

# Fan Charts! Fan Charts!

Handout for Reunion Software Special Interest Group Presentation  
August 25, 2022

This handout will be most helpful when you also view the recording in the Members section of the SVCGG website. Many features were demonstrated “live” during the workshop.

- Fan charts help you visualize **multiple generations** in a **condensed way**.
  - A source person is in the center, with direct ancestors in concentric rings moving back in time, away from the center.
- Reunion charts can be easily customized can help you visualize specific information about your genealogy work or your family history stories (see examples in the recording).
- The preset shapes are 150, 180, 270 or 360 degrees of a circle, but can be changed to anything between 150 and 360 by “grabbing” the outside edge of a cell and either dragging out or pushing in.
- Compared to other chart formats, only a fan chart can instantly show you where your brick walls are.
- Fan charts have the file extension *.fanchart13* (or other version #). The basic element is the cell.
- In a few ways, fan charts are a little different from tree charts. In a **fan chart**:
  - you can put pictures, shapes and text objects on the **chart**, but NOT within a cell.
  - you can't highlight a cell and hit the Delete key to delete it. You must double-click on it and remove all text in the cell. (This is NOT in the Help manual as of early 2022).
  - you **CAN** right-click (Control+click) on an individual cell and get choices such as: Edit Cell; Fan Settings (a quick way to get the Settings window without mousing to upper left of your screen); Go to Family View; Update from Family File; and Put Picture on Chart.
- When a chart is onscreen, the lower left corner has:
  - a Question Mark that will take you to the Fan Chart section of the Help Manual
  - a page count (example 1/9 = your cursor is over #1 of nine pages)
    1. clicking on the page count shows you details about your chart, including **how many cells (source person plus ancestors) are in the chart**
    2. Tool bar (on the left) toggle on/off. The toolbar activates when you add an Object to your chart (shape, text, or frame title). Like other charts, you can use it to re-size text in Object and make other adjustments.
    3. Zoom choices
- In the Menu bar (when in Reunion), the **Fan** drop-down has two choices: Settings and Optimize Size.
  - Optimize Size lets the software automatically re-size all cells to fit the longest length of text in each generation.
    1. If you have reduced some line lengths (such as by deleting surname variations that you'd entered in an ancestor's Last Name field), Optimize Size will quickly re-size everything to fit the new, shorter line lengths.
  - The Settings window has three tabs: Content, Text and Color.
  - Each tab has many selections that you can experiment with. You can see your chart changing “live” behind the Settings window, but you can't move the window off to the side to see your final effect, you have to Close it. ☹
  - The best way to learn what these settings do is to just play with each one and see the effect on your chart.

- Because fan charts automatically show the direct lines (only) of the source person, you may, depending on how many generations you choose to show, have cells on the outside edge of your tree that aren't actually people.
  - You may have created an "Unknown" parent on one or more direct lines so that you can connect a known sibling to your furthest-back direct-line ancestor. (To show two people as siblings, Reunion requires at least one parent.)
  - One way to prevent these Unknowns from being on your fan chart this is to just make your chart, then look at each outside cell to see if any of them aren't actual ancestors. Edit these cells to remove all text, which will delete/disappear the cells entirely.
  - **Another way:** this is not necessarily faster but setting a Flag on these types of "unreal ancestor" cells could prove useful in your general use of Reunion. For example, If you are frequently uploading tree information to an online website such as Ancestry, MyHeritage, etc., this method can help you exclude these "unreal ancestors" from GEDCOM files you would create to upload to online trees.
    1. Unmark everyone in your family file.
    2. Create a Flag (Reunion Preferences/Fields/Flags/Add Flag) to label these Unknown, unreal ancestors (I created a flag called "Exclude from tree").
    3. Now, Set that flag on these unreal ancestors.
      - Use Search/Advanced Find (magnifying glass) on the left toolbar to find records with "Unknown" (or other wording you use) in the field where you've entered it. In the Results pane, click the green checkmark, choose Mark Everybody in List. Repeat if you've put that word in other fields, too.
      - Click "Change" on left sidebar (sliding colored dots). Choose Set Flags/Set/Flag: *Exclude from tree* (or whatever you named your flag)/Marked People/ Set.
      - I have my Reunion Preferences set (Family View/Couple/Inside the Couple Buttons/Checked Flag Names) to show flags in the Person button, so I can immediately see any flags I have set for that person (e.g., Exclude from tree; AncestryDNA match; Most Recent Common Ancestor, etc.) without having to go to that person's flag tab.
    4. Now, navigate to your Source person for your chart. Use the Mark function (green checkmark in left sidebar), to Mark the Ancestors of your source person. Be sure to select the same number of generations as you want on your chart. Now you have both wanted and unwanted/unreal ancestors marked.
    5. Repeat Step 3, using **Search** (magnifying glass) **Advanced Find** to search for those "unreal ancestors" again so you can **unmark** them.
      - Again, the search results will appear on the right. Click on the green checkmark at the bottom of this Results panel. **This time, choose "Unmark Everybody in List."** By **UN**marking these unreal ancestors, you will prevent them from appearing on your chart (see next step).
    6. Now create your fan chart as usual, **checking the box where it says "Prune:  Marked ancestors only."** This means you will prune your chart by **including** only **marked** ancestors.
    7. Click Create Chart. Your chart should not display any unwanted boxes in the outside-edge (furthest-back) generation.