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Creating Pedigrees

When launching the Online Pedigree Tool, a default 3-member family is created for you. When creating a new pedigree, you will have a blank canvas and will need to add your first individual. To begin adding individuals to the pedigree, right-click on the canvas and choose ‘Add Individual’ or click the Male or Female button on the palette (bottom right of palette) and then click on the canvas. Either option will add an individual to the canvas.

Adding Individuals by Right-Clicking

From this point forward, to add individuals to the pedigree, right-click on the individual and choose Add Relation.

Adding Individuals Using the Palette

Or, instead of right clicking, use the Palette to add individuals. Choose the relation you want to add by clicking on the Palette and then clicking on the individual in the pedigree to add that relation.

Each time you click on the canvas, an individual will be added until you turn the palette off by clicking on the ‘Off’ icon in the upper left corner. To undo an individual, simply click on the Undo button in the upper left corner of the palette. Clicking Undo multiple times will undo all of the previous actions in succession.

One-Click Add

You can add individuals to the pedigree very quickly using the One-click Add option. Simply select an individual in the pedigree, and you will see ‘add’ buttons appear on all sides of the individual. They represent the following:

Simply click on the individual you wish to add and it will be instantly added to the pedigree. To help remember, blues represent males and yellow represents females. Spouses are green.
Unattached Individuals

You can add unattached individuals to the canvas by right clicking on the canvas and choosing ‘Add Individual’ or by clicking on the unattached individual on the Palette and adding them to the canvas. You can store data for an unattached individual and then attach them to the pedigree whenever you want.

Attaching Individuals

You can attach unattached individuals to other individuals in the pedigree. To attach an unattached individual, highlight the individual by clicking on the icon.

The black dots surrounding the icon are called Handles. By clicking on the black dot, you can drag a line from the dot to another individual. This will attach the individual and automatically add the line. Depending on the relationship you want to add, choose the appropriate Handle.

- **Left Side or Right Side Handle** – assign as a spouse only.
- **Top Middle Handle** – assign as a child only.
- **Top Right Corner or Top Left Corner Handle** – assign as a sibling only or twin. (Holding the control key on your keyboard while adding a sibling will connect the two individuals as twins)
- **Bottom Handle** – assign as a parent only.

After clicking on the handle, hold the mouse button down and drag it to the individual you want to add them to and release. A line should appear connecting the two individuals.

In the example above, person #1 (male) will be added as a spouse to person #2 (female). You can also delete a relationship and then re-attach the relationship somewhere else on the pedigree.

**Note:** If you try and attach an individual and it doesn’t work, try removing the spousal relationship first, and then attempt to attach again. After attaching, re-attach the spousal relationship.

Deleting Relationships

To delete a relationship or un-attach a person, highlight the line connecting the individuals by clicking on the line.

After selecting the line, you should see two black dots at the end of each line indicating that the line has been selected. Press the delete key on your keyboard. The line will disappear, breaking the relationship between the two individuals.

SmartDraw

You can click the SmartDraw button at any time when creating pedigrees to produce consistent, clean pedigrees every time. SmartDraw keeps spacing and relationships displayed consistently. This function is turned on by default through the ‘Auto Draw’ property found under ‘Properties – Progeny Tab’. It is good practice to click the button on the toolbar occasionally to clean up any display issues as your pedigree grows.
Selecting Individuals in the Pedigree

To select and move an individual, click on the individual icon and drag it to the desired position. To select or move multiple individuals at once, lasso the icons by clicking on the white canvas and drag a box around the desired icons. This will highlight the individuals, allowing you to click on one of the highlighted individuals and move all of them as a group.

Select All Individuals and Relations

You can select all Individuals in the pedigree by right-clicking on the canvas and choosing the Select All option on the popup menu. All the Individuals in the pedigree will be highlighted in yellow. To remove the highlights and return to normal, just click on the canvas once.

Reverse Select

Right-click on the canvas to choose the ‘Reverse Select’ option. The Reverse Select option allows unselected / un-highlighted Individuals in a pedigree to be selected instead.

Select/Search Relatives

You can also select or search for specified relatives of an Individual by right-clicking on an Individual icon and choosing the Select option. This way you can search and highlight all relatives, ancestors, descendants, parents, siblings, children, spouses, aunts/uncles and degree of relation.
Adding Legend Items and Assigning Symbols

You can edit the existing Legend Items or add new ones by selecting the Symbols button on the toolbar (without selecting an individual first) or by double-clicking on the symbol you see in the ‘Check to Apply Symbol’ window. If there is existing Legend Items in the current pedigree, they will appear in the table.

To add a new Legend Item:

1. Click on the Add Row button in the button panel that is at the center of the dialog box.
2. The text “Legend Text Here” will be assigned to the legend text column and must be changed to reflect the hereditary or other condition that you wish to track. The Icon for this Legend Item, shown in the 2nd column of the table, will be blank with no symbols assigned. To customize or assign symbols to the Legend Item, just highlight the row with the Legend Item and follow the steps outlined in the section on assigning symbols and colors below.

To remove a legend item from the system, just select the item in the table and then click the Delete Row button on the button panel.

To save any changes that have been made to the legend inside this dialog, remember to hit the Apply button otherwise click the Reset button to disregard all the changes and not save to the legend table in the pedigree. Once saved, the added and modified legend items will appear on the Legend when the pedigree is re-drawn.

Changing Legend Symbols and Colors

To change the quadrant colors and assign other symbols to any legend item:

1. First select and highlight the legend item. The selected row will be highlighted as shown below and the surrogate icon in the panel labeled “Icon Preview” will be the same as the current icon of the selected legend item.
2. To change the color of any quadrant, just click inside that quadrant in the Icon Preview panel to see it highlighted with a red outline. Depending where you click, you can highlight the entire quadrant, a box within the quadrant, a circle in the middle and so forth.
3. When you desired area is highlighted, you can then choose a color from the color palette. To assign the other symbols such as quadrant box and center circle, just click on the appropriate symbol on the Symbol Palette panel.
4. When finished, add another row or click the Apply button.
Assigning Symbols to Individuals

To assign a symbol to an existing Individual inside the pedigree, simply right-click on an individual and choose ‘Apply Symbol’ or click on the Symbol button on the toolbar while an individual is chosen.

From this screen, you can edit the Symbol description at any time by clicking on the description, or you can edit the symbol/legend properties by double-clicking on the symbol itself.

Another way of assigning symbols to individuals can be accomplished through the Properties panel. Using this method, all you need to do is follow the steps outlined below:

1. Right click on the icon of the individual and select Properties, or click the Properties button on the toolbar.

2. Select the Individual tab from the Properties panel. At the bottom right corner of the Individual tab is a copy of this Individual’s icon and the current symbols assigned to his/her icon.

3. Click on the button labeled **Update Symbols**. A list of check boxes will then be shown with descriptions of conditions matching those shown on the legend.

4. Check the conditions you wish to apply. The symbol for that condition will then appear on the individual. To un-assign a condition, just uncheck the box. When finished, close the window.
Adding Subtext to Individuals

You can track up to 5 custom fields of data for each individual in the pedigree and display it under each individual icon. To bring up the Subtext window, click the Subtext button on the toolbar, double-click on an individual, or right-click on each individual and choose ‘Add Subtext’.

Simply click on the label to edit the name of that field and enter the value of the field in the box on the right. The data will be automatically displayed below that individual icon in the pedigree.

Subtext Legend

The Subtext Legend can also be displayed alongside the pedigree by clicking the Properties button on the toolbar and checking the ‘Show Subtext Legend’ option under the Progeny tab.

Editing the Subtext

The Subtext can be edited at any time for an individual by clicking directly on the text itself (as shown below) or by right-clicking on the individual and choosing ‘Add Subtext’, which will bring up the Subtext window with the data for that individual.
Pedigree Properties

The Properties window controls all the options with displaying the pedigree. There are five tabs: Progeny, Pedigree, Individual, Relationships, and Dimensions.

Progeny Tab
The Progeny tab controls the options that will be set for all pedigrees (global settings). Each option you select will be the default for all the pedigrees you create.

- **Show Grid** – displays a grid on the canvas
- **Snap to Grid** – position icons on grid lines only.
- **Show Page Breaks** – (Print Preview) shows you where the page breaks are for printing.
- **Auto Draw** – automatically executes the SmartDraw algorithm to the pedigree when you add a person.
- **Live Dragging of icons** – lines move with the icon when you reposition the icons.
- **Show Symbols Legend** – displays a legend depicting the definition of symbols.
- **Show Subtext Legend** – displays a text legend defining the text fields displayed under each pedigree icon.
- **One Click Add** - enables the add (+) buttons to individual icons to quickly add individuals to the pedigree.
- **Show Header** – have header appear on pedigree or not.
- **Show Footer** – have footer appear on pedigree or not.
- **Show Haplotypes** – displays haplotypes with the pedigree (Not Applicable)
Pedigree Tab

The Pedigree Tab controls the other pedigree specific that are customizable. It also allows you to change some of the properties of the pedigree currently held by the control such as headers and footers among others. These options include:

- **Icon Subtext Font Selection** – choose the type of Font and size you want displayed in the pedigree as icon subtext and in the legend.
- **Line Width** – Adjust the thickness of the lines in the pedigree. Ideal for printers that print lightly.
- **Scale** – Scale the size of the pedigree from 0-10 (equivalent to 0 – 1000%). This physically changes the icon sizes and text of the pedigree. For smaller sizes, fractional scale values may be used.
- **X and Y Grid Spacing** – Adjust the sizing of the grid when the Show Grid option on the Progeny Tab is set. Adjust both horizontally and vertically.
- **Match Spouses** – Keeps spouses on the pedigree next to each other at all times. This has a huge effect on the way the pedigree is drawn.
- **Change Vertical Positions** – Maintains vertical positions of individuals at all times. (Not Applicable)
- **Pull Lone Relatives** – Has the effect of pulling lone relatives of an Individual as close to that individual as possible. This is useful for ensuring dangling spouses and lone siblings are drawn near their relative with other relatives.
- **Recalculate Positions** – Distinguishes between relational lines when you SmartDraw the pedigree.
- **Use Hooks** – Use hooks to distinguish lines that cross over each other. (Not Applicable)
- **Show Blue ID#** – Enables the pedigree to display position of this individual within his/her generation, determined counting from left to right. The number is displayed near the top left corner of the icon.
- **Show Date** – Displays the date on the pedigree canvas
- **Header and Footer** – You can enter new header and footer or change existing ones in these fields.
**Individual Tab**

The Individual Tab controls the properties of an individual. First highlight the individual and then access the Properties button. Click on the Individual tab.

- **Change Gender** – Female, Male, and Unknown.
- **Attributes** – Show someone as Deceased, Proband, No Issue, Infertile, SAB.
- **Adopted** – Show individual as being Adopted In or Adopted Out
- **Marked By** – Place an asterisk, minus, or plus next to the individual. (* - + )
- **Icon Text** – Type in any text you want to display inside the icon.
- **Proband Arrow** – Change Position and Arrow Type of the proband. Standard is a grey triangle and Custom is a red arrow.
- **Symbols** – Update the icon symbol for the individual

**Note:** The symbols displayed by Progeny Anywhere conform to the Standardization Pedigree Task Force recommendations. Icon text inside the icon can be any character you want and contain more than one character.
Relationships Tab

The Relationships Tab controls the properties of the relationship lines connecting each of the individuals to their relatives. To change the nature of any relationship, click on the line first and then access the Properties Window or if the Properties window is already displayed, just click and highlight the required relationship line. This will bring up the Relationships Tab shown below with the current settings of the selected line shown.

- **Spouse Type Relationships** – Change the line connecting the spouses to display Normal, Separated, Divorced, or Casual, and Consanguineous, No Issue and Infertile.
- **Twin Type Relationships** – click on the line angling up from one of the twins and change it to monozygotic, dizygotic, or unknown.

If you originally added an individual as a sibling and now need to change it to a twin, re-assign the sibling relationship (drag mouse from sibling handle of one sibling to the other’s icon) while holding down the control key on your keyboard. This will add the sibling as a twin.
**Dimensions Tab**

To change the dimensions of the pedigree icons and subtext, access the Properties Window and click on the Dimensions Tab. A window appears allowing you to select any of the objects. To move an object to a desired position, simply drag it to the spot and release. To alter the size of the object, place the pointer over the edges until the pointer changes to a sliding arrow. Drag the edge to increase or decrease its size.

- Drag any one of the four icons up or down to adjust the Generation Offset.
- Drag any Icon inwards to shrink the Individual Offset or Individual Space value.
- Drag any Icon outwards in order to increase the value of the Individual Offset.
Additional Options

Save (Licensed Version Only)
To save a pedigree, simply click the Save button on the toolbar. This will save the current changes made to the pedigree into an .xml file. **NOTE:** For Anywhere users, the pedigree will be serialized into an XML file using the Java XMLEncoder serialization API. The files will have an extension of “.xml” and can be opened using the Java XMLDecoder de-serialization API.

New and Open (Licensed Version Only)
To create a new pedigree, click the New button on the toolbar, or simply right-click on the canvas and select **New** from the popup menu. This will clear the screen for you to begin a new pedigree. To open a pedigree that was previously saved, choose **Open** and then select the .xml file of the previously saved pedigree.

Printing Pedigrees
To print pedigrees, choose the Print button on the toolbar, or simply right-click and choose the Print option on the popup menu. The pedigree will print exactly how it appears on the screen, along with the Header info, Footer info, and Legend if you have them selected.

Landscape is the default mode for printing. To change this, select the Page Setup tab and change the orientation. Margins can also be adjusted.

Fit to Page
Right-click on the canvas and choose the ‘Fit to Page’ option to fit the pedigree to a page for printing. After choosing this option, the Page Setup screen will appear where you can specify your margins and orientation. After clicking OK on this screen, the pedigree will shrink to fit to your custom page dimensions and is ready to print.

Save As Image
To save a pedigree as an image file, simply right-click on the canvas and choose **Save As Image**, and select from among bmp, jpg, and png. Once saved as an image, you can insert the image file into any application for publication.