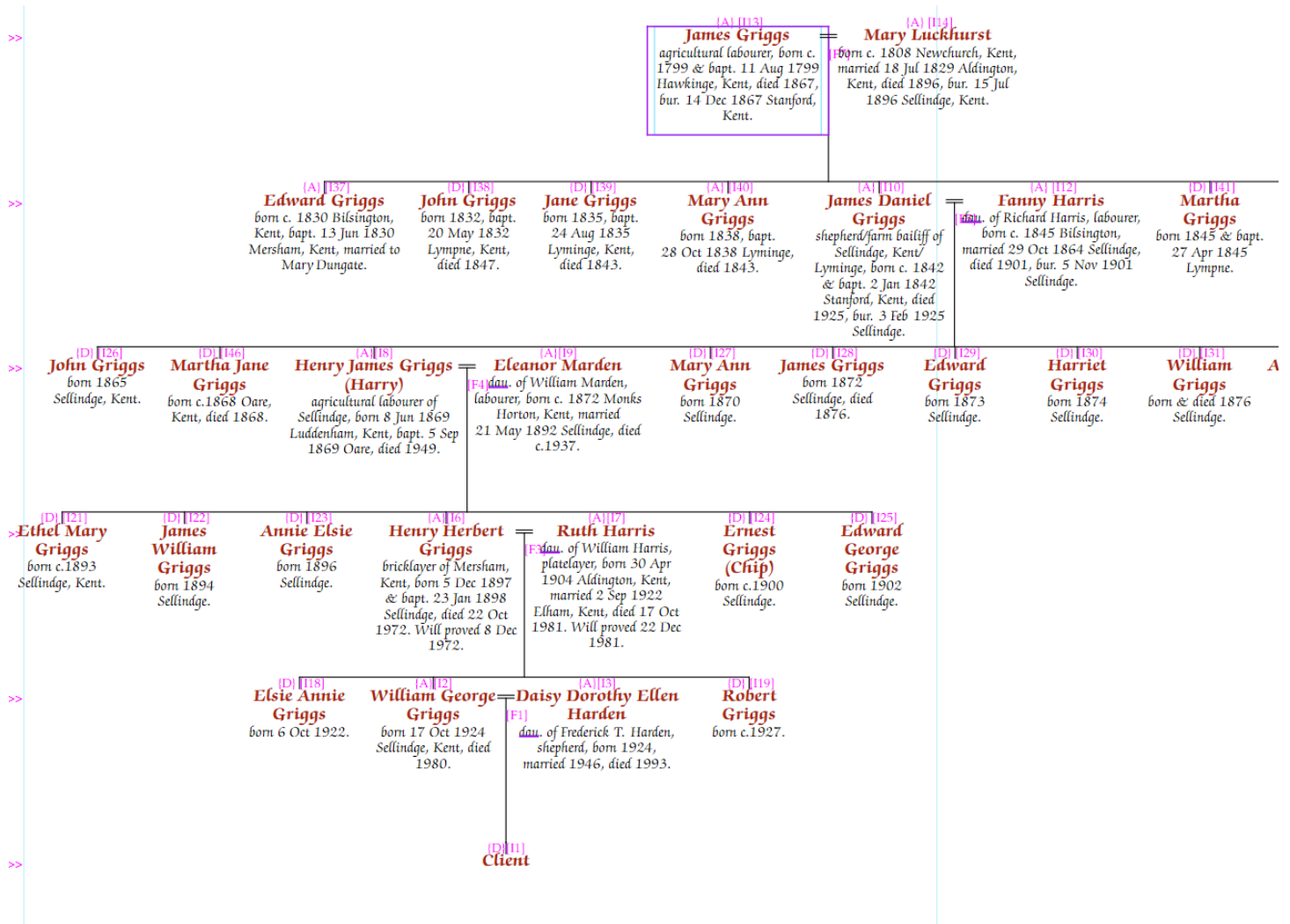
See chart 1
↑
John Smith = **Mary Jones**
wheelwright, born 1765. born 1762.

Direct line only

On occasions, it is clearer to only include a direct line chart, that is, the family from a particular ancestor to one of their descendants, ignore all of the brothers and sisters of the ancestors at each generations.

This is easy to achieve with Pedigree Forge. First, start a new descendant chart from the ancestor as usual.

Find the ID of the descendant to whom you wish to show the direct line only. This usually will start with the letter "I" and is shown on charts.



In the following example, we created a descendant chart starting with James Griggs (I13), and want to create a direct line chart to the client (I11)

Select the “General” tab of the “Chart Properties” panel. Open the “Advanced Parameters” section by clicking on the arrow, and then click on the “...” button to the right of the “Direct to” text box. Another dialog will popup to allow you to select the person to show directly to.

Chart Properties

General Layout Person Family Style

Parameters

Mode: descendants

Start With: I1 ... ↑

Generations: 7

Detail: ...

Advanced Parameters

1st Start: I1 ... Offset: 0

2nd Start: I10 ... Offset: 1

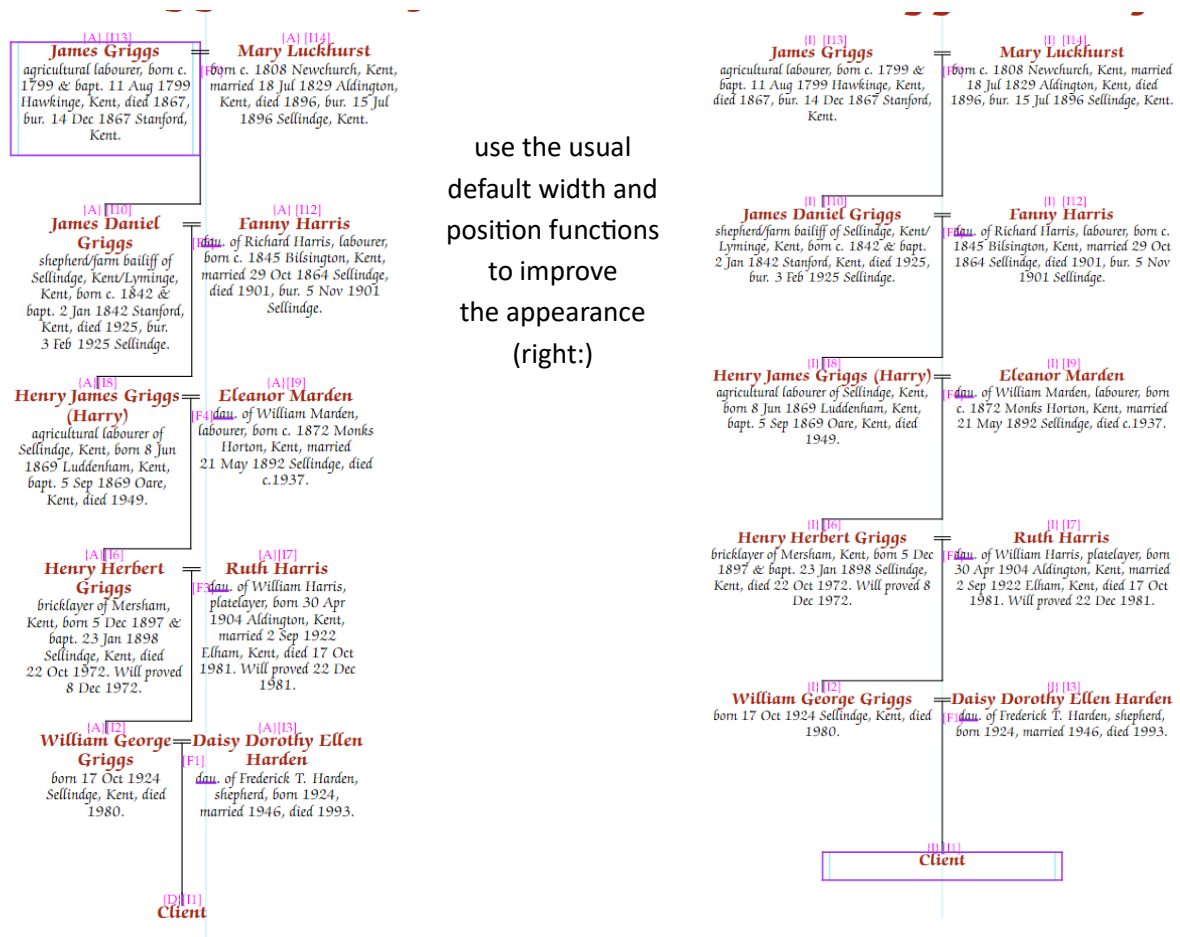
3rd Start: ... Offset: 0

4th Start: ... Offset: 0

Direct line to: ...

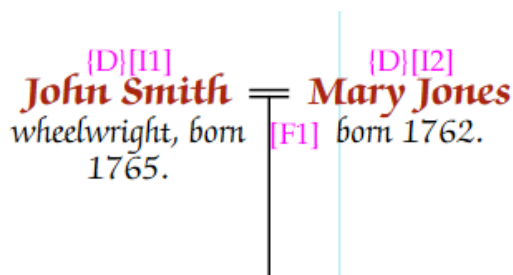
☐ Siblings on birth brief

Enter the destination descendants ID number (in this case, I1), and click enter. The chart will update to show only the direct line between the two:



Family symbols: divorced/never married

By default, a couple are shown with an “=” symbol between them:



If it is known that a couple never married, then the “X” symbol can be used. To do this, the person’s data must be edited in the main database.

Make sure that one of the couple is the selected person, and that their correct spouse is shown if there is more than one. In this case, John Smith is selected, as is his spouse, Mary Jones.

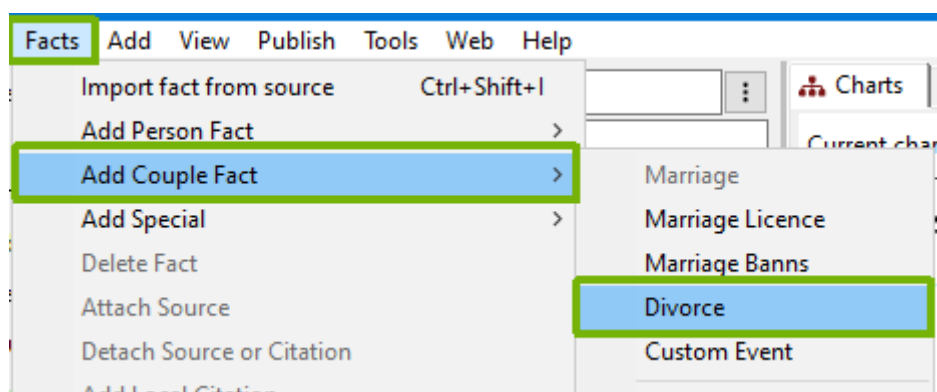
Then change the “Status” drop down box to “Never Married”. The family symbol on the chart will change to an “X”.

This might not always be appropriate, particularly with modern families. So rather than selecting “Never Married”, “Cohabiting” can be selected. This will show the “=” symbol is usual, but the key will be updated to indicate that the “=” symbol is also used for non-married couples.

Key

c. Circa (approximate date) = Married/living together
(1) Order of spouses/partners


A divorced symbol “=” with a bar through it, can also be shown. To do this, the couple have to have a divorce fact in their family. To do this, make sure that the correct person and spouse are selected, then select “Facts” from the menu bar, then “Add Couple fact” and “Divorce” from the sub menus.

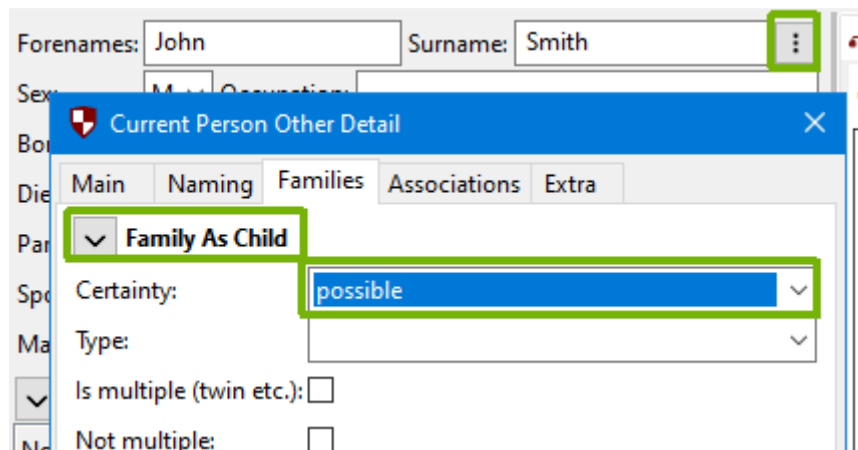


^{[D][I1]} John Smith ~~=~~ ^{[D][I2]} Mary Jones
wheelwright, born ^[F1] 1765. born 1762.

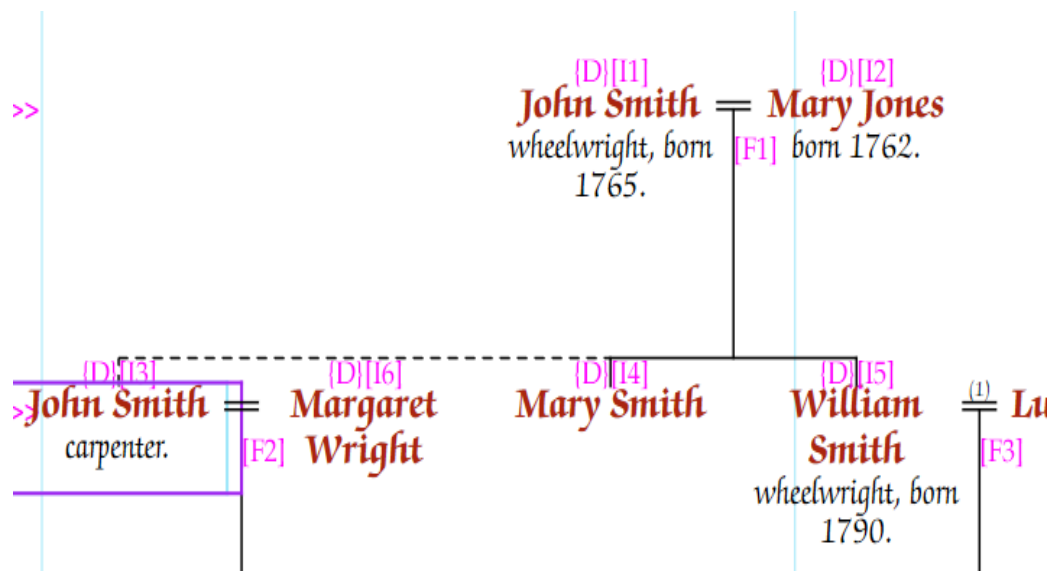
This can be removed by deleting the divorce fact from the fact grid. The same process, and symbol is used for an annulment.

Uncertain information—relationships

On occasions, it might be desirable to show on a chart a child-parent relationship that is plausible, but unproven. This is often shown with a dashed, rather than a solid line. To do this, make sure the active person is the child in the relationship. Then click on the  button next to the person's name on the person editing panel. Then set the "Certainty" value in the "Family As Child" section of the dialog box that appears.



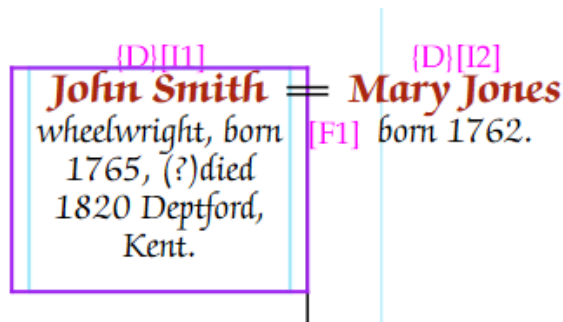
The values "challenged", "possible", or "probable", will cause the line to their parents to be dashed, as per the example below, and a relevant entry added to the charts key.



Setting the “Certainty” drop down box back to empty will clear the line. If multiple siblings are set as uncertain, then the lines should update correctly.

Uncertain information—facts

On occasions, one or more facts in someone’s life might be unproven. For example, perhaps a death/burial has been found, but it isn’t yet proven that it is the correct one. The convention here is to show the entry on a family chart with a question mark.



Facts can be flagged as uncertain by selecting them in the fact grid (whilst the correct person is selected), then using the Likelihood drop down box. Values of “possibly” or “probably” will cause a question mark to appear on the chart. Setting the box as empty won’t show a question mark.

A screenshot of a software interface for managing facts. On the left is a sidebar with icons for home, download, folder, and a list. The 'Facts:' tab is selected. The main area contains a table with columns 'Type', 'Date', and 'Place'. The table has three rows: 'BIRT' with date '1765', a '+' sign with date '1790' and place 'William /Smith/', and '?DEAT' with date '1820' and place 'Deptford, Kent'. The '?DEAT' row is highlighted with a green border. Below the table are input fields for 'Date:' (1820), 'in' (Deptford, Kent), 'Address:', 'Age:', and 'Time:'. A 'Likelihood:' dropdown menu is set to 'possibly' and is also highlighted with a green border.

Type	Date	Place
BIRT	1765	
+	1790	William /Smith/
?DEAT	1820	Deptford, Kent

Date: 1820 in Deptford, Kent
Address:
Age:
Time:
Likelihood: possibly ▾

Killed in action/executed, rather than died

By default, if a death fact is in the database, it will be shown on a chart as “died” or “d.” depending on the style of the chart. Sometimes, it might be preferable to show “Killed in action”, or use a different verb.

Ensure that the person is selected, and then locate the death fact from the fact grid. Use the “Type” box to choose a different kind, such as “Killed in action”

Not all types here will change the text on the chat, but many will.

Type	Date	Place
BIRT	5 Mar 1893	London
DEAT	15 Feb 1916	London

Type: **killed in action**

Albert Horace Doe
born 5 Mar 1893
London, killed in action
15 Feb 1916.

Stillborn children

The following is a sensitive issue, and different people will have different views, but it is perhaps more appropriate to show stillborn children on a family chart as stillborn, rather than giving them birth and death date. To do this, first ensure that the child is selected, then locate (or add) a birth fact to their fact grid. Then set the “Type” drop down box to “Stillborn” and the chart will be updated accordingly.

Type	Date	Place
BIRT	1 Jan 1980	London

Type: **stillborn**

Malcolm Smith
stillborn 1 Jan 1980
London.

Died without issue (dsp) and never married.

It is quite common on old charts to indicate that someone died without children, (using the Latin abbreviation dsp), or that they never married. Both pieces of information can be set in the database, so that they will show on the chart. Both set up in a similar way.

Died without issue

Ensure that the relevant person is selected, then use the “hamburger” button to the right of their name box to select the “Person Extra Information”. In the “Children count” box, enter “0” and press enter, the chart will be updated as appropriate

Pedigree Forge - [untitled]
File Edit Facts View Tools Web Help

Name: Richard /Doe/ [hamburger menu]
Sex: M Trade: in London
Born: 1665
Died: 1700
Parents: <Add>
Spouse: <Add>
Married: No
Children: No

Person Extra Information

General

ID 11
Alive ☐
Children count 0
Marriages count
Names/Titles
Nickname
First name unused ☐

[0] [11]
Richard Doe
born 1665 London, d.s.p.
1700.

Never married

Ensure that the relevant person is selected, then use the “hamburger” button to the right of their name box to select the “Person Extra Information”. In the “Marriages count” box, enter “0” and press enter, the chart will be updated as appropriate

Name: Richard /Doe/ [hamburger menu]
Sex: M Trade: in London
Born: 1665
Died: 1700
Parents: <Add>
Spouse: <Add>
Married: No
Children: No

Person Extra Information

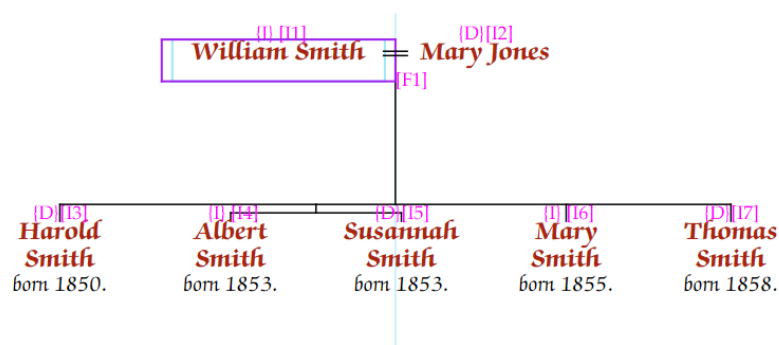
General

ID 11
Alive ☐
Children count
Marriages count 0
Names/Titles
Nickname
First name unused ☐
Prefer nickname ☐

[0] [11]
Richard Doe
born 1665 London, died
1700, never married.

Twins/multiple births

It is conventional that twins/triplets etc. are shown on a family chart with a common line, grouping them from the other siblings. This is done automatically if two children are given the same date of birth, and are next to one another in order in their family.

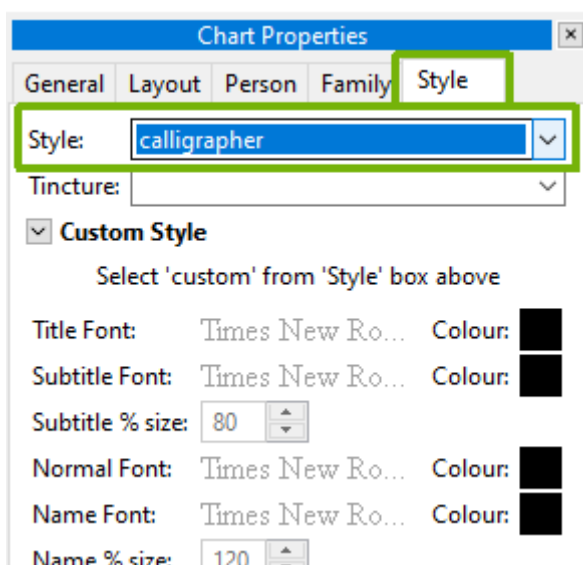


See the section on editing twins and multiple births in the section on working with people in this guide for more advanced scenarios.

Chart styles

Pedigree Forge comes with a number of pre-defined chart “styles”, the term style being used to describe things like font, colours and text formatting. There are also different chart “modes” which are used to describe how a chart is built.

Chart styles are set from the “Style” drop-down box of the “Style” tab of the “Chart Properties” panel, whilst editing a chart:

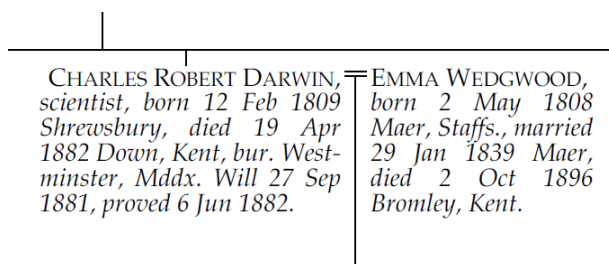


The default style is “calligrapher” which is what we have used in our examples so far.

A few of the other styles are described and illustrated below:

Antiquarian

Inspired by some of the charts often presented with family history books, with a “wordy” style, no colour, and justified text:



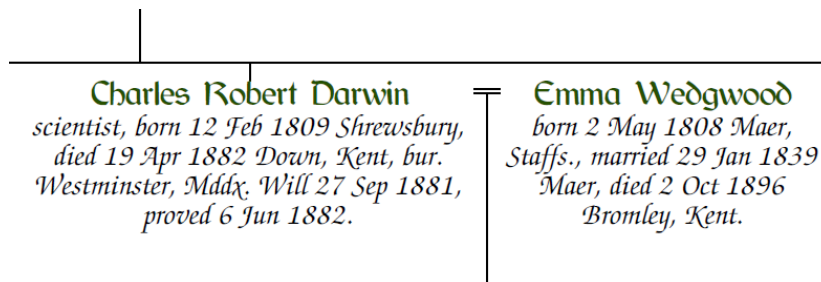
Visitation

Similar to Antiquarian, but with an Old English Font title, as often used in printed “Visitations”:

The Darwin Family

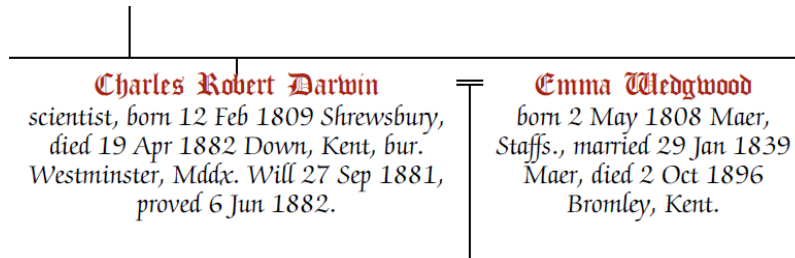
Celtic

A chart with a celtic inspired font:



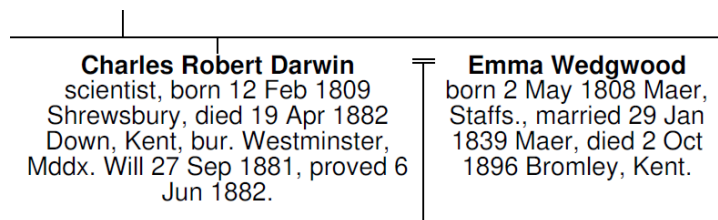
Monastic

A whimsical style inspired by monastic writing:



Minimalist

A more modern and plain style with a clear san-serif font:



Other styles are likely to be added in the future.

Tinctures

In addition to various styles, a set of “tinctures” can also be used to change certain colours used in many of the styles. Tincture is the term used in heraldry to describe colours used in coats of arms, and that tradition is carried forward using the historic names for these, as follows:

Or: Gold (Metal)

Argent: Silver (Metal)

Azure: Blue

Gules: Red

Purpure: Purple

Sable: Black

Vert: Green

Also included are the “stains”:

Sanguine: Blood red

Tenné: Tawny

Murrey: Mulberry

The image shows a genealogical chart on the left and a 'Chart Properties' window on the right. The chart is a family tree for the Darwin family, showing several generations. Names are color-coded: blue for males and red for females. The chart includes birth and death dates for many individuals. The 'Chart Properties' window is open to the 'Style' tab, which shows a list of tinctures (colors) used in the chart. The 'Tincture' dropdown is set to 'azure' (blue). Other tinctures listed include gules (red), sable (black), vert (green), argent (silver), or (gold), purpure (purple), murrey (mulberry), sanguine (blood red), tenné (tawny), and bleu celeste. The window also shows settings for font, line color, and border.

Chart Properties

General Layout Person Family **Style**

Style: calligrapher

Tincture: azure

Custom: gules, sable, azure, vert, argent, or, purpure, murrey, sanguine, tenné, bleu celeste

Mini Font: Times New Roman Colour: [black swatch]

Mini % size: 60

Line Colour: [black swatch]

Accent Colour: [black swatch]

Arrow Colour: [black swatch]

Thick Border: [black swatch]

Thin Border: [black swatch]

☐ Dingbats

☐ Justify

Family Tree:

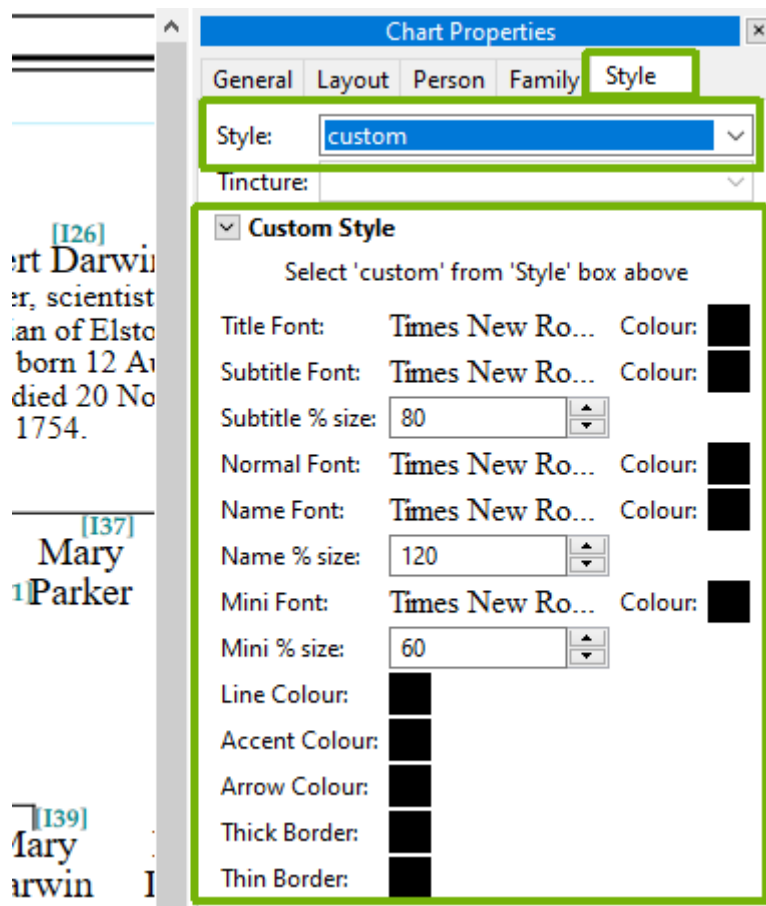
- John Darwin** (1730-1805) /partners **Mary Howard (Polly)** (1740-1770) [I23] (1)
 - Susanna Edgwood** (1765-1765) [I16] dau. of Josiah Edgwood, potter, n 3 Jan 1765.
 - William Alvey Darwin** (1767-1767) [I35] born & died 1767
- Erasmus Darwin** (1731-1802) [I22] born 12 Dec 1731 Elston, Notts., died 18 Apr 1802 Breadsall, Derbs. **Mary Parker** (1774-1859) [I37] [F11]
 - Susanna Darwin** (1772-1856) [I38] born 1772, died 1856.
 - Mary Darwin** (1774-1859) [I39] born 1774, died 1859.

Robert Darwin [I26] lawyer, scientist, physician of Elston, Notts., born 12 Aug 1682, died 20 Nov 1754.

Custom chart styles

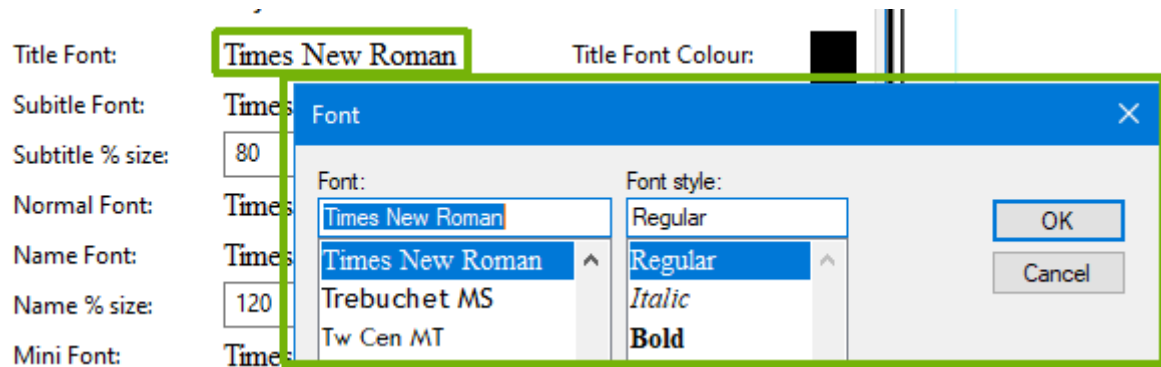
If the built in chart styles don't fit your needs, it is possible to create your own styles, using fonts and colours of your choosing.

First, ensure that the chart style is set to "custom", on the "Style" tab of the "Chart Properties" panel:



The "Style" section tab can then be used to choose fonts, sizes and colours, for various chart features:

Clicking on the font names will show the system font dialog to allow you to choose a font:

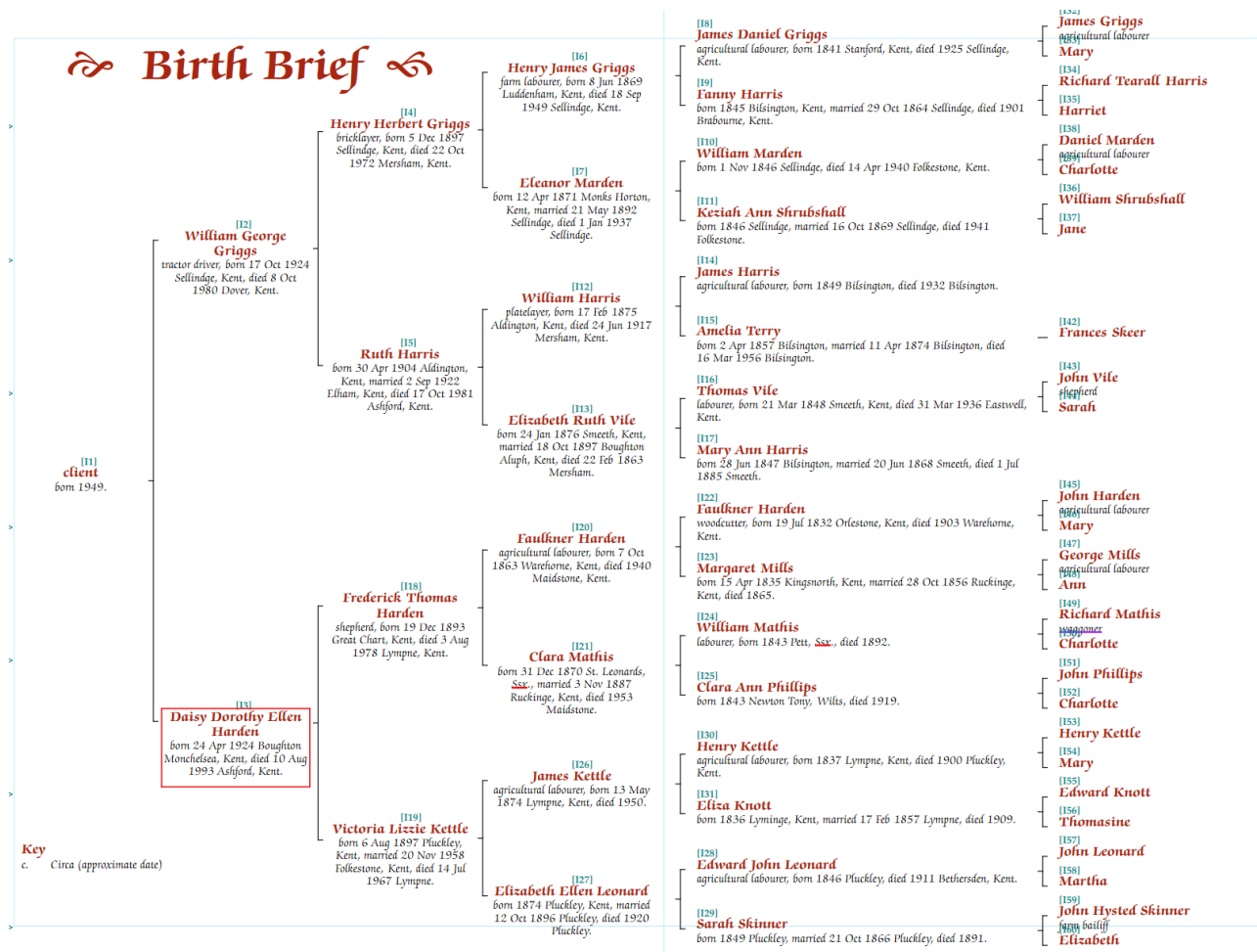


Clicking on one of the coloured squares will show the system colour dialog, to allow you to choose the colour:

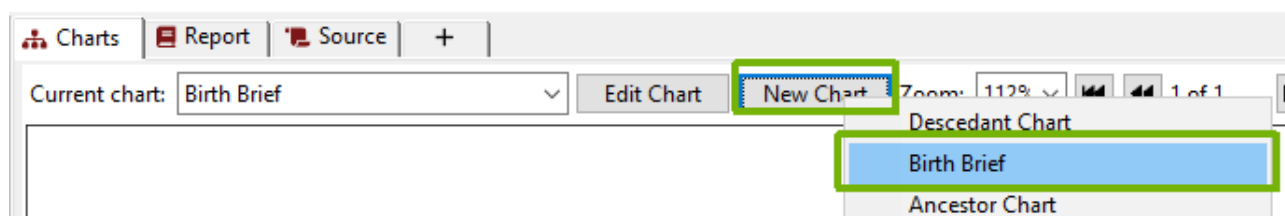


Birth brief charts

Pedigree Forge allows you to create “Birth brief” mode charts. These start from a particular person, and present their ancestors horizontally, with a summary of information of their direct ancestors. They are a good way to get an at a glance view of all ancestors, back to the great, great, great grandparents:



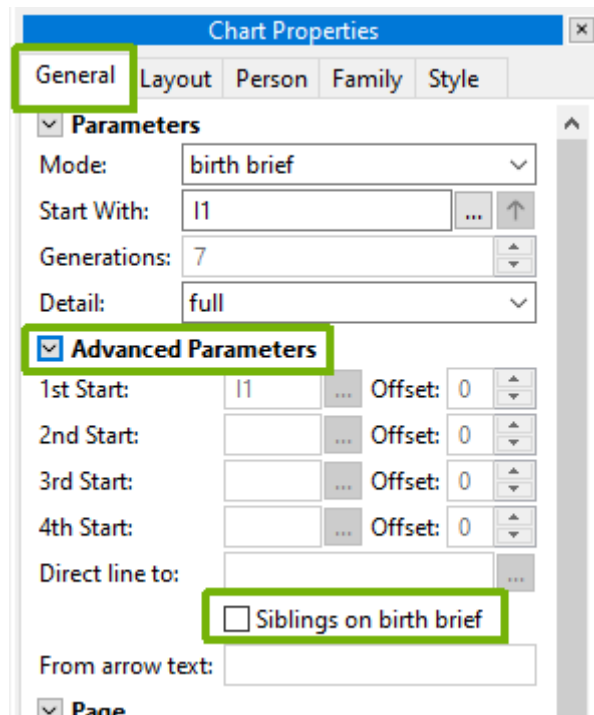
To create a birth brief style chart, click on the “New Chart” button, located on the Charts tab, and then select “Birth Brief”



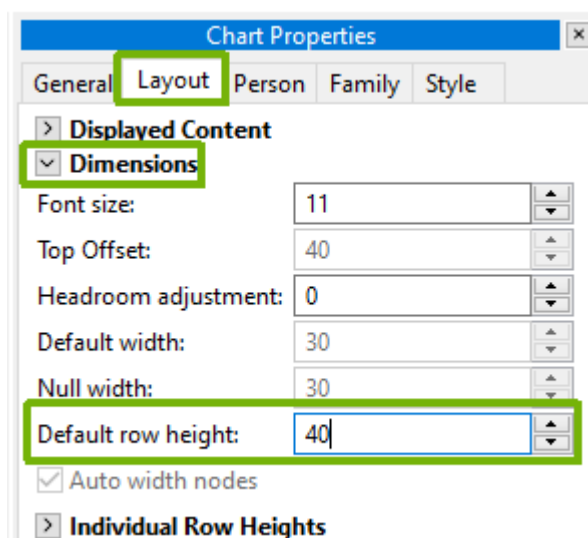
You will be prompted to select the starting person, and then the chart will be created.

Editing birth brief charts is similar to drop-line charts, as already described, in that the information is entered via the “Chart Properties” panel, whilst in editing mode. However, many of the options aren’t applicable in this fixed sized chart.

Although birth brief charts always start from a single person, you can opt to show their full siblings on the chart too. To do this, ensure that the chart is in “editing” mode, then check or uncheck the “Siblings on birth brief” check box, which is in the “Advanced Parameters” section, on the “General” tab of the “Chart Properties” panel:



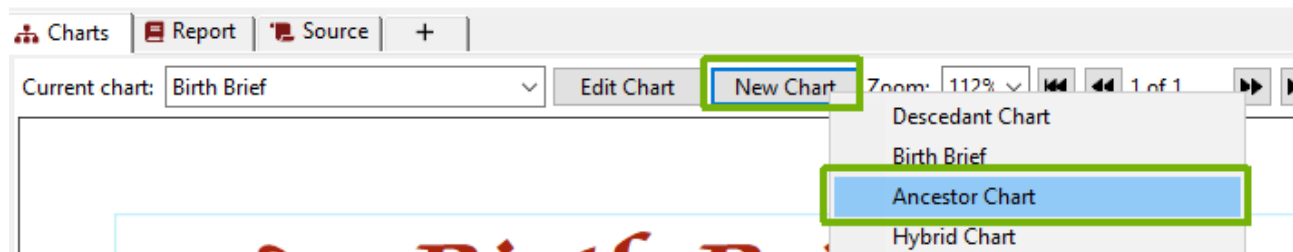
Whilst “Default row height” usually has no effect in birth brief mode, as it is a fixed layout, if the starting person’s siblings are being included, then the “Default row height” value can be changed to effect the spacing of the siblings:



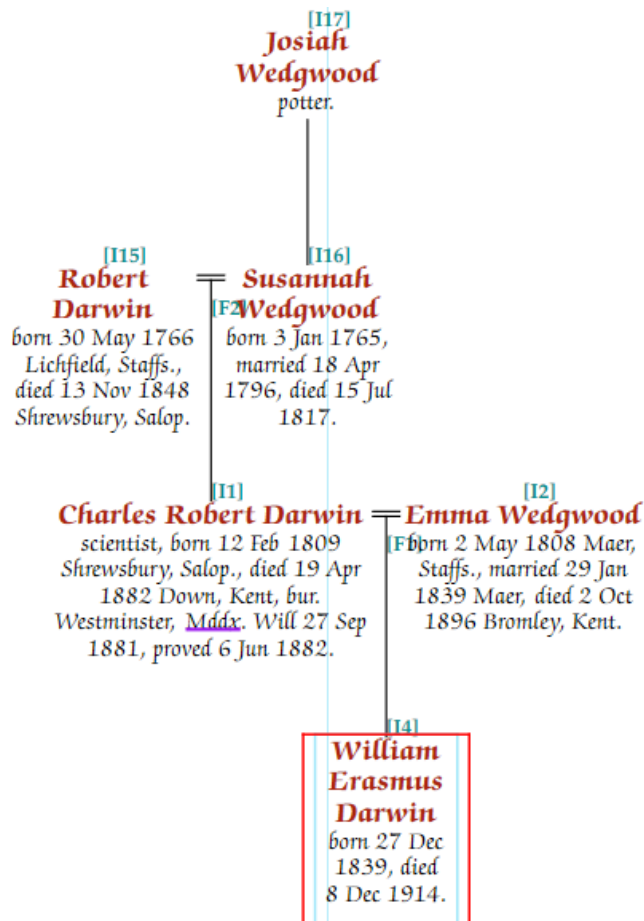
Ancestor charts

Pedigree Forge can work with charts that start with a particular person and shows their ancestors. This is the reverse of a drop-line descendant chart, which starts with one or more person and works forward.

To create an ancestor chart, click on the “New Chart” button located on the “Charts” tab, and then select “Ancestor Chart” from the drop-down menu:



You will then be prompted to select the starting person and the ancestor chart will be created:



In the above example, William Erasmus Darwin was selected as the starting person, and the chart shows all ancestors entered for him.

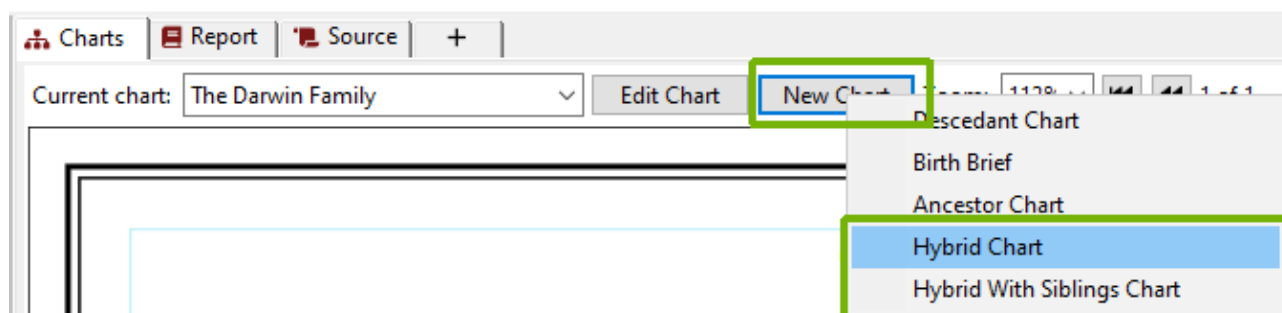
Editing ancestor charts is very similar to editing descendant charts, although as the chart is set out from the ancestor at the bottom, and only ancestors are shown, not all customisations work. In particular multiple marriages aren't shown (only the one from which the starting person is descended) are included.

Ancestor charts don't show siblings either: they only show the ancestors. Including siblings of each generation as you work back would create a spiders web mess.

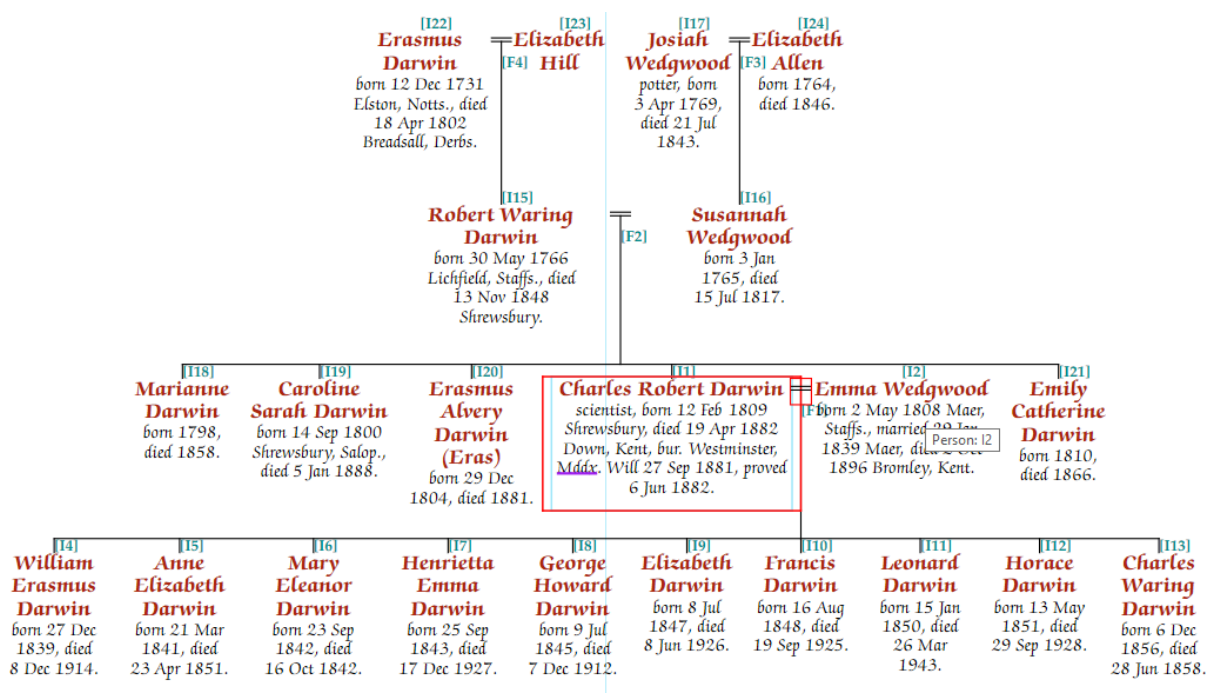
Hybrid charts (descendant and ancestor mixed mode)

Pedigree forge allows you to create a hybrid chart, which starts from a particular person and includes their descendants and ancestors: it is a mix between a descendant chart and an ancestor chart. There is also the option to include their siblings too (and their descendants too).

To create a hybrid chart, click on the “New Chart” button on the “Charts” tab, then either select “Hybrid Chart” if you want to start with a particular person, but not include their siblings or “Hybrid With Siblings Chart” if you want to include their siblings too:



The following is a “Hybrid With Siblings” chart, start with Charles Robert Darwin. It includes his ancestors, and descendants. If further generations were added, the chart would expand.



A Hybrid chart (without siblings) starting with Charles wouldn't include his siblings (or their descendants if added).

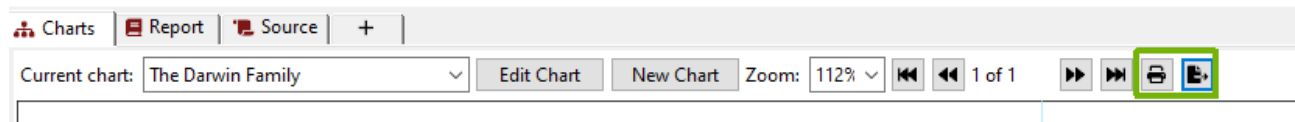
Editing hybrid charts is very similar to the steps outlined for drop line charts, indeed, some of the chart is a drop line pedigree.

A similar effect can be created by specifying multiple start people on drop line pedigree charts, see the section on “Starting charts with multiple people”. The main difference is that the hybrid mode charts don't

include siblings of ancestors of the starting person, which often gives a “cleaner” looking chart, at the expense of some information.

Printing and exporting charts

Charts can be printed or exported to other file formats (including PDF), via the buttons along the top of the Charts tab, or from the “File” menu.



Supported formats for export:

PDF: “Portable Document Format” recommended for most uses.

SVG: “Scaled Vector Graphics”—useful for various tasks, such as including on website. **Important** SVG charts require the same fonts to be installed on the viewer’s machine. Some of the fonts used in Pedigree Forge’s standard charts aren’t installed by default on many computers.

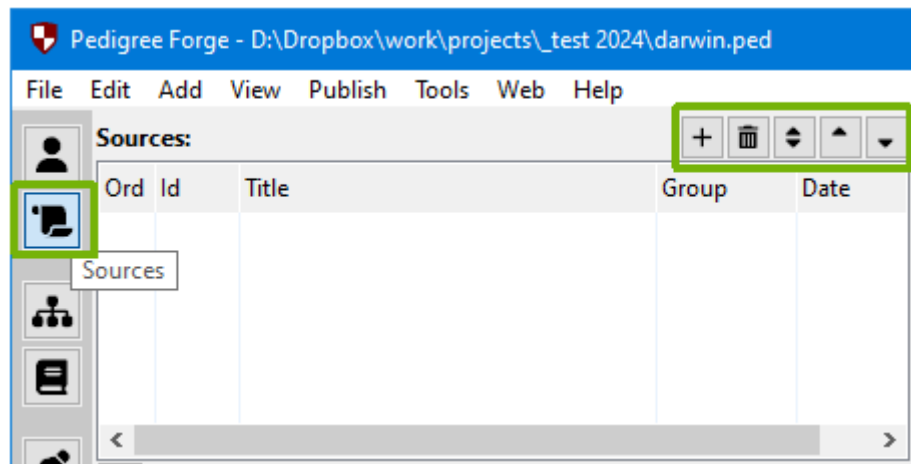
PNG, JPG, GIF, BMP: rasterised formats.

HTML: SVG (see above) embedded into an HTML document—experimental use for creating accessible charts for visually impaired users.

Working with sources

Recording *how* you know something to be true in genealogy is very important. Many genealogists regret not doing so too late!




Sources in Pedigree Forge are entered and edited via the source editing panel, which can be accessed from the second button on the “Action Bar”, which runs down the left-hand side of Pedigree Forge’s main window:



At the top of the sources panel is a table showing all sources so far entered in the project (the list above is empty). Clicking on one of the sources will make it the active source and allow you to enter or edit details. The buttons along the top of the table allow you to add, delete, or change the order of sources.

Creating a source

At the simplest level, you can click on the “+” button to create a new source, this will add a source and you can start entering information in the fields below:


Sources: +   

Ord	Id	Title	Group	Date
1	S1			



< >

Source Detail

Title:

Archive: 

Call No: Group:

Via:  

Some of the fields lower down the sources panel aren't shown by default, but can be made visible by clicking on the ">" buttons to show the extra fields:

Image: ☐ Inline ☐ In report

Date:

Place:

Address:

> Source Text

> Source Note

> Media

> Backlinks


> More Options

The amount of detail you record for each source will vary depending on your tastes. At a minimum, you would probably want to give a source a title, record the "archive" in which it was found and some kind of reference number, which will depend on the convention for the source.



Below is an example of how we might enter the information about Charles Darwin's death certificate:

Source Detail

Title:

Archive: 

Call No: Group:

Via:  

As the death certificate is registered as Charles Robert Darwin, that is the title used. The “Archive” is the General Register Office, and the “Call No:” is the reference. In this case, this is how the General Register Office reference particular certificates via their indexing system.

The “Archive” is set by clicking on the “monument” button, which will pop-up a dialog allowing you to select an archive from a list.

The screenshot shows a form with the following fields:

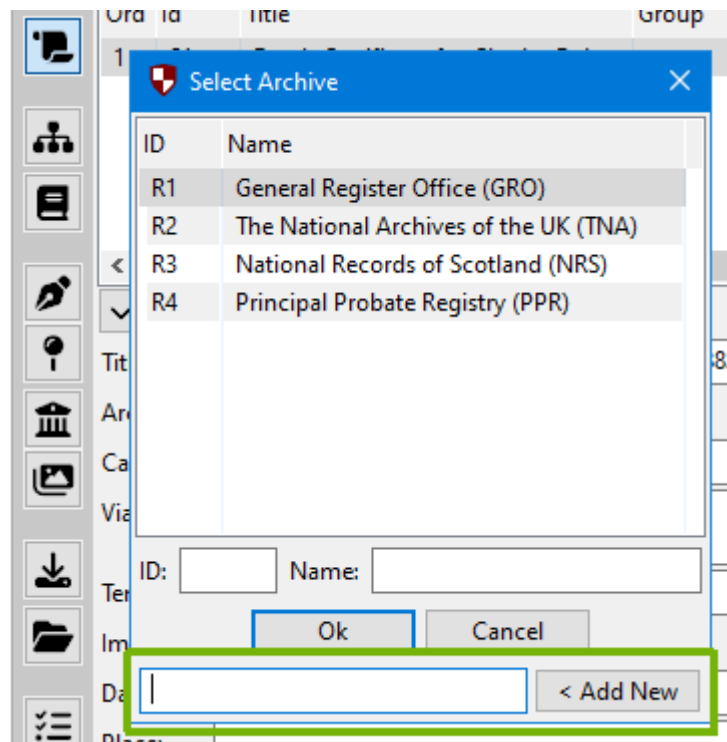
- Title: Death Certificate for Charles Robert Darwin, 1882
- Archive: General Register Office (GRO)
- Call No:
- Via:
- Template:
- Image:
- Date:

A "Select Archive" dialog box is open, displaying a list of archives:

ID	Name
R1	General Register Office (GRO)
R2	The National Archives of the UK (TNA)
R3	National Records of Scotland (NRS)
R4	Principal Probate Registry (PPR)

The dialog box also includes a close button (X) and a "monument" icon button.

When you start your project, only a small number of archives are pre-populated. You can add new ones via the “< Add New” button in the lower-right hand corner of the “Select Archive” dialog:



Archives can also be added and edited separately on their own editing panel. More information can be found in the archives section.

Sources are most useful when they are linked to from facts and events. This creates a citation, i.e. so we know the source of the information in that fact or event.

Citations

Pedigree Forge supports two types of citations. Firstly, there are citations that are linked to a source. To link a source citation to a fact, locate the relevant fact in the “Facts and Events” table for the relevant person (or one of the couple if it is a couple fact). Click on the fact so that the fact is the current one being edited (its information will appear in the fields below the table):

Facts and Events			
Date	Type	Place/Particulars	
27 Sep 1881(Tu)	Will		
19 Apr 1882(We)	Died	Down, Kent	
	Buried	Westminster, Middlesex	
6 Jun 1882(Tu)	Probate		
Date:	19 Apr 1882	in	Down, Kent
Address:	Down House	Likelihood:	

Then, either click on the “+” button below the “Citations:” label, or right-click on the fact in the table and then select “Add source citation” from the pop-up menu.

The screenshot shows a software interface with a table of facts and a context menu. The table has three columns: Date, Type, and Place/Particulars. The first row is '27 Sep 1881(Tu)' with Type 'Will'. The second row is '19 Apr 1882(We)' with Type 'Died', which is highlighted. The third row is 'Buried' and the fourth is '6 Jun 1882(Tu)' with Type 'Probate'. Below the table is a form with fields for Date, Address, Age, Cause, Note, Subtype, and Citations. The Citations field has a '+' button. A context menu is open over the 'Died' fact, listing options: Add Baptism, Add Divorce, Add Cremation, Add Seat, Add Custom, Delete, Witnesses, Add source citation (highlighted), Add local citation, and Import fact from source.

Date	Type	Place/Particulars
27 Sep 1881(Tu)	Will	
19 Apr 1882(We)	Died	
	Buried	
6 Jun 1882(Tu)	Probate	

Form fields:

- Date: 19 Apr 1882
- Address: Down House
- Age: 73y
- Cause: [empty] lived
- Note: [empty]
- Subtype: [empty]
- Citations: [empty]

Buttons: +, [trash icon]

Context menu options:

- Add Baptism
- Add Divorce
- Add Cremation
- Add Seat
- Add Custom
- Delete
- Witnesses
- Add source citation
- Add local citation
- Import fact from source

This will pop-up a dialog to allow you to select the source to link to. By default, the source being edited will be selected. Clicking the “OK” button will link the fact to the source, creating the citation.

The screenshot shows a 'Select Source' dialog box. It has a table with two columns: ID and Title. The first row is 'S1' with Title 'Death Certificate for Charles Robert Dar...'. Below the table are fields for ID and Title, and 'Ok' and 'Cancel' buttons. The 'Ok' button is highlighted.

ID	Title
S1	Death Certificate for Charles Robert Dar...

Form fields:

- ID: [empty]
- Title: [empty]

Buttons: Ok, Cancel

The source will show as linked in the “Citations:” list:

The screenshot shows the 'Citations:' list in the software interface. It contains one entry: '[S1] Death Certificate for Charles Robert Darwin, 1882'. Below the list are '+' and [trash icon] buttons, and a 'Notes' section.

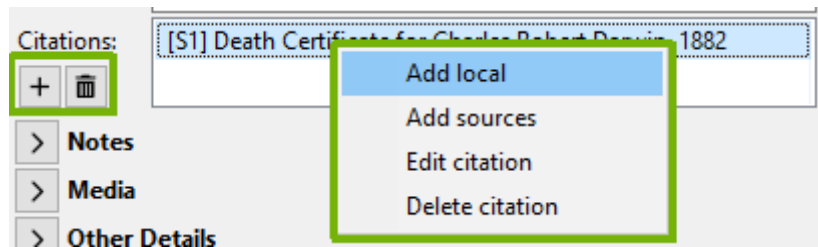
Citations:

- [S1] Death Certificate for Charles Robert Darwin, 1882

Buttons: +, [trash icon]

Notes: [empty]

Citations can be edited using the “+” and “Trash” buttons to the left of the citations list. More options are also available by right-clicking on the citations list, which will show a pop-up menu of choices:



Local Citations

In addition to citations that are linked to a source, it is also possible to create local citations. These are more “light-weight”, than a complete source citation. Perhaps little more than a footnote. I often use these where the only reference is from an index (such as the GRO index of births/deaths/marriage), rather than a full document.

Clicking on the “Add local” option above (or using the “+” button and then selecting the local option). Will show the Local Citation dialog:

A screenshot of a 'Local Citation' dialog box. At the top is a large text input field. Below it is an 'Ok' button. Underneath are four tabs: 'GRO' (selected), 'Scots', 'General', and 'Note'. The 'GRO' tab contains several labeled input fields: 'Type:', 'Quarter:', 'Year:', 'Name:', 'District:', 'Volume:', 'Page:', and 'DOB/Spou/Moth:'. At the bottom of the dialog are two buttons: 'Build' and 'Ok'.

You can enter free-text in the box at the top of the dialog, then select “Ok” to add the text as a local citation.

The tabs below, such as “GRO” and “Scots” will help you formulate an entry:

GRO Index of Births entry form. Fields: Type: Birth, Quarter: D, Year: 1840, Name: Darwin, William Erasmus, District: St. Pancras, Volume: 1, Page: 324, DOB/Spou/Moth: Wedgewood. Buttons: Build, Ok.

When the details have been entered, clicking “Build” will show the text in the box above:

Local Citation dialog box. Text: GRO Index of Births: D1840 Darwin, William Erasmus; district: St. Pancras; volume: 1 page: 324; mother: Wedgewood. Button: Ok.

Clicking on the “Ok” button will then add the local citation to the selected fact:

Citations section. Text: GRO Index of Births: D1840 Darwin, William Erasmus; distri... Buttons: +, -, Notes.

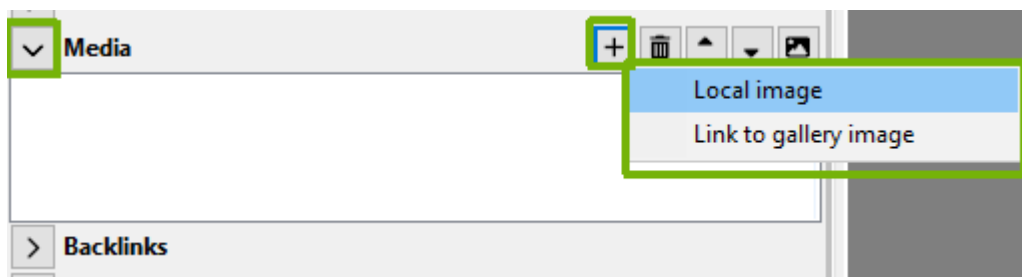
Source images

In the following example, we will build on Charles Robert Darwin's death. Below is the image of the entry obtained from the General Register Office:

19	Nineteenth April 1882 Down R.S.D.	Charles Robert Darwin	Male	73 years	J. P. M. A. L.L.D. F.R.S.	Angina Pectoris Syncope Certified by C. H. Allfrey M.D.	Francis Darwin Son present at the Death Down	Twenty Fifth April 1882	Henry J. Rose Registrar
----	--------------------------------------	-----------------------	------	----------	---------------------------	--	---	-------------------------	-------------------------

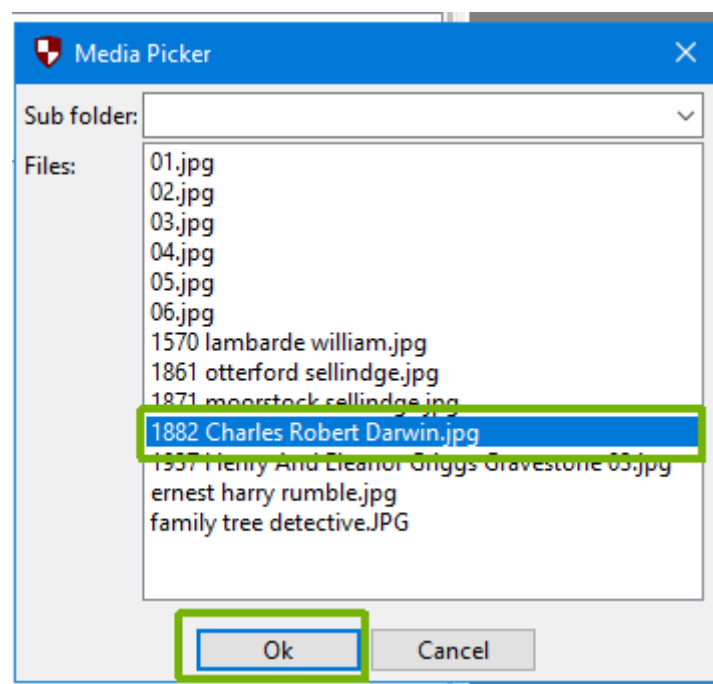
Source images should be downloaded or placed in the same folder as the file in which you are working.

Make sure that the “Media” section of the source edit panel is showing (use the “>” button to open it if it isn’t). The click on the “+” button. You can either add a local image, or link to one already in the gallery.

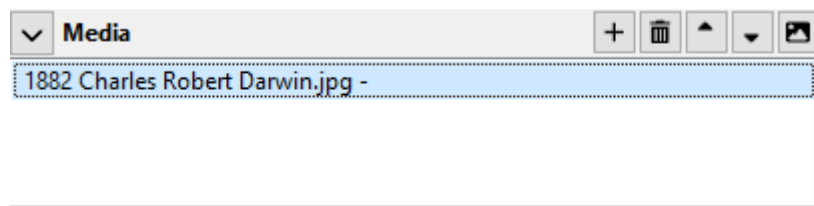


In this example, we will use a “Local image”, i.e. one that will be local to this source.

The “Media Picker” dialog will appear, showing the images in the project’s directory. Select the relevant one and click “Ok”:

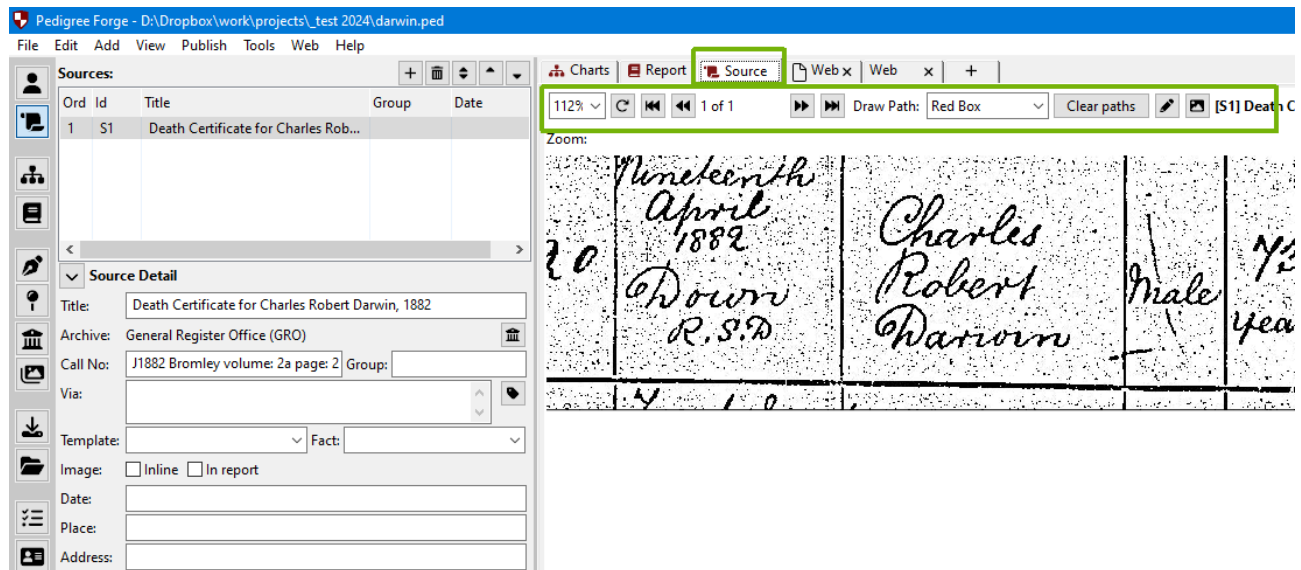


The image will now be linked to the current source:



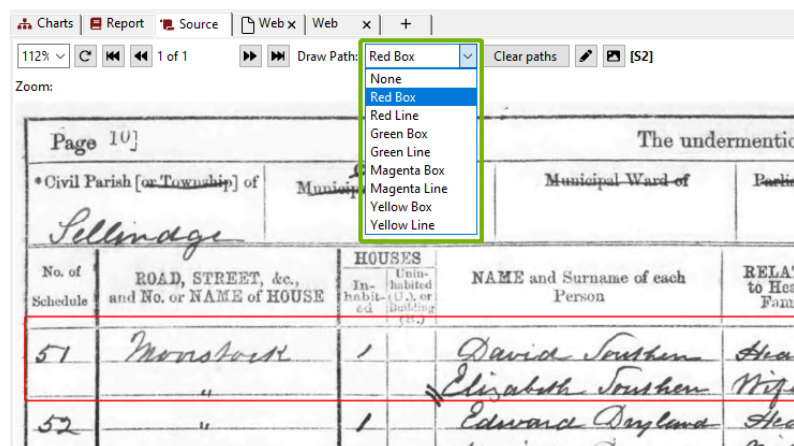
Multiple files can be added, if the particular source spans more than one page.

The image linked to the source can now be viewed within Pedigree Forge, on the “Source” tab:



The toolbar that runs along the top of the Source tab can be used to undertake various tasks, such as zooming in/out or moving to different images if there is more than one image for the source.

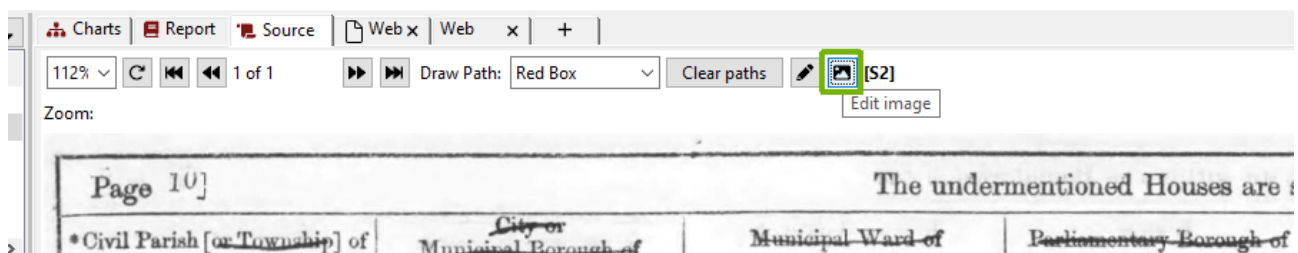
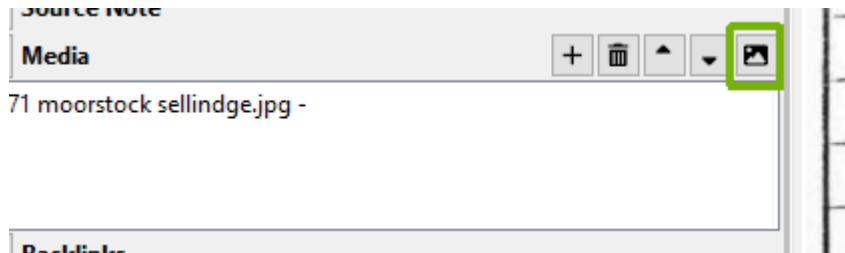
It is also possible to “Draw Paths” on top of the image. These don’t effect the original image, and only appear in Pedigree Forge or report outputs. You might, for example, want to highlight a particular entry on a census, as shown below:



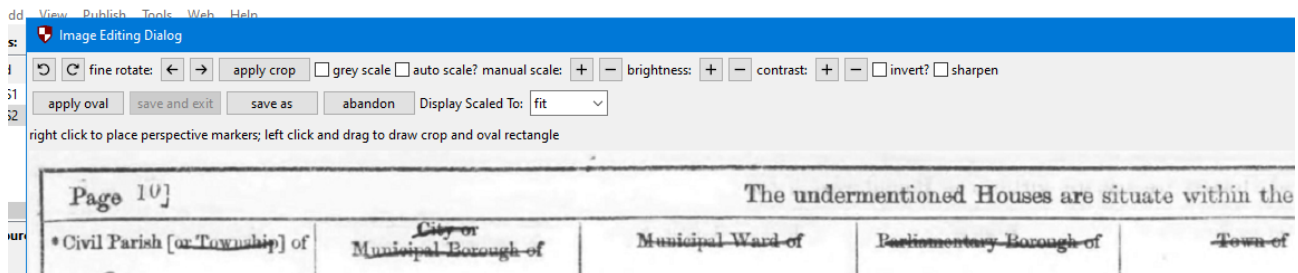
Selecting “None” from the Draw Path box allows you to “grab” a large source image with the mouse and move to different sections. “Clear paths” clears all paths on the current image.

Source image editor

Pedigree Forge includes a basic image editor, designed to help with some of the tasks you might want to do with source document images, like cropping. This can be accessed either from the Edit Image icon button on the sources tab toolbar, or from the Media grid on the sources panel:



The “Image Editing Dialog” will then appear, showing the current image.

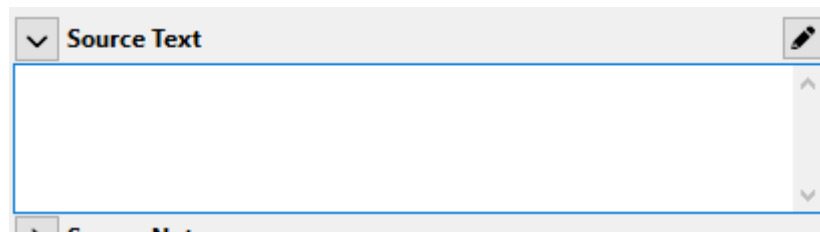


If you edit an image (by cropping it), you are likely to have to change and “paths” drawn over the image, as they are placed based on the images size.

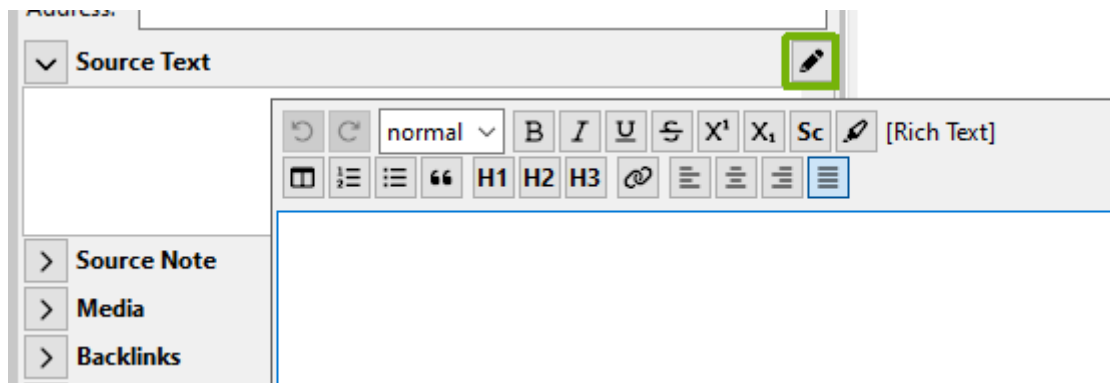
Source transcripts

Recording the basic information about a source (title/archive/call number) is the first step to properly organising your research. The next step is creating transcripts, or capturing information about a source. This was once very important, as the documents were always hard to access, and often it would be impossible to get an image of the source. In today's world, where many sources are available online, it is still a great way to make sure you have understood all the information on the source, and make it available to your family, who might not be able to read the old-handwriting.

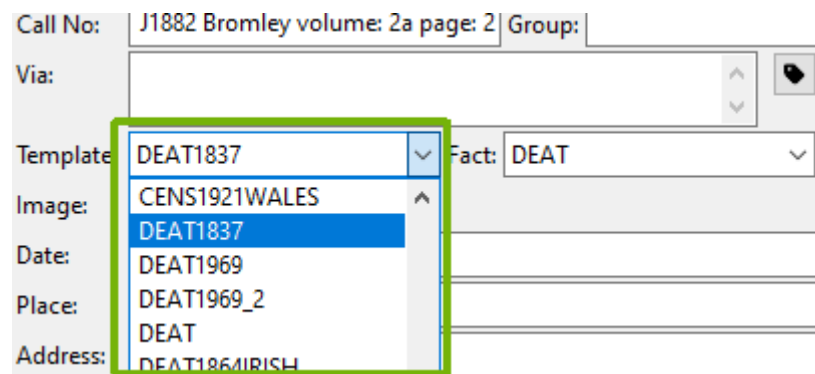
Source Text can be entered in the relevant section on the sources panel:

A screenshot of a software interface showing a section titled "Source Text" with a dropdown arrow on the left and a pencil icon on the right. Below the title is a large, empty rectangular text entry box with a vertical scrollbar on the right side.


The source text can accept "Rich text", such as bold, italic, tables etc. To access these features, click on the pencil icon above the Source Text entry box, which will show a fuller text editor—see section on Rich Text Editor for more information:

A screenshot of a Rich Text Editor interface. At the top, there is a "Source Text" label with a pencil icon to its right, which is highlighted with a green box. Below this is a toolbar containing various icons for text formatting (bold, italic, underline, strikethrough, text color, background color, link, unlink, list, indent, outdent) and a "Rich Text" label. Below the toolbar is a large text area for editing. To the left of the text area is a sidebar with expandable sections: "Source Note", "Media", and "Backlinks".

Many standard sources used in genealogy use common forms, for example, censuses, birth/death/marriage certificates and even later parish registers. You can create tables for these in the Rich Text Editor, but there is a simpler way to enter this kind of information, as Pedigree Forge comes with many built in source templates. For Charles Darwin's death certificate, we can set the "Template:" to "DEAT1837", selected from the dropdown list

A screenshot of a source entry form. The "Call No:" field contains "J1882 Bromley volume: 2a page: 2". The "Via:" field is empty. The "Template:" dropdown menu is open, showing a list of templates: "DEAT1837", "CENS1921WALES", "DEAT1837", "DEAT1969", "DEAT1969_2", "DEAT", and "DEAT1864IRISH". The "DEAT1837" option is highlighted. The "Fact:" dropdown menu is set to "DEAT". Other fields like "Image:", "Date:", "Place:", and "Address:" are visible but empty.

Now, when the pencil icon button is clicked, a template based on the General Register Office's death certificates, introduced in 1837, will be shown, allowing the information to be entered in a tabular format:

ext 

REGISTRATION District:

Year DEATH in the sub-district of in the include "County of" etc.

No.	When/Where	Name	Sex	Age	Occupation	Cause	Informant	Registered	Registrar
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Close

Note: we leave the top section blank in this case, as the image we have is the digital copy provided by the GRO, whereas the other information is if it were from a death certificate:

20	Nineteenth April 1882 Down R.S.D.	Charles Robert Darwin	Male	73 years	J. P. M.A. LL.D. F.R.S.	Angina Pectoris Syncope Certified by C. H. Allfrey M.D.	Francis Darwin Son Present at the Death Down	Twenty Fifth April 1882	Henry J Rose Registrar
----	--------------------------------------	-----------------------	------	----------	----------------------------------	---	---	-------------------------	---------------------------

REGISTRATION District:

Year DEATH in the sub-district of in the include "County of" etc.

No.	When/Where	Name	Sex	Age	Occupation	Cause	Informant	Registered	Registrar
20	Nineteenth April 1882 Down RSD	Charles Robert Darwin	Male	73 Years	JP MA LLD FRS	Angina Pectoris Syncope Certified by CH Allfrey MD	Francis Darwin Son Present at the Death Down	Twenty Fifth April 1882	Henry J Rose Registrar

Close

Clicking the "Close" button saves the transcript.

The benefit of transcribing sources in this way is that they can be included in reports. Below is how the transcript would appear in our report (see the section on Reporting for more information).

[1] Death Certificate for Charles Robert Darwin, 1882

General Register Office: J1882 Bromley volume: 2a page: 224

Col	1	2	3	4	5	6	7	8	9
No	When and where died	Name and surname	Sex	Age	Occupation	Cause of death	Signature, description and residence of informant	When registered	Signature of registrar
20	Nineteenth April 1882 Down RSD	Charles Robert Darwin	Male	73 Years	JP MA LLD FRS	Angina Pectoris Syncope Certified by CH Allfrey MD	Francis Darwin Son Present at the Death Down	Twenty Fifth April 1882	Henry J Rose Registrar

More source transcripts

Pedigree Forge includes a large, and growing, number of pre-defined forms for transcriptions. Many of these take a tabular form, like census transcripts.

Some fields are suggested for you, based on common values. For example, “Scholar” is a value that commonly occurs in this field on census returns, and so is suggested as you start to type:

The image shows a screenshot of a census transcription form. The form has columns for Name, Relation, Status, Age(M), Age(F), Occupation, Birthplace, and Infirm. Handwritten entries are visible in the background. A dropdown menu is open for the 'Occupation' field, showing suggestions: 'Farm Servant', 'Labourer's Wife', 'Scholar', and 'Infirm'. The 'Scholar' option is highlighted.

Name	Relation	Status	Age(M)	Age(F)	Occupation	Birthplace	Infirm
Edward Dryland	Head	Mar	51		Farm Servant	Kent Sellindge	
Harriett Dryland	Wife	Mar		45	Labourer's Wife	Kent Hinkshill	
George Dryland	Son	Unm	19		Farm Servant	Kent Sellindge	
William Dryland	Son	Unm	15		Scholar		

Pressing the [Enter] key will accept the suggestion, or pressing the [Esc] key, or continuing to type will allow you to enter your own value.

Spell checks are made in the transcript forms as the detail is typed. If there are spellings that are in the original, but aren't "correct", we can flag them as ignored, and they are showed as underlined in magenta—see the section on spell checking for how this feature works.

When working with censuses, information is often the same in one row as it is for the cell in the row above. In the example shown here, William Dryland was also born in Sellindge. Pressing the [Ctrl] and [D] keys copies the value from the cell above:

The image shows a screenshot of a census transcription form. The form has columns for Name, Relation, Status, Age(M), Age(F), Occupation, Birthplace, and Infirm. The 'Birthplace' field for William Dryland is highlighted with a green border, indicating it has been copied from the cell above (Kent Sellindge).

George Dryland	Son	Unm	19		Farm Servant	Kent Sellindge	
William Dryland	Son	Unm	15		Scholar	Kent Sellindge	

The transcript forms are “modal”, that is, whilst they are open, you can't interact with the Pedigree Forge main window directly. However, some shortcut keys allow some of the most likely tasks you would need to do on the main window, without closing the transcript dialog:

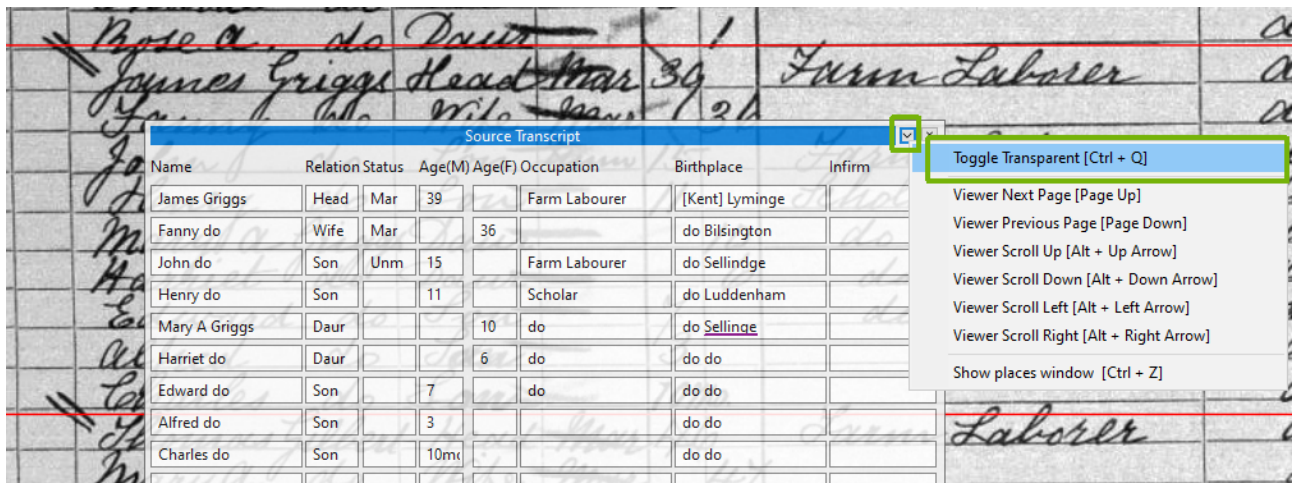
[Alt] + [arrow keys]: Moves the chart canvas window view point, i.e. the background image being transcribed is moved left, right, up or down, relative to the transcript window.

[Ctrl] + [arrow keys]: Moves the transcript window (leaving the background image in the same place). This can also be achieved by clicking on the grey areas of the transcript dialog and dragging.

[Page up] or [Page down]: If the source contains multiple images, these keys will move to the next or previous source image.

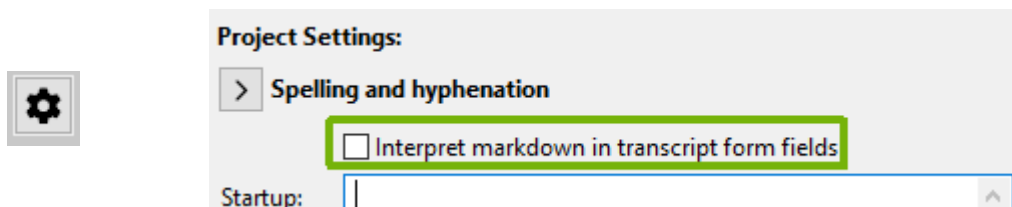
[Esc] Closes the transcript dialog.

It is possible to make the source transcription window semi-transparent. This is useful if screen space is at a premium, as it allows the text below the dialog to be partially visible through the window itself. To enable this, click on the small arrow next to the source transcript dialog's title and select "Toggle Transparent":



Markdown in source transcript fields

In most cases, the transcript forms used contain ordinary text. However, on some occasions, there might be features of the text that benefit from limited styling, for example ~~strike out~~. It is possible to enable a limited "markdown" like formatting of text in transcript fields. This feature has to be enabled for the project, via the "Project Settings" panel, which can be accessed from the cog button, located towards to lower-left corner of the Pedigree Forge main window:



The "markdown" format is similar to that used on mobile apps like WhatsApp, and also used by many programmers for documentation.

When this is enabled, the following formatting is applied:

Feature	Example	Styled as
Strike out	This is ~struck out~ text.	This is struck out text.
Bold	This is *bold* text	This is bold text
Italic	This is _italic_ text	This is <i>italic</i> text
Underlined	This is __underlined__ text.	This is <u>underlined</u> text.
Superscript	This is ^superscript^ text.	This is ^{superscript} text.
Larger/smaller text	This is \+ larger \- text.	This is larger text.
Small-caps	This is \$Small Caps\$ text.	This is SMALL CAPS text.
Number width space	\#	(Space the width of digits, 0 to 9)
Non-breaking white space	\~	(Space that doesn't break lines)
Fill gap with dots	\>.

Fill gap with under bar

Fill gap with wide dots

Fill gap with space

To next tab stop

\>

\>*

Left\>>Right

\>

.....

Left

Right

An example where this feature might be useful is the 1939 register, which often included later annotations showing married names. It is useful in the transcript to see what was original, and what was added later.

If you need to use one of the “markdown” symbols as a literal character, with markdown enabled, then typing two together. For example, if you want a literal * rather than starting bold, ** will output a single *, or if you need a literal \ you will have to type \\. If the markdown feature isn’t enabled, then you don’t need to double up on the characters.

In the following example, Eileen and Joan have married after the 1939 register was taken. We use the strike out (~) and superscript (^) markdown to reflect the original as best as possible:

1 Smith Alice - - F 2 Apr 82 W Unpaid Domestic Duties

2 Smith Stanley - M 18 Jan 19 S Press Operator Brush Works

3 ~~Smith~~ Palmer Eileen - F 22 June 20 S Cotton Spinning

4 ~~SMITH~~ Allen Joan - F 28 Aug 22 S Hosiery Spinner

This record is officially closed

6 Larkin William - M 21 Mar 22 W General Labourer

Name	O V S P	Sex	Born D/M	Born Y	Status	Occupation	Note
Smith Alice		F	2 Apr	82	W	Unpaid Domestic Du	
Smith Stanley		M	18 Jan	19	S	Press Operator Brush	
~Smith~ ^Palmer^ E		F	22 June	20	S	Cotton Spinning	
~Smith~ ^Allen^ Jo		F	28 Aug	22	S	Hosiery Spinner	
[Record Closed]							
Larkin William		M	21 Mar	22	W	General Labourer	

When a report is created, and with the markdown feature enabled, the transcript is rendered as follows:

SURNAME and OTHER NAMES	O, V, S or P	M or F	Born		S, M, W or D	PERSONAL OCCUPATION	NOTES
			Day	Year			
Smith Alice		F	2 Apr	82	W	Unpaid Domestic Duties	
Smith Stanley		M	18 Jan	19	S	Press Operator Brush Works	
Smith Palmer Eileen		F	22 June	20	S	Cotton Spinning	
Smith Allen Joan		F	28 Aug	22	S	Hosiery Spinner	
[Record Closed]							
Larkin William		M	21 Mar	22	W	General Labourer	

Working efficiently with sources

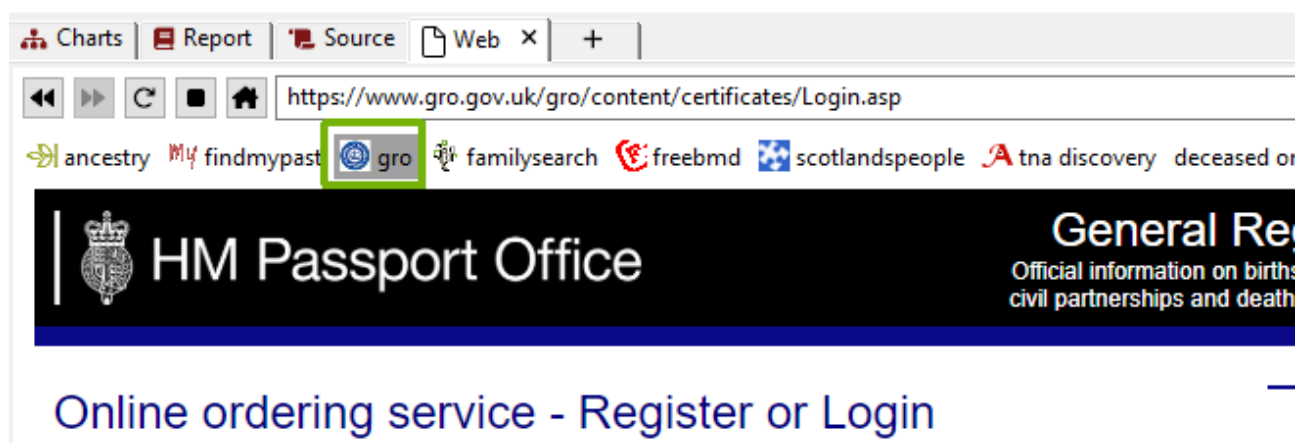
Pedigree Forge includes a number of features that make working with sources very efficient. To get the best from using sources in Pedigree Forge, we have to reverse our thinking: rather than adding the fact then finding the source, we should **add the source, then create the fact**. This is the more natural way to do things when researching properly, and the approach that Pedigree Forge gives most assistance.

The following will walk through the same source (Charles Darwin's death) as shown in the working with sources section, but taking the "Source first" approach.

First, we use the built-in web browser to locate the source, in this case, we have used the General Register Office's site: www.gro.gov.uk. To open the web browser, click on the "+" button on the tabs:

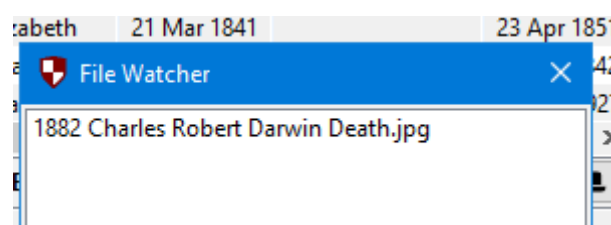


A new browser tab will appear, initially showing a home page. This works like any other web browser, and you can enter the address manually. The General Register Office's site is one of the default bookmarks, and so we can click on that to open their website:

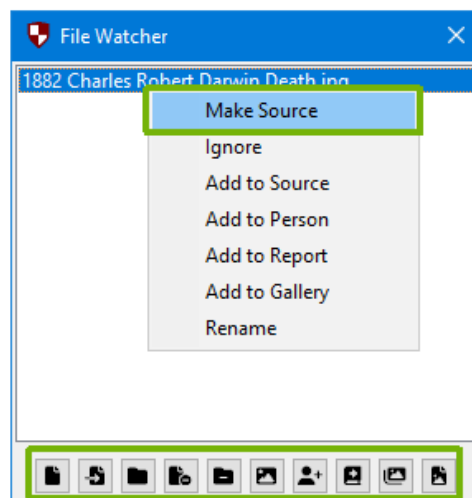


Using their website to locate, purchase and download the image is beyond the scope of this guide, but you should download the file to the same folder in which your project is located.

Pedigree Forge will recognise that a new file has been downloaded to the project's directory, and the "File Watcher" dialog will pop-up automatically, showing the file:




A number of options can be carried out on images in the file watcher, and can be accessed either from the buttons that run along the bottom of the dialog, or by right-clicking a file in the list, which shows a pop-up menu:




If we select “Make Source”, a new source will be created with the image already linked in and the edit source panel will be shown, ready for you to enter the details. Below we have added the title, linked the archive and set the call number. We have also selected the “Template” as “DEAT1837” (which populates the “Fact” type to “DEAT” automatically). **Note:** Pedigree Forge uses OCR (Optical Character Recognition) to try and populate the template and fact fields based on the source image, but this isn’t an infallible process, and will sometimes need entering manually.

▼ **Source Detail**

Title:

Archive: 

Call No: Group:

Via: 

Template: Fact:

In addition, we are also going to enter the “Date” and “Place” fields this time too. In this particular case, no address is shown (see information on entering dates, places and addresses, elsewhere in the guide).


Template: Fact:

Image: ☐ Inline ☐ In report

Date:

Place:

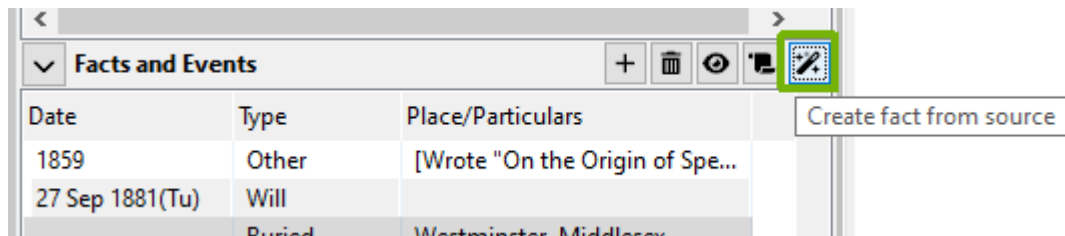
Address:

▼ **Source Text** 

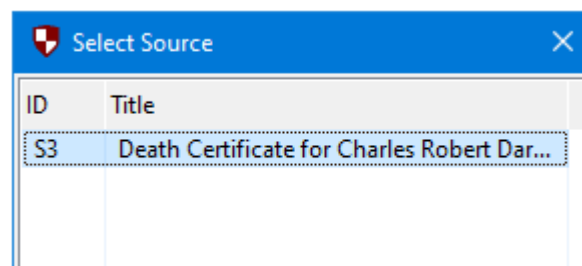
We can then transcribe the document, if we wish (see Source Transcripts section).

We are now ready to link the source. Navigate to Charles' record so that he is shown as the active person in the edit person panel. However, remember we are working in reverse; there isn't yet a death fact for Charles—we are going to create the fact from the source instead.

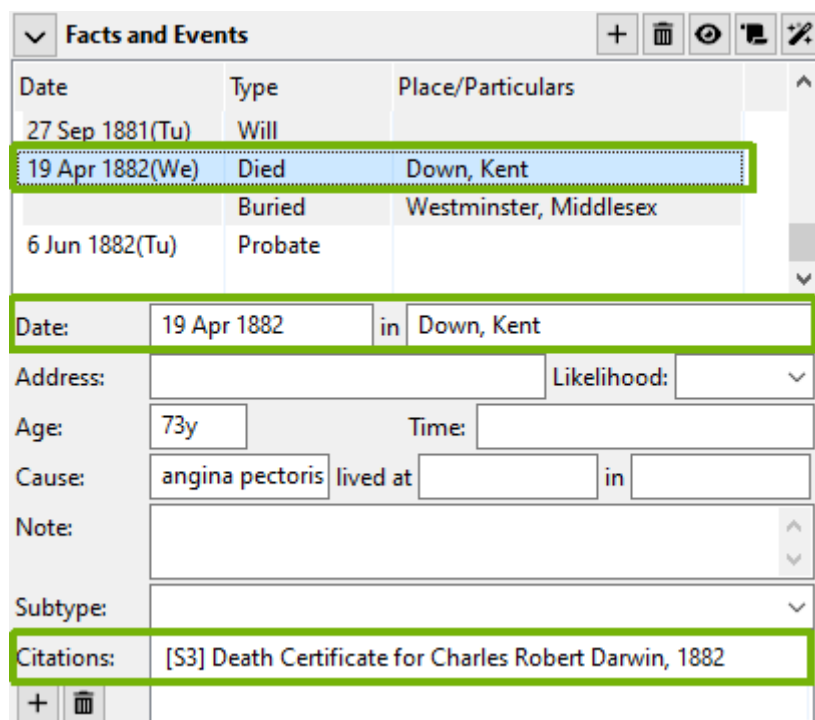
On the “Facts and Events” table, click the magic wand button.



The “Select Source” dialog will then appear to enable you to select the source to import to the fact. By default, this is the source you were most recently working with:

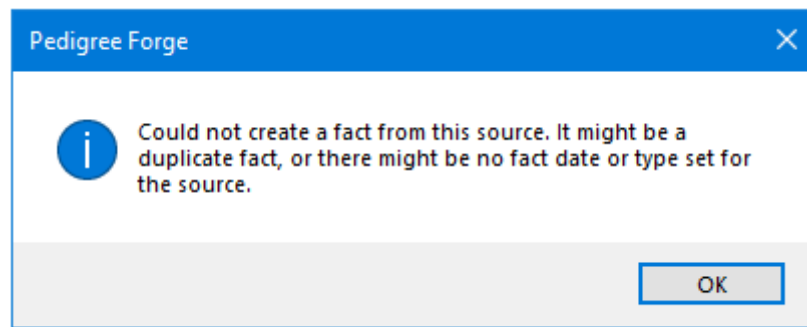


Clicking the “OK” button with the correct source will then import the source, creating the death fact, which already contains the date, place and a citation to the source:



You can add extra information, for example, age and cause, if applicable.

Sometimes, the creating a source from a fact will fail, and you will get an error message such as this:



If that happens, it might be because a fact of that type already exists (for example, if we tried to import the death again, it would fail).

A fact also can't be imported if no "Fact" type has been set for it, or if there is no date. These are set on the source edit panel:

Template:	DEAT1837	Fact:	DEAT
Image:	<input type="checkbox"/> Inline <input type="checkbox"/> In report		
Date:	19 Apr 1882		
Place:	Down, Kent		
Address:			

Create children from census transcripts

To help efficiently working with sources, Pedigree Forge has the ability to help you add children from a census transcript. The extra time it might take to transcribe the census form is therefore saved by creating the children automatically.

In the following example, we have created a source from the 1861 census for “Down House”, in Down, Kent, where Charles and Emma were living with their children. Only the family members have been transcribed: there were many servants and visitors too.

Household No.	House	Person	Relationship	Sex	Age	Occupation	Birthplace	Infirmary
50		Charles R Darwin	Head	M	52	Justice of P. M. A. Auth.	1 Clouds Shrewsbury	
51	Down House	Emma Do	Wife	F	52		Maer Staffordshire	
		William E Do	Son	M	21	Scholar Cambridge	St Pancras Midsex	
		Henrietta Do	Daur	F	17		Kent Down	
		George H Do	Son	M	15	Scholar	Do Do	
		Elizabeth Do	Daur	F	13		Do Do	
		Francis Do	Son	M	12		Do Do	
		Leonard Do	Son	M	11		Do Do	
		Horace Do	Son	M	9		Do Do	

Link the source to Charles and Emma, as described already and make sure either Charles or Emma are the active person, showing in the person edit panel. Currently only one child has been added for them: William, born 1839. Click on the person in house icon button, located above the Children Table:

Children				
No	Name	Born	Where	Died
1	William Erasmus	27 Dec 1839		8 Dec 1914

This will show the

“Census Children Dialog”, which should extract the children’s names from the census transcript we have just made:

Census Children Dialog

1861 Census for Down House, Down, Kent

Current Children:

No	Name	Born	Where
1	William Erasmus	27 Dec 1839	

On census:

Add	Born	Name	Relation	Sex	Age	Where
<input type="checkbox"/>	abt 1809	Charles R	Head	M	52y	Snt Clouds Shrewsbury
<input type="checkbox"/>	abt 1809	Emma	Wife	F	52y	Maer, Staffordshire
<input checked="" type="checkbox"/>	abt 1840	William E	Son	M	21y	Snt Pancras Midsex
<input checked="" type="checkbox"/>	abt 1844	Henrietta	Daur	F	17y	Kent Down
<input checked="" type="checkbox"/>	abt 1846	George H	Son	M	15y	Kent Down
<input checked="" type="checkbox"/>	abt 1848	Elizabeth	Daur	F	13y	Kent Down
<input checked="" type="checkbox"/>	abt 1849	Francis	Son	M	12y	Kent Down
<input checked="" type="checkbox"/>	abt 1850	Leonard	Son	M	11y	Kent Down
<input checked="" type="checkbox"/>	abt 1852	Horace	Son	M	9y	Kent Down

☒ Sort all children in family after adding?

Apply

Cancel

The list of the current children is shown on the left of the dialog. Use the “Add” check boxes to decide which children should be added. As William is already a child, we should uncheck him (we don’t want to create him again).

<input type="checkbox"/>	abt 1809	Emma	Wife	F	52y	Maer, Staffordshire
<input type="checkbox"/>	abt 1840	William E	Son	M	21y	Snt Pancras Midsex
<input checked="" type="checkbox"/>	abt 1844	Henrietta	Daur	F	17y	Kent Down
<input checked="" type="checkbox"/>	abt 1846	George H	Son	M	15y	Kent Down

Notice how the places are shown in red. This is because they haven’t been recognised, coming straight from the census transcript (it does expand “Do” i.e. ditto marks from lines above). Below we have changed Henrietta’s entry to “Down, Kent”, which is recognised:

<input checked="" type="checkbox"/>	abt 1840	William E	Son	M	21y	Snt Pancras Midsex
<input checked="" type="checkbox"/>	abt 1844	Henrietta	Daur	F	17y	Down, Kent
<input checked="" type="checkbox"/>	abt 1846	George H	Son	M	15y	Kent Down
<input checked="" type="checkbox"/>	abt 1848	Elizabeth	Daur	F	13y	Kent Down

The other children need the place of birth changing too. You can do this manually, or, if you press “Ctrl” + “D” on the keyboard, the details from the box above will be copied down.

You are then ready to apply the changes. Clicking the “Apply” button will add the children, along with their specified place of birth, and an estimated year of birth, based on their age:

Children				
No	Name	Born	Where	Died
1	William Erasmus	27 Dec 1839		8 Dec 1914
2	Henrietta	abt 1844	Down, Kent	
3	George H	abt 1846	Down, Kent	
4	Elizabeth	abt 1848	Down, Kent	

Note: the add children from census dialog should be seen as an aid. It will need manually alteration, and checking that information it suggests is as expected.

Archives

The term “Archive” is used in Pedigree Forge to indicate somewhere that keeps source documents. This might range from a large institution, like the National Archives in Kew, or your own person box of papers passed down through the family.

Archives can either be added “on the fly”, from the “Select Archive” dialog, as shown in the section on working with sources, or from their own editing panel. The archive editing panel is accessed from the “museum” icon, located on the main action bar that runs down the left-hand side Pedigree Forge’s main window:



Selecting the archives panel will show a table at the top of the archives already in the project. Clicking on one of these will make it the selected archive, so its information can be added. The buttons in the top-right hand side of the table can be used to add or delete an archive:

Archives:

+

🗑

Id	Name
R1	General Register Office (GRO)
R2	The National Archives of the UK (TNA)
R3	National Records of Scotland (NRS)
R4	Principal Probate Registry (PPR)

<

>

Name:

General Register Office (GRO)

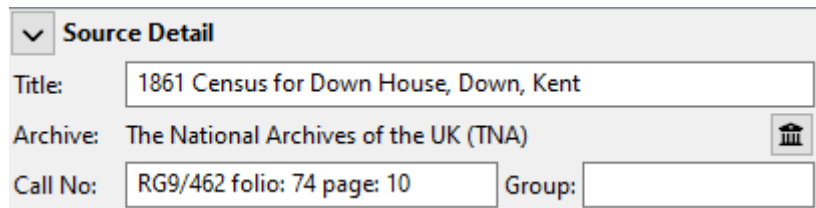
Address:

For most archives, only the “Name” is needed.

The use of brackets in the name is important: the text inside is used as the short abbreviation in reports. So, for example, “General Register Office (GRO)” will be abbreviated to GRO when it is used more than once in report citations.

Sources – how source was accessed

In genealogy, we often record both the original source location, and where we viewed it. The original source location (archive and call number) is most important, as it would allow someone else to view the source if they wished to. In the following example (1861 census for Down House), the original is located at the National Archives, and has the call number “RG9/462 folio: 74 page: 10”:



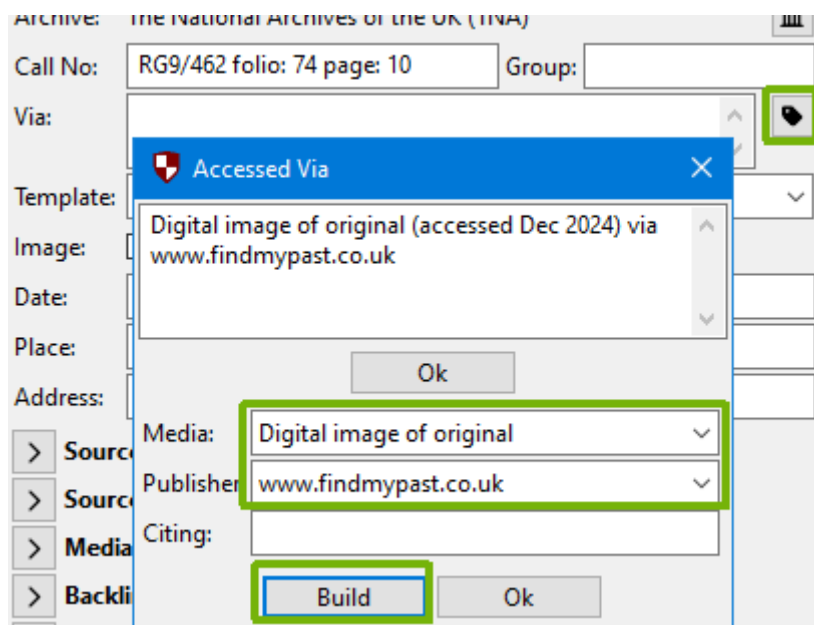
Source Detail

Title: 1861 Census for Down House, Down, Kent

Archive: The National Archives of the UK (TNA)

Call No: RG9/462 folio: 74 page: 10 Group:

In our particular case, we accessed this via the website, www.findmypast.co.uk. Best practice is also to record this information. For this, we can use the “Via” field, located below the call number. Text can either be entered free-form, or the “Tag” button can be used to access a dialog to help:



Archive: The National Archives of the UK (TNA)

Call No: RG9/462 folio: 74 page: 10 Group:

Via:

Template:

Image:

Date:

Place:

Address:

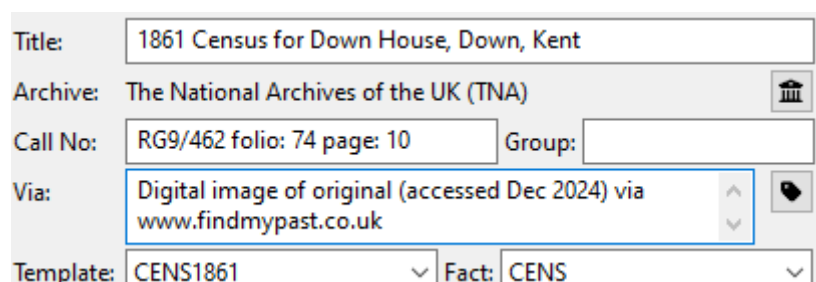
Media: Digital image of original

Publisher: www.findmypast.co.uk

Citing:

Build Ok

There are various pre-populated drop-down lists, which can be selected, and then the “Build” button used to build the sentence, including the date. The “Ok” button applies the information:



Title: 1861 Census for Down House, Down, Kent

Archive: The National Archives of the UK (TNA)

Call No: RG9/462 folio: 74 page: 10 Group:

Via: Digital image of original (accessed Dec 2024) via www.findmypast.co.uk

Template: CENS1861 Fact: CENS

Source groups

Sources allow a “Group” name to be entered. If we were researching many different branches of our family, we might want to group sources by surname. Group names can be entered in the “Group” field of the source panel, and are shown in the Sources table too:

Sources:

Ord	Id	Title	Group	Date
1	S3	Death Certificate for Chares Rob...	Darwin	19 Apr 1882
2	S4	1861 Census for Down House, D...	Darwin	7 Apr 1861

Source Detail

Title: 1861 Census for Down House, Down, Kent

Archive: The National Archives of the UK (TNA)

Call No: RG9/462 folio: 74 page: 10

Via: Digital image of original (accessed Dec 2024) via

Group: Darwin

Source groups are most useful when creating reports, as you might want to only include sources from a particular group with a given report.

Source backlinks

It is possible to see who is linked to a source via citations. This can be done from the “Backlinks” section on the source panel:

Backlinks

☒ Show people linked via citation: →

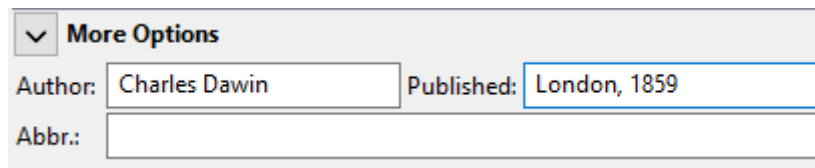
I1	Charles Robert /Darwin/
----	-------------------------

Click on the “>” button next to the Backlinks, if it isn’t showing. If you have a large database, showing back links can be slow, so these aren’t shown by default—click the check box so they are visible. You can also select the person from the backlinks list and use the “→]” button to go to the fact in the person’s main record.

Sources – published books etc.

By default, the source editing information is arranged to record “manuscript” type sources, i.e. those that exist in original form, often in an archive. It is always advised to check these “original” documents (or surrogates) where possible. However, sometimes the only source might be published information. Perhaps you can’t access the original, or it might have even been destroyed and so information published whilst the original still existed is the only source.

Published sources such as this are better described with an author and date of publication, rather than an archive and call number. This can be entered in the “More Options” section of the source panel. If the fields aren’t showing, you may need to click on the “>” button to show the fields:



▼ More Options			
Author:	Charles Dawin	Published:	London, 1859
Abbr.:			

The “Published” field would normally be the place and year of publication.

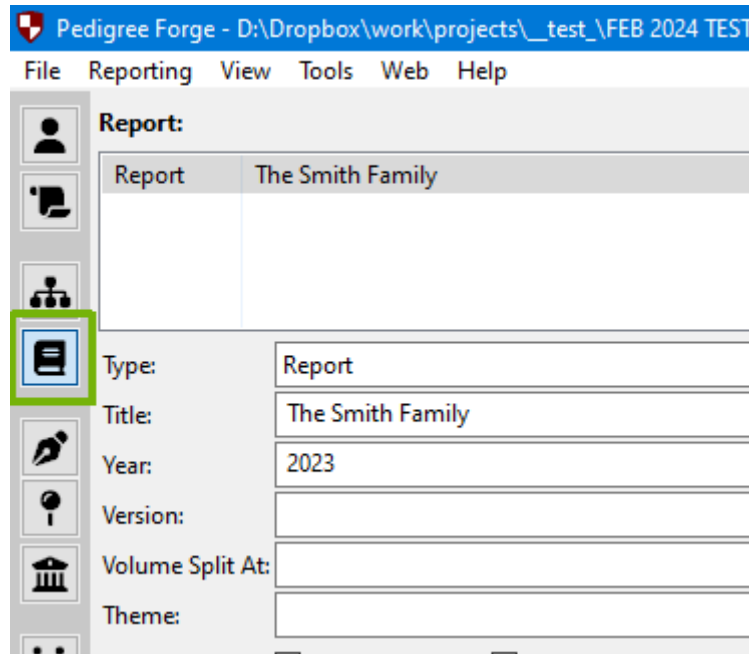
Sources – abbreviation

The “Abbr.:

The abbreviation field can also be used to give an alternative title. For example, if you created a source that is based on the extracts from a parish register of all the children baptised to a couple, you might give the main title as “Extracts of Baptisms for the Children of John and Jane Smith, Middleton, Register of Baptisms 1813-1842”, you could then use “Middleton Register of Baptisms 1813-1842” as the abbreviated title.

Reports

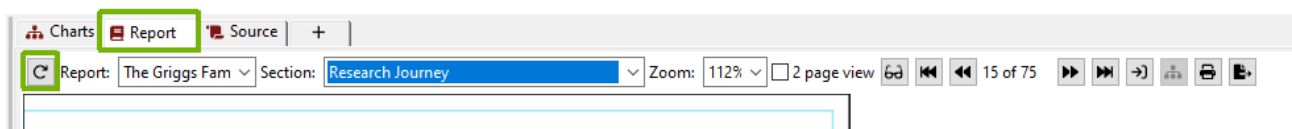
Pedigree Forge is very flexible when it comes to creating reports. You can create a basic report with just a few clicks, but there are many ways that reports can be customised.



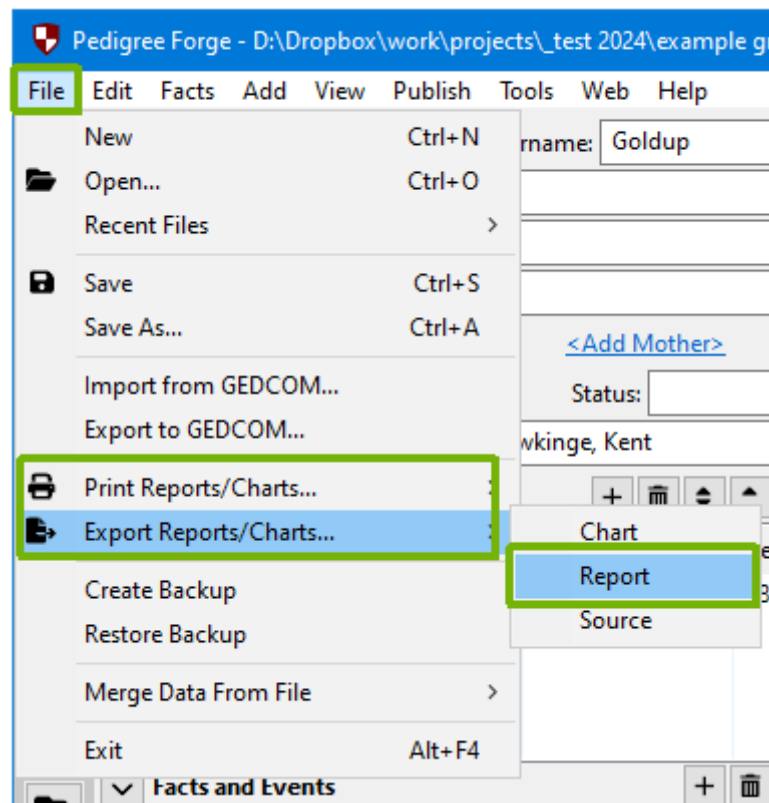
Reports are accessed from the report panel, which can be accessed by clicking on the book icon on the left-hand action bar.

Each project can have any number of reports, and each report can include any number of “items”, the components that make the report.

Reports can be viewed inside Pedigree Forge using the “Report” tab. Note, for any changes to be seen the report, must be updated using the refresh button:

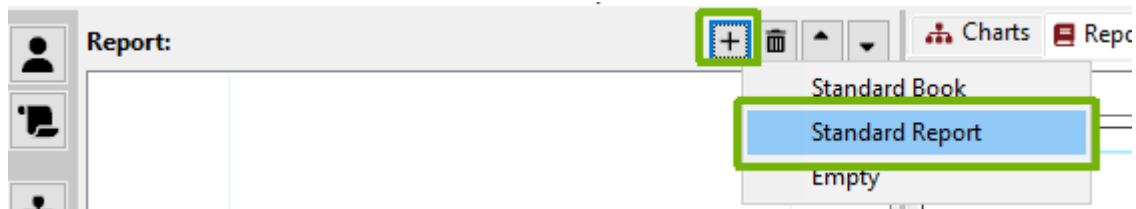


Reports can be printed, or exported (for example as a PDF), from Pedigree Forge using “File” from the main menu bar:

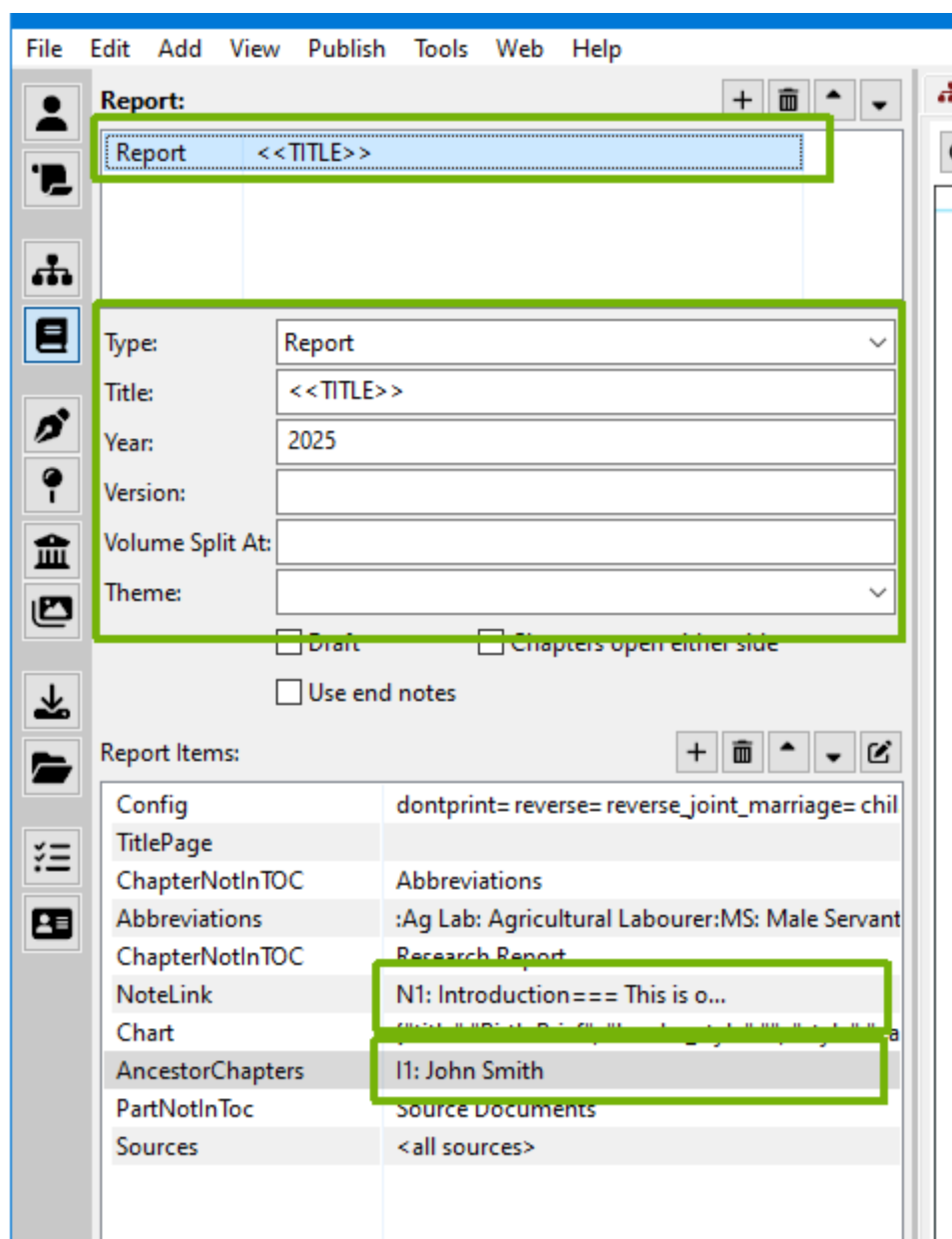


Create a report

The quickest way to create a report is by using the “+” button on the reporting tab. This will show a popup menu of the available report types. Select “Standard Report”.

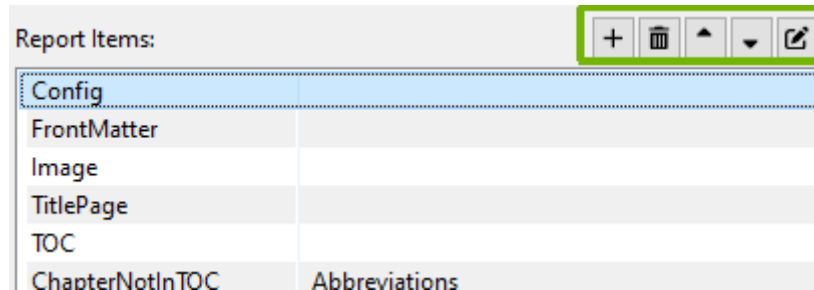


This will create a standard report with a number of items within it. The aspects of the report, such as title, and theme (the font used), can be changed as required.

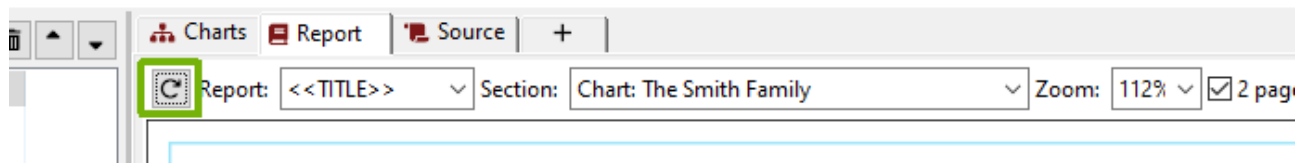


The report as created, is linked to a note (id N1) and a person . These can be changed by double-clicking on them.

Items can be added, re-ordered, or removed from the report using the small buttons in the top-right corner of the report items grid.



Don't forget to press the "Refresh" button on the report view so that you can see the report and after any changes made.



Items in reports

AncestorChapters

This automatically creates chapters for all ancestors of the person selected. The person themselves doesn't have a chapter (they are included in their parents chapter).

Each chapter is grouped as an ancestral couple, and includes the information entered about them in the databased, as well as a list of their children. Other spouses are also included.

As one of the most important components of a report, Ancestor Chapters can be heavily customised, but the default configuration will be fine in most circumstances.

Below are a couple of example pages from an ancestor chapter within a project that has many citations.

James William Smith (c.1842–1925) and Fanny Taylor (c.1845–1901)

James William Smith, shepherd and later farm bailiff, formerly of Sellindge, but late of Lyminge, both in the County of Kent, was the third son of James Smith, agricultural labourer, later a shepherd then farm bailiff and Mary Ann Hirst, his wife. He was born in about 1842, in Stanford, Kent and baptised there on 2 January that year.¹ James died in 1925² and was buried on 3 February that year, in Sellindge.³

James, then a bachelor, married **Fanny Taylor**, a spinster, on 29 October 1864, in Sellindge, following banns.⁴ At the time of the wedding, both were recorded as of full age and residing in Sellindge; James was working as a labourer. Fanny was the daughter of Richard Taylor, labourer. She was born in about 1845, in Bilsington, Kent and died in the autumn of 1901, recorded as aged fifty-six years old.⁵ She was buried on 5 November 1901, in Sellindge.⁶

James William Smith and Fanny Taylor had the following children:

1. **John Smith** born in the autumn of 1865, in Sellindge.⁷
2. **Martha Jane Smith** born in late-1867 or early-1868, in Oare, Kent;⁸ died in early-1868.⁹

¹ Baptism of James Daniel Smith, 1842; Stanford, Register of Baptisms 1913-12, CCA: U3/253/1/11. See [29].

² GRO Index of Deaths: M1925 Elham 2a 1576 age: 83

³ Burial of James Daniel Smith; England Deaths & Burials 1538-1991; Index via www.familysearch.org; citing FHL film: 1473767

⁴ Marriage between James Smith and Fanny Harris, 1864; Sellindge, Register of Marriages 1837-1957, KAS: P329/1/7. See [24].

⁵ GRO Index of Deaths: D1901 E.Ashford 2a 532 age: 56

⁶ Burial of Fanny Smith, 1901; Sellindge, Register of Burials 1848-1932, KAS: P329/1/A/5 p. 63. See [9].

⁷ GRO Index of Births: D1865 Smith, John; Elham v. 2a p. 826 mother: Harris

⁸ *ibid.* M1868 Smith, Martha Jane; Faversham v. 2a p. 757 mother: Harris

⁹ GRO Index of Deaths: M1868 Smith, Martha Jane; Faversham v. 2a p. 430 age: 0

3. **Henry James Smith** of Stone Hill in Sellindge, known as Harry, agricultural labourer, specifically a thatcher and shearer, born on 8 June 1869, at Oare Mill, in Luddenham, Kent; baptised on 5 September 1869, in Oare; died in the summer of 1949; Refer to separate chapter.

4. **Mary Ann Smith** born in 1870, in Sellindge.

5. **James Smith** born in the spring of 1872, in Sellindge;¹⁰ died in 1876.

6. **Edward Smith** born in the summer of 1873, in Sellindge.¹¹

7. **Harriet Smith** born in the summer of 1874, in Sellindge.¹²

8. **William Smith** born in the spring of 1876, in Sellindge;¹³ died in 1876, in Sellindge.¹⁴

9. **Alfred Smith** born in late-1876 or early-1877, in Sellindge.¹⁵

10. **Charles Smith** born in the summer of 1880, in Sellindge.¹⁶

11. **Ernest Smith** born in the spring of 1882, in Sellindge.¹⁷

12. **Annie Smith** born in the autumn of 1884, in Sellindge.¹⁸

13. **Alice Smith** born in the spring of 1886, in Sellindge.¹⁹

James married Minnie.

¹⁰ GRO Index of Births: J1872 Smith, James; Elham v. 2a p. 888 mother: Harris

¹¹ *ibid.* S1873 Smith, Edward; Elham v. 2a p. 878 mother: Harris

¹² *ibid.* S1874 Smith, Harriet; Elham v. 2a p. 901 mother: Harris

¹³ *ibid.* J1876 Smith, William; Elham v. 2a p. 958 mother: Harris

¹⁴ GRO Index of Deaths: M1878 Smith, William; Elham v. 2a p. 600 age: 2

¹⁵ GRO Index of Births: M1878 Smith, Alfred; Elham v. 2a p. 969 mother: Harris

¹⁶ *ibid.* S1880 Smith, Charles; Elham v. 2a p. 1003 mother: Harris

¹⁷ *ibid.* J1882 Smith, Ernest; Elham v. 2a p. 1013 mother: Harris

¹⁸ *ibid.* D1884 Smith, Annie; Elham v. 2a p. 1041 mother: Harris

¹⁹ *ibid.* J1886 Smith, Alice; Elham v. 2a p. 1037 mother: Harris

In addition to the text automatically generated for each ancestor, manual text can also be included. This is added after their introductory paragraph. Text to appear here is written in the “Notes” section of the person edit dialog, specifying “Report Notes” as the type of note.

Facts and Events		
Date	Type	Place/Particulars
abt 1770	Born	
abt 1799	Child born	James /Smith/
27 Mar 1799(We)	*Married*	Folkestone, Kent
abt 1802	Child born	George /Smith/
abt 1804	Child born	Mary /Smith/

Citations:

+

Notes Report Notes

As already noted, several generations of the family were agricultural labourers. 'The Agriculture of Kent', first published in 1795, by John Boys, gives some details of what life was like as an agricultural labourer in Kent around this **time**:

> Media

Samuel Smith, agricultural labourer, was the son of James Smith. He was born in about 1770 and died on 10 November 1844, in Lyminge, Kent, of bronchitis.

As already noted, several generations of the family were agricultural labourers. 'The Agriculture of Kent', first published in 1795, by John Boys, gives some details of what life was like as an agricultural labourer in Kent around this **time**:

The hours of labour in summer, are from six o'clock in the morning till eleven; and from one in the after noon till six in the evening, allowing half an hour for breakfast, in case that meal is not eaten before six o'clock; and then working till half past eleven; so that the standard day's labour is ten hours; but there are few instances in which it is strictly adhered to. In winter, the time of working for a day is as long as day light will permit, making the dinner-time as short as possible.

Upon the whole, a day's labour is generally much shorter than formerly, owing partly to the scarcity of workmen, who well know that if one master will not give them their hire for a short day, another will; and partly to the inattention of masters and their bailiffs to the hours of working.

At this time, things were quite good for Kentish agricultural labourers, as their work was in demand, John Boys went on to make the following observations:

The poor of this county are generally well taken care of by the parish-officers, and their opulent neighbours. The greater the scarcity of provisions, and the more the appearance of distress among the poor, the greater is the extent of charitable contributions, over and above what the law provides for maintaining them. The poor laws are such, that no person need be in distress for provisions, if it be not his own fault. Those

Clicking on the pencil items next to the “Report Notes” drop down allows the text to be edited in a separate window, which also allows formatting of text—see section on the rich text editor for more information.

Citations:

+
-

Notes
Report Notes

As already noted, several generations of the family were agricultural labourers. 'The Agriculture of Kent', first published in 1795, by John Boys, gives some details of what life was like as an agricultural labourer in Kent around this **time**:

Media
Other Details

Person Narratives

Bio: Report Notes

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X₁
Sc
[Rich Text]

As already noted, several generations of the family were agricultural labourers. 'The Agriculture of Kent', first published in 1795, by John Boys, gives some details of what life was like as an agricultural labourer in Kent around this **time**:

The hours of labour in summer, are from six o'clock in the morning till eleven; and from one in the after noon till six in the evening, allowing half an hour for breakfast, in case that meal is not eaten before six o'clock; and then working till half past eleven; so that the standard day's labour is ten hours; but there are few instances in which it is strictly adhered to. In winter, the time of working for a day is as long as day light will permit, making the dinner-time as short as possible.

Upon the whole, a day's labour is generally much shorter than

Pictures can be included in Ancestor Chapters if they are linked to the person in their record (use the "Media" section on the person panel:)

Facts and Events

Date	Type	Place/Particulars
	Seat	Mersham, Kent
	Child born	Test /Smith/
5 Dec 1897(Su)	Born	Sellindge, Kent
23 Jan 1898(Su)	Baptised	Sellindge, Kent
31 Mar 1901(Su)	Census	Sellindge, Kent

Citations:

+
-

Notes
Media

03.jpg - Henry Herbert and Ruth Smith
06.jpg - Henry Herbert Smith as a young man

Other Details



Henry Herbert and Ruth Smith

FamilyChapter

Creates a chapter for a particular couple, similar to the AncestorChapters, but does not follow them backward.

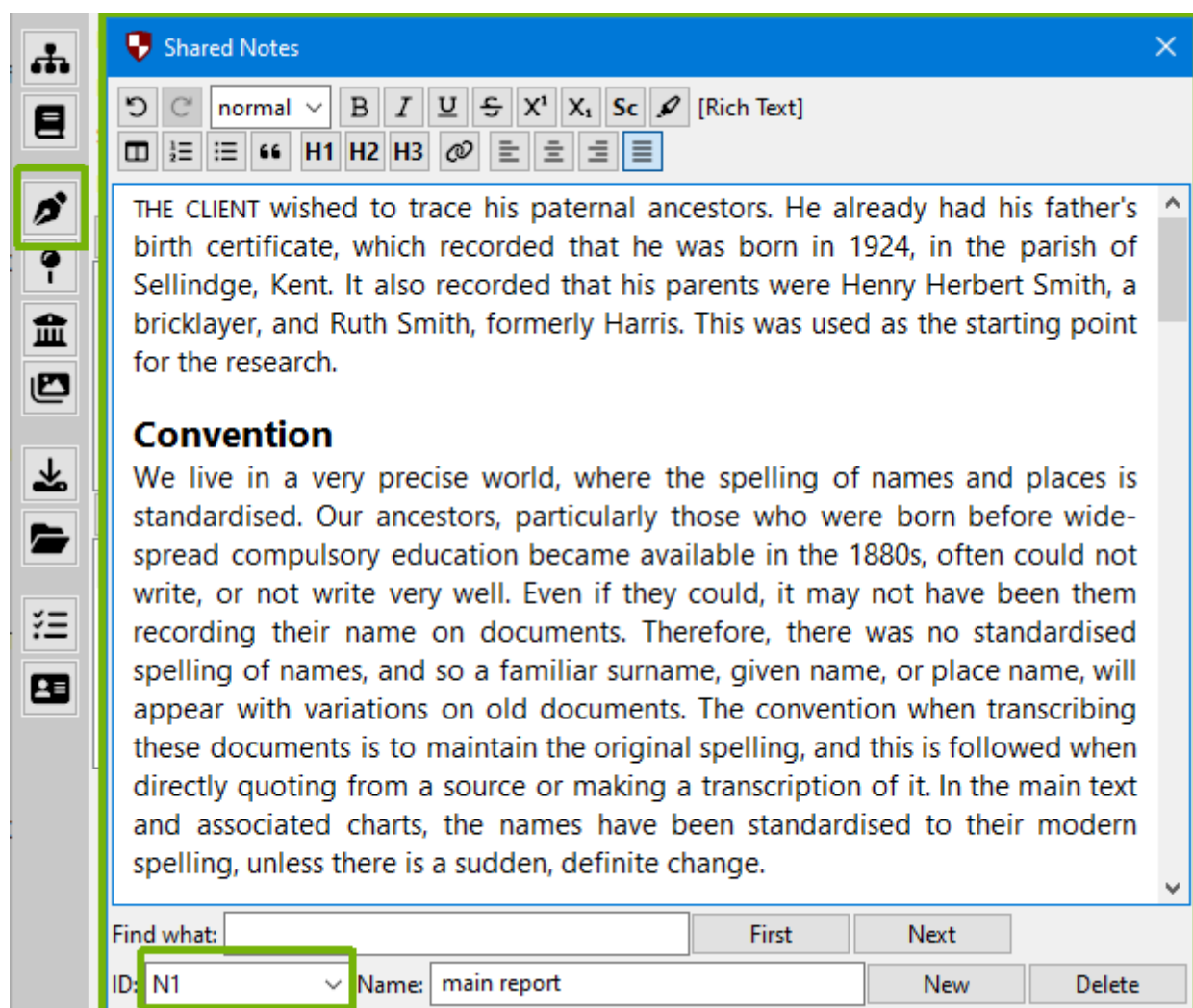
PersonChapter

Creates a chapter for a particular person, similar to the AncestorChapters, but does not follow them backward.

NoteLink

Perhaps more of a consideration for professional genealogists, who want to write a research report, the NoteLink item allows a large amount of text to be entered that isn't linked to any particular person. It is a mini word processor within Pedigree Forge. See "Rich Text Editor".

Notes are added using the pen icon from the action bar on the left of the Pedigree Forge window. They are edited (and can be added or deleted) from their own window. The ID number is used to link a NoteLink item in a report, to a note record. It is also possible to give a particular note record a name, so it can be located via name, rather than ID.



Sources

Outputs the sources in the project, along with any transcripts made. The information that appears here is entered in the "Sources" panel, accessed from the scrolled page icon on the main action bar:

Pedigree Forge - D:\Dropbox\work\projects_test

File Edit View Tools Web Help

Sources:

Ord	Id	Title
1	S25	Ruth Harris, 1981; National Prob
2	S24	Henry Herbert Smith, 1972; Nati
3	S9	1939 Register for Cranbrooks, M
4	S26	1939 Register for 1 Somerfield C
5	S1	Marriage Certificate for Henry H
6	S33	1921 Census for Old Forge Hous
7	S20	1911 Census for 3 Ark Cottages,
8	S10	1911 Census for Stone Hill, Sellir
9	S27	Burial of Fanny Smith, 1901; Sell
10	S19	1901 Census for Coombe Farm

Sources might include a link to an image of the file for the source, and can also include transcripts made of the information it contains. Many pre-built templates for transcript forms are included. Below is an example of a British 1881 census entry being edited using the 1881 census template and how it appears in the sources item in the report.

The screenshot shows a genealogy software interface. On the left, a 'Sources' list is visible, with the entry '1881 Census for Moorstock, Sellindge' highlighted. The main area displays a census form for '1881 Census for Moorstock, Sellindge'. The form includes fields for 'Civil Parish', 'Municipal Borough of', 'No. of Schedule', 'ROAD, STREET, &c., and No. or NAME of HOUSE', 'HOUSES', 'NAME and S', and a table for residents. The residents table lists the following individuals:

Name	Relation	Status	Age(M)	Age(F)	Occupation	Birthplace
James Griggs	Head	Mar	39		Farm Labourer	Kent Lymington
Fanny do	Wife	Mar		36		do Bilsington
John do	Son	Unm	15		Farm Labourer	do Sellindge
Henry do	Son		11		Scholar	do Luddenham
Mary A Smith	Daur			10	do	do Sellindge
Harriet do	Daur			6	do	do do
Edward do	Son		7		do	do do
Alfred do	Son		3		do	do do
Charles do	Son		10mo			do do

Person	Head	Status	Male	Female	Profession or Occupation	Where Born	Infirm
Mary Smith	Head	W		72	Laundress	[Kent] Newchurch	
Jane Lee	Grand daughter			14	Scholar	do Aldington	

[19] 1881 Census for Moorstock, Sellindge

The National Archives of the UK: RG11/1013 folio: 81 page: 21

Name and Surname of each Person	Relation to Head	Status	Age	Male	Female	Profession or Occupation	Where Born	Infirm
James Griggs	Head	Mar	39			Farm Labourer	Kent Lymington	
Fanny do	Wife	Mar			36		do Bilsington	
John do	Son	Unm	15			Farm Labourer	do Sellindge	
Henry do	Son		11			Scholar	do Luddenham	
Mary A Smith	Daur				10	do	do Sellindge	
Harriet do	Daur				6	do	do do	
Edward do	Son		7			do	do do	
Alfred do	Son		3			do	do do	
Charles do	Son		10mo				do do	

[20] 1871 Census for Moorstock, Sellindge

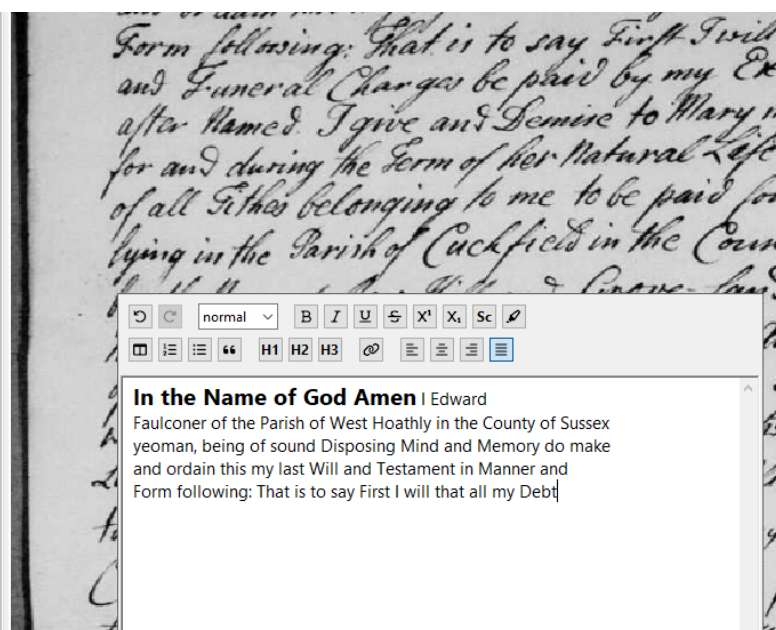
The National Archives of the UK: RG10/1019 folio: 75 page: 10

Name and Surname of each Person	Relation to Head	Status	Age	Male	Female	Profession or Occupation	Where Born	Infirm
---------------------------------	------------------	--------	-----	------	--------	--------------------------	------------	--------

If there is no suitable template, text can also be transcribed manually using the word-processor like interface. See "Rich Text Editor"

34	S8	Baptism of James Smith, 1799; Hawkinge, K...	11 Aug 1...
35	S36	J.W. Griggs, First World War Army Service R...	
36	S37	Will of Edward Falcolner, 1749	

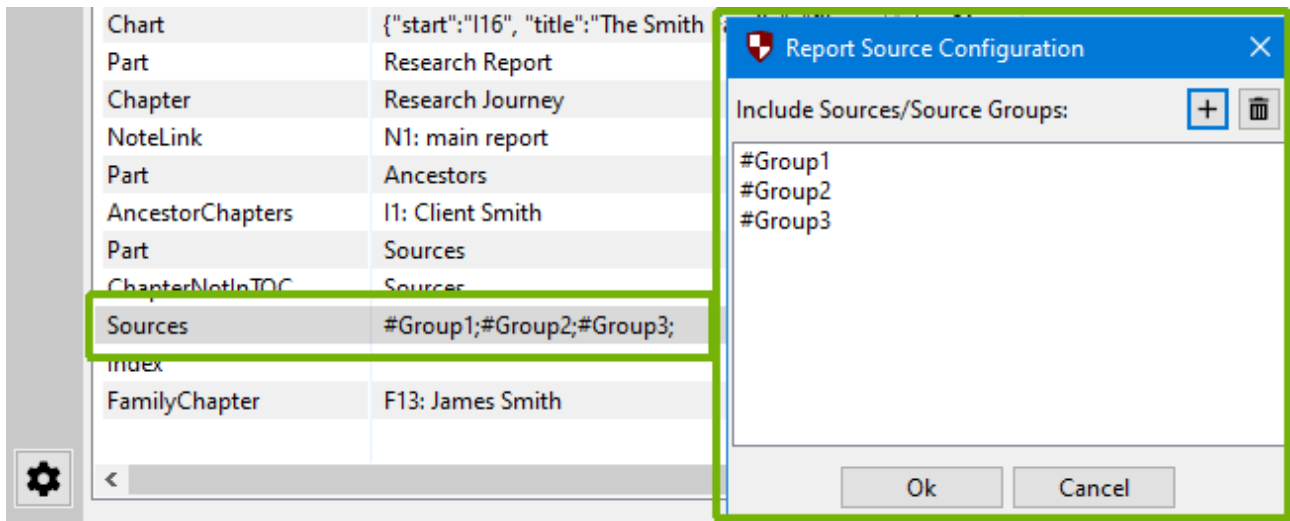
Title: Will of Edward Falcolner, 1749
 Archive: East Sussex Record Office (ESRO)
 Call No:
 Via:
 Template: Fact:
 Date:
 Place:
 Address:
 Text: **In the Name of God Amen** |
 Edward
 Faulconer of the Parish of West Hoathly in the
 Note:
 Abbr.:
 Media: 1749 Will of Edward Faulconer 01.jpg



normal B I U S X' X₁ Sc

In the Name of God Amen | Edward
 Faulconer of the Parish of West Hoathly in the County of Sussex
 yeoman, being of sound Disposing Mind and Memory do make
 and ordain this my last Will and Testament in Manner and
 Form following: That is to say First I will that all my Debt

Advanced Feature: If only some sources are required to be included in a report, editing the “Sources” report item will popup a dialog to select which source or sources should be included. They can either be selected by individually or by a group name.



Important: The source id numbers are the numbers that begin with an S. These are internal. When reports are created, sources are numbered from 1, in square brackets, according to the order they are presented in the report, surrounded in square brackets, for example [1]. This creates a professional cross-referencing systems. The numbers won't necessarily match, i.e. source S1, won't necessarily be source shown as [1] in the report.

References

Outputs the sources used in a project, but in a summary form list only:

References

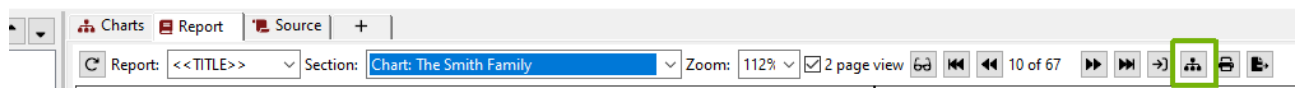
- [1] Ruth Harris, 1981; National Probate Calendar. Principal Probate Registry
- [2] Henry Herbert Smith, 1972; National Probate Calendar. Principal Probate Registry
- [3] 1939 Register for Cranbrooks, Mersham, Kent. The National Archives of the UK: RG101/1816L/003/43 Letter Code: DJGL

Chart and SingleChart

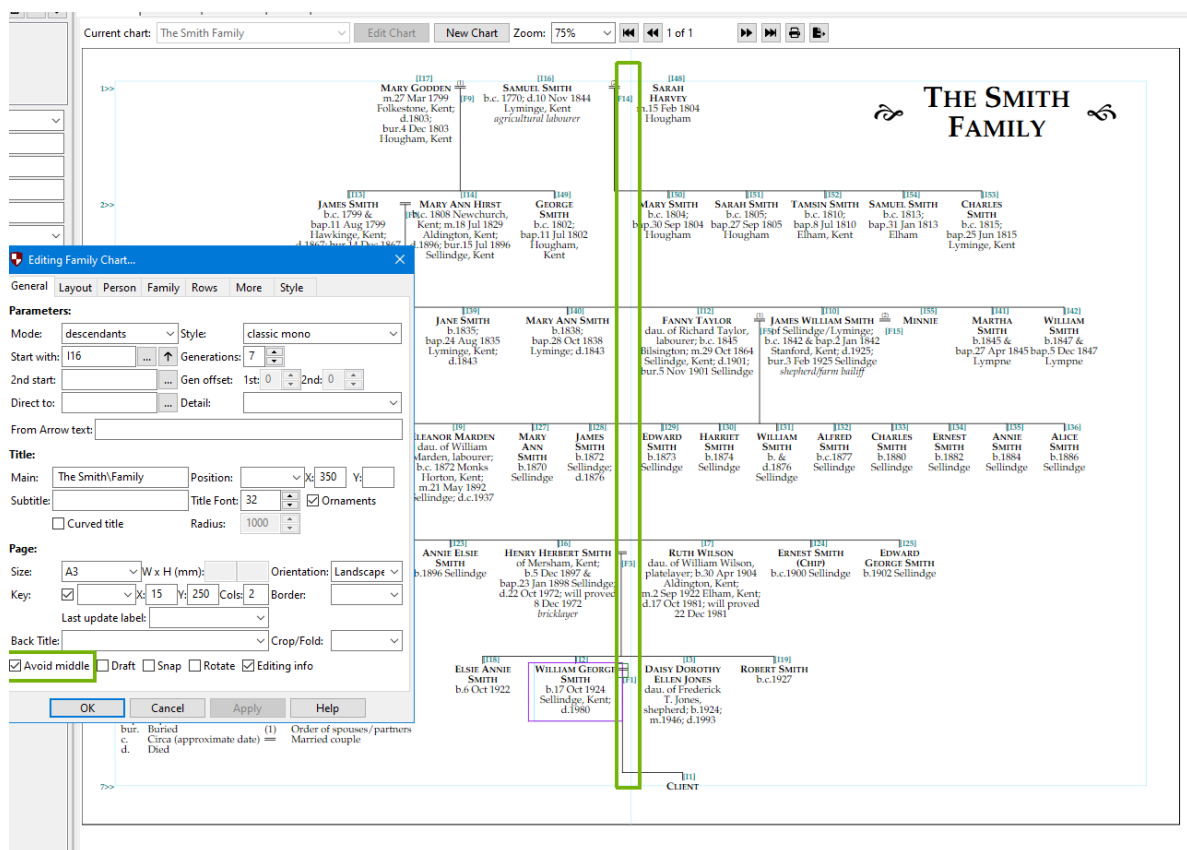
Pedigree Forge's charts can be embedded into reports. The default "Chart" outputs a chart that spans across two adjacent pages. A SingleChart outputs a chart that is on a single page in a report.

MainMatter	
Part	Charts
Chart	{ "title": "Birth Brief", "border_style": "", "style": "c
Chart	{ "start": "I16", "title": "The Smith Family", "filenar
Part	Research Report
Chapter	Research Journey

Double clicking on a Chart or SingleChart item in the list opens the Edit Family Chart dialog: see Creating Family Charts. Embedded charts can also be edited by clicking on the chart icon on the report panel, or the chart icon in the report viewer (assuming that there is an embedded chart on the selected page).



When including embedded charts that span two pages, you are likely want to avoid the middle of the page. This can be achieved by clicking the "avoid middle" check box when editing the chart:



Getting a beautiful chart that is still well balanced and avoids the middle of the page is a bit tricky and takes practice!

TOC

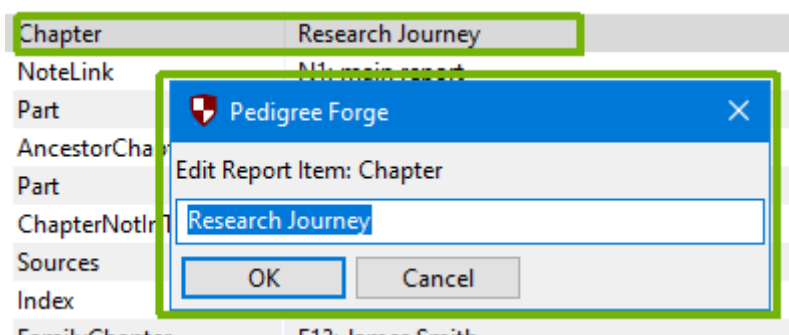
Outputs the table of contents

Index

An index of the people who appear in the report.

Chapter

Outputs a chapter heading, and starts a new chapter. The chapter's title can be set by double clicking on the item in the report list, which will open a small dialog to enter/edit the text:



ChapterNotInTOC

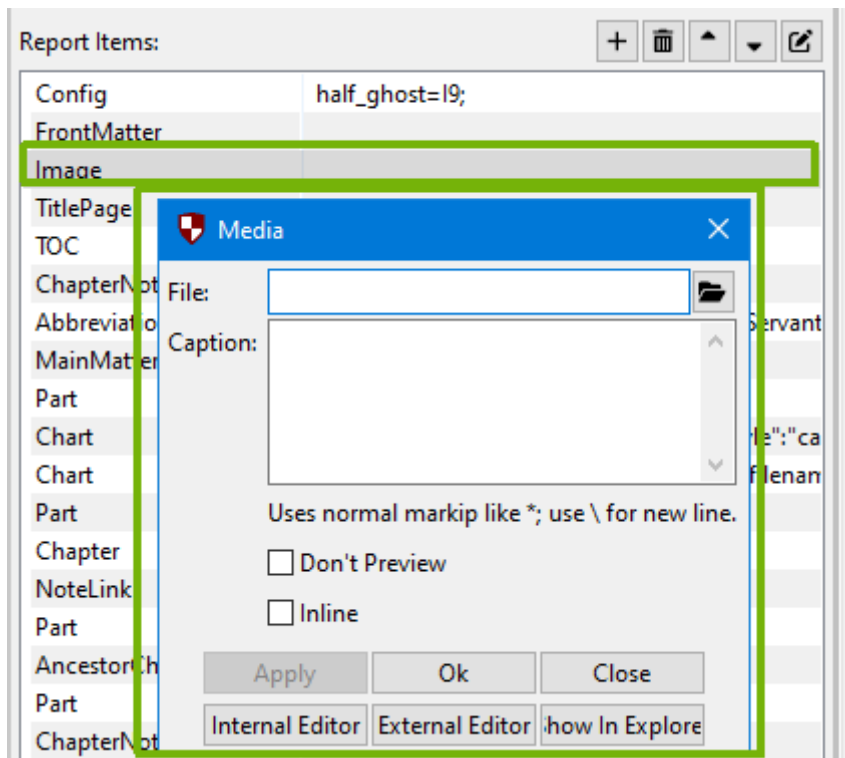
A chapter heading but which isn't included in the table of contents. See Chapter above.

Part

Sets a part title, for major parts of a report.

Image or ImageInGallery

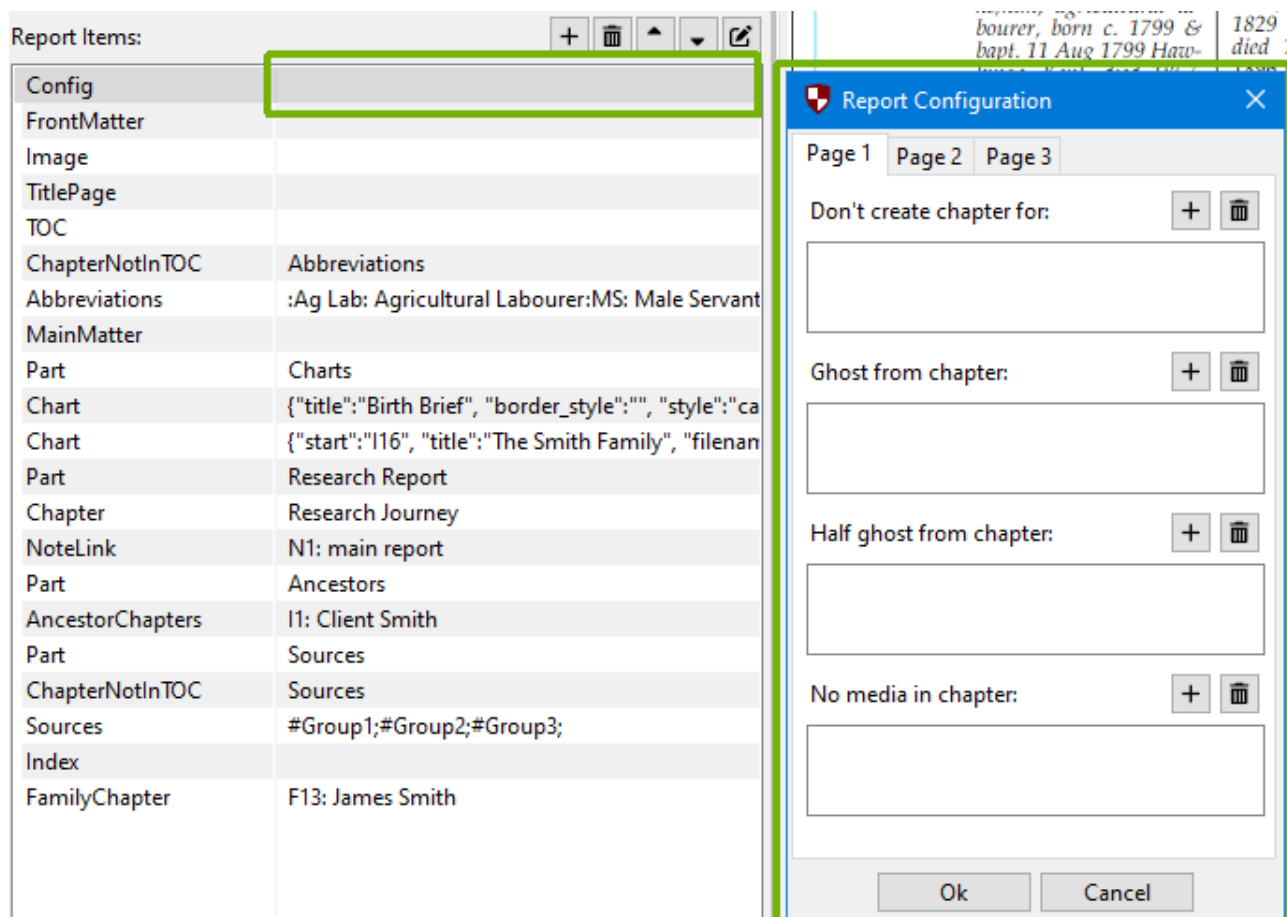
Includes an image in the report which isn't associated with a person or a source. Double click on the item in the Report Item grid to select the image file (must be in same folder as the project). You can also set the caption from the dialog that appears. The ImageInGallery links to an image already in the media gallery.



Configuring Reports

One of the items available in the report items list is the configure report item. This is an advanced feature, but allows changes to be made to how a report is created. **The configuration item must be the first item in the list of items for it to have an effect throughout the whole report.**

Configuration options are edited by double clicking on the “Config” item in the list of report items:



There are various lists on this dialog. Using the “+” and “trash” buttons will allow you to select certain records (generally people), to configure the report.

Don't create chapter for: don't generate a chapter for the person(s) in the list and don't follow them back either.

Ghost from chapter: In the chapter in which this person would appear with their spouse, create a chapter but ghost this person from it (don't them in the title or narratives). Useful if there is reason that this person should be virtually ignored.

Half ghost from chapter: In the chapter in which this person would appear with their spouse, create a chapter and include that person in the chapter title, but don't write a narrative for them. Useful if the person isn't of interest in the report.

No media in chapter: doesn't include any media (attached files) for this person or these persons.

Reverse in chapter: If there is a husband and wife, normally an AncestorChapter starts with the husband. Selecting one of the people in a chapter here starts the chapter the other way round. This means the wife is introduced first and appears first in the chapter's title.

Reverse joint marriage: Switch the order in which spouses are introduced in the narrative in the marriage clause paragraph. The chapter headings are left in the default order.

Stop at children: when people are included in child lists, stop at this person, don't include their own children in the subordinate list.

Local source citations in reference list: When checked, includes local citations (those without a source record) in the references report item, otherwise exclude them.

Use UPPERCASE surnames: It is recommended that surnames are entered in their natural case, usually with a capital letter first. Pedigree Forge leaves names as entered, because sometimes case is relevant, including inside a word, for example "McNelly." There is an old-fashioned convention of using uppercase for surnames. Checking this box will force surnames to always be upper case.

Custom chapter titles: Change the default title for a particular person or family's chapter. Select a person or family, and use the dialog box to set what the chapter title should be.

Which parents for adoptees: When building the ancestors to be included in a report, this sets which family or families, and in what order, the parent families should be followed. Select the person and the family combination.

Rich Text Editor

There are several places where styled text (bold, italic, sub-sections etc) can be entered. This amounts to a mini word processor within Pedigree Forge. This text can then be shown properly styled in reports.

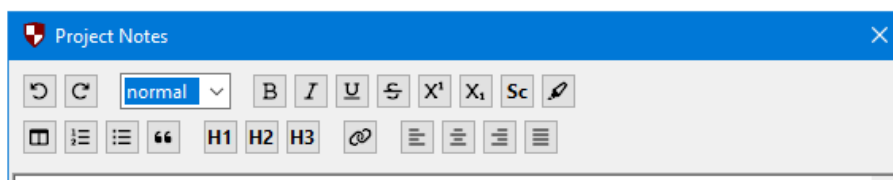
The main places where rich text can be added are as follows:

Project Notes—Accessed using the “pen” icon on the main action bar. These can form text in a report that isn’t tied to a particular person.

Person Notes—Accessed from the “Notes” section on the person panel. There are two types of notes here: Biographical Information, which is shown in the a report where that person is included or Research Notes, which isn’t shown in any report.

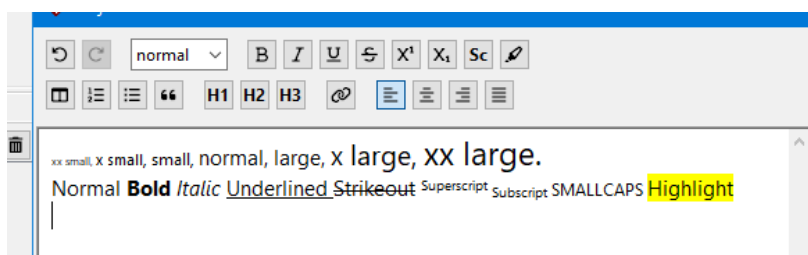
Source Text/Notes—Accessed from the source panel in the “Text:” or “Note” box. These are output in reports in which the relevant source is included.

Editing rich text in these places includes a similar toolbar, which should be familiar to word processor users:

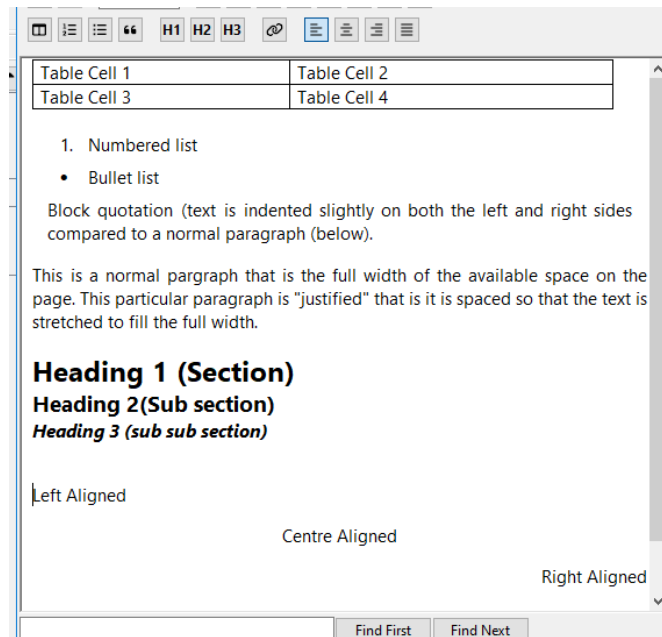


Most of the buttons act like toggles: selecting bold text and then clicking the Bold button which toggle off the bold attribute.

The top row includes: undo, redo, text size, bold, italic, underline, strikethrough, superscript, subscript, small capitals and highlight. Examples are below:

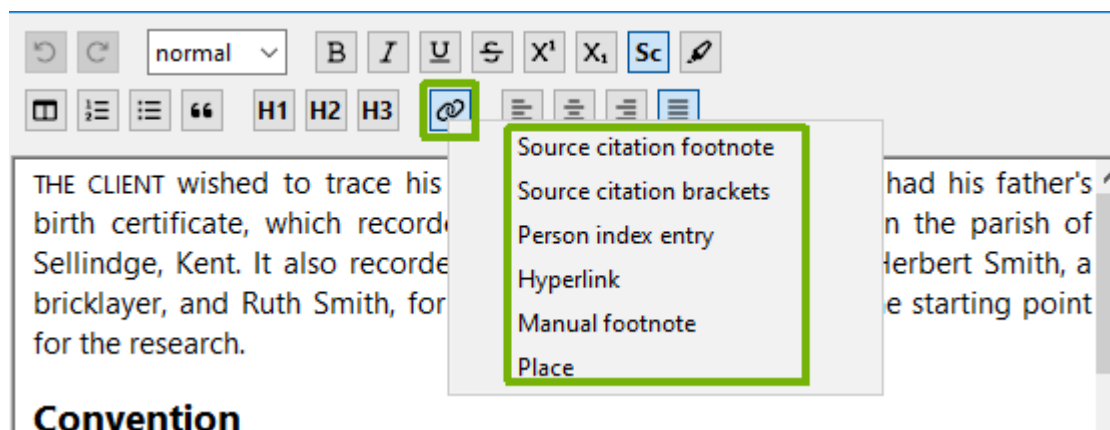


The second row includes: tables, numbered list, bullet list, block quote, heading level 1 (Section), Heading level 2 (Sub section), Heading level 3 (sub sub section), links, align left, align centre, align right and justify.



Note: The font face cannot be changed. This is set at the level of the report itself.

The link button allows various special features to be added:



Source Citation Footnote

This allows a source to be selected, which shows in the word processor as a superscript reference to the source. In a report, this is shown as a footnote referencing the source.

Henry Herbert Smith and Ruth Harris were married on 2 September 1922, at Elham Register Office.^[5] Their marriage certificate recorded that Henry was aged twenty-four, a bachelor, bricklayer, and that his father was Henry James Smith, a farm labourer.

Next, a search was made for Henry's own birth certificate, again, by looking in the G.R.O. index, there was only one suitable entry, and a copy of the certificate ordered. Henry Herbert Smith was born on 5 December 1897, at Stone Hill, Sellindge.³ His father was recorded as Henry James Smith (which matched the details from his marriage certificate. We can therefore be confident that this is the correct certificate. It also named his mother as Eleanor Smith, formerly Marden.

¹ Marriage Certificate for Henry Herbert Smith and Ruth Harris, General Register Office (GRO): S1922 Elham 2a 2935. See [5]
My manual footnote text

³ Birth Certificate for Henry Herbert Smith, GRO: M1898 Elham 2a 1061. See [13].

Source Citation Brackets

This allows a source to be selected, which is shown in the word processor in brackets (to the source ID), and is output in the report as a reference to the correct source.

1922, in Elham registration district, with the reference volume 2a, page 2935.
Henry Herbert Smith and Ruth Harris were married on 2 September 1922, at Elham Register Office. see [S11] Their marriage certificate recorded that Henry was aged twenty-four, a bachelor, bricklayer, and that his father was Henry James Smith, a farm labourer.

December), then by surnames and toponyms. A matching entry was found in the quarter ending September 1922, in Elham registration district, with the reference volume 2a, page 2935.
Henry Herbert Smith and Ruth Harris were married on 2 September 1922, at Elham Register Office. see [5] Their marriage certificate recorded that Henry was aged twenty-four, a bachelor, bricklayer, and that his father was Henry James Smith, a farm labourer.
Next, a search was made for Henry's own birth certificate, again, by looking in the G.R.O. index, there was only one suitable entry and a copy of the certificate ordered. Henry Herbert Smith was born on 5

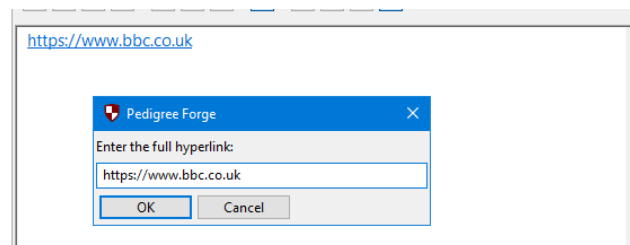
Person Index Entry

Outputs a mark that isn't visible in the body of the report itself, but adds an entry to the index of the report for the selected person. Index entries are automatically created for where people appear in Ancestor Chapters, so this is mainly useful in project level notes.

Henry Herbert Smith [I6] and Ruth Harris [I7] were married on 2 September 1922, at Elham Register Office. see [S11]. Their marriage certificate recorded that Henry was aged twenty-four, a bachelor, bricklayer, and that his father was Henry James Smith, a farm labourer.

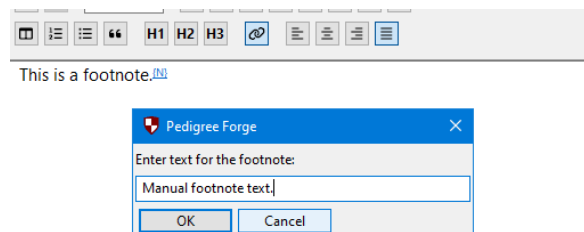
Hyperlink

Allows you to enter a hyperlink to a website.



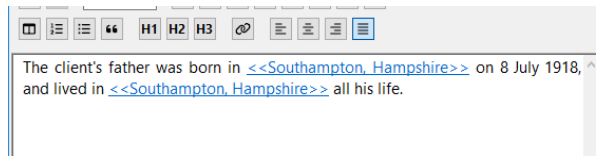
Manual footnote

Manual footnotes allow text to be entered as a footnote that isn't linked to a source citation.



Place

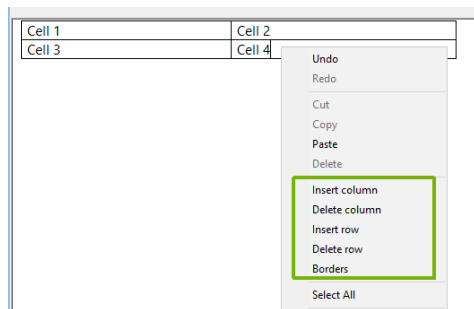
Allows a place to be selected from the places used in the database. Note: when expanded in a report, the long form of the name is used first time in the chapter in which it occurs; subsequent uses will use a shorter form.



The above example would show in the report as: "The client's father was born in Southampton, Hampshire, on 8 July 1918, and lived in Southampton all his life".

Tables

Tables can be added using the table button from the rich text editor's menu bar. They can be added by right-clicking with the mouse whilst inside the table:



The "Borders" option, toggles if the borders will be drawn any output report. The table below has had its borders turned off, so they are shown in light-grey in the word processor, and won't appear at all a report.

The screenshot shows a table with three columns: "Number", "Name", and "Age". The first row contains the headers. The second row contains "1", "John Smith", and "82". The third row contains "2", "Mary Smith", and "55". The table is displayed in a word processor interface with a menu bar at the top. The borders of the table are light-grey.

Number	Name	Age
1	John Smith	82
2	Mary Smith	55

Table columns can be made larger or smaller by clicking on them and dragging. **Note:** Tables are always shown in reports as the full width available to them. The widths of columns assigned is relative to the width set in the word processor. In the example below, the Number column would be approximately 20% of the width available, and the other two columns 40% each:

The screenshot shows a table with three columns: "Number", "Name", and "Age". The first row contains the headers. The second row contains "1", "John Smith", and "82". The third row contains "2", "Mary Smith", and "55". The table is displayed in a word processor interface with a menu bar at the top. The columns are of different widths, with "Number" being the narrowest and "Name" and "Age" being wider.

Number	Name	Age
1	John Smith	82
2	Mary Smith	55

Auditing and validation

Working with data in a family history database can introduce errors. Pedigree Forge supports both real time warnings and also has an audit report, which can help to find and correct errors too.

As you navigate around the people in your file, some possible errors will be checked in real-time and show in the status bar. This are for the current person in the edit panel:

The screenshot shows a family tree with a parent labeled "Scientist." and seven children. The children are listed in a table below the parent. The warning "Children not in chronological order" is highlighted in a yellow box in the status bar.

[16]	[17]	[18]	[19]	[110]	[111]	[112]
ry nor win	Henrietta Emma Darwin	George Howard Darwin	Elizabeth Darwin	Francis Darwin	Leonard Darwin	Horace Darwin
born 3 Sep 1842, died 5 Oct 1912.	born 25 Sep 1843, died 17 Dec 1927.	born 9 Jul 1845, died 7 Dec 1912.	born 8 Jul 1847, died 8 Jun 1926.	born 16 Aug 1848, died 19 Sep 1925.	born 15 Jan 1850, died 26 Mar 1943.	born 13 M 1851, died 29 S 1928.

Children not in chronological order

Opened: 07:36

Changes since saved

In the above example, Pedigree Forge has noted that the children of the current family aren't in chronological order. You can then use the children table to sort them chronologically.

Some of the warnings are things that *might* be errors, but can sometimes happen. It is rare to find children born after a lady was in her mid-forties, but it does happen on occasions. Charles Darwin's wife was 48 when their youngest son was born, as shown in the example below. If you click on the status bar warning, you can select to ignore the warning for that person going forward.

The screenshot shows a family tree with a parent and six children. The children are listed in a table below the parent. The warning "Child born when too old: Charles Waring Darwin?" is highlighted in a yellow box in the status bar. A button "Ignore always for this person" is also highlighted in a blue box.

[18]	[19]	[110]	[111]	[112]	[113]
George Howard Darwin	Elizabeth Darwin	Francis Darwin	Leonard Darwin	Horace Darwin	Charles Waring Darwin
born 9 Jul 1845, died 7 Dec 1912.	born 8 Jul 1847, died 8 Jun 1926.	born 16 Aug 1848, died 19 Sep 1925.	born 15 Jan 1850, died 26 Mar 1943.	born 13 May 1851, died 29 Sep 1928.	born 6 Dec 1856, died 28 Jun 1858.

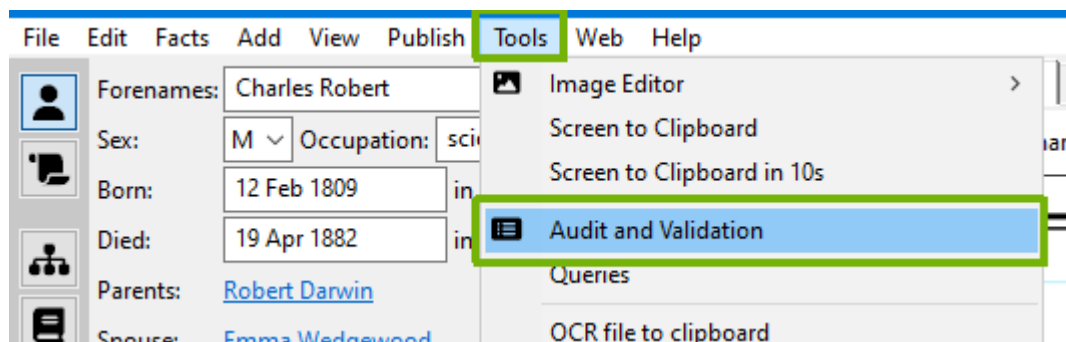
Child born when too old: Charles Waring Darwin?

Ignore always for this person

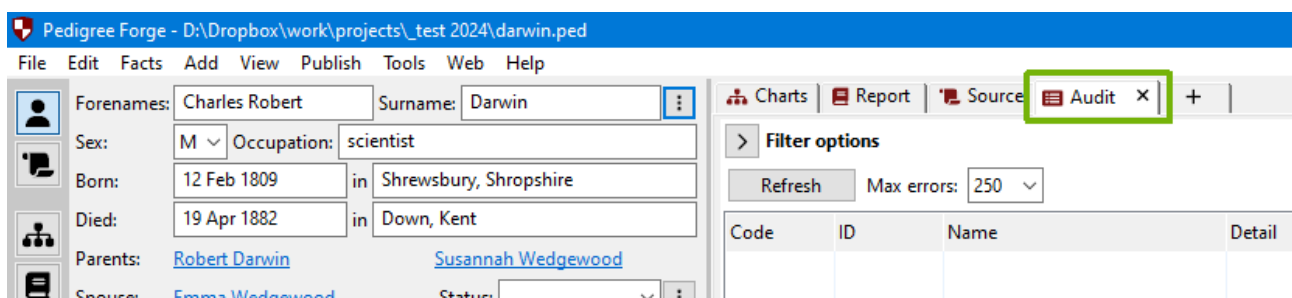
Opened: 07:36

Changes since saved

To run an audit over your the whole file, select “Audit and validation” from “Tools” on the menu bar.



This will add a tab to the list of content tabs, which are to the right of the editing panels:



At the simplest level, clicking on the “Refresh” button, on the Audit tab will run an audit of your file, with any warnings listed in the grid below.

Not all warnings will be an error; some things happen rarely, and so are more likely to be an error, or least need a big more work before accepting that they are correct.

The following audit has returned two warnings:

> Filter options			
Refresh Max errors: 250			
Code	ID	Name	Detail
119	I13	Charles Waring Darwin	Appears to have been born after their mother was 45.
150	F2	Robert Darwin & Susannah W...	Has a child or children out of sequence: Caroline Sarah I19

Double clicking on an item in the audit report list will take you to the correct record (and fact/event if applicable).

If we right-click on an item in the list, we are presented with a few options:

> **Filter options**

Refresh Max errors: 250

Code	ID	Name	Detail
119	I13	Charles Waring Darwin	Appears to have been born after their mother was 45.
150	F2	Robert Darwin & Susannah W...	Has a child or children out of sequence: Caroline Sarah I19

Go to record
Ignore always for this record
Ignore this time only

The first item is a warning because Charles Waring Darwin was born in 1856, when his mother was 48. This is quite old for a woman to have had a child, but did really happen in this case. We can therefore select "Ignore always for this record". This will stop the audit warning from appearing again.

The other item is an error in our file:

Sex: M Occupation:
Born: 30 May 1766 in Lichfield, Staffordshire
Died: 13 Nov 1848 in Shrewsbury, Shropshire
Parents: <Add Father> <Add Mother>
Spouse: Susannah Wedgewood Status:
Married: 18 Apr 1796 in
Children: + -

No	Name	Born	Where	Died
1	Marianne	1798		1858
2	Erasmus Alverv...	29 Dec 1804		1881
13	Caroline Sarah	14 Sep 1800	Shrewsbury, Sh...	5 Jan 18...
4	Charles Robert	12 Feb 1809	Shrewsbury, Sh...	19 Apr 1...

> **Filter options**
Refresh Max errors: 250

Code	ID	Name	Detail
150	F2	Robert Darwin & Susannah Wedg...	Has a child or children out of sequence: Caroline Sarah I19

Caroline Sarah (born 1800) is listed after her brother, Erasmus, who was born in 1804. We can therefore sort the children, so they are in the correct order.

If we then click the "Refresh" button again, the audit warning will disappear.

If you have a large file, there might be too many warnings to process conveniently at once. In this case, you can use the filter options, to reduce the number of items records that are checked, and then do them in stages.

Clicking on the arrow next to "Filter Options" will show some boxes to allow customisation of who is included in an audit:

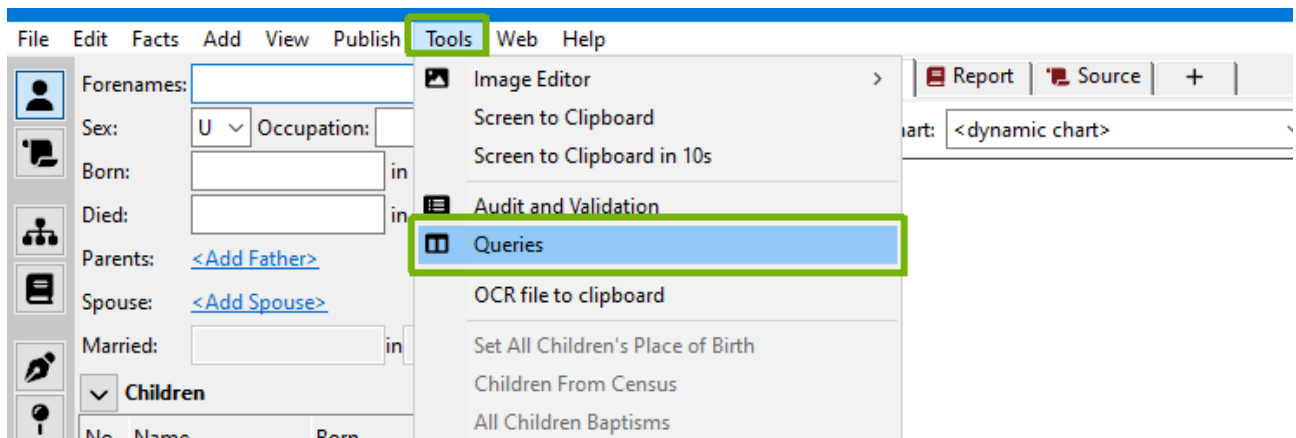
Filter options
Start Person: <-----> ... End Person: <-----> ...
Filter: Filter value: ☐ Include previously ignored warnings
Refresh Max errors: 250

Code	ID	Name	Detail
------	----	------	--------

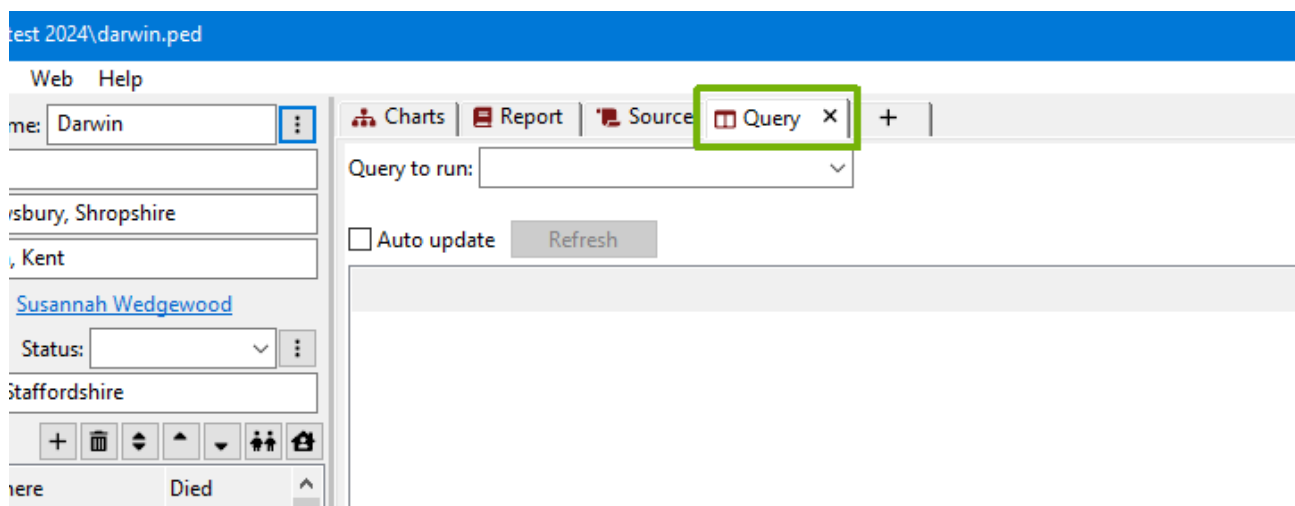
Use the "..." buttons to select a start and end (or one or the other) people to check. This is based on the order they appear in the lists when they appear (file order). You can also opt to see previously ignored warnings too.

Queries

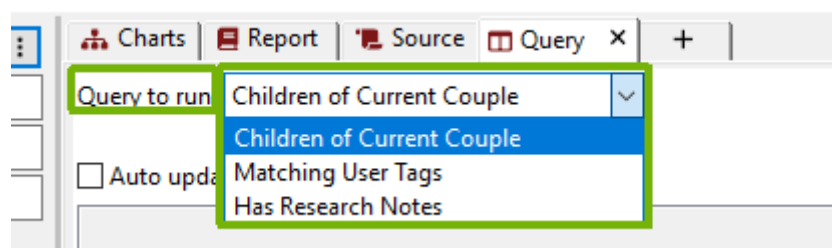
It is sometimes useful to run queries on the data in your project. Queries are accessed from the “Tools” menu.



When “Queries” is selected, a Query tab will be added to the tabs on of the main screen:



The particular query you wish to run can be selected from the “Query to run” drop-down list:



The data will then be presented in the table below:

Charts | Report | Source | **Query** x | + |

Query to run: Children of Current Couple

☐ Auto update Refresh

ID	Name	Sex	Born	Place	Ref
I4	William Erasmus /Darwin/	M	27 Dec 1839		
I5	Anne Elizabeth /Darwin/	F	21 Mar 1841		
I6	Mary Eleanor /Darwin/	F	23 Sep 1842		
I7	Henrietta Emma /Darwin/	F	25 Sep 1843		
I8	George Howard /Darwin/	M	9 Jul 1845		
I9	Elizabeth /Darwin/	F	8 Jul 1847		

Double clicking on an item in table will show the relevant record in the editing panels, usually located on the left-hand side of the screen.

Usually, the query grid will automatically update as any changes are made, but some queries might take a long time to run on large files, and so you can disable auto updates, and then use the “Refresh” button to update manually.

Some queries require extra parameters. For example, the “Matching User Tag” query requires you choose which user tag you want to show matches for (see “User tags” section” for more information). When this is the case, extra options will appear next to the query drop down. For example:

lp

Charts | Report | Source | **Query** x | + |

Query to run: Matching User Tags Tag: Direct Ancestor Needs more work Direct Ancestor

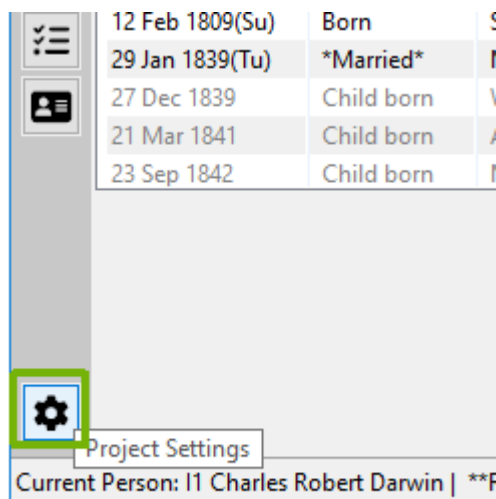
☐ Auto update Refresh

ID	Name
I1	Charles Robert /Darwin/
I7	Henrietta Emma /Darwin/
I15	Robert /Darwin/

User tags

When you are working with data, you may have a need to set “tags” on certain people in your project. For example, you might want to flag that more work is needed on a particular person, or that they are a direct ancestor, or that you have a DNA match with them. To do this, you can create your own tags, for use as you wish.

Tags are entered from the project settings panel, accessed via the “Cog” icon button, located at the bottom of the action bar that runs down the left-hand side of the main screen:



User tag definitions are edited via the “User Tags” table on this panel, via the buttons at the top of the table:

User Tags			
ID	Description	Colour	
1	Needs more work	#F25454	
2	Direct Ancestor	#5482F2	

Adding or editing a tag will show the Edit user tags dialog, allowing you to enter the text for your tag, and set the colour:

User Tags			
ID	Description	Colour	
1	Needs more work	#F25454	
2	Direct Ancestor	#5482F2	
3	<enter description>	#B0F254	

Edit user tags

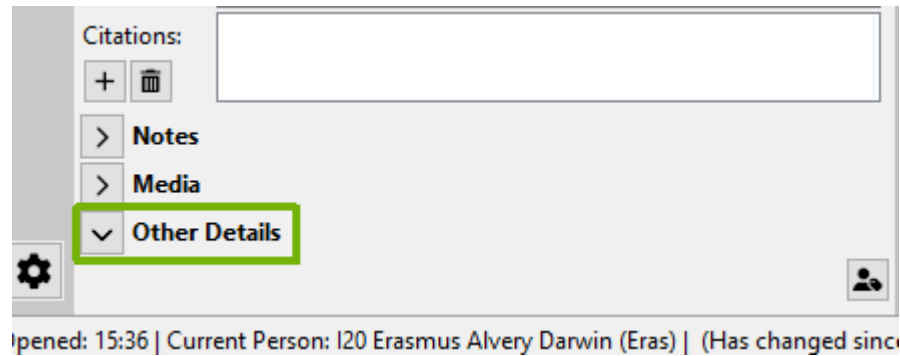
Description: <enter description>

Colour:

ApplyOkClose

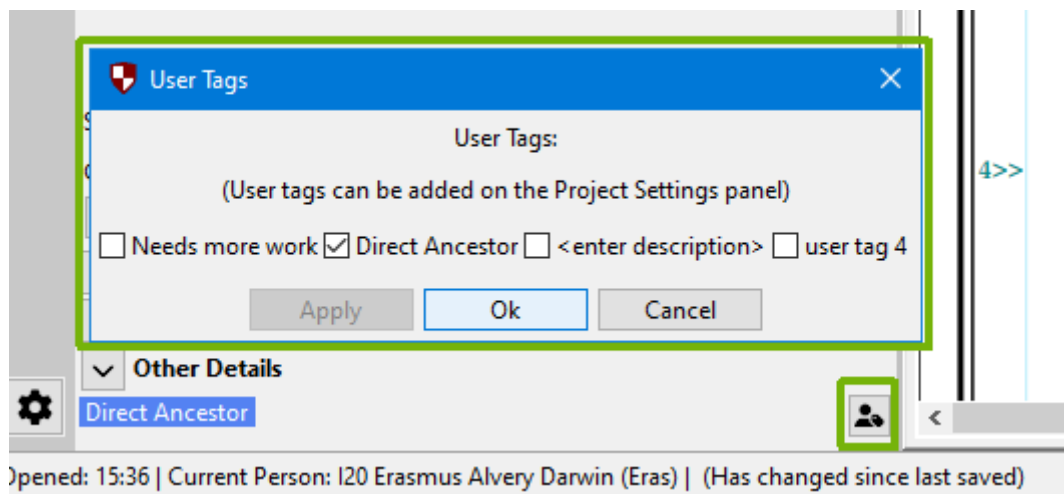
A default colour is suggested, but double clicking on the coloured square will enable you to choose a different colour for this particular tag.

Tags are applied or removed from people via the normal person edit panel. Towards to bottom of the panel is the “Other Details” expanding panel (closed by default). Clicking on the button so the arrow points downwards will show the panel:

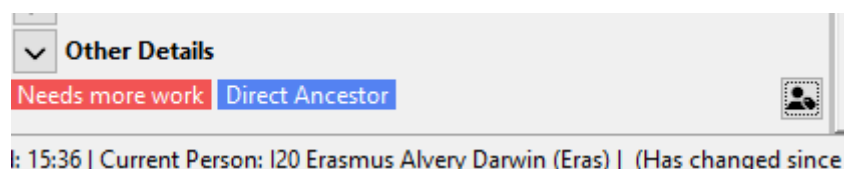


If you are working on a small screen, you may need to close the “Children” or “Facts and Events” panels so you have enough room on the computer screen.

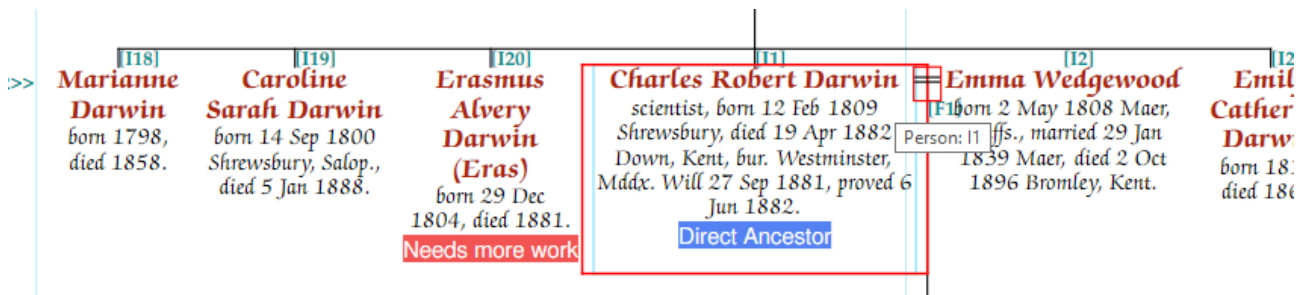
Clicking on the person tag button will show the user tags edit dialog, you can then select which tag (or tags) apply, and click on “OK” to confirm.



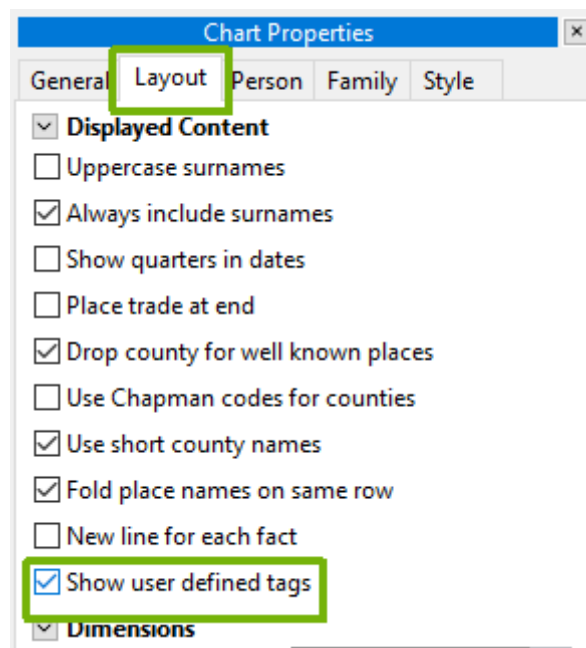
The applicable tag(s) are then shown in the person's edit panel:



Tags can also be configured to appear on charts. They are shown by default on the automatic dynamic chart:



The tags aren't shown by default on charts you create, but can be made visible by click on the "User tags" check box on the "Layout" tab of the "Chart Properties" panel—see section on Creating and Editing Charts:

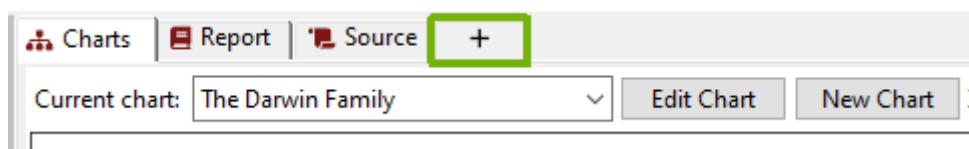


You can also run queries to see which tags apply, see the section on Queries.

Web browser

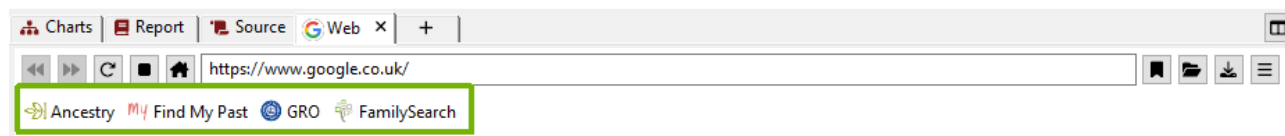
Pedigree Forge includes an integrated web browser (Microsoft's "WebView2" technology). You can disable the default browser if you wish—select "Options" from the "Tools" menu. The on the "Options" dialog uncheck the "Use embedded browser" check box on the "Internet" tab. You can also set the home page here too.

To open a new browser tab in Pedigree Forge, use the "+" button along the top of the tabs:

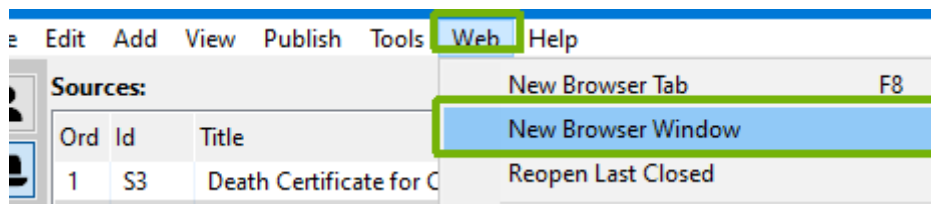


A new browser tab will open, initially on the home page (this can be set from the Options dialog, accessed from the "Options" item on the "Tools" menu).

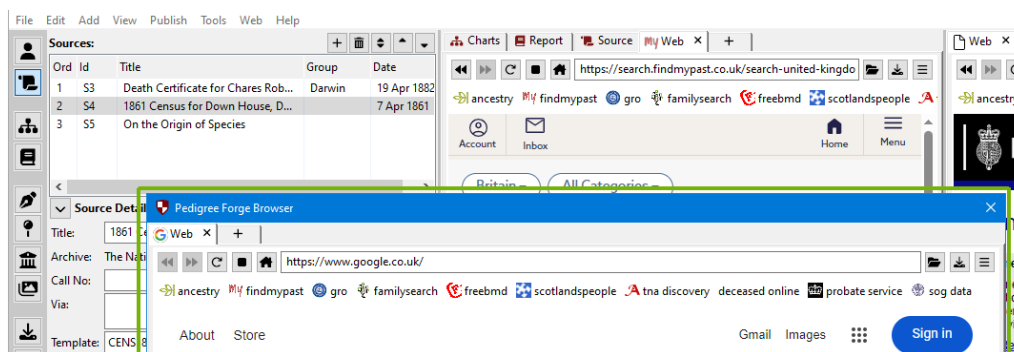
The browser works like external web browsers, allowing you to surf the web. Some common genealogy links are included along top of the browser tab. These can be customised (see section on bookmarks):



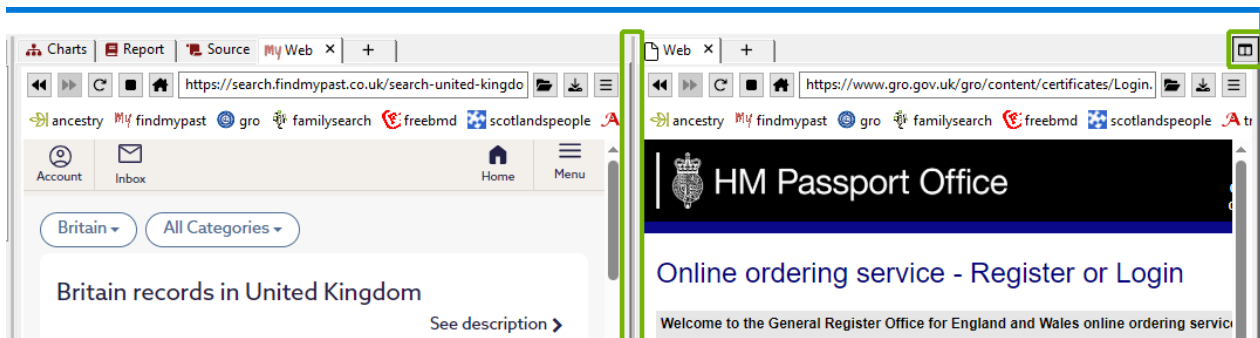
Browser tabs can also be opened in a separate window. To do this, use the "New Browser Window" from the "Web" menu:



This browser window will "float" on top of Pedigree Forge, and can have tabs of its own:



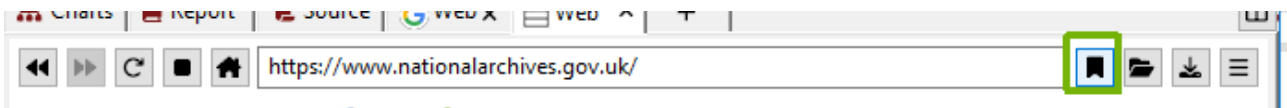
If you have a larger computer screen, you can also open more browser tabs and show them next to the content panels. To do this click on the “split” icon button on the right-hand side of the main Pedigree Forge window:



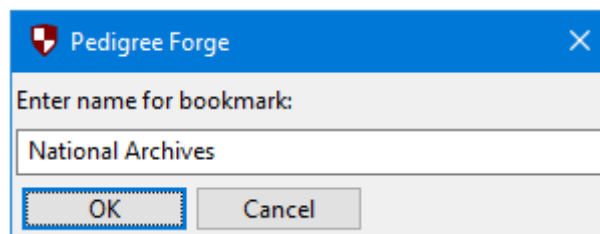
You can adjust the width of each side using the grip bar between. Clicking the “split” icon button again will hide the right-hand side panel.

Bookmarks

You can customise the bookmark short-cut buttons that appear in each browser tab. To add a bookmark, navigate to the page you wish to be a book mark, then click on the “bookmark” icon, which is to the right of the address bar:



You will be prompted to add a name for the bookmark:

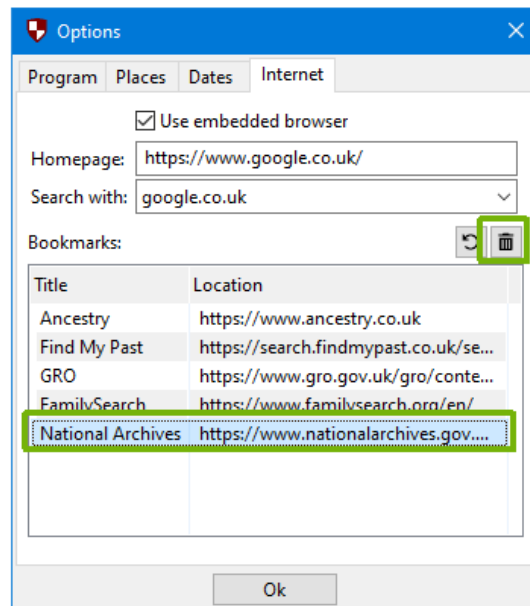


When you click “OK”, the bookmark will be added:



It will also be added to any new browser tabs created, but won't be added to other tabs already open.

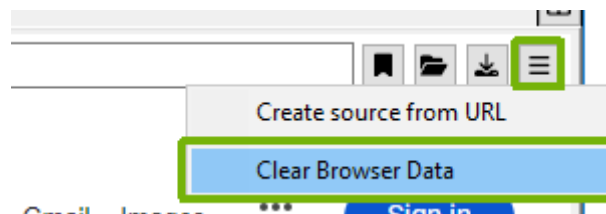
Bookmarks can be removed on the “Internet” tab of the “Options” dialog, accessed from “Options” on the “Tools” menu:



Select the bookmark you wish to remove from the “Bookmarks” list, then click on the Trash button. After being prompted to confirm, any new tabs created will not have that bookmark (it won’t be removed from currently opened bookmarks).

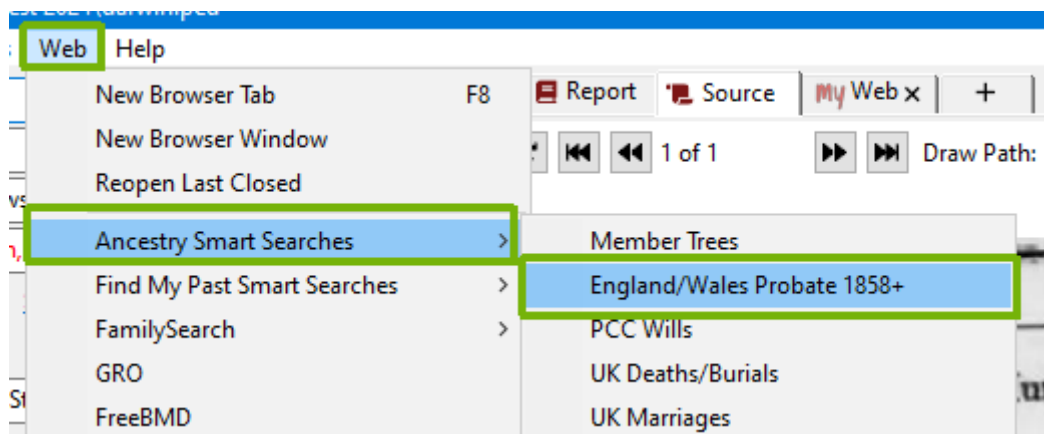
There are a few places within text fields and in the browser itself, that using a right-click context menu, gives you the ability to search the web for some text. The search engine to use can also be configured in the options dialog, as above.

If you need to empty the browser’s cache, for example clear all cookies, and auto-completion fields, this can be done from the “more options” button on the browser tabs:



Web searches

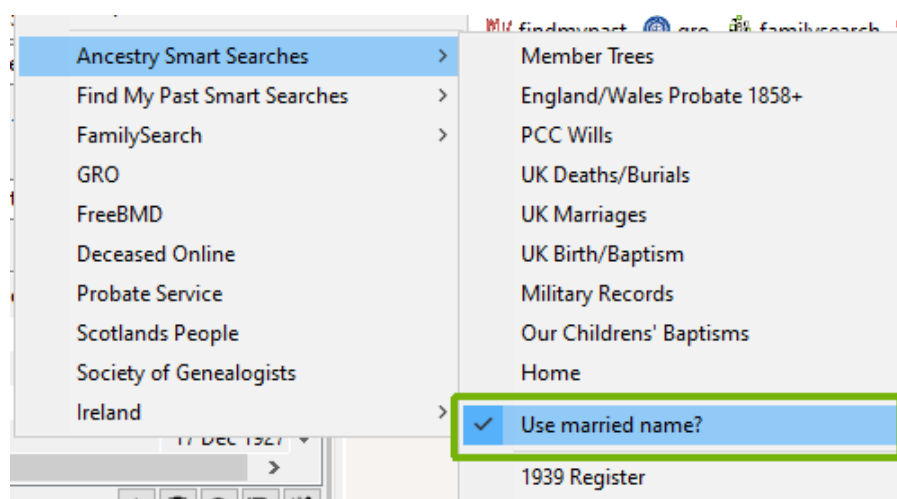
Pedigree Forge allows you to make searches on certain websites, directly from the active person you are working with (you are likely to need your own subscription to access the data on these sites). These are accessed from the “Web” menu.



The example selection shown above will try and find the current person on www.ancestry.co.uk, in their England and Wales probate collection.

Note: the Smart Searches should be considered a first-step. They will sometimes do a very good result, for example, searching for Charles Robert Darwin's will in the above entry finds it straight away. At other times, you may need to adjust the search parameters on the website. At the very least, the Smart Searches should save you from re-typing the information again.

For ladies, most searches are initially made under their maiden surname (deaths/burials and probates searches are conducted using their last known married surname). You can check the “Use married name?” option from the relevant Smart Search screen to search under the married name:



If they appear in more than one family as a spouse, it will be the married name of the currently active spouse.

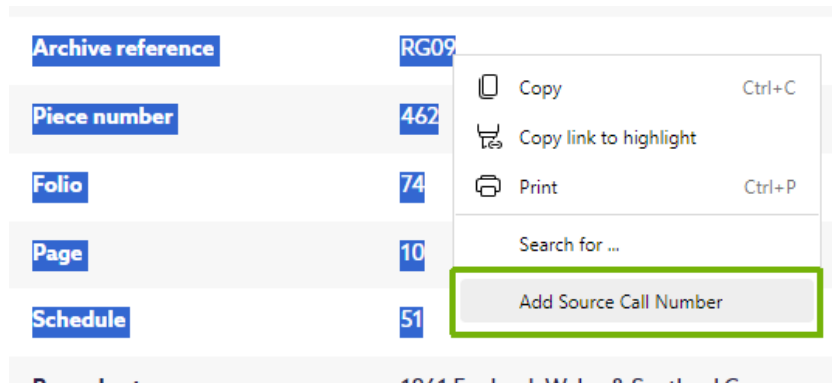
The number and options for Smart Web searches are likely to be added to in future versions.

Web browser tricks

Having a web browser built in to Pedigree Forge means that it can sometimes use contextual information to help improve the experience of researching. Below are a couple of areas related to particular websites:

FindMyPast UK census call numbers:

When creating a census from www.findmypast.co.uk, Pedigree Forge can import and format the call number. Highlight the reference information shown with the transcript with the mouse, then right-click with the mouse to show the context menu, and select “Add Source Call Number”:



The first part of the source title, archive, call number, accessed via, template, fact type and date will all then be populated automatically:

A screenshot of the 'Source Detail' form in Pedigree Forge. The form is titled 'Source Detail' and contains the following fields: 'Title' (text box with '1861 Census for XXXXXXXX'), 'Archive' (text box with 'The National Archives of the UK (TNA)' and a building icon), 'Call No' (text box with 'RG9/462 folio: 74 page: 10') and 'Group' (text box), 'Via' (text box with 'Digital image of original (accessed Dec 2024) via www.findmypast.co.uk' and a magnifying glass icon), 'Template' (dropdown menu with 'CENS1861' selected), 'Fact' (dropdown menu with 'CENS' selected), 'Image' (checkboxes for 'Inline' and 'In report'), 'Date' (text box with '7 Apr 1861'), 'Place' (text box), and 'Address' (text box).

If any fields that had already been added, they will be left unchanged.

Ancestry UK census call numbers

When creating a census from www.ancestry.co.uk, Pedigree Forge can import and format the call number. Highlight the reference information shown with the transcript with the mouse, then right-click with the mouse to show the context menu, and select “Add Source Call Number”:

Detail

Source

Source Citation

Class: Ra 9: Piece: 462: Folio: 74: Page: 10: GSII roll: 54264

Source Information

Ancestry.com. 1861 England Census [database on-line]. Lehi Inc, 2005.

Original data: Census Returns of England and Wales, 1861. Ke Archives of the UK (TNA): Public Record Office (PRO), 1861. D Archives, London, England. The National Archives gives no completeness or fitness for the purpose of the information p for purposes of research, private study or education. Applie

Copy

Ctrl+C

Copy link to highlight

Print

Ctrl+P

Search for ...

Add Source Call Number

The first part of the source title, archive, call number, accessed via, template, fact type and date will all then be populated automatically:

Source Detail

Title: 1861 Census for XXXXXXXX

Archive: The National Archives of the UK (TNA)

Call No: RG9/462 folio: 74 page: 10 Group:

Via: Digital image of original (accessed Dec 2024) via www.ancestry.co.uk

Template: CENS1861 Fact: CENS

Image: ☐ Inline ☐ In report ☐ Not in enclosures

Date: 7 Apr 1861 Parsed Date:

If any fields that had already been added, they will be left unchanged.

Adding GRO references

The integrated web browser can be used to add GRO references directly from the General Register Office's website, www.gro.gov.uk. Use the GRO's site to locate references as required, for example, search for children by surname and mother's maiden name. When you have found a birth or death reference, you can highlight the entry, then right-click with the mouse to show a context menu:

Name:

Mother's Maiden Surname:

DARWIN, CHARLES WARING WEDGWOOD

GRO Reference: 1856 D Quarter in BROMLEY Volume 02A Page 205

1 Record(s) Found - Showing Page 1 of 1

Go to page 1

Noticed a problem with a record in the GRO Indexes?

You can [report it to GRO](#) and help us improve the quality of information available

Home > Online Ordering

Added Successfully

Copy

Ctrl+C

Copy link to highlight

Print

Ctrl+P

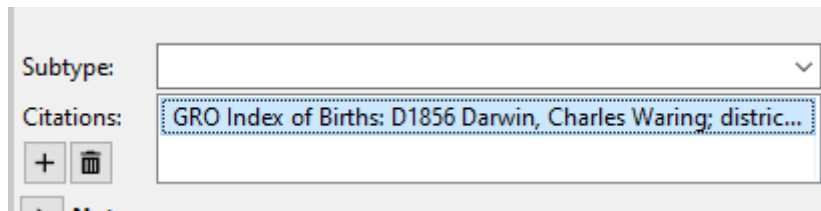
Search for ...

Create Child From GRO Birth

Add GRO Birth

Add GRO Death

The fact will then be created (if it doesn't exist) and a local citation added:



The screenshot shows a software interface with two main fields. The first field is labeled 'Subtype:' and is a dropdown menu. The second field is labeled 'Citations:' and contains the text 'GRO Index of Births: D1856 Darwin, Charles Waring; distric...'. This text is highlighted with a blue border. Below the 'Citations:' label, there are two small icons: a plus sign (+) and a trash can icon.

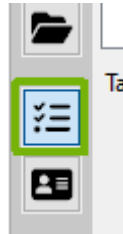
Make sure that the correct person is the one being edited, as this will be applied to the currently selected person.

Note: this option will also change the date if it is slightly off, for example, if we had Charles Waring Darwin's birth as "About 1857", perhaps based on an age on a census, it will be amended to "D1856", which Pedigree Forge recognises as a GRO quarter date—see section on dates.

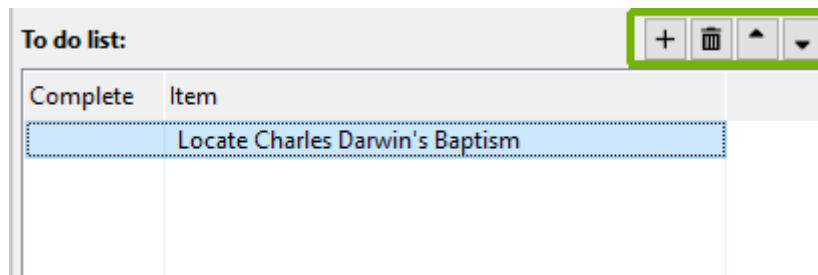
The option "Create Child from GRO Birth" can also be used. For this option, make sure that the child's parents are currently selected as the active person and spouse. The child will then be created, and their approximate date of birth, and citation to the GRO reference, will also be populated.

To do lists

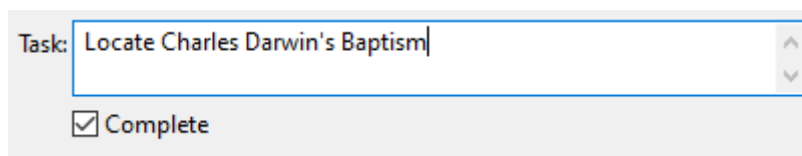
Pedigree forge allows you to have a basic “to do” list within each project. This is accessed from the check list icon on the action bar that is located on the left-side of the Pedigree Forge main window:



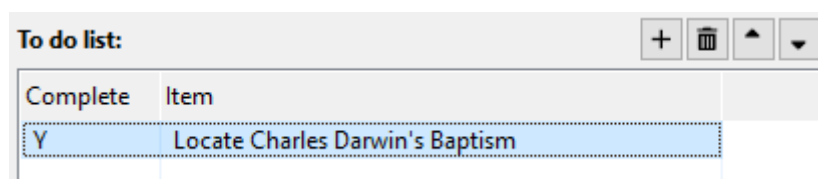
The to do list panel has a table at the top, which includes all the “to do” items. The small buttons in the top-right corner allow you to add, delete and re-order tasks:



Clicking on an item will allow you to edit the task’s description. It can be marked as complete with the check box below:



The task will then show as complete:



You can also right-click on the to do list to add/delete items.

Project and user configuration

Pedigree Forge allows configurations for a particular project, for example, adding recognised places and tags. These are available on the “Project Settings” panel, which is accessed from the “Cog” icon, in the bottom left-hand corner of the Pedigree Forge main window:



Project Settings:

> **Spelling and hyphenation**

Startup: message

Output Dir:

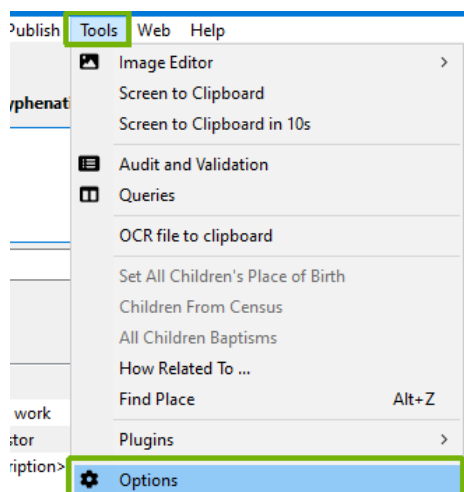
Update

▼ **User Tags** + ✎ 🗑

ID	Description	Colour
1	Needs more work	#F25454
2	Direct Ancestor	#5482F2

Any changes made on this panel apply to this project only.

User preferences apply to all projects you open on your computer. These are set on the “Options Dialog”, accessed via the “Options” item on the “Tools” menu:



Options X

Program Places Dates Internet

☐ Larger font (requires restart)

☒ Prompt to backup on close

☐ Enter given and surnames separately

Some of these configuration options have already been covered in particular sections of this user guide.

Document vs database mode

Pedigree Forge can run in one of two modes. The default is “Document” mode. You can switch between modes on the “Options Dialog” accessed from the “Options” item on the “Tools” menu. Note: you have to close and reopen Pedigree Forge for the change in mode to take effect.

It is recommended that you only work in one mode or the other; switching modes will cause confusion—pick one.

Document mode

In document mode (the default), Pedigree Forge works like most office type programs: you open a particular file, you can edit the data and then must save it for the changes to take effect. If you don’t save the changes, they will be lost.

This allows you to “fiddle” with a file, with the knowledge that you won’t change the main data unless you save it.

As with other applications like this, on closing a document that has changed, you will be prompted to ask if you want to save any changes.

In document mode, the file you are working is saved in the background, in case Pedigree Forge closes unexpectedly, either due to a crash or system shut down—you will be prompted for which version you want to keep when Pedigree Forge starts next time.

If you have a very large file, consisting of hundreds of thousands of people, you might notice a slight delay of a second or two, as the auto save background feature runs.

In document mode, you can have multiple copies of Pedigree Forge open on your computer at the same time—you could even open the same file in each, but that would cause data loss, with the last one to save winning.

“Document” mode files have the file extension “.ped” and are a flat text file (an extended GEDCOM format).

Database mode

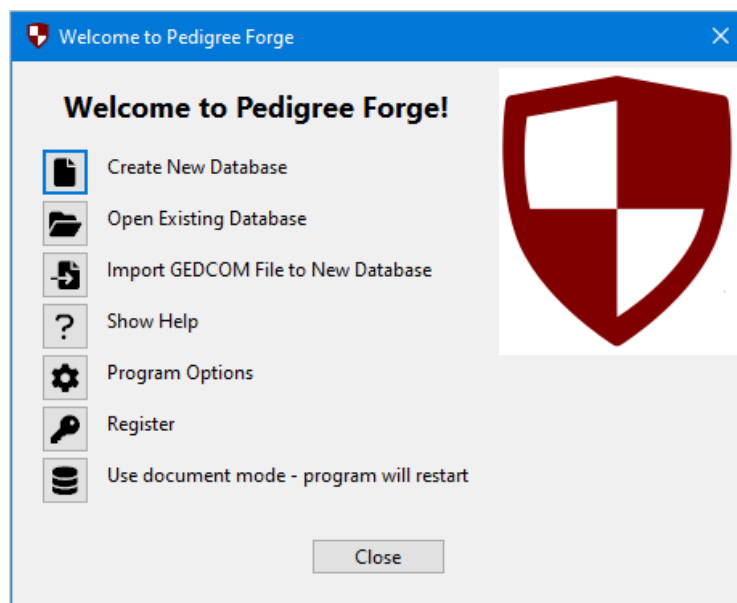
Database mode works with an SQL database—any changes you make to your data are immediately written back to the database, so it is always up to date. There is no need to save your data, as this automatically happens in the background. You can still use the “Undo” option from the “Edit” menu to undo the last action, but beyond that, you can’t revert to earlier versions.

As the data is written back to the database immediately, and controlled by an SQL database, no data is lost if Pedigree Forge shut down unexpectedly. This also means that there is no background auto saving of files and so there will no pause, even with very large files.

“Database” mode files have the file extension “.pedb” and are SQLite database files.

Database mode will only allow a single instance of Pedigree Forge to run on your computer at a time. Trying to open a second instance of the program will not work.

The first time you open Pedigree Forge in database mode, you have to create or open an existing database. The “Welcome to Pedigree Forge” database dialog will help you to create or open a database:



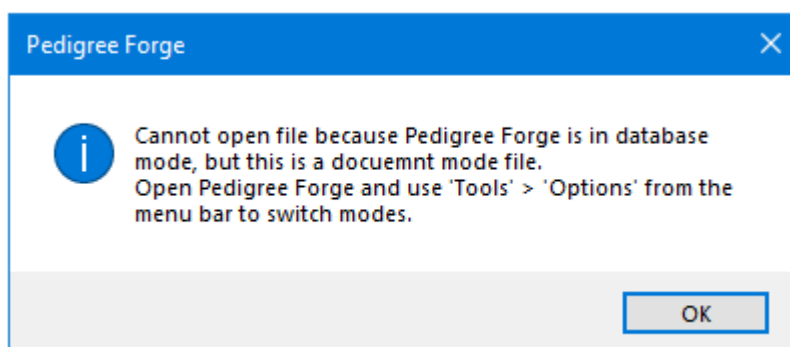
“Create New Database” will allow you to pick the file name and location for your new database.

“Open Existing Database” will show a list of recent databases (if any) and or allow you to select another database with the Open File Dialog.

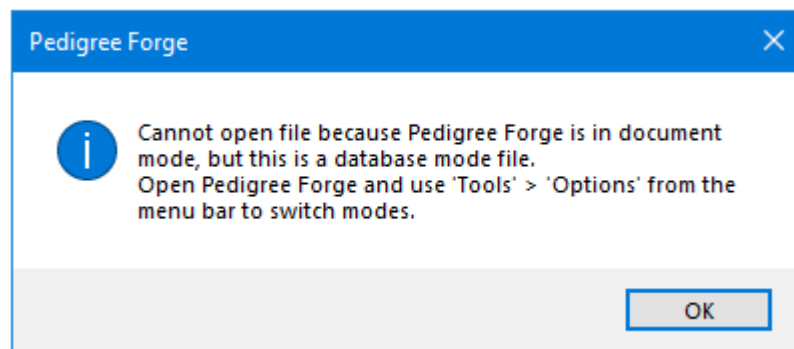
When working with a database mode project, there are very few differences. The main one is that there is no “Save” option on the “File” menu and the other is that when you close the file, you won’t be asked if you wish to save any changes, as this will have been done automatically for you.

Database vs document mode trouble shooting

It is recommended that you work either in document or database mode (see the sections above for the pros and cons of each). As Pedigree Forge can only work in one mode at a time, you might get an error message if you try and open a file of the other kind. For example, if we are in database mode, but double click on a “.ped”—document mode file, the following error will appear:



Similarly if we are in document mode, and double click on a “.pedb”—database mode file, the following error will appear:



The solution is the same: switch to the other mode. Start Pedigree Forge manually (from the windows “start” menu, or by whatever means you open the program. Then selected “Options” from the “Tools” menu and check (or uncheck) the “Use database mode” check box as appropriate:

☒ Use database mode (requires restart)

When you close and reopen Pedigree Forge, it will be in the other mode.

Spell checking and hyphenation

Pedigree Forge includes a built-in British English spell checker. It works very similar to a conventional spell checker, where misspelt words are underlined in red, with the addition that “ignored” words are still underlined, but in a magenta.

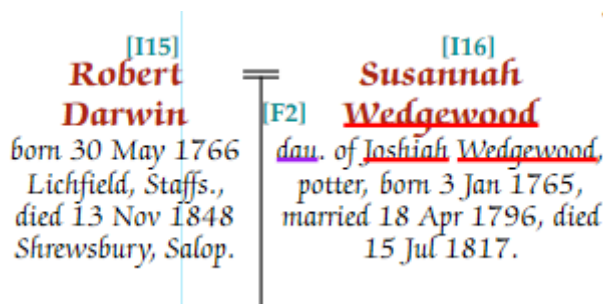
This is useful in genealogy, it isn’t uncommon when transcribing an old document for there to be spelling mistakes. This mistakes can be marked as “ignored”, to flag that they aren’t quite correct.

Spell checking is applied to text fields, i.e. where text is entered, as well as on any charts and reports.

In the following example, Pedigree Forge doesn’t recognise “Joshiah” or “Wedgewood” and so has underlined both in red, in the person panel (where the information is added and edited).

Forenames: Joshiah Surname: Wedgewood ⋮

And on the chart we are working with:



The spelling checks only show on the screen; if a chart or report is printed or exported, the spell check underlining doesn’t appear.

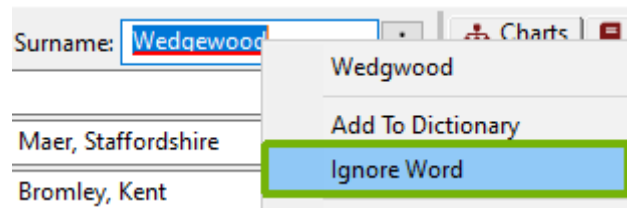
In the above example, we have spelt Joshiah wrongly. In the text-editing field, we can highlight the misspelt word and then right-click with the mouse to be presented with options. This includes some spelling suggestions:

A screenshot of the text editing field for 'Forenames' showing 'Joshiah' underlined in red. A right-click context menu is open over the text, with 'Joshiah' highlighted in blue. Other options in the menu include 'Joshing', 'Add To Dictionary', 'Ignore Word', and 'Undo'. The 'Surname' field next to it shows 'Wedgewood' underlined in red.

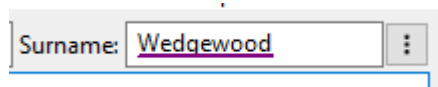
Selecting “Josiah” will change the word to the correct spelling:

Forenames: Josiah Surname: Wedgewood ⋮

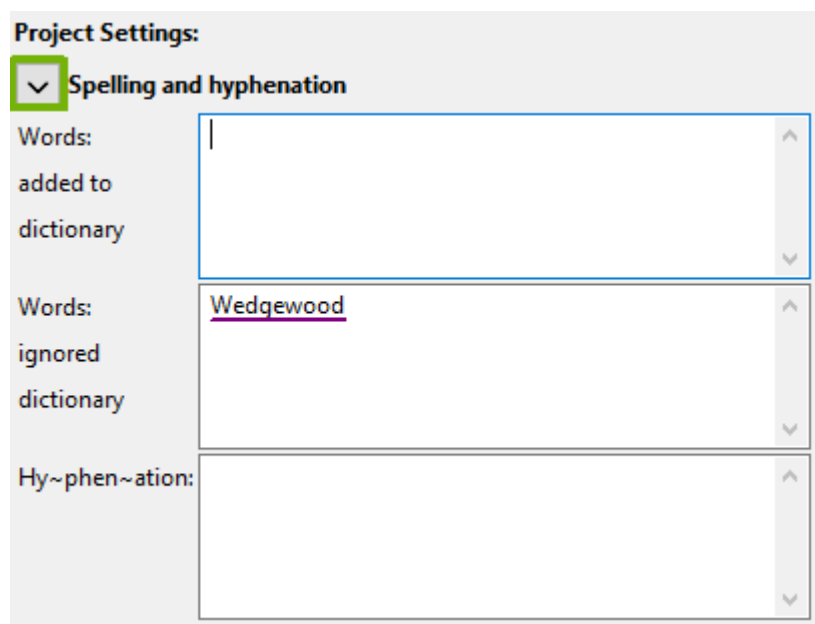
In regard to Wedgewood, the accepted spelling for this family appears to be Wedgwood, i.e. without an “e”. We can use the spelling suggestion to correct that, as with Josiah. However, if we were transcribing an old document with the particular spelling of Wedgewood, we might want to retain the word, but mark it as ignored:



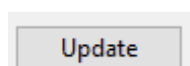
This spelling would then be underlined in magenta, to show that it is being ignored:



The spell checker dictionaries and ignored words are per project. Words that have been added or ignored can be viewed from the Project Settings panel (the cog icon in the lower-left corner of the Pedigree Forge main window). The “Spelling and hyphenation” section isn’t shown by default, so you will need to click on the button next to it to expand the view.



Each word in the lists of added and ignored words must be on its own line. When you have added any words, the “Update” button will apply the changes to Pedigree Forge’s dictionary. If you remove words, this doesn’t take effect until next time you open Pedigree Forge.



On loading Pedigree Forge, any user dictionaries on your computer will be read-in too. These aren’t are shared between many common Windows programs, but not all.

Hyphenation

Pedigree Forge uses hyphenation when it needs to break a word across a line boundary—mostly to create similar length lines when justifying text. This most commonly occurs in reports, but certain style of charts allow hyphenation of words too.

Pedigree Forge has built-in rules for hyphenation, which will do a reasonable job on most occasions, but if you want to specify hyphenation opportunities for particular words, then you can do so. These should be added to the “Hy~phen~ation” text box, located on the Project Settings panel—see section on spelling to locate this.

Each word should be entered on a separate line, and the tilde character ~ should be used to indicate in where the word hyphens can be added if needed.

The “antiquarian” style chart is one where text is justified. In the example below, we can see that Pedigree Forge has hyphenated Wedgwood as Wedg-wood, to fit into the space available for justification:

[I16]

N,	SUSANNAH
56	[F]WEDGWOOD,
3.,	<i>dau. of Josiah Wedg-</i>
48	<i>wood, potter, born 3</i>
p.	<i>Jan 1765, married 18</i>
	<i>Apr 1796, died 15 Jul</i>
	<i>1817.</i>

This was automaticity applied but if it hadn't been, we could have entered the hyphenation opportunity into the “Hy~phen~ation” text box as **Wedg~wood**.

As with spell checking, once the text has been entered, the “Update” button must be clicked to apply.

Contacts

Pedigree Forge allows you to include contacts. This is how “submitters” are handled if importing information from a GEDCOM file. This feature is probably of limited use to most genealogists, but professionals might wish to store client contact information here, so it can be kept with the project.

The contact editing panel is accessed from the contact card icon button, located on the main action bar, which runs down the left-side of the Pedigree Forge main window:



The contact panel works in much the same way as the other panels in Pedigree Forge, with a list of contacts at the top, and buttons to add or remove the selected contact. Clicking on a contact in the list makes it the active contact, and the information can be edited in the fields below:

Contacts: + 🗑️

Name:

Address:

Town:

County:

Postcode:

Country:

Email:

Phone:

Fax:

Website:

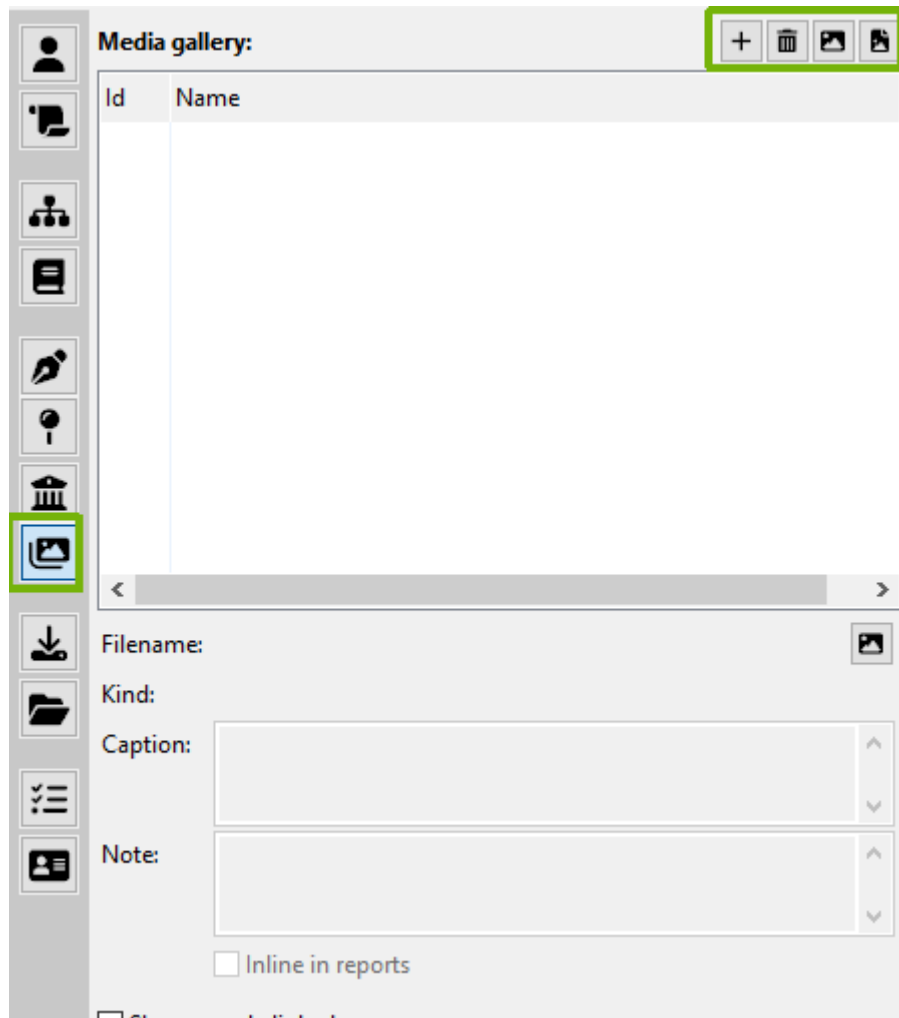
Note:

⬆️

⬇️

Media Gallery

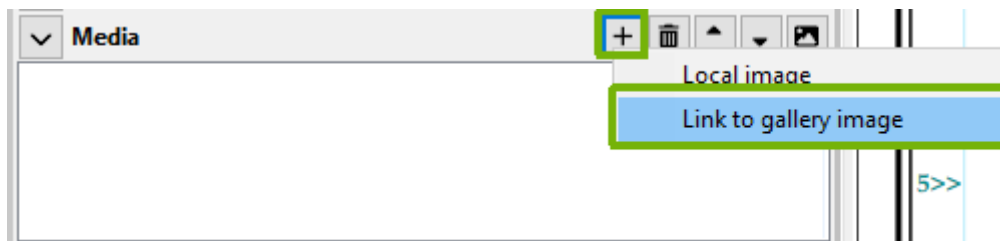
The Media Gallery panel is useful for adding captions to photos, for use in reports. It is accessed from the “pictures” icon button, located on the action bar, which runs down the left-side of the main Pedigree Forge window:



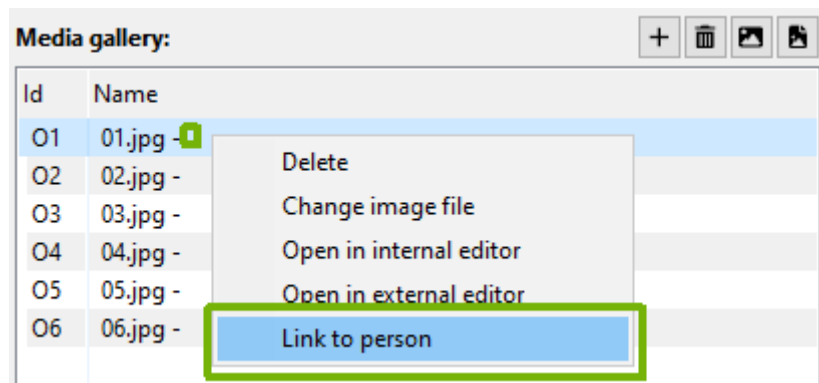
The basic use is very similar to the other editing panels in Pedigree Forge, whereby a list of all the items appears at the top. Selecting an item from the lists makes it the item being edited (with the fields below) and the small buttons above the list of items allow adding/deleting of the photos.

Any gallery items should be located in the same folder as your Pedigree Forge project (.ped) file.

People can be linked to items in the gallery. You can do this either when editing the people themselves (on the people editing panel), via the “Media” section:

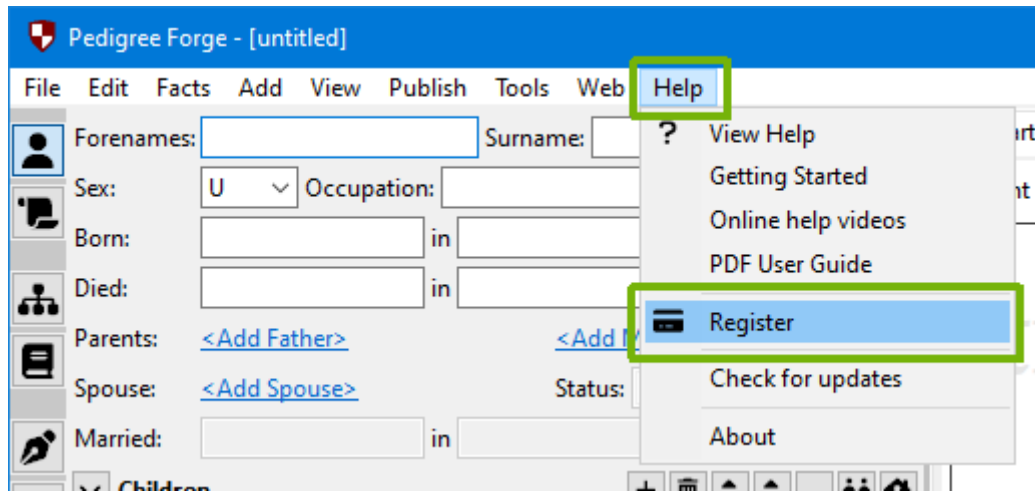


Alternatively, the person can be linked to media gallery item the other way around, i.e. by selecting an item in the list of gallery items, and then right-clicking on the item in the list and selecting “Link to person”.

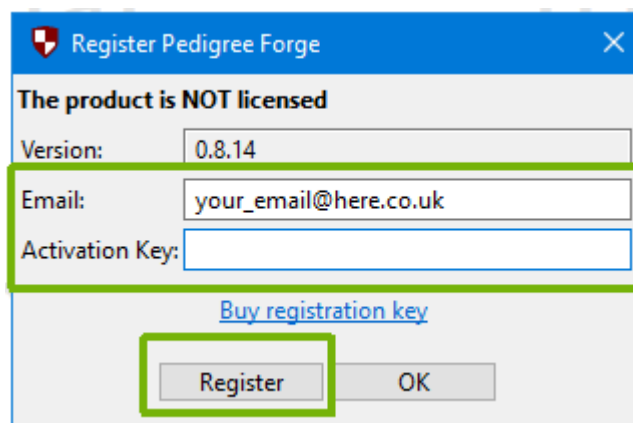


Activate Pedigree Forge

To activate Pedigree Forge, you will need to purchase the software, which will give you an activation key. This is done from the “Help” option of the main menu bar, by selecting “Register”:



This will show the register dialog:



Use the “Buy Registration Key” to obtain your activation key. Once this has been emailed to you, again go into the Register dialog where you can enter the same email used to purchase the software and the activation key provided. Then click the “Register” button. If the key and email are correct, your software will be activated.

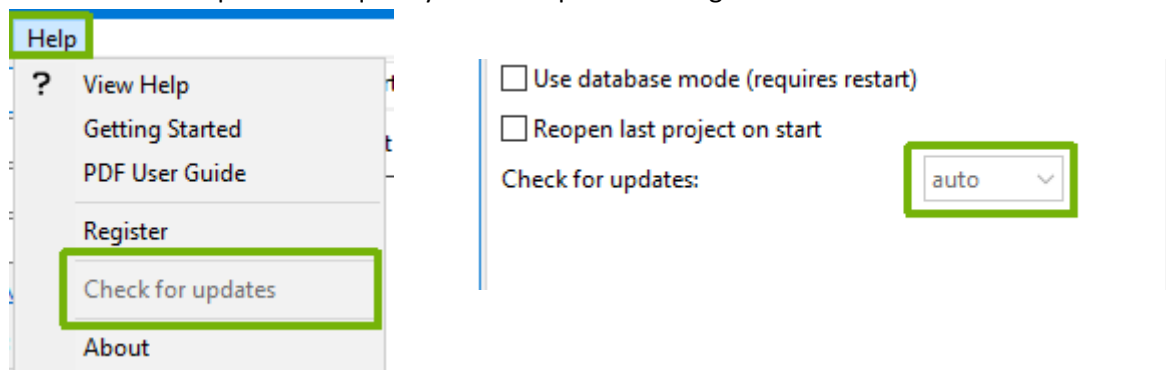
Note: You must enter the email and key EXACTLY (including correct upper/lower case) as given in the email sent to you. It is recommended that you “copy” the key from the email and “paste” it into the Activation Key box.

Updating Pedigree Forge

Pedigree Forge can be installed in two different ways. The method recommended for most users is to use the “MSIX” installer. If this doesn’t mean anything to you, then you should use this method!

In this mode, updates are completely handled by Windows in the background, and updates will be applied automatically, and probably without you even noticing.

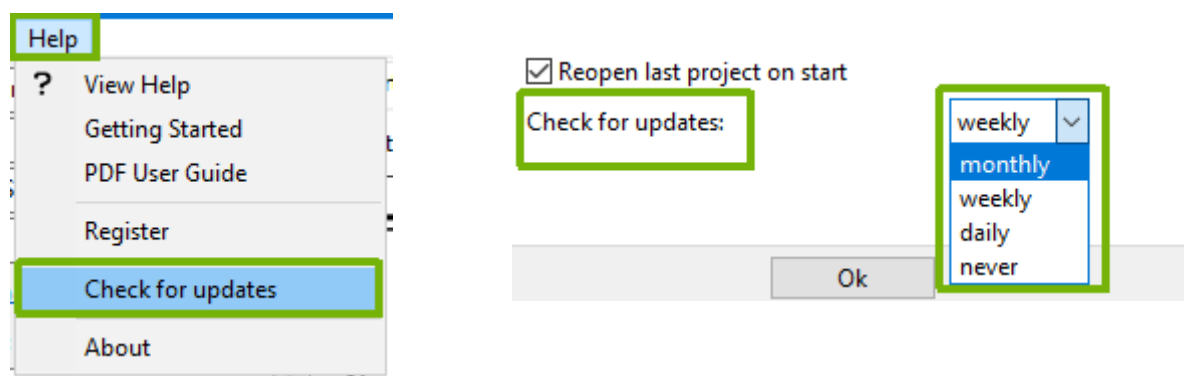
You can tell if this applies, as the “Check for updates” option on the “Help” menu isn’t selectable (greyed out) and the “Check for updates” frequency on the “Options” dialog is set to “auto”:



The MSIX technology on Windows also means that updates only change small amounts of the setup at a time, it cleverly only downloads the parts that have actually changed, so updates are quick, and download the minimal data necessary. These installed applications are safer on modern versions of windows, as they run in a containerised environment and uninstall cleanly.

Executable installer

If you are a power user or don’t want Pedigree Forge to be updated automatically by Windows, then you should install via the setup installer (executable program). In this mode, Pedigree Forge (rather than Windows) has to manage the updates. You can tell if this applies to your copy because the “Check for updates” option is available from the “Help” menu and you have the ability to set how often Pedigree Forge checks for updates, or even never if you wish, from the “Options” dialog, accessed from the “tools” menu:



Important: No technical support will be given for users who choose the executable installer. You will have to navigate the security warnings, and virus scan settings yourself.

Importing and exporting data from other applications

Pedigree Forge is one of many genealogy computer programs. To share and transfer information between them, the common format is known as GEDCOM, which is an acronym for **GE**nealogical **D**ata **COM**munication. It was developed by the Family History Department of the Mormon Church. These file have the extension “.ged”.

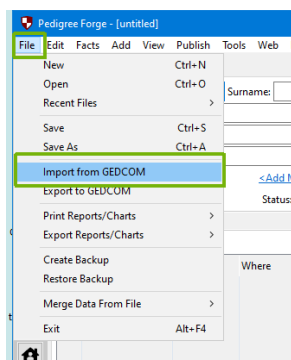
The GEDCOM format has developed over the years; the most commonly used version is 5.5.1, which dates from 1999, although version 7 (also known as FamilySearch GEDCOM¹) was introduced in 2021, the use of which is growing, but not all programs currently support this version.

Important: GEDCOM is the best (but imperfect) tool we have to transfer data between applications. As each program supports different functionality—part of what makes them unique—there is very likely to be some data lost each time you transfer information between different applications, as one program won’t have the same features as another. For example, Pedigree Forge allows you to mark text as bold, and italics etc². This isn’t supported by GEDCOM 5.5.1 at all, and many other programs don’t support this feature either, so the bold and italic attributes, are likely to be lost on transfer, although the text within should be retained. All good genealogical applications will support the “core” of GEDCOM, so things like names, dates, places, relationships, sources etc., should be transferred without issue.

Note: Raw GEDCOM does not transfer any linked files (like photos). You will have to transfer these manually.

Importing fom GEDCOM

To import a GEDCOM file, select “File” from the main menu bar then “Import from GEDCOM”:



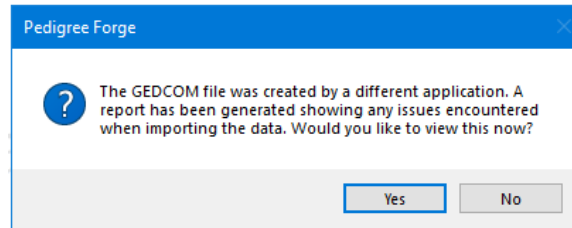
A file selection dialog will then be shown to allow you to locate and find the GEDCOM (.ged) file on your computer. Select the file and then select “Open”.

The file should then be imported into Pedigree Forge.

1 FamilySearch GEDCOM is a trademark of Intellectual Reserve, Inc. All rights reserved. A service provided by The Church of Jesus Christ of Latter-day Saints <https://gedcom.io/>

2 GEDCOM version 7, introduced a limited amount of support for rich text.

After the import, the following dialog box will appear:

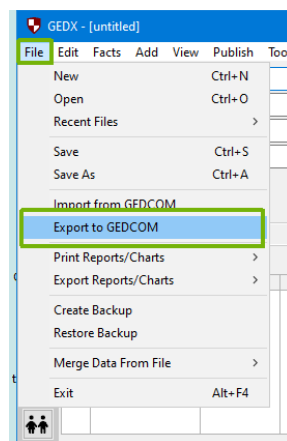


Selecting "Yes", will open your system's text file view and show any issues noted when importing the file—reviewing these will help to minimise any loss of fidelity in data. Select "No" to start using the program in Pedigree Forge.

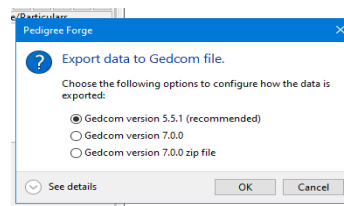
Important: After the file has been imported, you will need to save it—use the usual Save or Save As files to select where you want to save the imported file.

Exporting to GEDCOM

To export a Pedigree Forge file to GEDCOM, select "File" then "Export to GEDCOM" from the main menu bar:



You will then be asked to confirm how you wish to export the file:



As at the time of writing (2025), most other programs support GEDCOM 5.5.1, and so is probably the best choice. However, GEDCOM 7, does offer more options, which can be useful—for example, the ability to have rich text transfer—and so might be better if you know that the program you are exporting to supports version 7. In reality, you might want to export as both (selecting different file names for the output), and experiment with the importing program.

Version 7 also introduces the ability to export a zip file, which includes an other files linked—raw GEDCOM only transfers the data, not any linked files.

Expert Information

The information given above will be enough for most users, and so many people will want to skip the next section. This section is for expert users who need to know more about how Pedigree Forge handles certain GEDCOM features on import and export.

Pedigree Forge Features and Data Model

Pedigree Forge works internally with Unicode (UTF-8), so should have no trouble with importing information in Unicode, although display of Unicode characters requires suitable fonts.

Except in a few defined places, Pedigree Forge only supports left-to-right scripts, i.e. text that runs from left to right. Right-to-left scripts, and bidirectional text isn't supported, although it will work in *some* scenarios.

Pedigree Forge supports record structures very similar to those in GEDCOM, namely:

INDI (Individual), FAM (Family), SOUR (Source), OBJE (Object/media), REPO (Repository/archive), NOTE—SNOTE in v7 (Notes), SUBM (Submitters).

Pedigree Forge supports a superset of GEDCOM date and age formats.

Pedigree Forge supports a HTML like markup language for text, which is a superset of that in GEDCOM 7.

Other items in Pedigree Forge are all extensions over GEDCOM, for example: charts, reports, transcripts.

Record identifiers created by Pedigree Forge only consist of numeric digits (0-9), alphabetical characters (A-Z or a-z) and the underscore _.

GEDCOM to Pedigree Forge

GEDCOM is a very flexible data exchange format. The “core” functionality will work when importing to Pedigree Forge, and there should be only limited data loss, as long as the file being imported does conform to the GEDCOM specification it claims to be.

Character Sets

Pedigree Forge will safely import the following character sets:

- Unicode UTF-8 (with or without byte order mark). If the Byte order mark is present, this will take precedence. The HEAD.GEDC.CHAR should be set to “UTF-8”
- Unicode UTF-16 (either endian), but only with accompanying Byte Order Mark. Without the Byte Order Mark, the endianness isn't known. The HEAD.GEDC.CHAR should be set to “UNICODE”. The file is converted to UTF-8 before parsing begins.
- “ASCII”. Ascii is a 7-bit character set, and a subset of UTF-8 and also many windows codepages. If a GEDCOM file states that it is ASCII in the HEAD.GEDC.CHAR, then it will be treated as Ascii, with any characters over 127 (i.e. using 8 bits), treated as windows code page 1252, which is also a superset of ISO 8859-1. This is the same convention used in parsing HTML 5.
- “ANSEL”. Ansel was the original character set for GEDCOM files, but is long since obsolete. Its is compatible with ASCII up to character 127, but then follows its own encoding, with combining

diacritics, rather than composed characters. Pedigree Forge will try to read in ANSEL files, and convert common sets of diacritics and letters to their composed Unicode form. As ANSEL is obsolete, this feature isn't well tested.

- “ANSI”. Whilst not officially supported by GEDCOM, many programs output their data using a “Code Page”. Pedigree Forge will treat ANSI as windows code page 1252.

Low-level features of GEDCOM

Version 5.5.1 GEDCOM identifiers can be virtually any character. In practice (and required in version 7), they must only be alpha-numeric values (0-9, A-Z or a-z) or the underscore character (_). Pedigree Forge imposes the stricter version 7 behaviour when importing GEDCOM files, and never creates its own identifiers with other characters.

When importing a GEDCOM file that has characters other than 0-9, A-Z, a-z or _, they are mapped to new record identifiers.

Structures of the lineage-linked form

The following structures of the GEDCOM “lineage-linked form” have no direct mapping to Pedigree Forge, and so describe the action that is taken on importing:

Submission (SUBN) records

Submission records were/are used internally by FamilySearch, for submission of files. They are imported into Pedigree Forge, as are any information they contain. They will be written back out on export too, but there is no facility within Pedigree Forge to modify them. Note: The optional link from the HEAD to a SUBN record is ignored.

Latter Day Saints Specific Ordinances and Spouse Sealings

These are included on INDI and FAM records as appropriate. They are specific to FamilySearch, and are not imported into Pedigree Forge. They are skipped and a warning is issued.

Links from INDI and FAM records to submitters.

GEDCOM allows linking from INDI and FAM records to submitters. These are silently ignored by Pedigree Forge.

Restriction Notice

GEDCOM allows restriction notices to be placed on INDI and FAM records. These are imported, can be edited within Pedigree Forge, and are exported again, but aren't currently used for any purpose within Pedigree Forge.

Various Specific ID numbers

GEDCOM allows various (and numerous) kinds of identifiers to be placed on various record kinds.

TO DO: Import, modification, and export of REFN (at least 1) for a user reference number and round-trip of a RIN.

Alias (ALIA) and Association (ASSO) links on Individual Records

GEDCOM allows linking individual records via an ALIA and ASSO mechanism. Pedigree Forge supports both. Some applications use the ALIA mechanism in a way not specified in the GEDCOM spec; Pedigree Forge only supports the method specified in the GEDCOM specification, i.e. linking to another record that might be an alias for the person.

TO DO: Review the various kinds of enums for ASSO

Names

The GEDCOM specification allows an unbounded number of NAME structures for a person. Pedigree Forge currently only uses the first two of these; the first being the preferred, and the second being an alias. Additional NAME structures are imported and exported again, but they aren't used in Pedigree Forge, and there is no way to edit or delete them in Pedigree Forge either. Also see the "Aka" tag.

TO DO: More names.

Aka (Also Known As) tag

Some applications use an extension tag: _AKA to indicate an alias name. Pedigree Forge imports these (if present) as the non-preferred name.

Note links

GEDCOM allows various places in which notes can be added. It also allows an unbounded number of notes in those places too, either directly placed there or linked to a note record. This makes user interface very messy. Pedigree Forge allows notes in more limited places, and these are generally not linkable to a note record.

TO DO: Reading all the places that GEDCOM allows many notes; Perhaps place them all in their containing record? Also, changing notes from links to inline (unless the record "bins" for these notes might allow linking?)

Media objects and links to media objects

GEDCOM allows zero or many links to media objects (and embedded objects in version 5.5.1), in many locations: for example, on an individual; on facts for the individual, on any where that citations are allowed for the individual (in the person record itself, in the name structure, in any facts). This is impossible to support in the Pedigree Forge user interface, as it would make usability impossible.

Pedigree Forge supports embedded objects, and object links, in more limited places. Where these are allowed in the GEDCOM specification, but not in Pedigree Forge, the links are placed in the owning record. For example, a media link from a birth fact, would be placed in the person record.

TO DO: Reading all the places that GEDCOM allows media links and making sure that they are "lifted" into the owning record.

Citations to sources

TO DO: Support more places where the GEDCOM spec allows citations to sources, e.g: PERSONAL_NAME_STRUCTURE, ASSOCIATION_STRUCTURE others? On (S)NOTE record

Multiple families as a child

GEDCOM allows a person to appear in an unlimited number of families as a child; Pedigree Forge only supports two families in which a person can appear as a child.

Multiple families linked to same spouse

There are occasions when two individuals might be joined more than once, for example, perhaps they married, divorced, then remarried. There are two ways that this could be implemented: either through having a single family record, but multiple marriage events, or having multiple family records, each with a marriage. The GEDCOM specification supports either.

For consistency, Pedigree Forge merges situations where the same two people are linked as spouses via multiple family records, into a single family record, and allows multiple marriages. The alternative (keeping multiple family records) might give the impression that some kind of order of spouses can be maintained, but this isn't useful in practice—you wouldn't draw the same spouse twice on a family chart, even if this were the case, nor would you introduce them twice in a report.

Multiple families in a single object record

GEDCOM supports the ability to have multiple files linked to the same object, although this feature isn't supported well in other applications. When importing an object record that contains multiple files, the additional files are split out into new object records.

Calendar Escapes

GEDCOM dates support various calendar escapes, some of which were never implemented. The @#DROMAN@ escape was declared in version 5.5.1, but never defined. Any dates containing this will be considered invalid in Pedigree Forge. The @#DUNKNOWN@ calendar escape was also defined in 5.5.1, and isn't implemented in Pedigree Forge. The other calendar escapes are implemented.

INT Dates

GEDCOM 5.5.1 (but not 7), allows dates with an INT prefix. This mechanism was designed to allow specifying that a date was based on interpretation of some other text. These dates are considered invalid in Pedigree Forge. The information is read in and retained, but Pedigree Forge doesn't know how to interpret them.

TO DO: Is it worth implementing this?

Other Items

TO DO: Fixing file locations on import

TODO Gedcom 7 @VOID@ record on INDI.CHIL... need to consider how to implement this?? Do we have null checks in enough places?

GEDCOM “Y” on facts

TO DO: Import the “Y” on a fact/event, like DEAT Y to indicate that it happened.

GEDCOM Extensions – Name parts in speech marks

TO DO: Import name parts in speech marks as name used

GEDZIP

TO DO: Implement GEDZIP properly

GEDCOM 7 Sort dates

TO DO: Implement sort dates

GEDCOM 7 “No” events

TO DO: Implement no events

GEDCOM 7 Phrases

TO DO: Better implementation of GEDCOM 7 phrases

GEDCOM 7 Objects Crop Etc.

TO DO: Better implementation of GEDCOM 7 object meta data, like cropping

GEDCOM 7 Exid

TO DO: Better implementation of GEDCOM 7 exids

Pedigree Forge to GEDCOM

The following is how Pedigree Forge will treat information that has no representation in GEDCOM files, and so can't be exported, or has to be exported in a different way.

Inline media objects.

GEDCOM 5.5.1 allows media objects to be defined both “inline”, i.e. within other records, or as links to object records. The actual file data is always in external files, rather than inside the GEDCOM itself. Version 7 only allows links to object records.

Dual dating

GEDCOM version 7 does not support dual dates. Dates exported to version 7 use the “modern-style” year, and export a date phrase.

Date Extensions

Pedigree Forge supports various extensions to the GEDCOM data format, for example, GRO quarters. These are exported as valid GEDCOM dates, that are closest to Pedigree Forges interpretation. See the section on dates for more information.

Rich text

Pedigree Forge permits rich text, like bold, italic, heading and tables, to be used. Version 7 supports a limited amount of markup. Any rich text features are exported as plain text, so for example, the bold attribute will be lost and text in a table be retained, but without the table.

TO DO: Add option to export?

Transcription Forms

Pedigree Forge permits pre-defined transcript forms for things like birth certificates and censuses. There is no corresponding way for this information to be transferred in GEDCOM, and so the information will be lost.

TO DO: Add option to export as text?

Charts and Report

Pedigree Forge creates charts and reports. There is no mechanism for these to be transferred in GEDCOM. Whilst the genealogical information will be transferred, the chart layouts and report configuration isn't exported to GEDCOM—other applications would not know what to do with it.

Other features

Pedigree Forge contains a number of other advanced features. Their use should be fairly intuitive, but this section will be expanded in the future.

Scripting System

Pedigree Forge has a built-in scripting system, which uses the programming language Lua. Whilst the “plumbing” is in place for this feature, there is more to do before it is ready for use.

The planned use of this feature is to allow it to extend the functionality of “Smart” Web Searches, Audit checks, Queries, Reports and Charts, i.e. add-ons will enable further customisation of those features.