

Heredis 2022 for Windows

English version

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System requirements

Important: Your licence is personal and confidential, you can use it 3 times. You can manage your installations in My installations section of your Heredis account.

Heredis 2022 system requirements :

Windows

- **Windows from 8.1 to 11**
- 500 MB disk space required
- Screen 1366×768 minimum (11")
- Local administrator account
- Internet connection for research, publishing, integrated maps and dashboard

For an optimal use :

- Windows 10
- 8 GO of RAM
- SSD Hard Disk

Mac

- **Mac OS Mojave (10.14), Catalina (10.15), Big Sur (11), Monterey (12)**
- 500MB disk space required
- Screen 1366×768 minimum (11")
- 64 bits only
- Internet connection for research, publishing, integrated maps and dashboard

For an optimal use :

- 8 GO of RAM
- SSD Hard Disk

Other software to detain

A text processor managing the RTF and DOCX formats is necessary to edit documents such as sheets, lists or books.

You can open easily those documents with software text processors.

Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

Adobe Reader are often used by Archives websites.

How to download Heredis?

Visit Heredis' shop to buy and download Heredis' software.

You will receive an email with your licence code and the link to the shop to download the software.



HI HELENE [REDACTED]
PLEASE FIND YOUR KEY(S) BELOW FOR ORDER @ [REDACTED]

Heredis 20 [REDACTED]
Your license key and/or download link:
HI [REDACTED]
[DOWNLOAD](#)

Since HEREDIS 2019, it is no longer necessary to enter your license number!

- 1) Launch Heredis
- 2) If using your software for the first time, please click on Log In
- 3) Enter your ID and password (the ones you use for the online store)
- 4) That's it, your software has been activated!

All the best,

HEREDIS
Atrium du Millénaire
78 allée John Napier
CS 49458
34961 Montpellier CEDEX 2
France

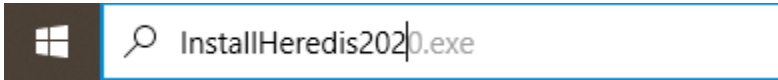
(Mac users) You can also buy and download Heredis from App Store, the license is included, you will not see it, it requires to be connected to your App Store account.

How to download again Heredis ?

If you bought Heredis already and want to install it on your second computer or install it again check this article: I have a new computer or a second computer – what to do? (voir page 20)

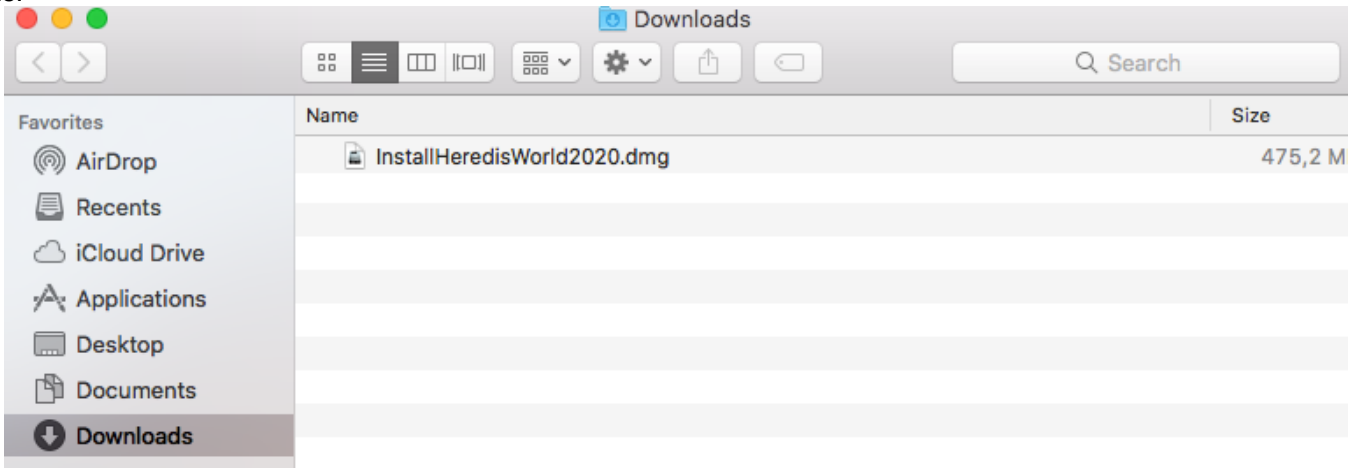
How to find the downloaded software?

(Windows) Click on the search field in the Start menu or toolbar and write **InstallHeredisWorld20xx.exe**, press Enter.



You can also go to your **Downloads** folder.
See also How to install Heredis' software? (voir page 9)

(Mac) Go to Downloads and search for **InstallHeredisWorld20xx**. Double-click on the file to install Heredis.



See also How to install Heredis' software? (voir page 9)

How to install Heredis' software?

Windows

Double-click on InstallHeredisWorld20xx.exe file.

Follow instructions, it will guide you through the setup process.

When setup is over, double-click on Heredis 20xx icon on your desk or access through Windows explorer (Programs (x86) – BSD Concept – Heredis 20xx World).

Then login to activate your licence. For further information see Activating Heredis (voir page 11).

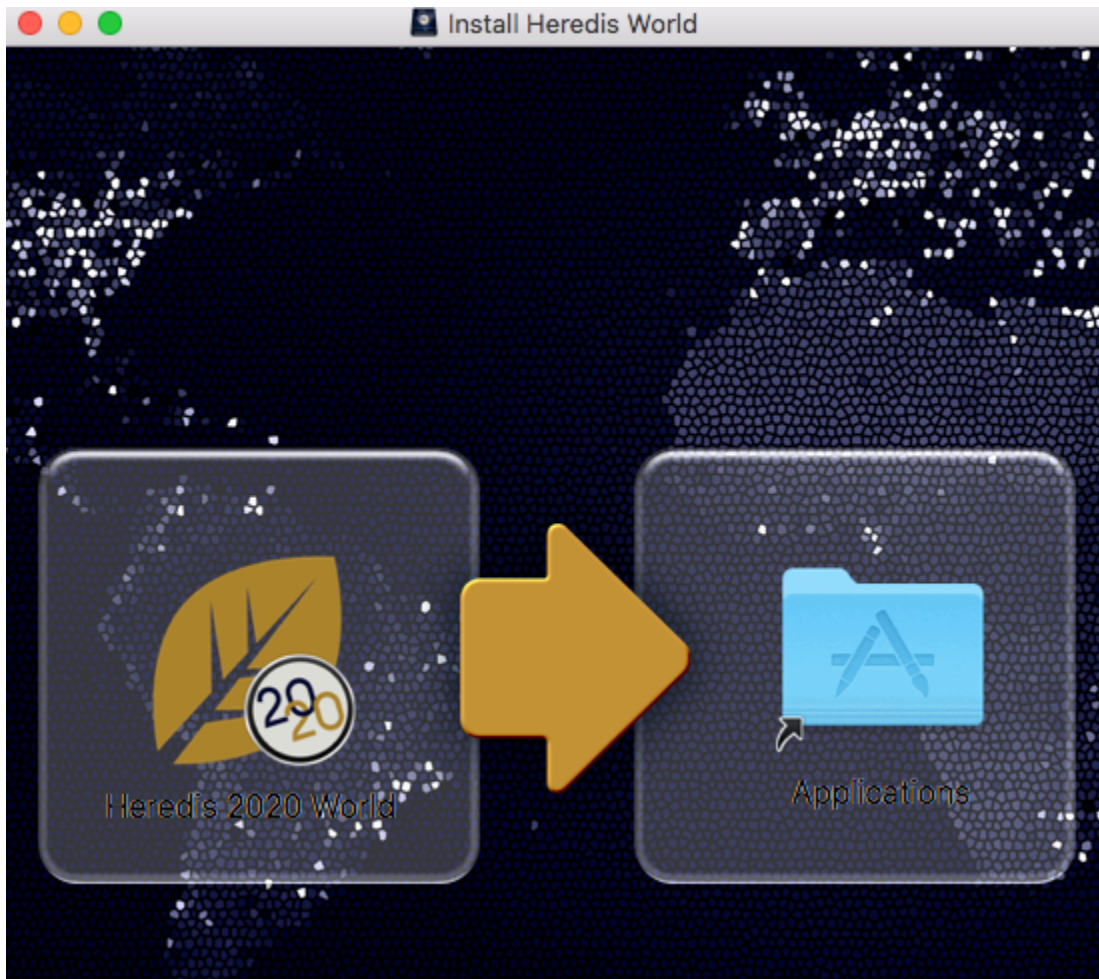
Mac

Click on the downloaded link. When the download of InstallHeredisWorld20xx.dmg is over, the installation windows opens. If not, double-click on the downloaded file.

In the Installation window:

1. Drag the Heredis icon in Applications

Example of icon to be dragged, according to your Heredis version, this image and version number may vary.



2. Open the Applications folder and start Heredis. Drag and drop the Heredis icon to your dock to easily access Heredis.

Then login to activate your licence. For further information see Activating Heredis (voir page 11).

Launch Heredis

After activating your Heredis license (see Activating Heredis (voir page 11)), click on Launch Heredis to start working. If you already have Heredis' files from an old version, Heredis 20xx will convert them automatically on the first opening with the newer version.

(Windows) If you do not see your files on recent files, click on **Open a genealogy** in the home page and choose the file to open. If the files are too old (before Heredis 11), they might not convert themselves. Contact us through our Contact form and we will send you the procedure so we can convert it for you.

(Mac) Files previous Heredis 2014 might not convert themselves, contact us through our Contact form and we will send you the procedure so we can convert it for you.

Uninstall my old version of Heredis

Each new version of Heredis is a full installation. So it is not necessary to keep your old version of Heredis. Your files will still be on your computer. You can uninstall the old version to get some space on your computer.

(Windows) Uninstall your old version from the Control Panel then click on Uninstall a program. Choose your old version of Heredis and click on Uninstall. Windows 10 you can make a right click on program directly on the program list, then choose Uninstall.

(Mac) Drag your old version of Heredis from the Applications and drop it on the Trash Can.
See Uninstall an older version of Heredis for more details.

Activating Heredis

As long as you are connected to the internet, you no longer need to enter your license number.

All you need to do is log into the account you used to purchase Heredis (on our online store) and your license will be activated automatically.

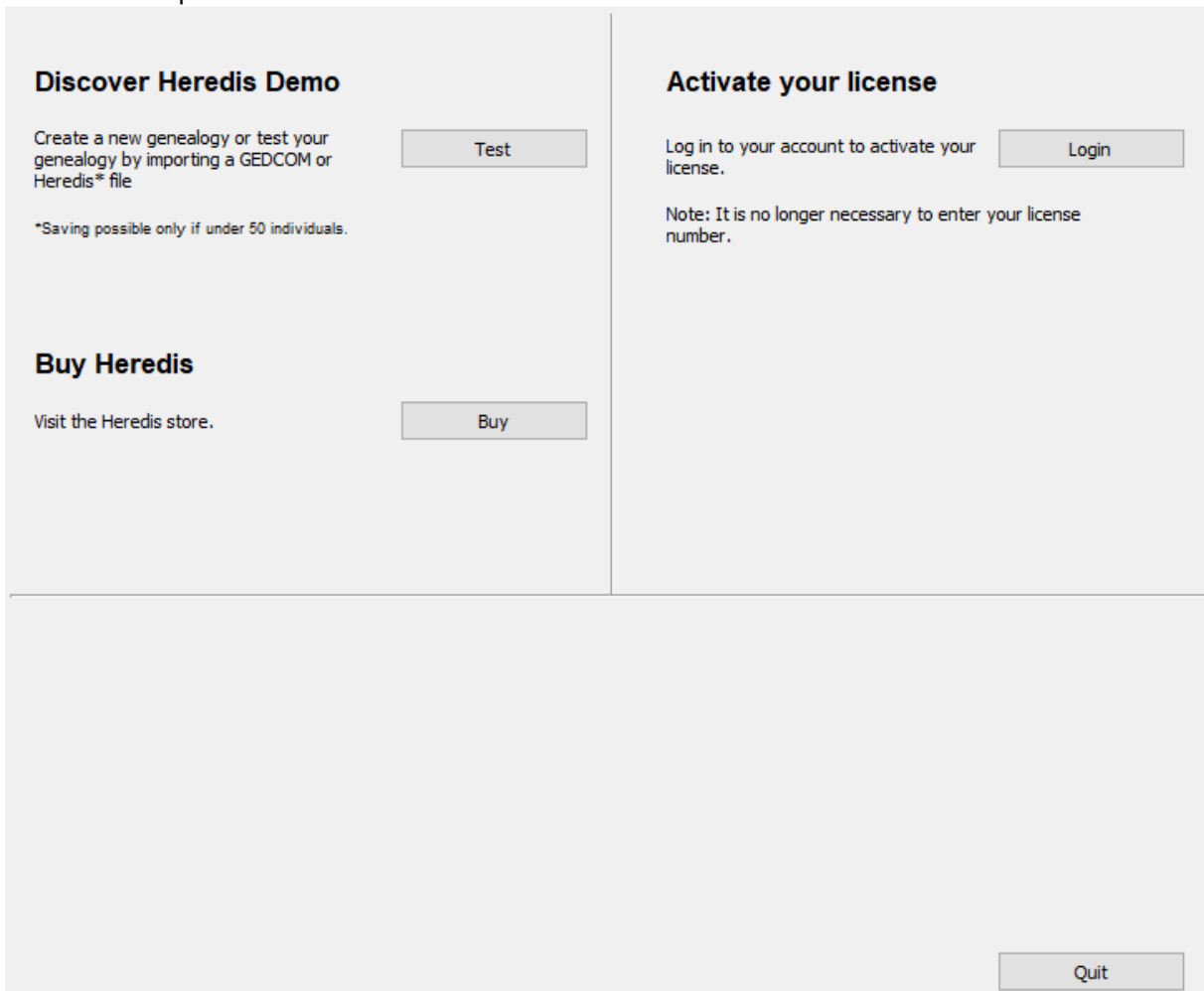
A Heredis license for Mac is valid only for Mac. Similarly, a Heredis license for Windows is usable only for Windows. If you change your operating system, you'll need to acquire a license for the new system.

How to install and activate Heredis on a computer connected to the internet

Start with the purchase of a Heredis license on Heredis' Shop, then download and install the Heredis software on your computer.

See also these articles to know how to download and install Heredis: (Windows) Install Heredis or (Mac) Install Heredis.

The first time you launch Heredis, it will display a page offering you to either try the software or to login to the account used to purchase Heredis.



When you login to your Heredis account, the license you have just purchased will automatically be assigned to the computer on which you have just installed Heredis.

Login

Your email or username

Password



Login

[Forgot your password?](#)

[Having trouble logging in your account?](#)

You don't currently have an Heredis account?

[Create an account](#)

If you have forgotten your password, click on the link « [Forgot your password?](#) » to receive a reset email valid once.

If you are not sure if you have entered the password correctly, since Heredis 2022, click on the eye to see what you have written.

To know how to install Heredis on a second computer, see [I have a new computer or a second computer – what to do?](#) (voir page 20)

How to install and activate Heredis on a computer that is not connected to the internet

Clicking on the **Enter** button will allow you to enter your license number and to get full access to your software and its many features.

Activating Heredis

<h3>Discover Heredis Demo</h3> <p>Create a new genealogy or test your genealogy by importing a GEDCOM or Heredis* file</p> <p>*Saving possible only if under 50 individuals.</p> <p><input type="button" value="Try"/></p>	<h3>You have a license number</h3> <p>Enter License Number <input type="button" value="Enter"/></p>
<h3>Buy Heredis</h3> <p>Visit the Heredis store.</p> <p><input type="button" value="Buy"/></p>	
<p><input type="button" value="Quit"/></p>	

Then enter your license number. It was sent to you right after your order of Heredis.

Enter your Heredis license number

Enter the license number (Key code) you received via email.

Your License Number has been mailed to you with the download link.

Note: If this computer is later connected to the internet, the following time Heredis is launched you will be asked to log in to your account to finalize the activation process. Some features require internet such as maps, access to Online Archives ... but features that do not require internet are usable without a connection.

In case of problems

You have a message informing you that you no longer have a license available? See [Manage my installations and the use of my license \(voir page 17\)](#) for more information.

Heredis needs an internet connexion to activate your license. Often, firewalls and antiviruses are too uncompromising and block Heredis. It can provoke white pages while trying to activate Heredis' license, blocking the installation of the software...


Check that the antivirus/firewall installed on your computer or embedded in your internet box does not block Heredis. If so deactivate it while installing Heredis and authorize Heredis to access the network, tell those software that Heredis is trustworthy.

How to update Heredis?

Heredis corrective updates (patches) are automatic and free (example : from Heredis 20.1 to Heredis 20.2). You do not need to bother with this, a window opens when you launch Heredis to indicate that an update is available. Simply accept and the download/install starts.

To be kept informed, simply be connected. When Heredis can be updated, just accept the downloading and installation of the update.

(Mac) If you acquired the Heredis software via the App Store, you will be notified of updates.

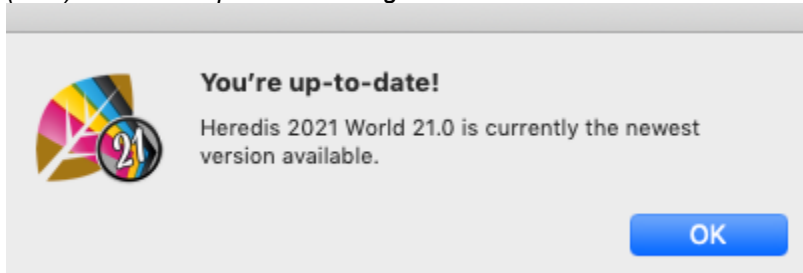
Check the AppStore icon  in the dock. It shows the number of application updates available. Click to access the App Store then follow the instructions to update.

Upgrading is not automatic. When you upgrade, your version changes (ex: Heredis 2019 and Heredis 2020), it has new features, that is why it is not free.

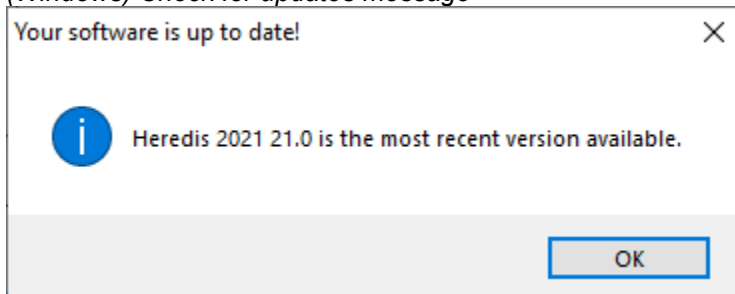
Check for updates

If you ignored an update, you can check for updates by clicking on **Help** menu > **Check for updates**.

(Mac) Check for updates message



(Windows) Check for updates message



If a patch is available, validate the download and installation. It is important to download and install a corrective patch because if we make corrections, it means there have been changes as a result of feedback from our users.

How to install again Heredis?

If you acquired the software through the Heredis store, you may download the application from your Heredis' shop account in My Keys section. See I have a new computer or a second computer – what to do? (voir page 20) to see the full explanation.

(Mac) If you bought Heredis from App Store, you can download it directly from App Store as any application. (no licence needed if you bought from App Store, just connect to your App Store account).

Once downloaded and installed, you will have to click on **Login** to connect to your Heredis' shop account with your email address and password used to buy Heredis.

If you installed Heredis on a second computer, see the article on Share on local network (voir page 495) to share your file with the second computer.

You can also find the downloads of the software from our Knowledge Base.

Note: Your licence is available for 3 installations, if you need more, you'll have to buy an other licence. (Since Heredis 2019) You can manage your installations and delete a computer you no longer use from the software. Click on the Help menu then on Manage my installations.

Manage my installations and the use of my license

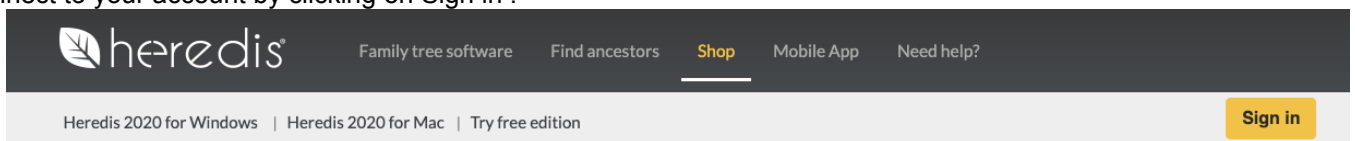
How to manage my Heredis installations

Your license is personal and confidential, it can be used on 3 computers you own. For example, you have one desktop computer and one laptop, that means 2 installations. If both computers break down, you'll have to reinstall, which will be 4 installations. Since Heredis 2019 and the change of our license management system, you can manage your installations.

Easily access the management of your installations, either from your account on our Heredis' Shop or directly from the application by clicking on the **Help** scroll-down menu > **Manage my installations**.

1- Rendez-vous to : shop.heredis.com

2- Connect to your account by clicking on Sign in :



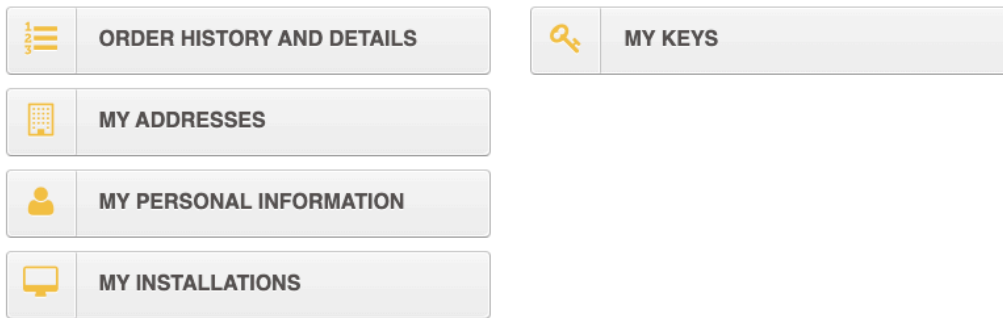
3- Enter your email address and password used to buy Heredis.

The screenshot shows the authentication page on the Heredis website. At the top, there is a navigation bar with the Heredis logo and links for 'Family tree software', 'Find ancestors', 'Shop' (highlighted), 'Mobile App', and 'Need help?'. Below the navigation bar, there are links for 'Heredis 2020 for Windows', 'Heredis 2020 for Mac', and 'Try free edition'. On the right side, there is a yellow 'Sign in' button and a 'Cart (empty)' button. The main content area is titled 'AUTHENTICATION' and contains two columns. The left column is titled 'Already registered?' and has input fields for 'Email address' and 'Password', a link for 'Forgot your password?', and a 'Sign in' button. The right column is titled 'Create an account' and has a text prompt 'Please enter your email address to create an account.', an input field for 'Email address', and a 'Create an account' button.

4- Click on **MY INSTALLATIONS** to manage your installations :

MY ACCOUNT

Welcome to your account. Here you can manage al of your personal information and orders.



For each license you own, it is easy to see which computer(s) it is assigned to.

A **History** button will allow you to visualize all actions related to each license (assigning a new computer, detaching...)

Note: If you already used 3 times your license, Heredis will automatically suggest you to manage the installations. Click on the button **Manage my installations** to access directly to the section on your account. If you need a license for 4 computers, you'll need to get 2 licenses.

How to detach the use of my license

If you no longer use your Heredis software on a computer, uninstall the application from this computer then log in to your account on Heredis' Shop, click on **My Installations** and locate the computer you no longer use.

Click on the red button with a white cross at the end of the line to detach the computer you no longer use, so you can install this license on another device.

Manage my installations and the use of my license

MORE ON HOW TO MANAGE MY INSTALLATIONS

A license allows you to use the Heredis software on a maximum of 3 different computers.

Note: If you no longer use Heredis on one of your computers, you can detach the license assigned to this computer and install it on another computer.

Your licenses

Heredis 20

MP [redacted] Order #: @729455 Purchase: 12-07-2018 Heredis 20 - Mac History [down arrow]

Computer Name	Information System	Detach
MacBook Pro de Greg	Version 10.12.6 (assemblage 16G1212)	[red x]
Mac mini de reunion2	Version 10.13.6 (assemblage 17G65)	[red x]

HP [redacted] Order #: Purchase: Heredis 20 - Pro - Windows History [down arrow]

Computer Name	Information System	Detach
---------------	--------------------	--------

I have a new computer or a second computer – what to do?

Heredis is a desktop software, which means that your files are saved on your computer. You are the only one who can retrieve them, as we do not have access to your files. Which is why you should always back them up either on a USB drive, a cloud or an external hard drive.

Downloading Heredis

Heredis can be installed on up to 3 computers you own.

Note: Once you have reached the maximum number of installations for a license, Heredis will warn you that you can no longer install this license on another computer. Heredis will suggest you manage your installations to potentially detach a license from a computer you are no longer using and install it on a new computer.

You can download Heredis from your Heredis store account.

Log in by clicking on the **Sign In** button, enter the email address and password you used to purchase Heredis. If you are already logged in, click on the Hello... button.

Then click on **My Keys**.

I have a new computer or a second computer – what to do?

The screenshot shows the Heredis website's account management interface. At the top, there is a navigation bar with the Heredis logo and links for 'Family tree software', 'Find ancestors', 'Shop', 'Mobile App', and 'Need help?'. Below this, a user is logged in as 'Hello Helene' with a 'Sign out' button and a 'Cart (empty)' icon. The main section is titled 'MY ACCOUNT' and contains a welcome message: 'Welcome to your account. Here you can manage all of your personal information and orders.' Below the message are five menu items: 'ORDER HISTORY AND DETAILS', 'MY ADDRESSES', 'MY PERSONAL INFORMATION', 'MY INSTALLATIONS', and 'MY KEYS'. The 'MY KEYS' button is highlighted with a red rectangular box. At the bottom left, there is a 'Home' button.

You will find a **Details** button allowing you to find the **Download** button.

The screenshot shows the 'MY KEYS' page on the Heredis website. It features a table with columns for 'Order reference', 'Date', 'Number of keys', and 'Email'. The table contains three rows of data. The 'details' button in the last column of the first row is highlighted with a red box. Below the table, there is a section for 'Order placed on 01/25/2019' with a reference number '@784355'. A 'Products' section contains a 'DOWNLOAD' button, which is also highlighted with a red box. Below the 'DOWNLOAD' button, there is a field for 'Your key code' which is redacted with a black box. At the bottom, there are navigation buttons for 'Back to your Account' and 'Home'.

Order reference	Date	Number of keys	Email	
@794087	03/14/2019	1	Send	details >
@784355	01/25/2019	1	Send	details >
@729455	07/12/2018	1	Send	details >

Perform the installation as for any software and activate your license for this computer. See the Activating Heredis (voir page 11).

Your files

In order to find your files, be aware that on Windows, they are usually stored in Documents / BSD Concept / Heredis / Heredis Files.

On Mac, there is no usual storage, you will find the file where you chose to put it. So use your Finder to find the .hmw file (it is the Heredis format).

Before changing computers, remember to make a copy of your .hmw folder (see also The Heredis File and .hmw folder) on a USB key or an external hard drive.

After changing computers, if you made a copy on a USB key or an external hard drive, copy the (Windows) .hmw-folder/ (Mac) .hmw-file named after your genealogy and paste it into your computer (on Windows, into Documents / BSD Concept / Heredis / Heredis Files) . Launch Heredis and click on Open a Heredis file.

If you have not made a copy but still have access to your old computer, you can share your file on the local

network:

- turn both computers on
- check and make sure they are both on the same internet network
- launch Heredis (same version) on both computers
- on the old computer, click on the File dropdown menu, then select Share on Local Network...

Heredis will transfer your file from your old computer to the new one.

For more information, see the article entitled Sharing your genealogy with other devices on local network (voir page 495).

If you no longer have access to your old computer and have not saved your data to a USB key or an external hard drive, then your file is lost. We have no access to your data.

What can Heredis do?

Heredis will assist you managing your genealogy. Thanks to its multiple functions and Heredis' ongoing development, you can:

Entering

Data

Who were your ancestors? Heredis will help you find them. Through guided and intuitive progression, you enter all the information which you have gathered on your family. You will note some odd facts: your grandfathers were cousins, a certain great-uncle was a witness to all the marriages in the family, your great grandmother was very young when she lost her parents, one couple had more than 50 years' age difference...

A research assistant will help you every step of your quest. You have access to all the power of the Internet directly from Heredis' software.

For further details, see Add persons (voir page 97), Input events (voir page 114), Save time by inputting faster (voir page 72) and more...

Illustrations

You have found some photos or copies of acts? Every item of data will be shown directly in your genealogy. The Photo Tool will help you a simplify management of your media.

Unfamiliar with the area of origin of this family branch? Geolocation will show you that they all lived in neighboring towns.

For further details, see Photo Tool (voir page 337), Media (voir page 105), Geolocating Places. (voir page 289)

Family tree charts and other documents

Your work is taking shape, you cannot wait to print the results of your research.

Print trees

Heredis Family trees trace ancestors or descendants in a variety of different forms and adapt to all formats.

For further details, see (Windows) Building single-page pedigree tree charts, (Windows) Unlimited size tree chart (voir page 440) or (Mac) Unlimited size tree charts, (Mac) Predetermined size tree charts...

Print reports, sheets, or fully illustrated books

All documents which the genealogist needs are available: working papers for refining your research, person or family sheets for your filing system and even illustrated books for preparing a family monograph which will bring you pride and happiness to your family.

For further details see Create and edit sheets (voir page 373), (Windows) Create and edit reports (voir page 390), (Mac) Create and edit a report, Create and edit a book (voir page 358).

Making your work known to others

What could be more simple than the free online publishing of your work on the Internet? Wherever they may be, your family and friends can visit your site and contact you to give you more details. With your family site hosted free on Heredis Online, your family bonds are facilitated, your work valued and your data preserved.


For further details, see Heredis Online (voir page 507).

Exchanging

Genealogy is an act of sharing. Heredis gives you all the tools which you need to communicate with other genealogists, give and receive information and have your work available everywhere, on all your devices (desktop or laptop computer, Windows or Mac, iPhone, iPad).

For further details, see Share your genealogy (voir page 495), Export Heredis data (voir page 466), Export a GEDCOM (voir page 488).

Launch Heredis

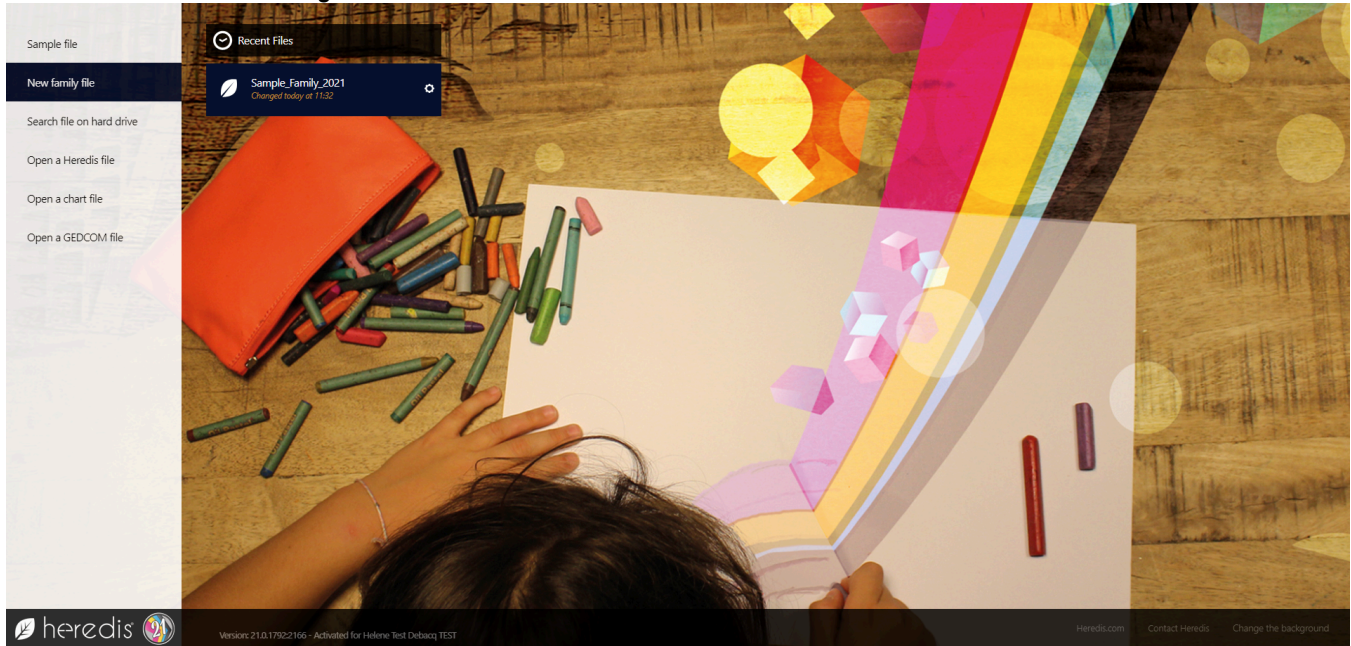
Double-click the Heredis icon  (*it looks like a leaf, the color depends on the version you have*) to launch the application.

(Windows) For a quick access, slide the icon from **BSD Concept** Program menu to your taskbar, wherever it is convenient for you.

(Mac) For a quick access to Heredis, select the icon  in the **Applications** folder, drag it to your dock, wherever it is convenient, or drag it to the Launchpad icon. Each version has its own icon. If you click on the Heredis 2018 icon while trying to use Heredis 2022, then you will open Heredis 2018. You can uninstall older versions of Heredis even if you purchased the new version at the upgrade rate.

Create a new genealogy file

From the **Home Page**, click **New Family File**.
Windows' Home Page



Mac's Home Page

Create a new genealogy file

Home Page

heredis 21

Version: 21.0.1400-2166 - Activated for Laetitia SIMON-BOYER

New Tree
New Family File

Open Tree
Open Recent
Exemple 2020 OK ⚙️
Open
Heredis File OK

Heredis Online
Manage My Account OK

Learning Center
Online resources:
• Sample file,
• Video Tutorials,
• FAQ,
• Forums,
• Technical Data Sheets...

Heredis Help

Modified: September 10, 2020 09:31
Macintosh HD/Users/bsdconcept/Desktop/Exemples/Exemple 2020.hmw

Save your new genealogy, give it a name and specify the desired location for the file.

An empty **Immediate Family** screen appears, and you may now start entering your data by clicking on the **Create the first person** link at the center of the screen.

Family Data History Search

Immediate Family XXL Family Ancestors Descendants ⚙️

Create the First Person

The proposed data entry screen is ready and easy to fill in. Enter all known information and thus you have created the individual who is at the base of your genealogy: the root person (voir page 78).
You can also check you Create the first person (voir page 74) article.

Record a file

Consider regularly recording your genealogy during your work session. When the file has been changed, **(Windows)** a star appears next to the file name, **(Mac)** a black dot appears in the file window closing icon; it needs to be registered.

A record overwrites the old version of your file, unlike a backup, which it is a photo of your file in the state at a time T. It is always useful to make a backup at least once a month on external device in addition to the recordings. See also How to save your file.

WARNING! Under no circumstances should you save a Heredis file in a cloud for the purpose of using it from that cloud. Indeed, synchronization and different backups performed by the cloud provider may damage your file. ALWAYS have your file on the computer hard drive when you run it in Heredis. A cloud allows you to backup, but you must not launch the file from this cloud.

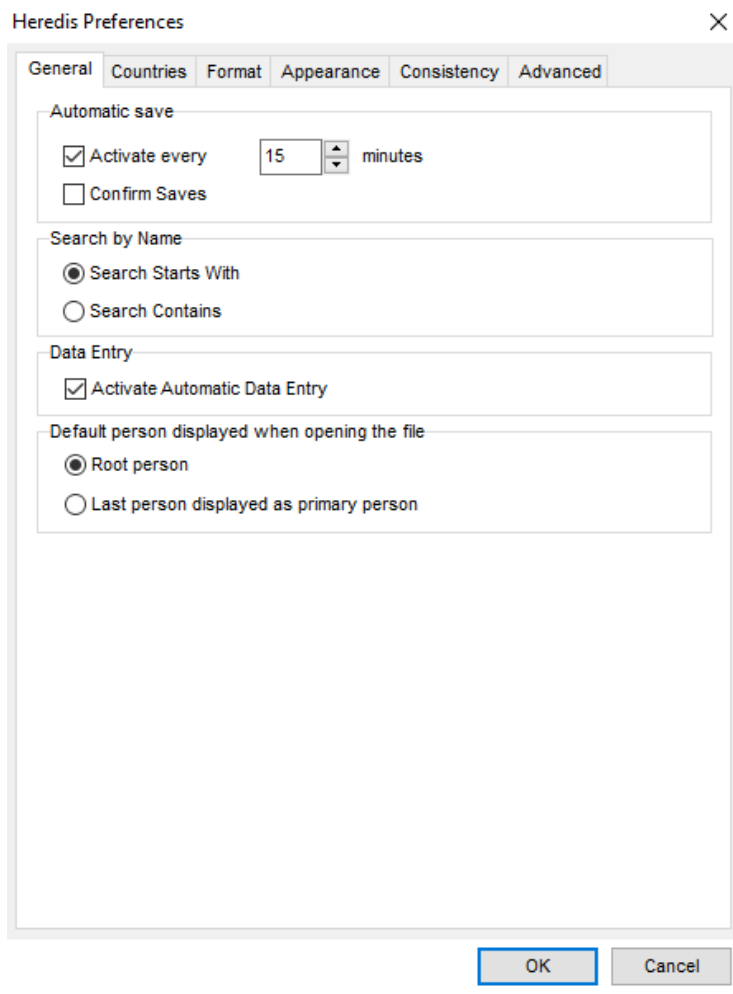
Manually

Click the **Save**  button, or choose **File> Save**.

Automatically

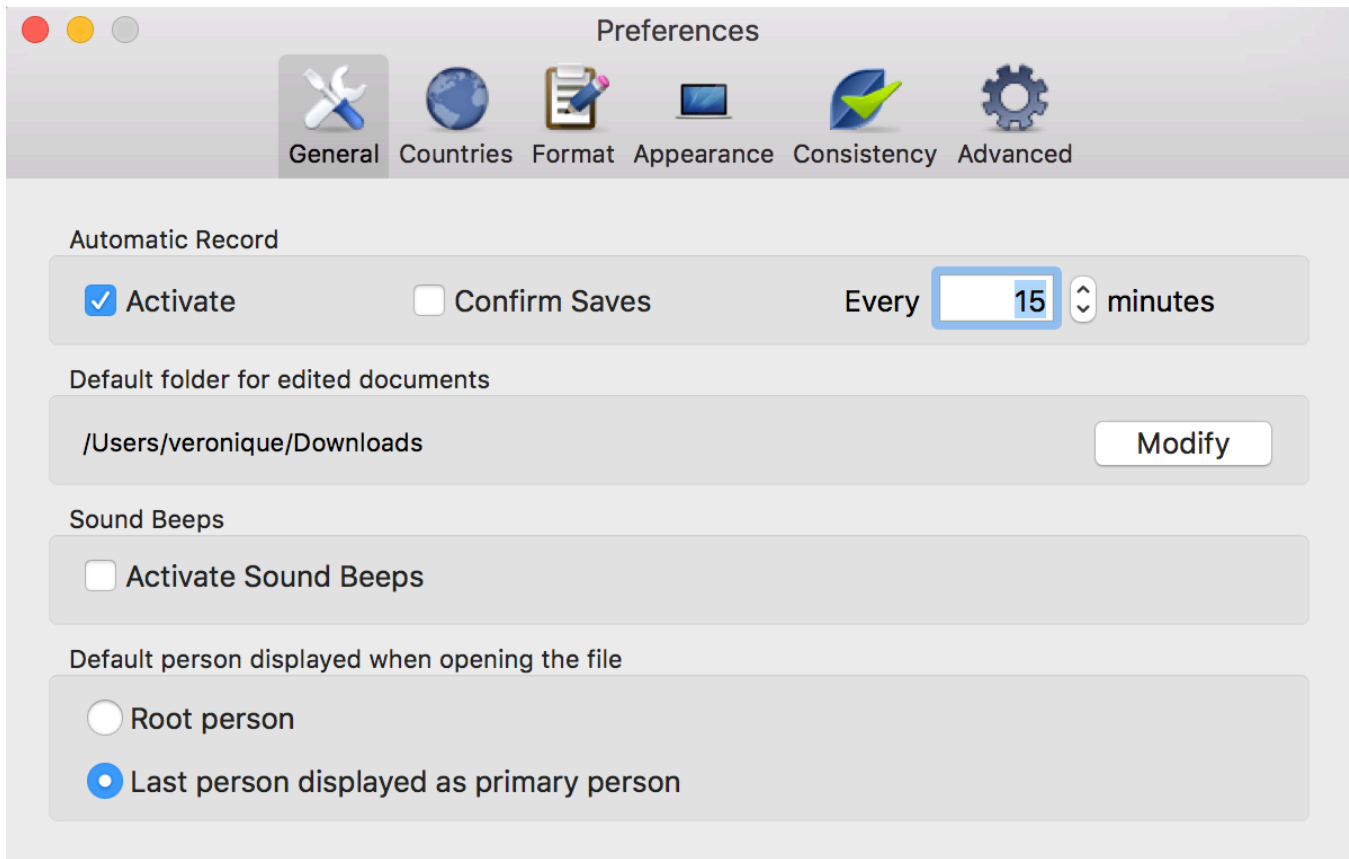
For security you can program automatic recordings of your data.

(Windows) Automatic recording



- (Windows)** 1. Select **Preferences – Heredis Preferences** in the **Tools** menu.
2. Click on the **General** tab and check the **Activate every...** You can specify the rate at which you want the data to be recorded.
3. If you check the **Confirm Saves** box, Heredis will ask for confirmation with each automatic check-in.
(Mac) Automatic recording

Record a file



- (Mac)** 1. Choose **Preferences** from the **Heredis** menu.
 2. Click the **General** tab and check the **Activate** box in the **Automatic Record** area. You can specify the rate at which you want the data to be recorded.
 3. Check the **Confirm Saves** box so Heredis will notify you before each automatic check-in.
-

Save a file under another name

If you want to make a copy of your genealogy, to create a copy or another version, you can save the file under another name or in another location.

(Windows) Select the **File menu > Save a Copy** . Indicate the duplicate file's destination folder. Heredis creates a new *.hmw* folder, containing genealogical data (file *.heredis*) and folder containing media or a *.ha* file if it is a tree file. Click the **Save** button.

Heredis launches the Windows Explorer and shows you where the copy was made. You can move it, open it or close the window, depending on your needs. Your original file is still open and you can keep working.

(Mac) Choose **File > Save as**, then indicate a name and location.

The file with the new name is open on the screen. To work with the previous version, choose **File > Open Recent** and choose the previous version in the sub-menu.

See also The Heredis file and *.hmw* folder.

(Mac) Back to the recorded version

Heredis gives you the opportunity to reopen your genealogy as it was the last time it was recorded. This possibility is very useful when you have made an error importing a file, for example.

Choose **File > Revert to saved ...** Heredis closes the active genealogical file without saving it and then reopens it as it was before the last changes.

Info – All changes made after the last record are lost.

Close and reopen a genealogy

Close a genealogy file

When you have finished working with a genealogy file, you can close it without leaving Heredis.

- To close the active document, choose **File > Close**. You can also click the Close button in the upper **(Mac)** left, **(Windows)** right corner of the file.
- To close all open Heredis documents, press **(Windows)** Ctrl-Q; **(Mac)** the Option (\square) key, then click the **Close** button of the active document.

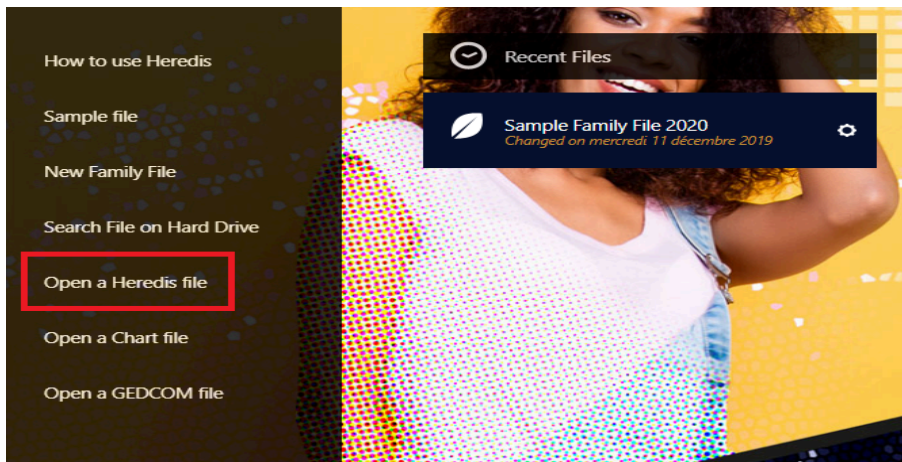
Info • If you have made changes since you last saved the file, Heredis will invite you to save it.

Note: When you close Heredis, wait a few minutes before to shut down your computer, Heredis can take some time to close properly. If you shut down too quickly your computer and Heredis didn't finish to save the modifications you made, you will damage your file. It only takes a minute so please be patient. Computers are just like genealogy, they require patience 😊

Reopen a genealogy file

Select your genealogy from the **(Windows)** **Recent Files**, **(Mac)** **Open** submenu or **(Mac)** double-click the file in the Finder.

- **(Windows)** click on **Open a Heredis file**,



- **(Mac)** click on **Heredis File** on the **Open** section, then click on **OK**.

Close and reopen a genealogy



New Tree

New Family File



Open Tree

Open Recent

Sample Family File 2020

OK



Open

Heredis File

OK



Heredis Online

Manage My Account

OK

If your file is not on the recent files, it doesn't mean it has been deleted! Heredis will never delete your file! The recent files list might have been cleaned by your operating system or by you after a spring cleaning. Your file is stored on your hard drive disk. It can easily be found. However, you should make regular backups of your file in case your computer crashes or you need to reinstall your operating system etc. Check out [How to save your file](#) article.


Windows Info: If you don't remember where to find your file on your hard drive disk, click on **Search File on Hard Drive**. Heredis will scan your hard drive searching for all Heredis and GEDCOM file format.

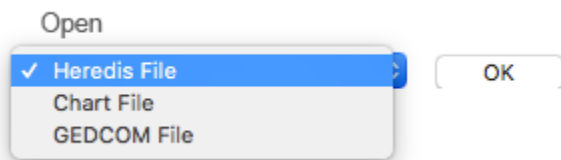
Mac Info: If you don't remember where to find your file on your hard drive disk, open your Finder and write *.hmw* in the search bar.

Open an existing Heredis file

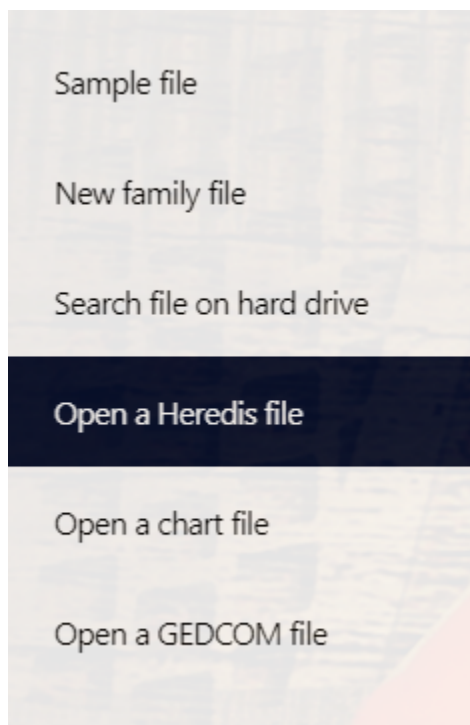
There are several different ways to open a Heredis genealogy file.

Open a genealogy file if it is not in the recent file list

- To open a file when Heredis is already running, choose **File** menu > **Open**. Choose the genealogy file in your file directory, and then click **Open**.
- **(Mac)** To open a file from the **Home** page, if you already have a file launched, click the **Home**  button. On the home page, select **Heredis File** in the **Open** menu. Click **OK** and then select the file.



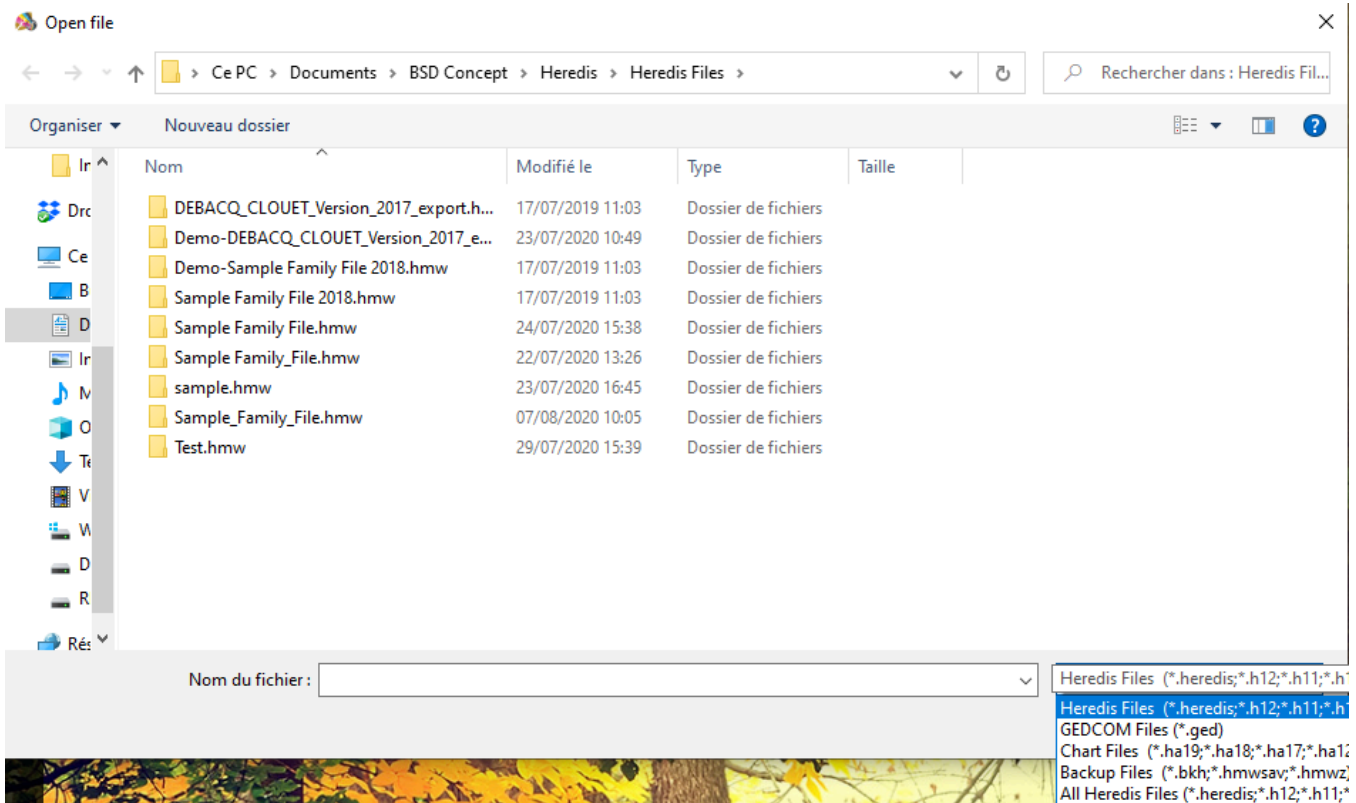
- **(Mac)** To open a Heredis file from the Finder, double-click the file icon or drag it to the Heredis application icon. You may open a Heredis file created with an older version of the software from the home page if they were created with a version equal to or after Heredis 2014. Prior to Heredis 2014, the Heredis format was different. Contact us, we can convert it for you for free.
- **(Windows)** To open a file from the **Home** page, click on **Open a Heredis file**, select the file on your hard drive disk and click on **Open**.



- **(Windows)** You can open a Heredis file created using an old version of the software, you will need to change the file type in the opened window. Indeed, before Heredis 2014, the file format had a different

Open an existing Heredis file

extension to each version. Click the Heredis Files drop-down list and choose All Heredis Files. You will see the files in the old formats.



Info • By default the last folder in which you saved a file will open. To select another location, select it in your file directory.

Info Windows and Mac • Files created after the 2017 version are identical, regardless of the platform you are using: Windows, Mac, iOS, Android. You can directly exchange data without any preparation or conversion.

For more details on opening a GEDCOM file, see [Open a Gedcom in a new file](#), [Import a Gedcom into an existing file](#) (voir page 482).

Open a recently used file

To open a file you worked on recently, open Heredis' home page, (**Windows**) choose it on the recent files area, (**Mac**) select the file from the **Open Recent** menu, select the file in the drop down menu and then click **OK**.

You can also select **File** menu > **Open Recent**. Choose the file and click **OK**

Mac Info • To delete the list of recently used files, choose **File** menu > **Open Recent** > **Clear**. The file will not be deleted from your hard drive disk but won't appear in the Recent file list.

Windows Info • To delete a recently used file, click on the indented wheel near the name of the file you want to remove, then choose **Remove from Recent Files**. The file will not be deleted from your hard drive disk but won't appear in the Recent file list.

Important : Heredis is a desktop software, which means your files are on your computer's hard drive. You are the only one able to access it, we do not have your files. That is why you need to save your work on an external device. If the file is missing from the Recent Files list, just because it is no longer in the Recent Files list does not mean that it has been deleted! Heredis never deletes your files! It's just that the list of recent files has been cleaned.

To find your files, on Windows, they are usually stored in Documents > BSD Concept > Heredis > Heredis files. You can use the **Search on hard drive disk** function on the Home page to launch a scan of your hard drive disk.

On Mac, use your Finder to search for your files by indicating .hmw in the research bar after selected your hard drive disk in the device list.

Rename a file

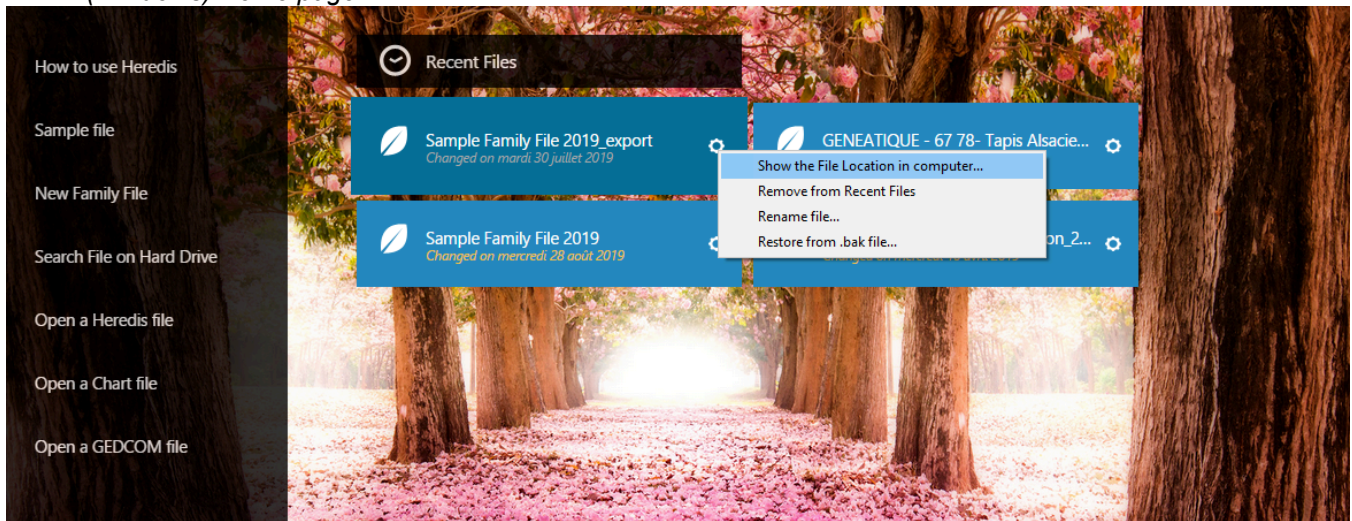
You need to be on the Heredis home page in order to rename a file.

A Heredis file is actually made out of several smaller files within the same folder (or “bundle”) entitled **nameofyourgenealogy.hmw**.

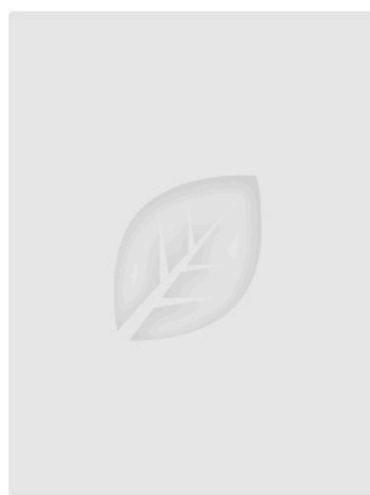
If any of the smaller files is named differently from the others, Heredis will be unable to launch your file. You'll encounter an error message telling you « The file nameofyourgenealogy.heredis jas been removed from its original folder or has been renamed. To ensure proper use of your genealogy file, please relocate it in the nameofyourgenealogy.hmw folder or rename it ... »

To prevent this from happening, the Heredis team has created a specific tool: on the home page, click the indented wheel located to the right of your genealogy name and select **Rename file...**

(Windows) Home page





(Mac) Home page




Customize the Home Page with the image of your choice

Add picture here

 **New Tree**
New Family File

 **Open Tree**
Open Recent

Open

 **Heredis Online**
Manage My Account



Reveal in Finder
Rename file...
Restore from .bak file...

Center

Online resources:

- Sample file,
- Video Tutorials,
- FAQ,
- Forums,
- Technical Data Sheets...

Help & Learning Center

Note: Computers are not very fond of files with long names, special characters and spaces, which can damage your data. Do avoid using accents, cedillas, spaces, and other special characters. Think simple! In lieu of spaces, archives centers (among others) use the _ (underscore) sign. For example: « file_of_francois ».

See also The Heredis file and .hmw folder.

How the Heredis data is structured

Heredis manages all types of data related to genealogical research and organizes them logically, in order to deepen your understanding of your ancestors.

Persons

Every individual mentioned in the genealogy file: ancestor, contemporary, witness, is known as a **Person**. For each person included in the genealogy file, specify:

- Identity (surname, give names, nickname, occupation, etc.). If you wish to enter information that is not proposed by Heredis, create your own user field.
- Characteristics known as **flags**: childless, unmarried, confidential, etc.
- A free note.
- Each person is numbered automatically according to his/her position in the genealogy but you may assign a personal number based on other criteria.
- Various events in the person's life, expanding his/her personal story, and citing sources of information.
- Media (photos, videos or other documents) to illustrate the person, unions or events.
- Personal ties, apart from family ties, Heredis allows noting that people had a special bond. Include friends, tutors, mentors. Create «witness» links for those present at or quoted at an event.

Also see The different data fields (voir page 50) and Add a person with no direct connection (voir page 97).

Relationships

As you build your family genealogy, you create new persons with their appropriate relationship. Any relationship can be established retrospectively.

Relationships are of two types: the parent-child and spouse relationships.

Other family ties and the position of any person in the genealogy are determined automatically from these basic links. To create brothers and sisters, you have only to create new children for parents.


- Create direct family links: father, mother or child.
- Create a spouse link (whether the union is official or not). Specify the status of the family: the spouses are married, separated, divorced...? When a person has been married several times, Heredis will number them for easy access, as well as to the children who resulted from them.
- Assign a note, pictures and events to each family created in your genealogy.


For more details, see Add parents (voir page 79), Add spouses (voir page 87), and Add children (voir page 93).


Events

To record important events in the lives of your ancestors, you may note person events (christening, military service, will...), or events shared with a spouse, called family events (engagement, residence, etc.). If you cannot find events that are appropriated, create your own definition of events.

- For each event, enter all known details (date, time, place, age stated on the record...) and add a note relating to the event.
- Specify the status of the source of information (No search record, Search Record or Untraceable Record), allowing you to edit a report of all sources to be researched.
- Declare an event as private, not to be exported or published.
- Illustrate the event with various media (photos, documents).
- Assign a source to the event, to record the origin of your information.
- Assign witnesses to the event (witnesses, registrars, godparents, etc.).

A visual cue  showing the status of main events (Birth or Baptism – Marriage – Death and Burial) appears in the **Persons** and **Branches** panels, as well as in the status bar and in the **Search** screen.

To define the appearance of the icon, select the criteria that you feel are relevant: **No missing, approximate or incomplete date – Place mentioned – Source mentioned – No ‘Search Record’ status** in the **Preferences** screen. According to the criteria checked by you are met or not, the bar symbolizing the event in the icon  is in the top, middle or bottom.

In this icon , for example, the Birth event is partially filled, the Marriage event is not specified, the Death event is complete.

For more details, see Input events (voir page 114) and Heredis' Preferences (voir page 65).

Sources

Heredis may assign any number of information sources to each event.

Each source is an independent element, which is then assigned to one or more events. Heredis allows you the flexibility to create a source and then assign it to the events in question, or at the same time to create both the source and its link to the event.

For further details, see Sources (voir page 147), The different mode for Sources & Citations (voir page 157).

Witnesses or participant

Each person involved in the lives of your ancestors can be entered, be part of the family or not. Heredis will assign persons to events (the witnesses of a marriage, the registrar for a birth, a relative present at the ceremony for a decoration etc.).

- Creating a witness or participant assigns an individual to an event concerning another person. A witness may be assigned to one or more events, and each event can have one or more witnesses or participant.
- Anyone entered in your genealogy plays a role, regardless of its importance and the degree of kinship. When you assign a person to an event, specify the type of link (witness, godfather, declarant...), the age of the linked person at the time of the event, and enter if necessary a suitable comment on the link.
- The information entered for the witness or participant is the same as for any other individual: identity, flags, notes, media...

For more details, see Add witnesses (voir page 129).

Linked Persons

Sometimes we know of a relationship which existed between two people, without being able to assign it to any event. You know that Paul is the uncle of John, but you do not know if he is the brother of the father or mother of John, or the husband of an aunt. You cannot create this link as a kinship. Create a personal link (**Sundry Links**) between Paul and John until you find the information you need to create the kinship.

- Create linked persons to declare a relationship between one individual and another person. Every individual may be linked to several other persons.
- The name of the link is determined by choosing the type of relationship and meaning of the link. You can also add a comment to the link.

For more details, see Add linked persons (voir page 134).

Media

You have photos or documents; use them to complement and illustrate your family tree.

You can assign a digital image (photograph, signature, seal, etc.) sound recordings (interviews, speeches), videos or any other type of file (document prepared with a word processor or spreadsheet, PDF, HTML, etc.) to any data in your file.

- Each item of media is identified by its name, to which you can add a date and a note.

How the Heredis data is structured

- You can make any media private if you do not want it to be broadcast.
- Media may be assigned to all types of data: person, family, event, source, name, occupation, place.
- The number of media assigned to any data is without limit and every item of media may be linked to several different data.
- All media are listed and may be managed in the **Media Index** or in the **Photo tool**.

For more details, see Media (voir page 105) and Photo Tool (voir page 337).

Surnames – Given Names – Occupations – Places

In your genealogy, you will have names, occupations and places that sharpen your interest. When you know more about them (photo of a place, story of a given name etc.), Heredis allows you to keep this information by completing each item.

The surnames, given names, occupations and places that you use in your genealogical file are automatically stored in the Indexes.

Indexes are powerful tools that play several roles: retrieve data by how they are used, link different data by themselves, illustrate your genealogy by management of your documents. Thus, you enrich your genealogy and understand all the better the lives of your ancestors.

- In each Index, the surnames and given names, occupations and places may be illustrated by a note or by media.
- The Indexes can merge similar data. They allow you to declare variants within the same category of data: such spelling of a name is a variant of another name in the file, such given name is a local variant of another given name, such a name is a variant of another occupation saved in the file.

For more details see Indexes: generalities (voir page 241).

Presentation of the Heredis' interface

Genealogy files

The genealogy file will open as a global screen. This screen can either occupy all available space, or occupy only a part, or be iconized.

Each input of surnames, given names, occupations, sources, places, medias generates indexes. The generated information are changeable by clicking in the menu « Tools / ... Index... » or in the concerned search panel.

(Mac) Display several working windows

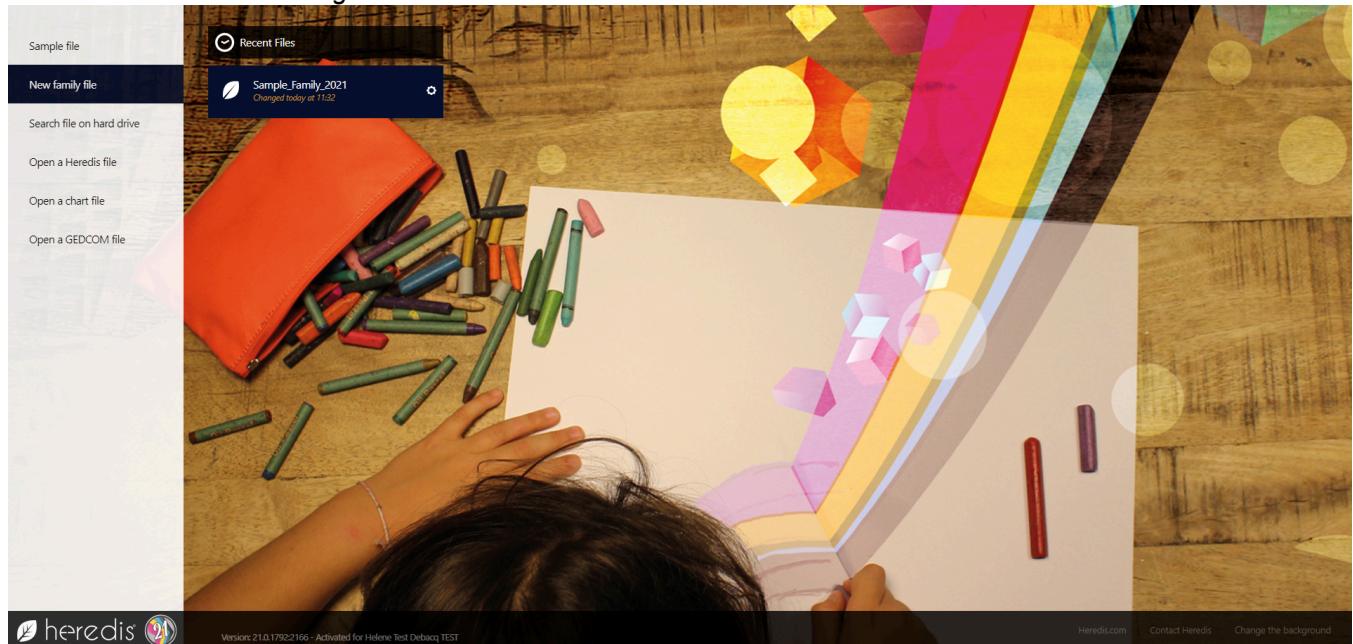
Several views of the same genealogical file may be opened simultaneously: the main navigation screen, tool screens (Indexes, Search for duplicates), tree chart screens, document screens, the Preferences screen...

Display several genealogies simultaneously

Several genealogies may be opened simultaneously with Heredis. Each file can display data differently: in Family, in Data, in History or in Search. The list of open files and all screens open for each file is available in the Window menu. Click the name of the file or screen you want to display in the foreground.

The Home Page

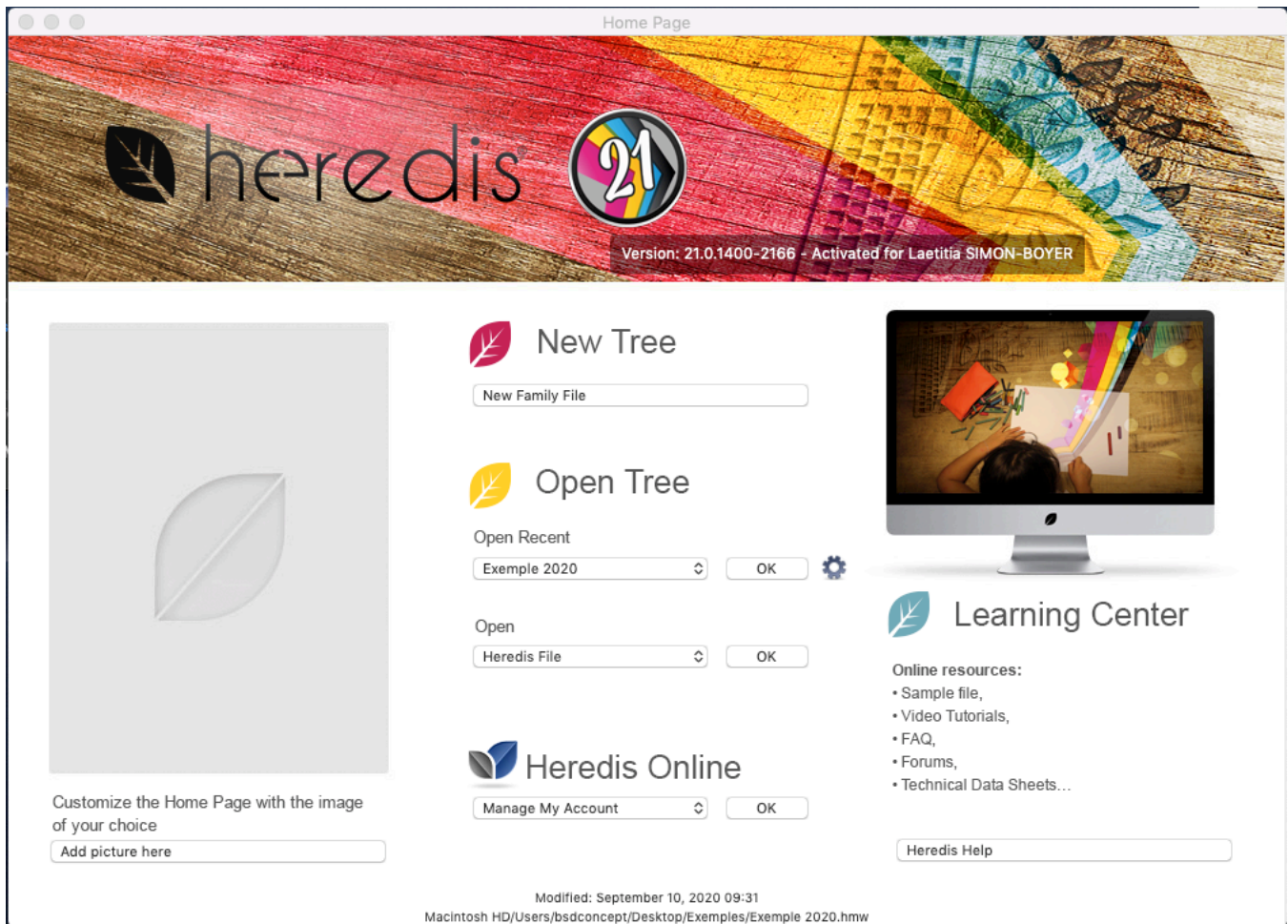
Windows's Home Page




It allows you to open an existing genealogy, to create a new one, to import a genealogy from a Gedcom file or a Heredis file (**Windows**) from the black banner on the left of the screen, (**Mac**) from the pop-up menu.

Mac's Home Page

Presentation of the Heredis' interface



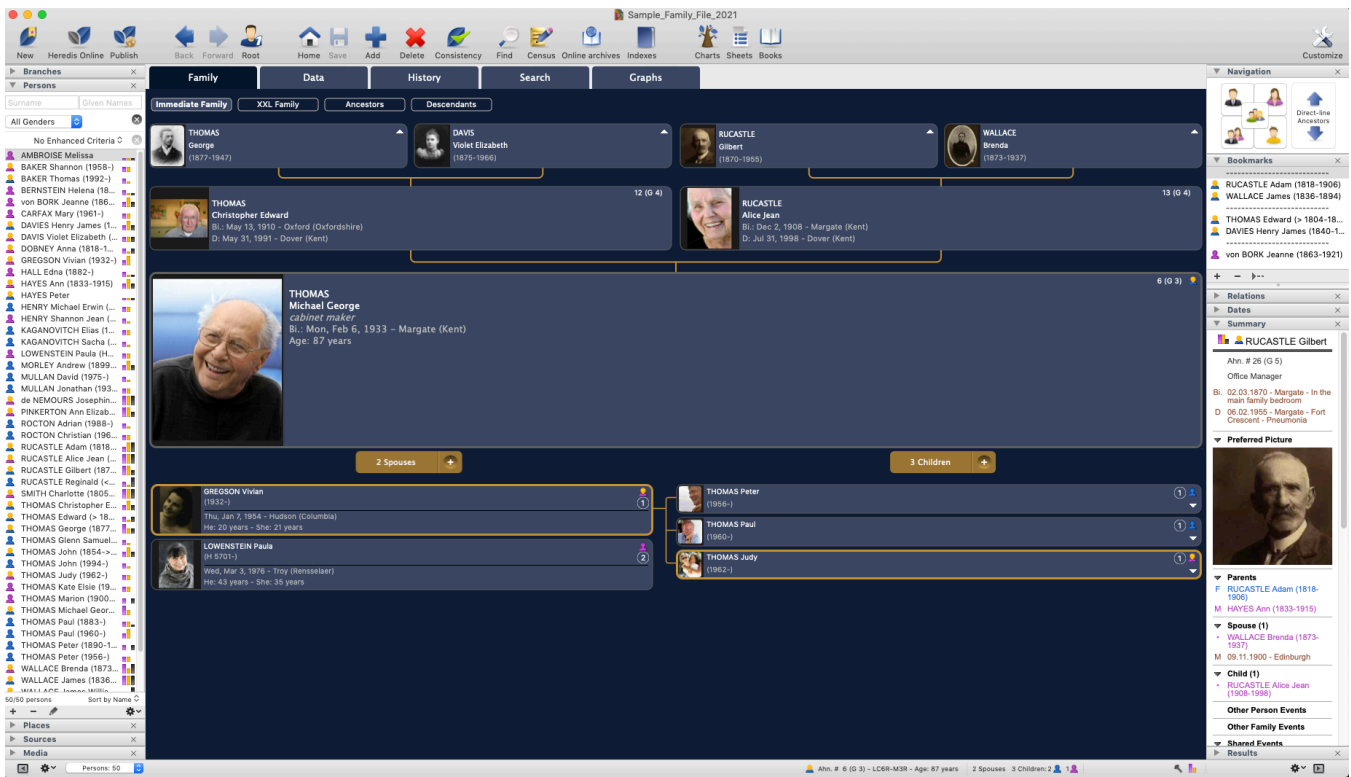
To find again this screen when you are already in a working session, click on the **Home** icon  of the toolbar or choose **File > Home Page**.

The main Screen of Heredis

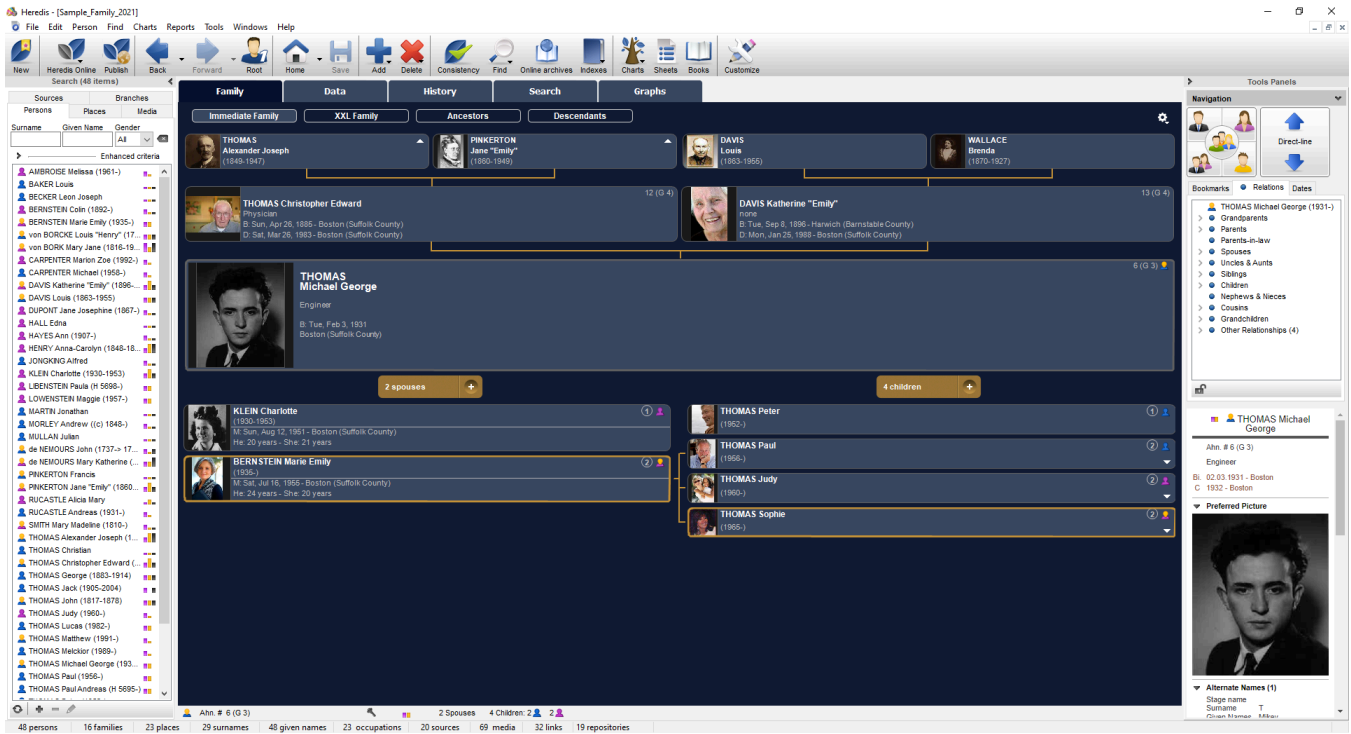
Heredis' software reacts just like any other application / software. It can be resized, displayed full screen (**Windows**) or iconized in your taskbar; (**Mac**) or iconized in the dock.

The Heredis' working space is entirely flexible to be adapt to your methodology and offer all the tools within reach.

The main screen Mac



The main screen Windows

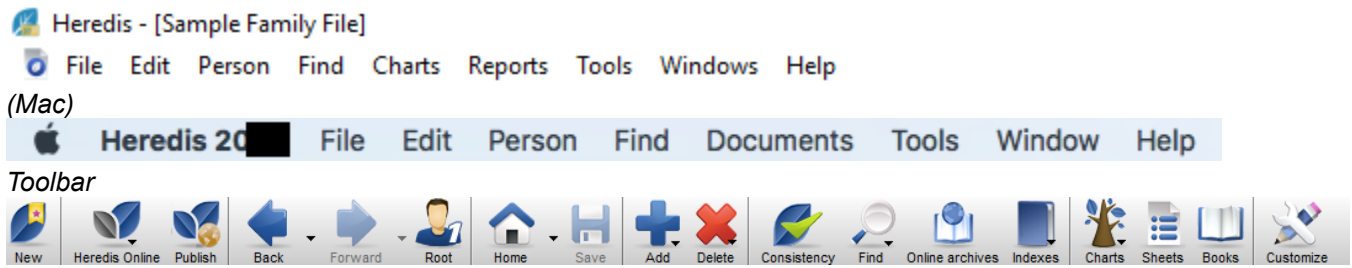


The Menu and Toolbar


At the top, menus and buttons provide access to all functions of the software. Buttons are different depending on whether you are managing data or building trees.

*Menu
(Windows)*

Presentation of the Heredis' interface



Some buttons allow access to more detailed choices: **Add** (> **Unrelated Person ...**), **Find** (> **Search Number ...**), **Indexes** (> **Given Names ...**). The toolbar may be modified at any time to meet your work needs:

click **Customize** Toolbar  to add, remove or rearrange buttons on this bar.
See the article [Customize Heredis](#) for further details.

The buttons

See the Buttons article.

The central part of the screen displays four tabs.

You visualize your genealogy better under the **XXL Family** view or you like to study their movements in **Migrations**. You prefer to work on **Descendants**? Click on the **Family** tab or **History** tab to select the screen of your choice.



The **Family** tab allows you to choose between different views of the immediate family of the primary person. It develops as and when you enter data, each person taking his/her place in the organization of the family.

The **Data** tab allows you to add information at any time concerning the primary person and his/her immediate family. Use the Family Group Data to save time.

The **History** tab displays the migrations of the primary person.

The **Search** tab provides a helpful research tool to assist you in reviewing your work and evolving your genealogy. The top of the screen shows the known or missing information. The bottom part of the screen allows you to send a search online on the websites of your choosing in the main existing genealogy website. You can also use the **Family Search** button to access your family search account and do a research on the primary person and find his/her ancestors and progeny.

The **Graphs** tab displays the dynamic wheels.

For more details, see [The different tabs](#) (voir page 46).

Search and Tool Panel

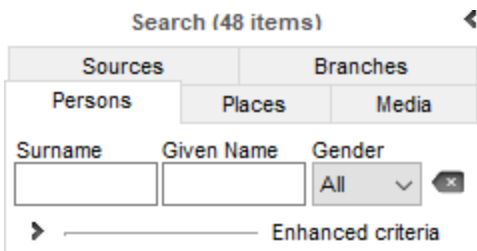
On both sides of the main screen, there are removable panels which provide access to data lists or tools. Their presentation is customizable. Open and scroll the panels, **(Mac)** move them to improve your personal organization, add columns to the panels, choose how they appear (one at a time or all visible at once) or hide them.

(Mac) At the bottom of the Heredis screen, you can find the management button for the panels and all the key information concerning the genealogy which is open.

Search Panel

This panel has five tabs allowing your to search inside your file: **Persons**, **Branches**, **Places**, **Media** and **Sources**. Additions, deletions or changes are possible directly from this tabs, except the **Branches** tabs. You can use them to complete your genealogy with drag and drop function. From the search panel you can also do your researches without using the **Search** menu.

Windows' Search Panel



Mac's Search Panel



Tools Panel

Some tabs are about the primary person (**Kinship**), the others contain tools (**Dates**, **Bookmarks**).

Windows' Tools Panel



Mac's Tools Panel



For more details, see [Customize Heredis/Customize the panels](#).

Navigating

Explore all the family branches and display the people you want to view, edit or print documents concerning to them.

Drag any person displayed on the screen to change their position: select a child and drag to the grandfather box. If this person is indeed a grandfather, a new **Immediate family** appears.



Drag any person shown in the removable panels or on any data entry tab input or from one panel to another: a bookmarked individual as the primary person, an uncle to the bookmarks, a person from any of the Indexes to the bookmarks, or as primary person etc.





Display the **Navigation panel** and use it as a compass. A simple click will navigate to the parent, the



Presentation of the Heredis' interface

spouse, a child or sibling. For a list of spouses, children or siblings, right-click their location on the panel.

Navigate according to Ahnentafel numbering with the **Next Ancestor**  – **Previous Ancestor**  arrows.

Click **Root Person**  on the toolbar to return to the person at the base of your genealogy.

To view any person according to his number, choose  **Find (> Search Number...)** and navigate directly to the person.

Use the **Back**  and **Forward**  arrows to redisplay those already consulted. For a history of your browsing, position the mouse on the relevant arrow and a list is displayed.

(Windows) For a history of your browsing, hold down the mouse on the arrow next to the button and choose from the list displayed or select Navigation History.

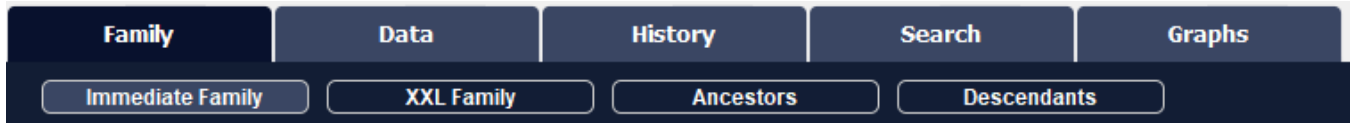
(Mac) For a history of your browsing, position the mouse on the relevant arrow and a list is displayed.

The different tabs and panels

The different tabs

Heredis memorizes the last viewed screen and will reopen the corresponding tab when you click on **Family**, **Data**, **History**, **Search**, and **Graphs**.

Family tabs




They are used to navigate between the different family members and to create them if necessary.



The **Immediate Family** screen displays the family members who are close to the primary person (parents, grandparents, spouses, children).

The **XXL Family** screen shows the family of the primary person, his/her parents, grandparents, spouses and children but also every relative who possibly knew him/her and you will get an XXL view! For further details see XXL Family (voir page 422).

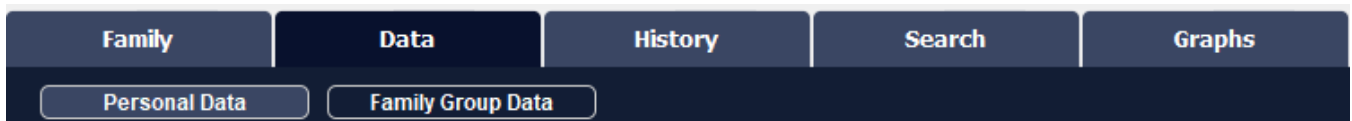
The **Ancestors**' screen presents 4, 5 or 6 generations of ancestors of the primary person.

- Change the number of generations displayed with the indented wheel  icon or you may start printing the ancestry as it is displayed.
- You can also display views of the ancestors' origins by town, county, state/province or country. For further details, see the article Location tree (voir page 428).
- This screen is dynamic; click the arrows at the end of the line for the following generations. If necessary, you can create new ancestors.

The **Descendants** screen shows the number of generations of your choice.

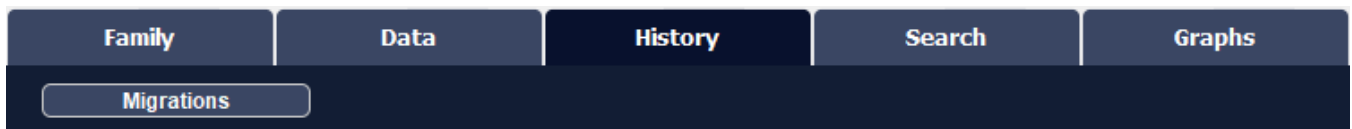
- You may configure its display from the indented wheel , with the presentation of generations and the data format.
- Complex highlighting allows you to easily identify consanguine marriages.
- The information displayed for descendants as well as for its printing are also available from the indented wheel  icon. When you click on **Print**, choose the presentation you want in the 2 tabs of the displayed window and click on **OK**. Heredis will create a document that will open with your word processing software.

Data tabs



- The **Personal Data** screen shows all the data entered and allows you to add or complete events for the primary person or for the couple. You access the **Personal Data** tab for any person displayed by double-clicking on the name.
- The **Family Group Data** screen provides a summary of the information entered for the primary person and allows you to add all the members of his/her immediate family (parents, spouses, children, step-children) without having to exit this screen. See the article Input a Family Group Data (voir page 164).

History tabs



The **Migrations** screen positions on a map the places of the life of the primary person or any other family member. The markers are numbered to display the sequence of movements. Each place marker indicates the list of events which took place in this place. You can see simultaneously all the events of all members of the immediate family unit.

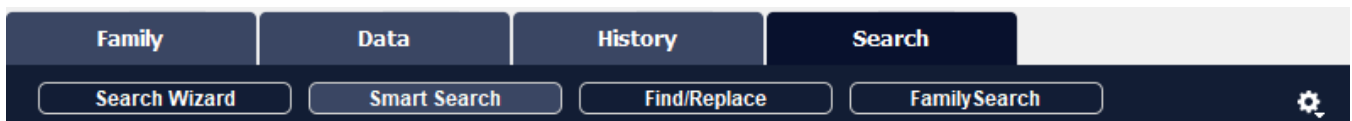
The navigation miniature, displayed at the bottom right in the map of Migrations tab and in Search Wizard (in Search Tab) in Map tab, allow you to easily move on the map easily.

Select the frame with left clic of your mouse, by moving it, you will navigate on the displayed map.

Note:

- blue markers are the markers attached to the selected person on the right list of the map.
- yellow markers represents events of other persons of the right list.
- the + sign in a blue marker indicates that more than one event are registered at the place and concerns the selected person.
- since Heredis 2020, you can see the subdivision pins.

Searches tabs



The **Searches** tabs contain research tools for the primary person and your genealogy.

- In **Search Wizard** sub-tab, the upper part shows the known or missing information. The lower part of the screen allows you to launch any online research with the operator of your choice. You can also restart a previous search, enter a research note, check the details of sources, media, or geographic locations for known data. You can easily manage linear research by using the **Branches** panel. Also consult Search

Wizard (voir page 203) article.

- From this tab, you can also access **Smart Search** which allows you to find data of your genealogy by combining different search criteria such as persons, relations, families, events. See also Smart Search (voir page 208) article.
- From the **Find/ Replace** sub-tab, you can also replace and modify data entered in a Persons, Families, or Events section. For more details, see Find/Replace (voir page 217) article.

Graphs tabs



From Heredis 2021, you can, from Graphs tab, edit a dynamic wheel. See article The Dynamic Ancestors Wheel (voir page 407) and Descendants Wheel (voir page 413).

The panels

Removable panels display data or tools.

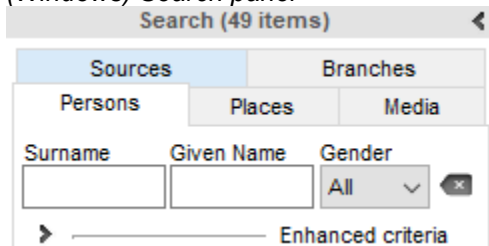
The search panel is displayed in a hidden area on the left of the main screen. Heredis offers different tabs in Windows & Mac version: **Persons**, **Branches**, **Places**, **Media**, and **Sources**.

The search panel and the results it displays are always available and provide direct access to the data for viewing or use to complete the entry.

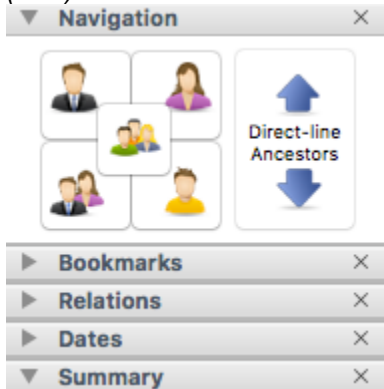
(Mac) Search panel



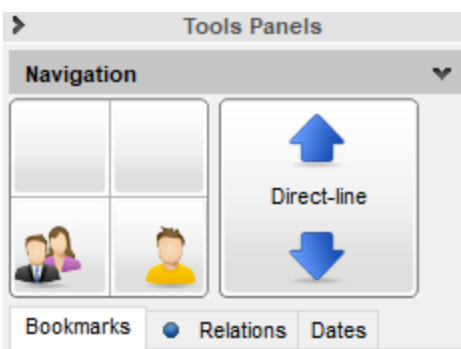
(Windows) Search panel







(Mac) Tools Panels






(Windows) Tools Panels



Display or Hide panels


Click the icon **(Windows)**  or , **(Mac)**  or  **Show/Hide Panel** at the bottom (or top for Windows) of the panel columns, to the right and left of the Navigation screen, choose the **Windows** menu > **Show/Hide Right or Left Panels**.

(Mac) Click the close check box  on a panel to hide it. To display a hidden panel, click the **Panel Options**  button at the bottom of the panel columns and select it from the list.

Add a column of panels, to the right or left of the navigation screen using the **Panel Options** , and then divide the panels into the two columns. Delete a panel column with the same button.

(Windows) You can choose to unfold only one panel at a time by clicking on the **Windows** menu > **Open one panel at a time**.

Resize the panels

The space allocated to the display of panels can be modified: click on the separation area between two palettes. The cursor takes the shape of a cross  and you can enlarge or decrease the area displayed above. Click the separation area between the panel column and the file display area to change the space allocated to the panels.


(Mac) Arrange panels

1. Drag and drop the panel.
2. Click the top strip of the palette (example: Branches) and drag to the desired location for the panel in any column.
3. When the desired destination is marked with a blue line, release the mouse.

See the article [Customize Heredis – Heredis Preferences](#).

The different data fields

Identity fields

Some fields are not displayed by default. If you need to use them click on the indented wheel  to choose the Data Entry mode adapted to your work. For further details, see Customize Heredis/Heredis' Preferences.

Surname

Type the surname of the person, without worrying about upper or lower case. Heredis includes various data entry aids which allow you to save time and avoid errors. Each new surname entered is added to the **Surnames Index**, you can change the formatting for any name from the Surname index.

See Customize Heredis/Heredis' Preferences and Indexes: generalities (voir page 241).

Prefix



The prefix is used to specify an attribute found often in an old deed, such as «Lord», «Sir», «Reverend»..., or in more recent documents, such as «Professor», «Master», «Doctor»...

Suffix

The suffix specified is assigned only to the surname of the person being entered. You can add references such as «Senior» or «Junior» or assumed names.

Given Names

Type the different given names of the person. The list of given names known to Heredis appears and is updated as and when you type. Once you have located the given name in the list, use the down arrow to select it and then press **Enter** to select it.

If the usual given name is not the first given name, it can be highlighted. To do this, click the icon (Windows:  , Mac: ) to the right of the field for entering given names, and select the usual name in the list.

Info • The usual given name may also be highlighted by entering it with quotation marks.

Gender

The gender of the person is automatically filled in by Heredis, according to the given name entered. If you want to change it, or if you typed a given name unknown to Heredis or for a multiple given name, type **M** for Male, **F** for Female, or leave **?** for persons whose gender is unknown. You can change the default gender for a given name by editing it in the Given Name Index. If you encounter multiple male Robin, choose by default the male sex in the Given Name Index. If you meet a woman named Robin, it will be enough to change the sex only for her. **Info**: if a given name is unknown to Heredis and add to the given name index, it will get the chosen gender of your first entry to use by default.

Nickname

The display of a nickname will be preceded by aka.

Occupation

Enter the occupation of the person. This item should contain the sole or main occupation he/she held. You may also enter as events any other dated and detailed occupations, for other activities. The list of recognized occupations with Heredis appears and is updated as and when you type. When you see the desired occupation in the list, use the down arrow to select it and press **Enter** to select it.

In the **Occupations** field, recognized occupations are underlined. When you type a word not recognized as an occupation, you may add it to the list of occupations available.

(Mac) Select the word or phrase with your mouse and click the arrow to the right in the input field. Heredis will add the occupation to the **Occupations Index**. When you leave this field, you will find that the occupation is now recognized as it is underlined.

(Windows) Select the word or phrase with your mouse and click the + button to the right in the input field. Heredis will add the occupation to the **Occupations Index**. When you leave this field, you will find that the occupation is now recognized as it is underlined.

Title

Indicate here any title of nobility or honorary title.

Personal number

This number corresponds to any personal numbering system you may wish to set up (numbering by genealogical areas, identification numbers...).

Signature

Scroll down the **Signature** menu and select:

- **Yes** if the person knows how to sign,
- **No** if you have observed that the person does not know how to sign
- **?** if you do not have any information.

You can choose which option is the default for each new person entered in Heredis > Preferences > Format, see Customize Heredis/Heredis' Preferences.

Child status


Scroll down the **Child Status** menu to choose the appropriate option. If your ancestor was born out of marriage of an unknown father, chose natural. Make your choice according to the data you found.

Flags and their use


Placed alongside the **Child Status** field, the clickable flags icons correspond to various characteristics of the person. They allow you to enter additional information relevant to your genealogy.

You may change the flags assigned to a person or to a list of individuals.


Complete person

Click the  **Complete person** icon if you know you do not have any research to do or if you do not want to search more on this person even if the major events are not completed.

Untraceable Father


Click the  **Untraceable Father** icon if the person was born of unknown father or if you know you won't be able to find out who he was (no more Archives left for example).

Untraceable Mother


Click the  **Untraceable Mother** icon if the person was born of unknown mother or if you know you won't be able to find out who he was (no more Archives left for example).

Note: the untraceable father and untraceable mother flags icons can be ticked both at the same time if both parents are unknown. You will have to untick the flag icon in order to input a father and/or a mother if you found out who he/she was.


Childless

Click the **Childless**  icon if you know that the person had no offspring. This flag is grayed out if you input a child to the primary person.


Unmarried

Click the **Unmarried**  icon if you know that the person never married. This flag is grayed out if you input a spouse to the primary person.


Secondary Person

Click the **Secondary Person**  icon to indicate that this person has only a minor role in your genealogy. Secondary individuals in your file may be excluded from printouts, exports and publications. You may, for example, declare secondary all children who died in infancy so that they are not in your tree charts.

Marked Person

Click the **Marked Person**  icon to highlight an individual and apply specific treatment to this person. A marked person may be ignored when you export the file, may be selected with specific research tools, may or may not be printed in a tree chart or a report.

Confidential Person

Click the **Confidential Person**  icon to avoid publishing information on this person in your printouts, exports and publications.

Click again the icon to deactivate.

Use the Smart Search to change flags at once for multiple persons. For example, you want to make confidential all people born after 1920. Use the Smart Search and apply the treatment to make them all confidential at the same time. See Smart Search (voir page 208) article for further details.

Facts

With **Facts**, enrich your genealogy with new data and attach witnesses, places, sources, medias and dates to it.

You can add as much as you wish, unlimited number, and you can organize them.

These facts are displayed in the central part of the screen **Data > Personal Data** in the **Facts** tab.

When a **Fact** is filled, the tab is marked with a blue spot.

Facts



Fact	Description	
Nationality		N



Read also Facts (voir page 140) article.

Notes

Add specific details to your genealogy by using the available notes. You will find entry boxes for notes on persons, families, events, media, sources, surnames, given names, occupations and places. The notes are equipped with formatting tools integrated in the Heredis software. One may also paste formatted text from other applications (word processors, browsers, desktop publishing tools, etc.) though images are ignored.

For further details, see Input notes (voir page 143).

How to find a person in your navigation history

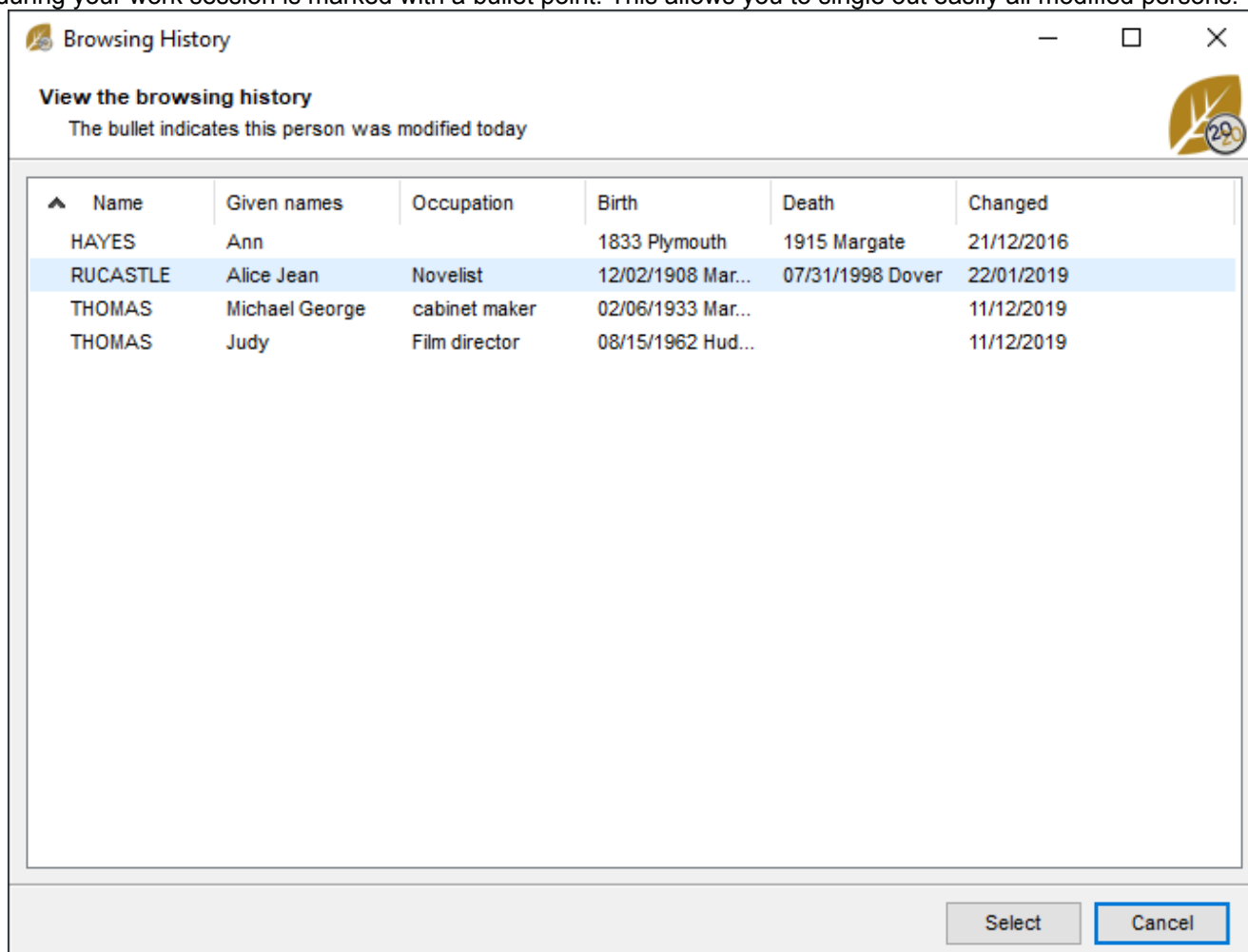
Select **Navigation History** from the drop-down list located to the right of the  or  buttons in the toolbar.

Windows Only

This window shows, in tabular form, all the persons you have displayed as the primary person since you started your work session. Unlike in the dropdown list, each person is listed only once in the table.

Click the column header to display data in alphabetical or numerical order for the following fields: **Name** or **Given Names** or **Occupation**, **Birth**, **Death** or **Changed**. Another click in the header will reverse the displayed order. The arrow indicates the sorting order.

Any person who has already been displayed as the primary person and whose data has been modified during your work session is marked with a bullet point. This allows you to single out easily all modified persons.



Browsing History

View the browsing history
The bullet indicates this person was modified today

▲ Name	Given names	Occupation	Birth	Death	Changed
HAYES	Ann		1833 Plymouth	1915 Margate	21/12/2016
RUCASTLE	Alice Jean	Novelist	12/02/1908 Mar...	07/31/1998 Dover	22/01/2019
THOMAS	Michael George	cabinet maker	02/06/1933 Mar...		11/12/2019
THOMAS	Judy	Film director	08/15/1962 Hud...		11/12/2019

Select Cancel

Choose a person from the list and click on the **Select** button to view him or her as the primary person again. Click **Cancel** or close the window to go back to the previous navigation screen.

Genealogy numbering

A genealogical research can lead to the processing of thousands of people, some bearing the same name and sometimes the same given name over several generations.

In order to identify ancestors and position them with relation to other persons, various numbering systems have been developed and are commonly used by genealogists.

Ancestor numbering

The method for numbering ancestors is called Ahnentafel. The number assigned to a person will identify the gender and position of any individual in direct descent (it does not apply to collaterals).

The three basic rules for Ahnentafel numbering are:

1. Even numbers are assigned to men and odd numbers to women.
2. For every couple, the woman's number is the equivalent of the number of the man + 1.
3. For every father, a number is assigned equal to twice that of his son or daughter.

The person whose ancestry is being researched bears the No. 1 (irrespective of gender). This is the person who is at the base of the genealogy file. He/she is called the **Root person** (voir page 78).





The father of the root person is No. 2 (twice the No. 1), his mother No. 3 (No. 2 + 1). His paternal grandfather is No. 4 (double the No. 2), his paternal grandmother No. 5 (4 + 1). His maternal grandfather is No. 6 (double the No. 3), his maternal grandmother No. 7 (6 + 1), etc.

Thus each ancestor is traceable from his/her number: No. 599 is a woman (odd No.) and is the wife of No. 598. She is the mother of No. 299, who is a woman, and who is the mother of No. 149, etc..

This numbering is displayed on the data entry and navigation tabs, in the panels and in the different documents and tree charts. It is automatically calculated by Heredis.

Identifying the Ahnentafel lineage

You may identify persons who belong to the Ahnentafel lineage by the symbol preceding their names.

Heredis identifies each person with an icon indicating its gender (blue  for men, purple  for women and green for persons whose gender is unknown). If the person is a direct ancestor of the root person, the head of the icon is yellow  or .


The primary person's number is displayed in the status bar after the generation's number (G).


If a marriage between blood relatives in his/her ancestry has created a duplicate branch (implex), the primary person's number is followed by the ++ signs. Click the Ahnentafel number to display the list of all the number the primary person bears.

Navigating in the direct lineage



Use the compass  to navigate in direct line from the tools panel.

If the primary person displayed is part of the direct lineage of the root person, the  **View previous**

direct-line ancestor and  **View next direct-line ancestor** arrow buttons allow you to move up or down the genealogy, generation by generation, without overlooking a single ancestor.

Descendant numbering

Heredis uses d'Aboville or Lettered numbering to treat individuals listed in a descending genealogy. The three basic rules for d'Aboville numbering are:

Genealogy numbering

1. Each child bears the number of his father or his mother followed by the number of his/her order of birth.
2. Then one proceeds by adding the order number of birth for each generation.
3. A letter distinguishes the different unions.

D'Aboville numbering allows you to know the number of generations separating an individual from his/her ancestor and from which branch of the family he/she comes.

Thus you will identify the progeny of a person: the eldest is No. 1, the next youngest No. 2, the very youngest No. 3, etc.. The two children of the eldest are numbered No. 1-1 and No. 1-2. The child of the first husband of the youngest bears the number No. 2-1a, those of the second husband are numbered No. 2-2b, N° 2-3b and No. 2-4b. The only child of the youngest is numbered No. 3-1.

D'Aboville numbering may be displayed on the different descendant documents and tree charts.

Lettered numbering uses the same system but with letters instead of numbers.

Implex (duplicate branches)

The same person may appear several times in an ascendancy, and appear in several branches of a tree. This is due to consanguineous marriages.

The ratio between the total number of ancestors and the number of ancestors that really exist (smaller) is called the Implex rate. One person may therefore bear several Ahnentafel numbers.

Imagine that Jack marries Marianne. However, Jack's father was the brother of the grandfather of Marianne. Jack and Marianne therefore have common ancestors, which will appear in two different branches of the family tree.

Heredis manages the different numbers automatically and symbolizes it with ++ symbol after the Ahnentafel number. If you click on the Ahnentafel number, you'll see all numbers corresponding to the same person.

In Descendants view (Family tab) and in Search Tracking, the name of implex persons will appear in red.

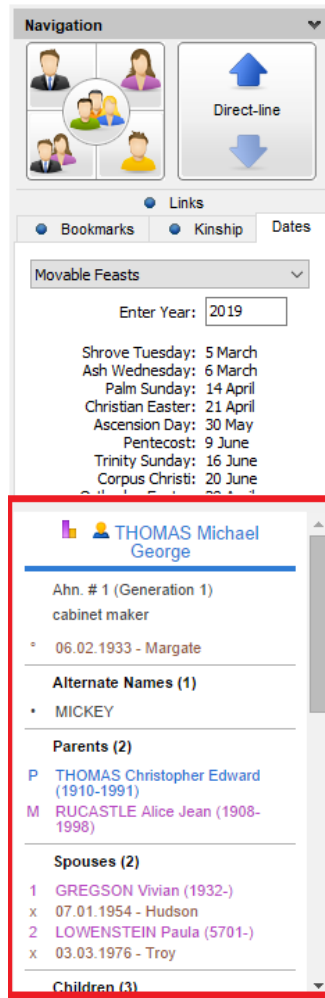
See also Implex (Duplicate Branches) (voir page 175)

Summaries

Each person, source, place... has a summary in the Tools Panel usually on the down right of the Heredis screen. You will find brief information and clickable links.

For example, click on a father's name, it will open the father's data.

Summary Heredis Windows before 2019's version



Summary Heredis Mac before 2019's version

Summaries



Since Heredis 2019, improvement of the summaries

Since Heredis 2019, each summary has a foldable panel allows you to visualize or hide data so that you can customize your display and view useful data only.

The display you have chosen for the summaries will be saved by the application and will remain unchanged until you decide to modify it.

A Person's summaries will allow you to see a vignette of the person's preferred picture as well as a list of Family Events along with other events and facts.

New Summary

  **THOMAS Michael George**

Ahn. # 1 (G 1)

cabinet maker

Bi. 02.06.1933 - Margate

▼ Preferred Picture



▼ Alternate Names (1)

- MICKEY
-

▼ Parents

F THOMAS Christopher Edward
(1910-1991)

M RUCASTLE Alice Jean (1908-1998)

▼ Spouses (2)

1 GREGSON Vivian (1932-)

M 01.07.1954 - Hudson


2 LOWENSTEIN Paula (H 5701-)

M 03.03.1976 - Troy

Customize Heredis

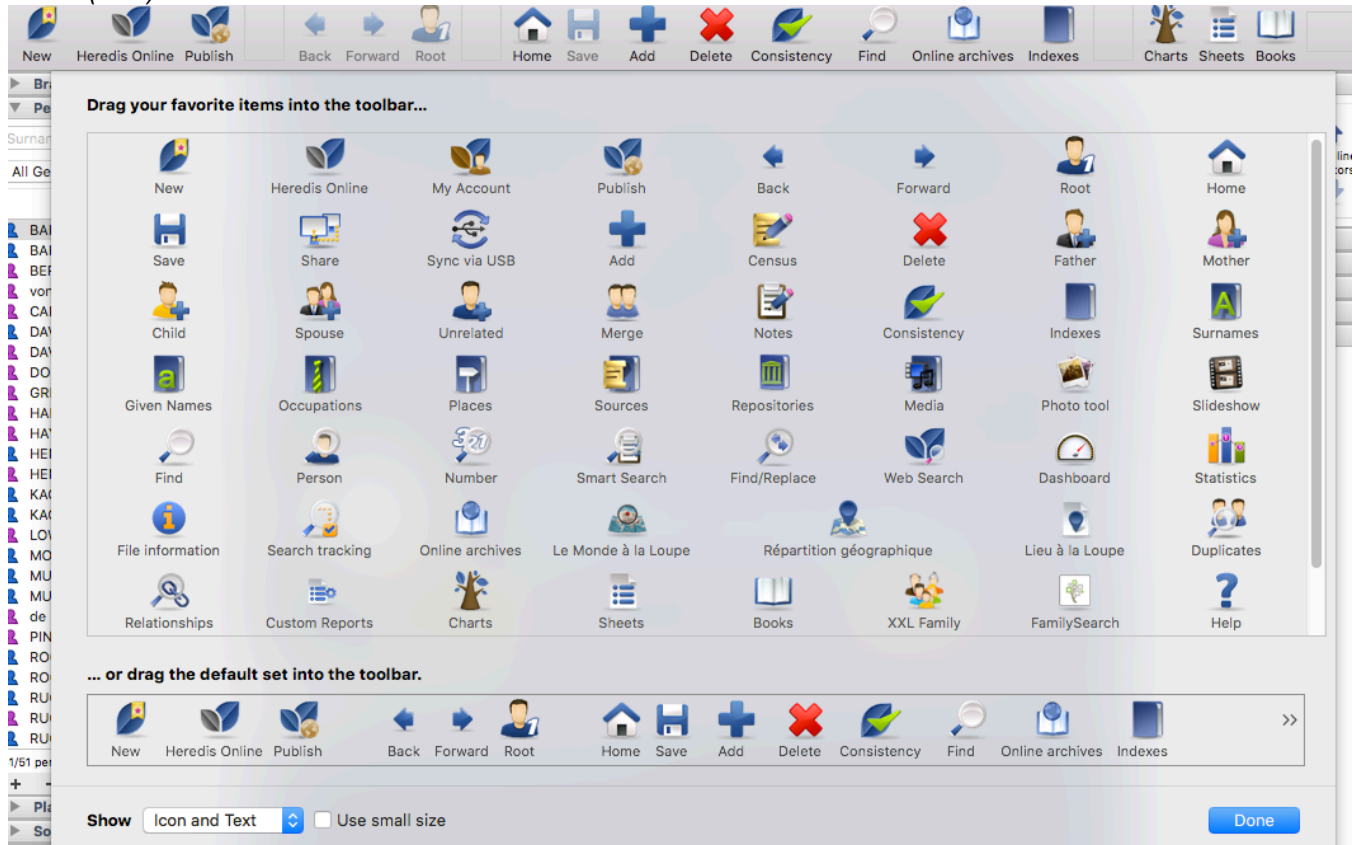
You may adapt Heredis to your personal work methods.

Select the Toolbar

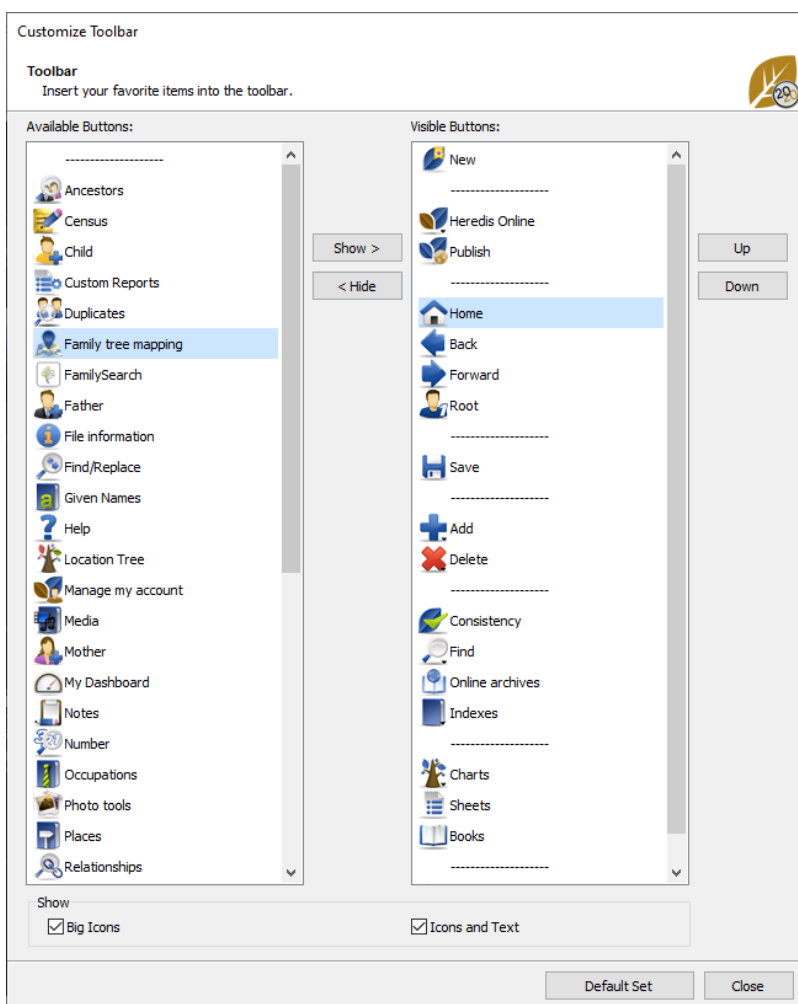
Click **Customize** button  to select the tools you need. You can also choose the size of icons and to display or not the text.

- To add a button in the toolbar,
 - **(Mac)** Choose an icon, drag and drop it to your toolbar at the desired location.
 - **(Windows)** Choose an icon and either drag and drop it from left to right or click on **Show** to add it on your toolbar.
- To remove an icon,
 - **(Mac)** Drag it out of the toolbar. Click on **Done** to close the window.
 - **(Windows)** Either drag it from right to left or click on **Hide**.
- To order the icons
 - **(Mac)** Drop the icons and place them in the order you want.
 - **(Windows)** Click on the **Up** and **Down** buttons or drag and drop on the list. Click on **Close** button to close the window.
- You can also add extra spaces between the buttons.
- To display the buttons as they were when Heredis was first launched,
 - click on **Default Set** button.
 - drag the default set to the toolbar.

(Mac) Customize the toolbar



(Windows) Customize the toolbar



You need more space? Then change the display format of the icons.

(Windows) Tick or Untick **Big Icons** and **Icons and Text**.



(Mac) Select **Icon only** from the **Show pop-up** menu and click **Use small size**.

Customize the panels

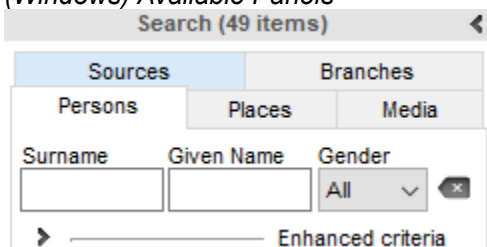
Display or hide the panels

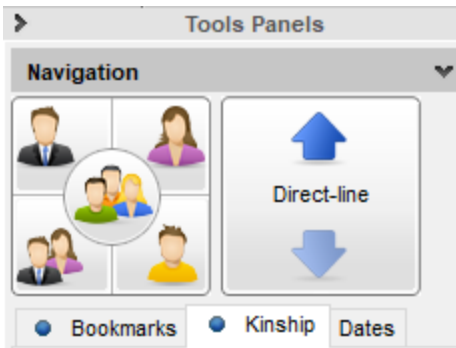
Certain panels are of no use to you? Click the closure button and they will disappear from the column.






(Windows) You can hide or display the **Search** and **Tools** panels on one side or the other of the screen.

Click the arrow at the top of the panels   to open or close them or choose **Windows** menu > **Show/Hide Tools** Panels, or **Show/Hide Search** panels, or **One panel at a time**. You can also swap the panels. You may alter column width and height of panels if necessary.

(Windows) Available Panels





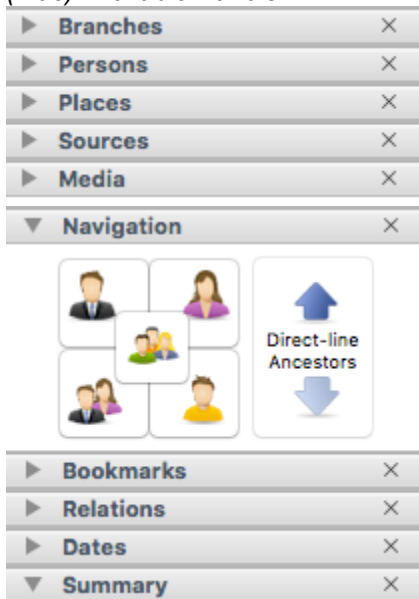
(Mac) Use the buttons   at the bottom of the screen to change the display of panels. The arrow button to the right  or left  will display the column, you can click on the cross button to hide the panel. The indented wheel  button at bottom right will give you access to any panels which have been removed. A simple click will display the panel again.

The procedure for opening the panels may be different for each column. Select **Open one panel at a time** and the panel which is open will automatically close when another panel is opened in the same column. Otherwise the panels will remain open as long as you have not clicked the disclosure triangle.

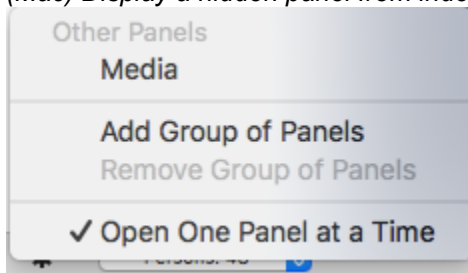
Add a column of panels if you want to have more information simultaneously displayed.

You may reposition a panel in the column or to another column by drag and drop with the mouse. Its new position is indicated by a blue line and then release the mouse to place it there.

(Mac) Available Panels






(Mac) Display a hidden panel from indented wheel



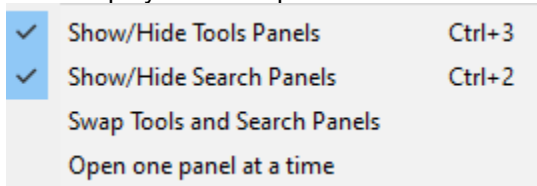
Resize the panels


Panels are resizable in width. Click on the line between panel/navigation screen.

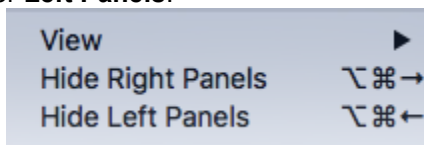
The cursor shape will change and turn into . You may increase or decrease the proportion of the screen allocated to the panels. The display area of the panel is vertically adjustable in the same way. If your cursor shape becomes  or , you can change the size of the column or area.

Arrange the panels

(Windows) Panels may be positioned to the right or left of the navigation screen. You can change their position by using the **Windows** menu > **Swap Tools and Search panels**. Select **Open one panel at a time** in the **Windows** menu to save space on your screen. Heredis automatically closes the open panel when you click the arrow to display the other panel.



(Mac) Move the panels by using drag and drop. Click the top bar of the panel and drag to the desired location for the panel in any panel column. When the desired destination is highlighted by a blue line, release the mouse. Choose **Open One Panel at a Time** by using the **Options**  panel button. Heredis automatically closes the displayed panel when you click the display triangle of another panel. Use Window menu to **Show** or **Hide right** or **Left Panels**.




Select data entry method

Heredis allows you to display only the information that you commonly use. This visual selection mode in no way changes your data, which are still preserved whether or not you display them. You can change the data entry mode at any time.

Depending on whether or not you have a complete deed or just a mention on a website, you will not need the same input fields. This is why the Heredis data entry fields are modular.

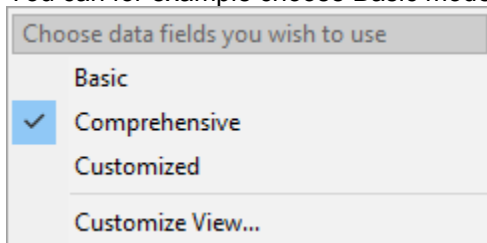
There are three data entry modes (**Basic – Comprehensive – Customized**) that you may use in different ways depending on the data input screen (**Add** screen, **Personal Data** tab, **Family Group Data** tab).

The **Basic** mode is displayed by default. This mode displays only the main fields. You can change the data input mode at any time.



Choose between Basic, Comprehensive or Customized mode by clicking on the indented wheel  on top right of **Add** screen, **Personal Data** tab or **Family Group Data** tab.

Prepare the data entry screen to your liking by using the **Customized** view.

Each data entry screen will then display the selected items. Every inputting screen can display a different mode. You can for example choose Basic mode for **Add** screens and Customized mode for **Personal Data** tab.




Check the items not displayed

If you choose the **Basic** or **Customized** display modes, it may happen that certain information entered does not appear. Heredis alerts you by displaying an alert triangle  next to the indented wheel icon .

Customize Heredis

(Choose data fields you wish to use).

Click the alert triangle : the display is changed temporarily and all saved data items are displayed. When you navigate to another person, the data items are again hidden in accordance with the mode you have chosen.

See also Heredis' Preferences (voir page 65) and Change Heredis colored Theme (voir page 64).

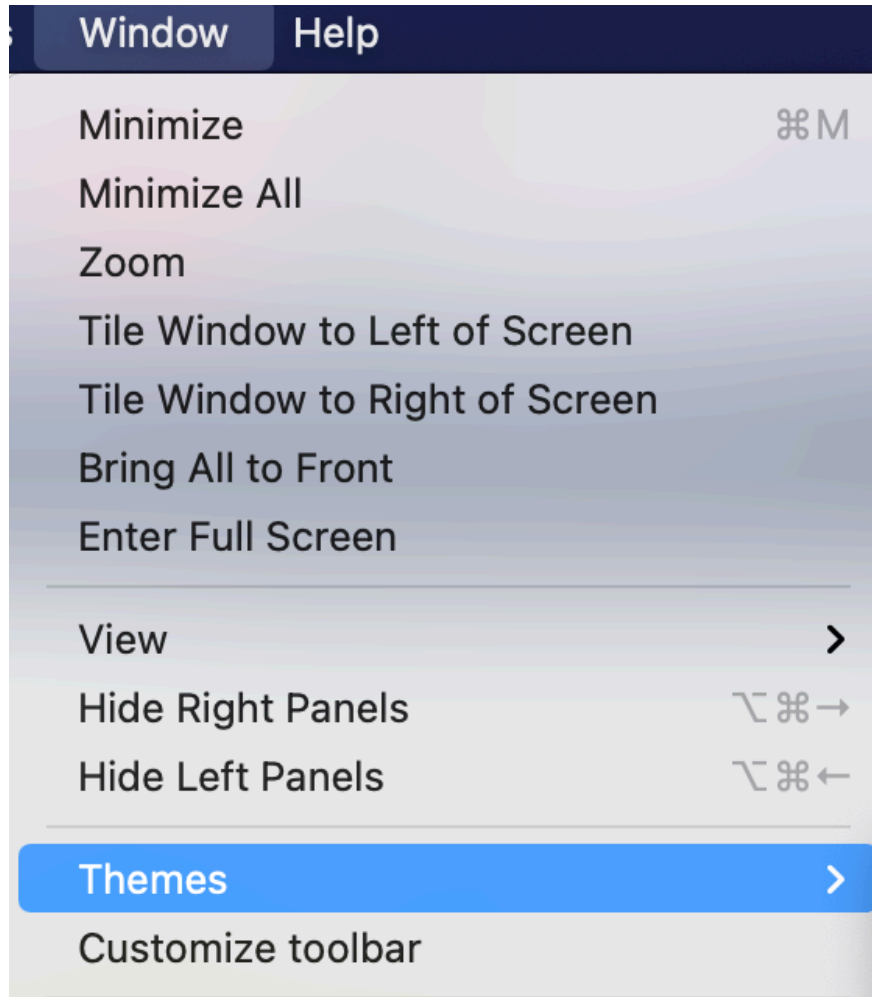
Change Heredis colored theme


You may adapt Heredis to your personal work methods.

Choose your color theme

You spend many hours in front of your Heredis screen? Select the color of the environment that is best suited to your eyes and your taste.

Click **Window** Menu > **Theme**.



Click the **Themes** button  to change the color of the main Heredis screens.

Heredis' Preferences

Define your preferences

In the **(Windows) Tools** menu > **Preferences** > **Heredis Preferences**, **(Mac) Heredis 20xx** menu > **Preferences**, you may define the formats of all the various input fields. Choose how to display the names, places, numbers. Choose the default options for creating events and set inconsistency alerts. Choices made in Heredis Preferences will apply by default for all new inputs.

You can change them at any time.

Windows' Heredis Preferences

The screenshot shows the 'Heredis Preferences' dialog box with the 'Appearance' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with the following tabs: General, Countries, Format, Appearance (selected), Consistency, and Advanced. The 'Appearance' tab contains several sections:

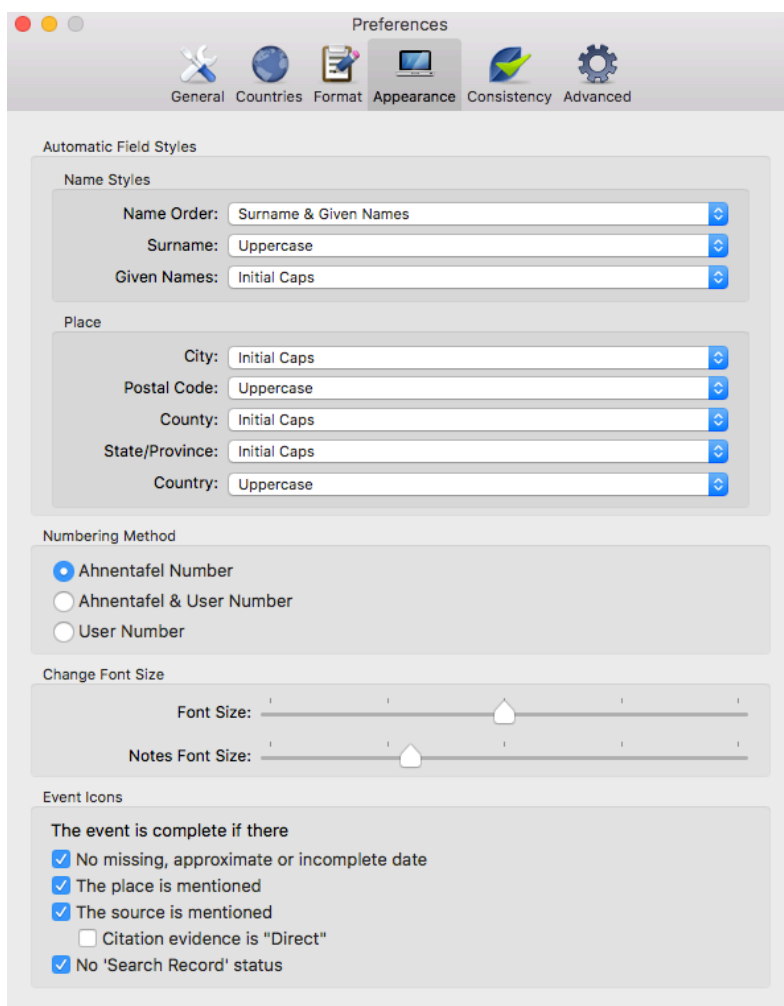
- Name Styles:**
 - Surname: Uppercase
 - Name Order: Surname & Given Names
- Numbering Styles:**
 - Numbering Method: Ahn. Number
- Place Styles:**
 - City: Initial Caps
 - Postal Code: Uppercase
 - County: Initial Caps
 - State/Province: Initial Caps
 - Country: Uppercase
- Event Icons:**

The event is complete if there is:

 - No missing, approximate or incomplete date
 - The place is mentioned
 - The source is mentioned
 - Citation evidence is "Direct"
 - No 'Search Record' status

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Mac's Heredis Preferences



Automatic formatting of data

When you enter a surname or given names, you can type them in either uppercase or lowercase. If the **Uppercase** option has been selected in **Preferences**, a surname or a given name typed in lower case will be automatically converted to uppercase, including accented characters. If the name contains a particle it will remain in lowercase.

If you have chosen in **Preferences** the **Initial Caps** option, the surname or given name's first letter will be automatically converted to uppercase, including accented characters.

Choose the recognized places

Heredis integrates lists of places for most of the countries of Western Europe and North America, indicating their administrative connections (county, state, country). These headings may be different from country to country.

Because your ancestors probably lived in your home country or are from a limited number of other countries, you can limit the list of countries for which places will be suggested during the data entry.

To choose the countries for which you need input help, open **Heredis' Preferences**.

1. Choose **Countries** tab.
2. Check the different countries where you are likely to have places to enter. You can add more at any time. Thanks to automatic entry, you have direct access to all the information for these places.

- The places proposed during data entry in the **Add** screen, **Personal Data**, **Family Group Data** or **Places Index** tabs will be limited to those countries. The locations already used in the file are displayed at the top of the list.

Heredis' Preferences


- Use the arrow keys on the keyboard and confirm the selected location with the Enter key or click the selected location.

Heredis will show you all the location information in the free area above the topic or in the tooltip for the **Data > Family Group Data** screen.

Info • The proposed geolocations relate to the whole world and are not limited to countries ticked in the **Preferences** menu.

This place database can be enriched of places you inputted. See also Places index (voir page 267) and Geolocating Places (voir page 289).

Completeness of data

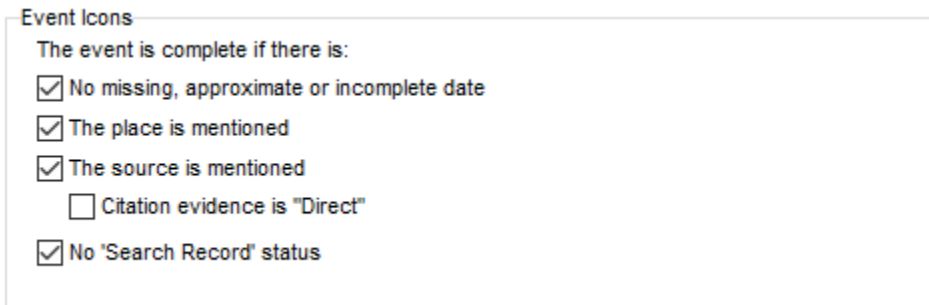
The icon  indicates whether or not essential information for major life events is complete (Birth/Christening, Marriage/Union, Death/Burial).

This icon concerns the completeness of information for the primary person in the Status bar and in the **Search** tab. It appears also in the **Persons** and **Branches** panels for all individuals displayed.

It also influences Search Tracking tool. See Search Tracking tab (voir page 332) article.

The icon display is defined in **Heredis' Preferences > Appearance**. You can choose what information is required for an event to be complete: the accuracy of the date, place, the presence of a source and the status of the search for the event. Tick the boxes you believe are essential for you.

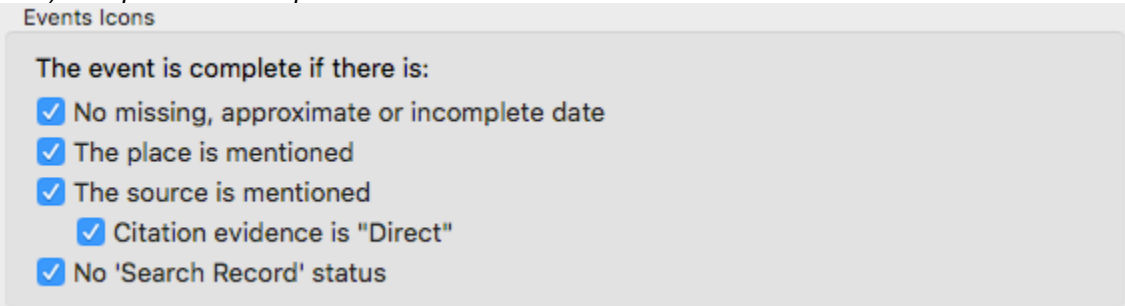
(Windows) Completeness setup



The event is complete if there is:

- No missing, approximate or incomplete date
- The place is mentioned
- The source is mentioned
- Citation evidence is "Direct"
- No 'Search Record' status



(Mac) Completeness setup



Events Icons

The event is complete if there is:

- No missing, approximate or incomplete date
- The place is mentioned
- The source is mentioned
- Citation evidence is "Direct"
- No 'Search Record' status

Regardless of the information collected in Heredis, you may determine that certain individuals will not require further research. Click on the icon  in **Data** tab > **Personal Data** or open the **Search** tab > **Search Wizard** and click the  **Consider that this individual is complete** button. The icon changes color from grey to blue.

When using the **Branches** panel, choose the **Complete Persons Only** option, and the results take into account both the completeness of the events and the individuals for whom you had determined that they be considered complete.

Consistency Control – Error-free data entry

In order to avoid errors, with each data entry, Heredis checks that the information entered is logical in relation to the persons and events already known. It alerts you to any anomalies which you may either correct or confirm.

Heredis notifies you when you enter an event date which is later than that of the death of such person. You may fix the date entered if you made a mistake, or confirm a post-mortem event, such as the transfer of ashes or an act concerning the deceased's estate.


Note: You can use and personalize a post-mortem event in order to avoid alerts like this. See also Input events (voir page 114) article.

Heredis also checks for possible inconsistencies if you have created a link with a person bearing the same name as the person you are entering: it will inform you, for example, if you link a possible father, that he was 143 years old at the birth of the child, or if the wife assigned to the primary person had died before her wedding.

Consistency control

Permanent control for duplicates

You will be notified if any date or time appears inconsistent.

Any input which appears inconsistent will be highlighted by a red cross  in the **Consistency** button on the toolbar. Click the button to be notified of the apparent inconsistency (due to a mistake of date, or the attribution of a link which is not valid) and understand it. Consistency control is automatic and can not be turned off. When inconsistencies are detected, a message pops up to alert you at the end of the input.

Review the summary of the inconsistencies shown for the primary person. These controls are only indicative and it is your responsibility to rectify the anomalies detected or not.

To avoid the double entry of a person in your family tree, Heredis will display a list of existing name matches similar to your entry for any new persons you may enter in the **Add** menu screens.

Simply select from the list and click **Choose** to choose that person instead of creating a new individual.

For further information, read (Windows) Permanent control for duplicates, (Mac)Permanent control for duplicates and Merging Two Persons (voir page 352).

Check all persons in the file


Heredis provides a tool for detecting all inconsistent data in your genealogy file.

- Open the **Persons** panel.
- **(Windows)** Choose the **Enhanced Criteria** then **Inconsistent Data**.
- **(Mac)** Choose the **Genealogical Criteria** option then **Inconsistent Data**.
- Double-click each of the persons displayed in the results list to verify their data.


You can also launch a Smart Search to find inconsistencies. Set up as follows: **Persons > Consistent > No**.

Mac Info • To do this at a later date, you may store the list obtained by marking all the people displayed. Click the **Batches** button (indented wheel icon) on the **Persons** panel toolbar. Choose the **Mark/Unmark > Mark All** option. You may also keep the results displayed by printing the list of incoherent persons. To do this select the **Print List** option.

No longer consider a person as incoherent

After checking the data of the primary person and to keep the information as it was entered, choose **Person > Check Consistency** or press the **Consistency** button  on the toolbar and select the **Mark** as

Consistent option.

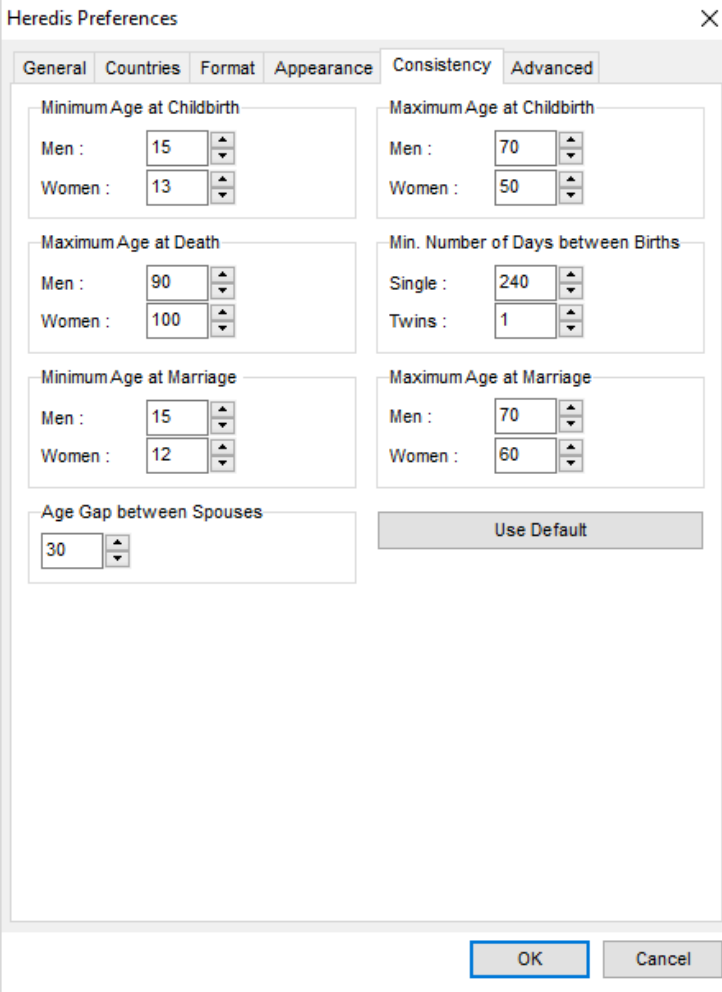
The **Consistency** button changes its appearance and displays a green tick mark . This person will no longer be displayed in the list of a search for inconsistent information.

Change the consistency criteria

Heredis allows you to set your own criteria for checking the consistency of some data.

- **(Windows)** Choose **Tools > Preference > Heredis Preferences**
- **(Mac)** Choose **Heredis > Preferences**
- Open the **Consistency** tab.

Windows Consistency

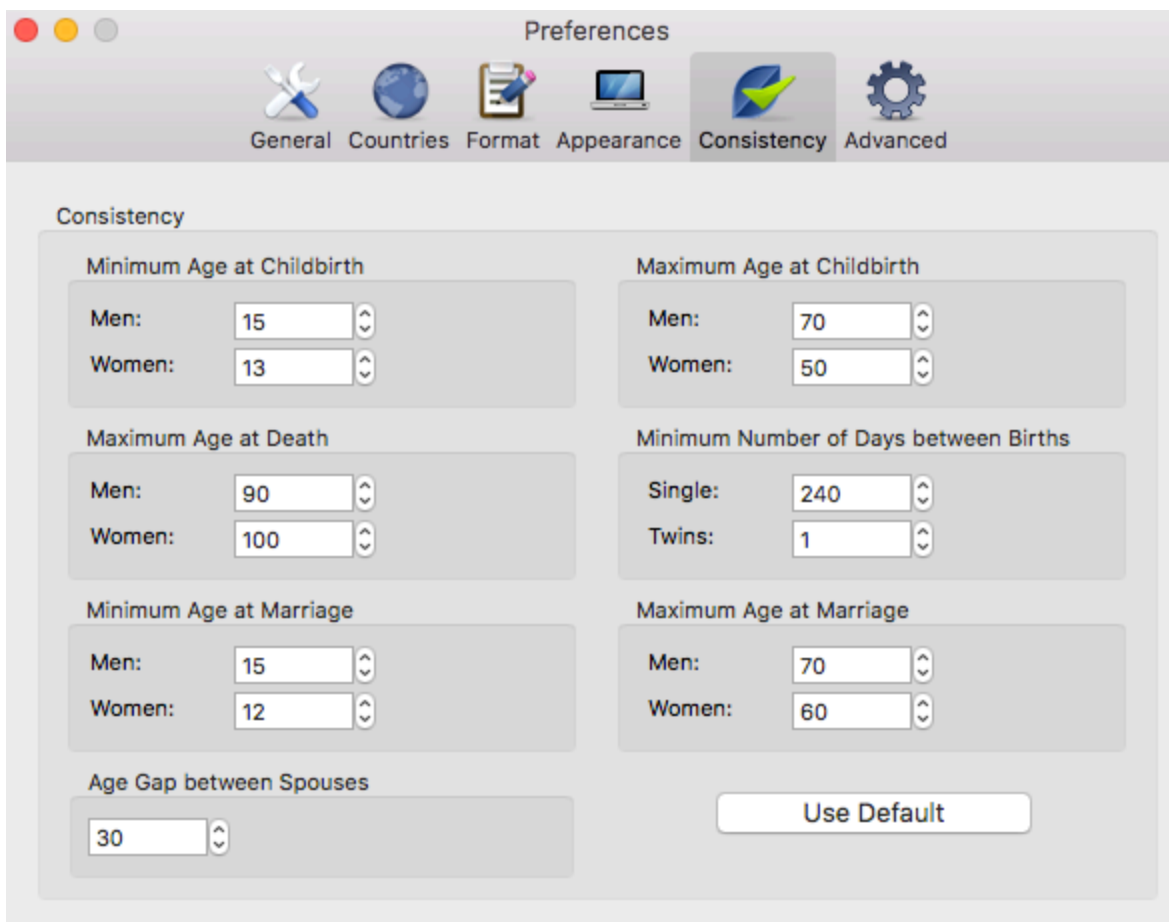


The screenshot shows the 'Hereditis Preferences' dialog box with the 'Consistency' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with the following tabs: General, Countries, Format, Appearance, Consistency (active), and Advanced. The 'Consistency' tab contains several settings for age and birth criteria, each with separate controls for men and women. The settings are:

Setting	Men	Women
Minimum Age at Childbirth	15	13
Maximum Age at Childbirth	70	50
Maximum Age at Death	90	100
Minimum Age at Marriage	15	12
Maximum Age at Marriage	70	60
Age Gap between Spouses	30	
Min. Number of Days between Births	Single: 240	Twins: 1

At the bottom of the dialog, there is a 'Use Default' button and 'OK' and 'Cancel' buttons.

Mac Consistency



- You may modify the limit value so Heredis will consider it consistent or not. The controls relate to the age of spouses at marriage, age at death, parental age at birth of children, the gap between two dates for successive births, the age gap between spouses. Indicate the minimum or maximum values (expressed in years) you wish to apply to your genealogy file. It may be interesting to change the maximum age at death to input contemporaries. It is frequent since the XXth century for men to pass away after 90.

These amendments are effective immediately for the all file.

Validity Control

Heredis analyses all information and will block any erroneous data entry.

Dates

Dates should be entered properly.

See article Dates (voir page 121) for possible formats.

Heredis notifies you when you enter an event date which is later than that of the death of such person. You may fix the date entered if you made a mistake, or confirm a post-mortem event, such as the transfer of ashes or an act concerning the deceased's estate. You can use and personalize a post-mortem event in order to avoid alerts like this. See also Input events (voir page 114) article.

Heredis also checks for possible inconsistencies if you have created a link with a person bearing the same name as the person you are entering: it will inform you, for example, if you link a possible father, that he was 143 years old at the birth of the child, or if the wife assigned to the primary person had died before her wedding.

Links

Links created between people must be consistent. Heredis prevents the entering of inconsistent links: one person cannot be entered as the son of another if he is already his grandfather. A message will indicate why the link may not be validated.

Note: A message will pop up if you try to marry 2 persons of the same sex. You just need to validate the message if you didn't make a mistake. There won't be any inconsistency. This message pops up only to make sure you didn't input a wrong information.

Save time by inputting faster

Data memorized

Heredis memorizes all your previous data entries, item by item, and will suggest the appropriate data as you type. To validate a proposed entry, press **Enter** or **Return** keys. To choose among several propositions, use the arrow keys and then press **Enter** or **Return** keys.

Prerecorded data

The application is supplied with databases of places, given names and occupations. Choose from the propositions as they appear. If no proposition appears or if it is not appropriate, select **New Place**.

Each new given name entered is automatically added to the **Given Names Index**.

Each new Occupation will be added to the **Occupations Index** by clicking the arrow button in this section after selecting a word or a phrase. The new elements will be proposed in subsequent data inputs.

For more details about Indexes, see Indexes: generalities (voir page 241).

Preferences

Whichever way you may have typed data, in uppercase or lowercase, Heredis will automatically format the entry according to your predefined **Preferences**.

For more details on how to personalize Heredis, see Heredis' Preferences (voir page 65).

Automatisms

The **Gender** field is filled in automatically based on the given name entered, but it may be changed. Multiple given names will be automatically entered according to your initial entry, but may be subsequently altered. Check out The different data fields (voir page 50) article.

Heredis calculates for you the date of birth of people based on their age at any particular event. It gives them an approximate date which you may confirm later, when you know it. See also Consistency Control – Error-free data entry (voir page 68) article.

Drag and drop

To speed up your data entries, complete your data by using drag and drop.

Add links to other people by selecting them in the various panels and deposit them in the data field if it is empty. Select a man in the **Persons** panel and drop it as the grandfather in the **Immediate Family** tab. Select a woman from the (Windows) **Kinship**; (Mac)**Relations** panel and drop in **Personal Data > Event > Christening** to make this person the godmother.

In the same way, you may add information to the **Events** field. Select a source from the **Sources** panel and drop it on the event you will have selected to associate it with this event. You may do the same for a place selected from the **Places** panel.

Add media already used for other data by choosing from the **Media** panel and drop them into the appropriate entry fields. A group photo can illustrate both a family and a marriage event.

(Mac) Correcting spelling

Anything you type in the **Notes** data entry field will be subject to a spelling alert. Typing errors are underlined in red. Right-click the underlined word so that the software may propose the correct spelling.

Save time by inputting faster

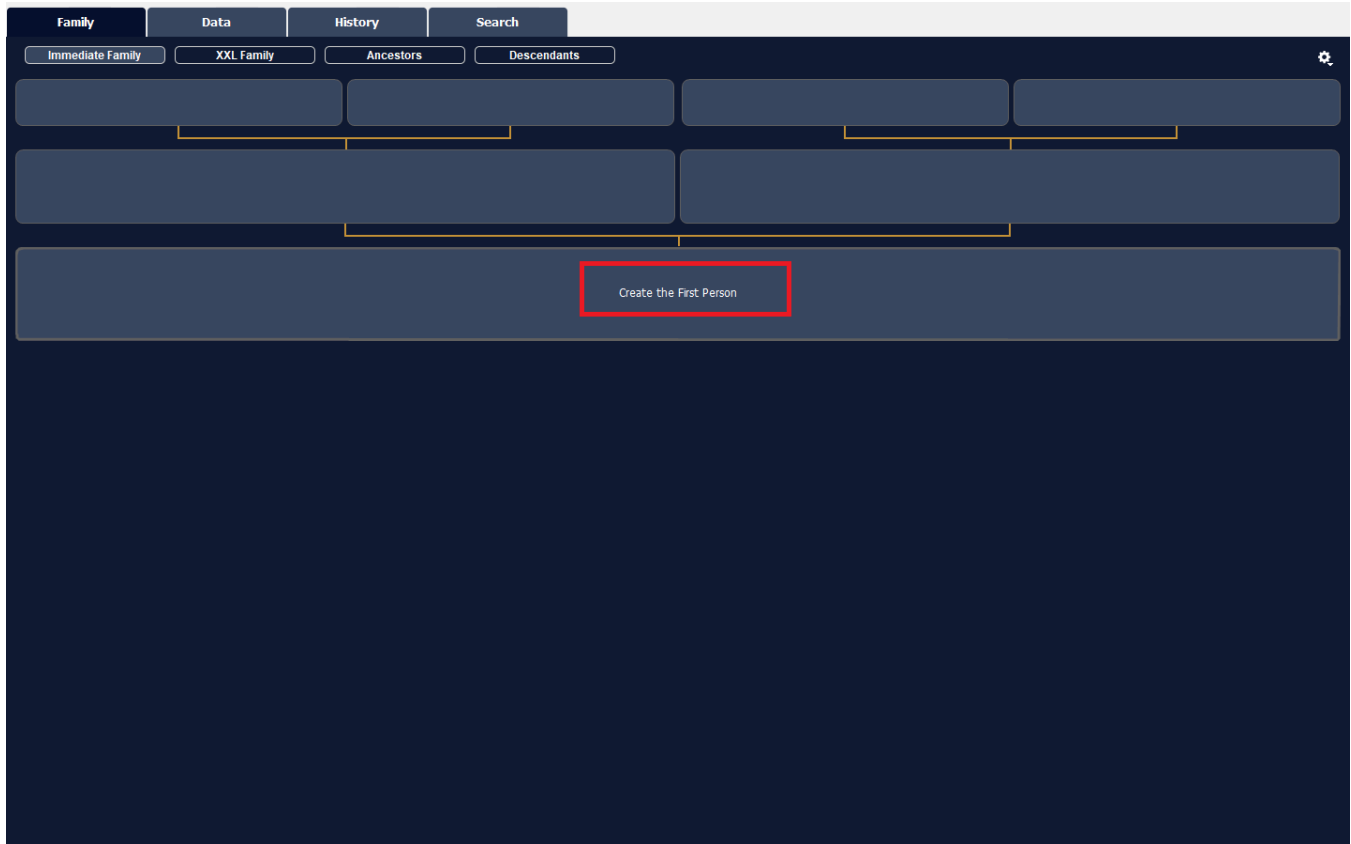
Census Grid


Heredis created a census grid to help you input all data found in a Census at once. See our Census (voir page 165) article for details.

Create the first person

You have chosen to create a new genealogy: Heredis opens an empty **Immediate Family** screen, which will fill up as and when you enter data. Now create the first person to start your new file.

Click **Create the First Person** in the center of the screen



or click on **Add**  button of the toolbar > **Add Unrelated Person**
or choose **Person** menu > **Add > Unrelated Person**

The **Entering New Person** screen opens with the data boxes to complete. To move from one box to another, press the **Tab** key or click in the next box.

Heredis includes data entry aids which will save you time and avoid errors.

Windows Entering a new person

Create the first person

Entering New Person

Personal Data

Surname
[]

Given Names [] Gender [?]

Occupation []

Child Status [Legitimate] Signature [?]

[] [] [] [] [] [] [] [] [] [] [] []

Birth/Christening

Event Type [Birth] Date [] []

Place [] Subdivision []

Sources []

[+] [-]

Death/Burial

Type [Death] Date [] Age/Record [] []

Place [] Subdivision []

Sources []



[Add] [Cancel]

Mac Entering a new Person

Surname

Type the name of the first person without worrying about upper or lower case. Each new name entered is integrated into the **Surnames Index**, making it available later for help with entering surnames.

Given Names

Type in the given names of the person. The list of given names known to Heredis appears and is updated as you type. Once you locate the given name in the list, use the down arrow to select it and then press the **Enter** key to select it. If the usual given name is not the first given name, it may be highlighted. To do this click the icon (Windows: ; Mac: ) which appears to the right of the data input area, and select from the list the usual name, or enter the usual name in quotes.

Gender

Gender is automatically inserted by Heredis based on the given name(s). If the given name is multiple, Heredis leaves a ?.

For gender selection, click the arrow or type **M** for Male, **F** for Female. Your choice will be stored for future use of the same given name. If you want to modify it later, you can do so in the **Given Names Index**, without changing the data that you have already entered.

Occupation

Enter the occupation of the person. This section is for the sole or main occupation the person held. You may also enter **Occupation** events, dated and detailed for any other activities. The list of recognized occupations with Heredis appears and is updated as you type. When you see the desired occupation in the list, use the down arrow to select it and tap **Enter** to select it.

In the **Occupation** field, recognized occupations are underlined. If you type a word that is not recognized as an occupation and want to add it as an occupation, with the mouse select the word or group of words and click the arrow to the right in the box. Heredis will create an occupation that is added to the **Occupations Index**. As you leave the field, you will find that it is now a recognized occupation because it will be underlined.

Child status

Create the first person









Scroll down the **Child Status** menu and choose the appropriate option.

Signature

Scroll down the **Signature** menu and select **Yes** if the person knows how to sign, **No** if you have seen that he/she cannot sign, **?** if you are not sure of the information.

Flags

They can enter additional information relevant to your genealogy.

- Click the  **Complete person** icon if you have no more research to do for the person.
- Click the  **Untraceable father** icon if the person was born of unknown father or you can not know the name of the father (missing records...).
- Click the  **Untraceable mother** icon if the person was born of unknown mother or you can not know the name of the mother (missing records...).
- Click the  **Childless** icon if you know this person had no offspring.
- Click the  **Unmarried** icon if you know this person did not have a spouse.
- Click the  **Secondary** Person icon to indicate that this person has only a minor role in your genealogy. Secondary persons in your file may be excluded from printouts, exports and publications. For example you can declare as «secondary persons» all children who died in infancy so that they will not appear in your tree charts.
- Click the  **Marked** Person icon to highlight the individual and apply specific treatment to him/her. A marked person may be excluded when exporting the file, or highlighted in a search, or may or may not be printed in a tree chart or a list.
- Click the  **Confidential** Person icon to prevent publication of information on this person in your printouts, exports and publications.

Main events

Heredis distinguishes main events (Birth – Death) from minor events (Communion – Retirement – Will, etc..). The **Entering New Person** screen gives access to major events only. If necessary you can enter minor events in the **Personal Data** tab at any time.

Birth

1. Click the **Birth** event title to bring up the pop-up menu and select **Birth** or **Christening**.
2. Enter the date.
3. To enter the **Place** field, type the name of the town of birth or **Christening**. Once you enter the first letters of the place, Heredis proposes a list of places that may match your entry. Select a place using the mouse or use the up and down arrows and confirm the location selected with the **Enter** key. If there is no place relating to your entry, select **New Place**. Complete the various boxes for the new location to be saved and confirm its creation by clicking **OK**.

Death

1. Click the **Death** event title to bring up the pop-up menu and select **Death** or **Burial**.
2. Proceed in the same way as for **Birth**.


Further information

To display further data fields, use the **Choose Data Fields** option . For further details, see Customize>Select data entry method.

Validate the creation of the first person



Click the **Add** button to validate the first person in your genealogy, or press the **Enter** key. The person appears in the center of the **Immediate Family** screen.

This individual is the starting point of your genealogy, the person called the Root Person and who will have the Ahnentafel number 1. Continue your genealogy by clicking on the Add Father (voir page 79), Add Mother (voir page 79), Add Spouse (voir page 87) or Add Child (voir page 93) links to complete the immediate family.

Later on, you can access the root person by clicking on the  button or from the menu: **Find > View Root Person**. The Root Person can be changed at any time, see The Root Person (voir page 78) article.

The Root Person

The Root Person is the individual at the base of your genealogical research. By default, Heredis defines the first person entered in your genealogical file as the root person and assigns the Ahnentafel number 1 to this person.

Heredis indicates that a person is part of the Ahnentafel lineage (direct ancestry of the root person) by the yellow color of the heads  and .

To access the root person

- Click the **Root** button  in the taskbar.
- Select **Find > View Root Person**.

To modify the root person

1. Display the new person to be at the base of the genealogy currently open in Heredis.
 2. Select **Person > Define as Root Person**
- The new root person will bear the Ahnentafel number 1 and all other Ahnentafel numbers will automatically be reassigned by Heredis based on the new root person.

Add parents

Add a new person

All tabs

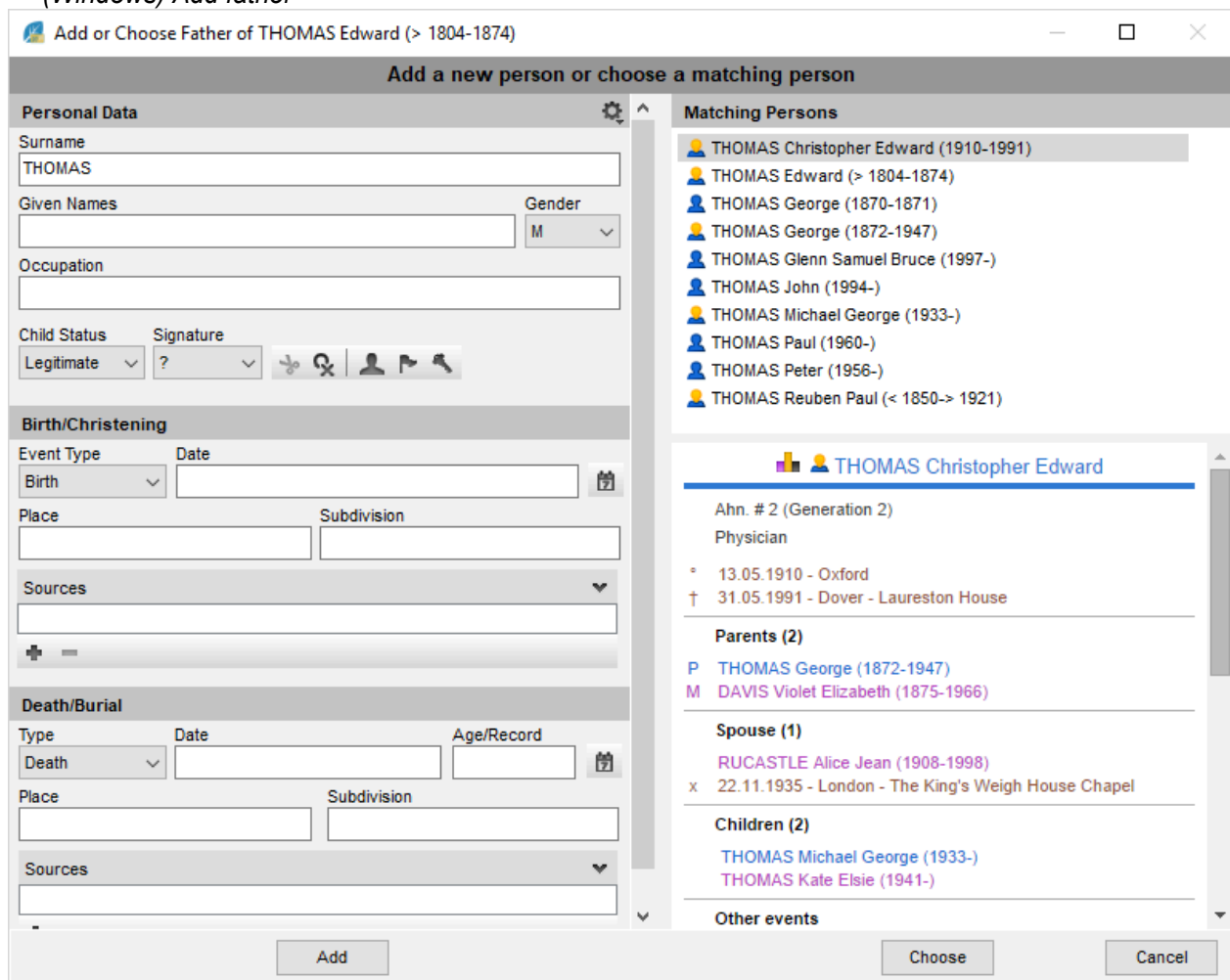
1. Place the person for whom you want to add parents, as the primary person.
2. Create the link.
 - Click the link in the empty boxes for the father or the mother.
 - Choose **Person > Add Father** or **Add Mother**

- Click the  button (Add or link persons) on the toolbar and choose **Add Father**  or **Add Mother** .

3. Enter the new person.
In the **Add Father** or **Add Mother** window, complete the entry fields with the information you have. Some items are prefilled such as the father's surname or gender of the father and mother.

- To change the surname, click in the field and enter another name. You can change the gender using by clicking in the Gender box and changing it.

- **(Mac)** To change the gender, click the **Do not specify gender** lock.
(Windows) *Add father*



(Mac) *Add father*

The screenshot shows a software window titled "Add or Choose Spouse of DEBACQ Hélène". The window is divided into two main panes: "Add" and "Choose".


Add Pane:

- Birth:** Includes fields for Date, Time, Place, and Subdivision. There is a "Private Event" checkbox and a "No search record" dropdown.
- Desc./Cause:** A text input field.
- Witnesses (0):** A table with columns: Role, Name, Age, Comments.
- Sources (0):** A table with columns: Source, Comments, Evidence.
- Death:** Includes fields for Date, Time, and Age/Rec. (Age/Record).

Choose Pane:

- Matching Persons:** A list of names with birth and death dates, such as ACHART François (-< 1767), ALLOIS Antoine (-< 1712), AMBOCHEUR Antoine ((c) 1689-17...), etc.



At the bottom of the window, there are buttons for "Add", "Choose", "Cancel", and "OK". A gear icon is located at the top right of the window.

Info • Click the  indented wheel icon at the top right of the screen to change the display mode if all desired fields are not displayed.

Before you add the parent, check the right part of the screen to make sure he/she is not already created. Click **Add**. The parent is created as well as the link with the child.

Info • You can link the grandfather and grandmother in the same way.

Family Group Data entry

1. Click the  button at the bottom of the Parents entry field.
2. Choose **Add Father** or **Add Mother**. If this arrow  appears at the end of the line, it means Heredis detected a potential duplicate. Click on it to compare the potential duplicate.
3. Continue the data input with the information you have. To validate the new individual, click outside the entry field.




Info • For more information on adding the spouse of a child in the **Family Group Data** tab, see Input a Family Group Data.

Link an existing person

During data entry

- 1 Place the person for whom you want to add parents as the primary person.
2. Create the link.

- Choose **Person** > **Add Father** or **Add Mother**

- Click the  button on the toolbar and choose **Add Father**  or **Add Mother** .

- Click the links in the empty boxes for the father or the mother on the **Immediate Family** screen.

In the **Add Father** or **Add Mother** window, select the person to be linked from the list of **Matching**

Add parents

Persons to the right of the screen. To limit the list displayed, you can enter the given name in the **Personal Data** area. Click **Choose** or double-click the name in the list.

Info • To access this screen from the **Family Group Data** tab, click the red arrow  that appears on the input line.

Drag and drop

1. Place the person for whom you want to add parents as the primary person.
2. Drag the father or mother from one of the side panels (**Persons, Bookmarks, Relations...**), and release on the display area of the screen (Father or Mother box or Parent fields in the **Family Group Data** tab). The parent is then linked.

Info • Creating a link to the Father and a link to the Mother will automatically create a union between the father and mother, even if no event has been entered.

Unlink a person and parents

When you detach a person from his/her parents, the individuals concerned will always remain in your genealogy file.

Info • After you have removed the parent link, you can assign a different mother or father to the primary person.


All tabs

1. Place the person as the primary person.
2. Remove the link with the parents.

- Choose **Person > Delete > Father Link** or **Mother Link**.

- Click the  on the toolbar and choose  **Unlink Father** or  **Unlink Mother**.

Family Group Data tab


1. Select the parent to be deleted in the **Parents** data entry fields.
2. Click the  button at the bottom of the field, and choose **Unlink Father** or **Unlink Mother**.

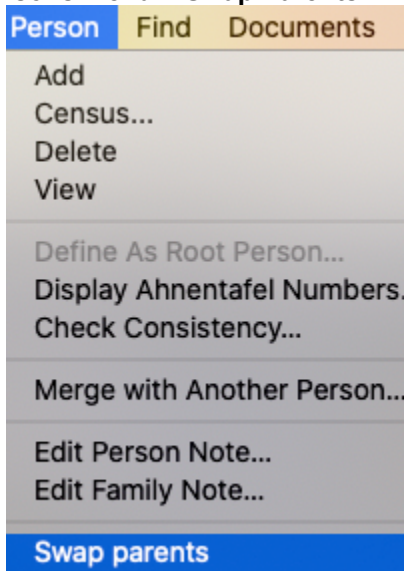
Info • If you select the Delete Father and All Links, or Delete Mother and All Links option, this will remove the person from your genealogy, not just the link.

Swap parents

Sometimes you make a mistake and enter the mother instead of the father. The Ahnentafel numbering is false. It is therefore useful to be able to rectify this mistake.

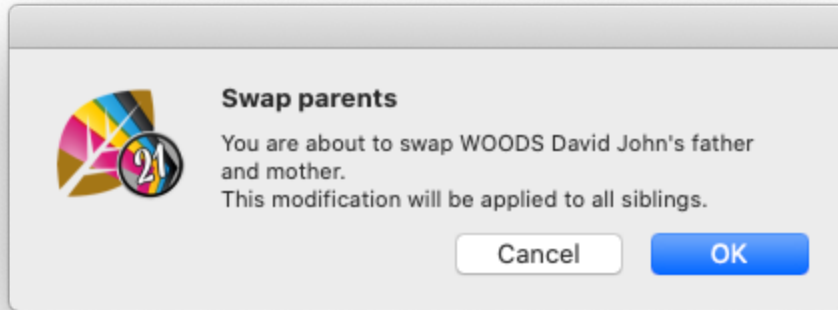


Since Heredis 2021,  it is no longer necessary to unlink each parent to connect the right ones, click on the **Persons menu > Swap Parents**.



An alert message informs you of the upcoming action and that the change will apply to all siblings.

Swap parents





Confirm by clicking on Yes. Et Voila !

Important: the place of the father on the left and the mother on the right is thus made by convention. For your GEDCOM exports, it is important to respect it.

Untraceable Parents

It is not uncommon to come across abandoned children or children born to unknown fathers when doing genealogical research. In most cases, chances of finding out who the parents were are quite slim. You can now categorize such « dead ends » in a quick and easy manner. Dead ends indicate that the paternal and/or maternal branch(es) cannot be traced. As a consequence, it is apparently impossible to go any further on this branch.

For each person in your file, you can now use the label  **Untraceable Father** or  **Untraceable Mother** – or both if the child has been abandoned.

This way, you can see right away whether more research is needed or not.

Create a new person with an untraceable parent

When you add a new person, various labels are displayed. Right then, you are free to click on Untraceable Father or Untraceable Mother.



(Windows) New Person input screen

(Mac) New Person input screen

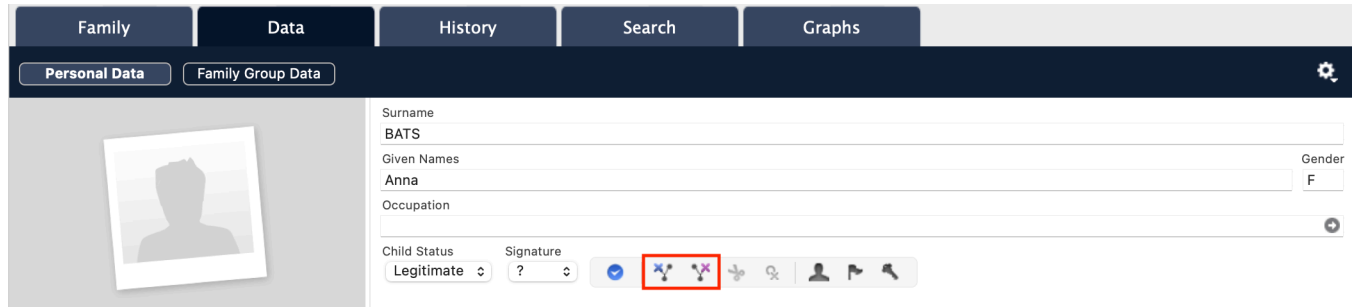
See also: Add Persons (voir page 97) and The different data fields (voir page 50).

Declare an existing person's parents as untraceable

Place the person as the primary person, click on the **Data > Personal Data** tab or on the **Data > Family Group Data** tab and click on the appropriate button.

-  **Untraceable Father**
-  **Untraceable Mother**

Personal Data



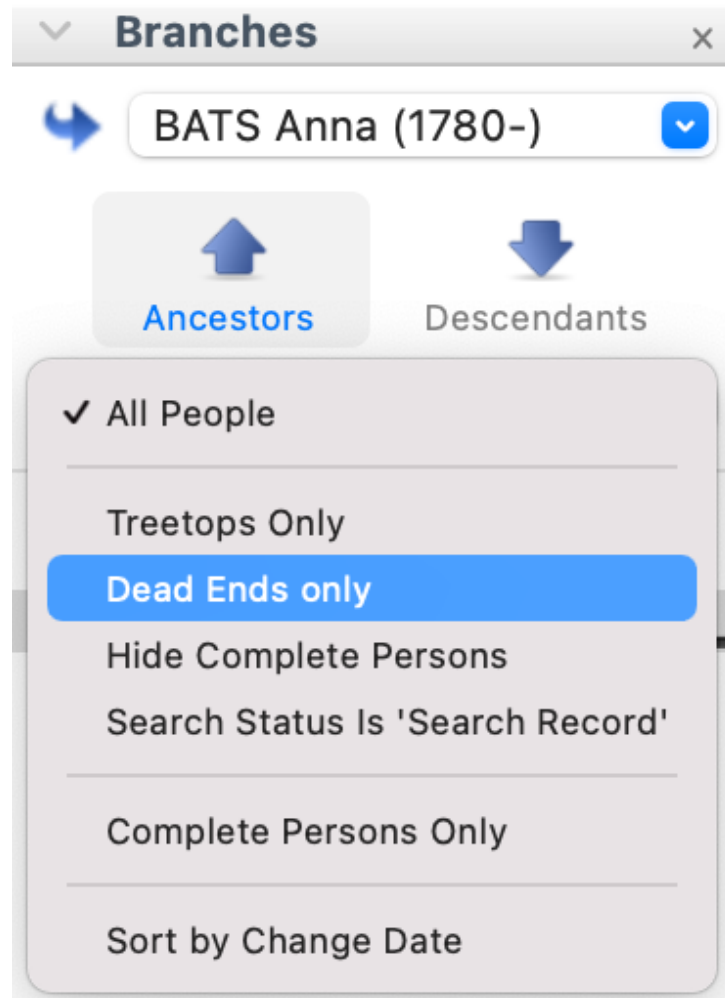
See also The different tabs (voir page 46).

Identify Dead Ends

Heredis provides several tools to help you track your searches.

- When you need to know where you are at, feel free to consult **Search tracking**. This tool allows you to identify your “dead ends”. See Search Tracking Tab (voir page 332).
- The **Branches** panel also allows you to filter **Dead Ends only**.

Branches Panel



Dead Ends can be viewed on the various Heredis tree charts:

- The **XXL Family** now mentions untraceable fathers and mothers
- The **Immediate Family** shows untraceable fathers and mothers
- The **Ancestors** chart under the **Family** tab also displays untraceable parents
- The **Ancestors Wheel** under the **Graphs** tab will also show any dead end. See the article entitled *Dynamic Ancestors Wheel* (voir page 407) for more details.

Untraceable father/mother data will be included in the Sheets as well.

Note: Our earlier printable tree charts do not include this data. Likewise, our automatically generated Books do not specify when parents cannot be found.

Search persons whose parents cannot be found

If you wish to identify every person in your file whose father and/or mother are untraceable, use our **Smart Search**.

- Click on the **Searches > Smart Search** tabs.
- Set parameters to **Persons > Untraceable father > Yes** to search your file for persons whose father cannot be found.
- Set parameters to **Persons > Untraceable mother > Yes** to search your file for persons whose mother cannot be found.
- Set parameters to **Persons > Untraceable father > Yes**, click on the + button to **add Persons > Untraceable mother > Yes** to search your file for persons whose father and mother cannot be found. Remember to change the filter to **At least one criterion** if you are looking for persons with either a father or mother who cannot be found, or both.

See also Smart Search (voir page 208) for more details on this search tool for your file data.



Attach a parent to a child with an untraceable parent

If, by chance, you end up finding one or both missing parents, uncheck the corresponding label in the **Personal Data** input screen for this person.
Declaring a parent as untraceable can easily be cancelled.

Add spouses

Add a new person

All tabs

- Place the person for whom you want to add a spouse, as the primary person.
- Create the link.
 - Click the + (xx spouse(s)) sign in the display field of the spouse on the **Family** tab.
 - Choose **Person > Add Spouse**
 - Click the  button on the toolbar and choose **Add Spouse** .
- Enter the new person. Check the list of matching persons already in your file in order to not input duplicates.

In the **Add or Choose Spouse** screen, complete the input fields with the information you have. Gender is prefilled. To change the gender in order to indicate a same sex union for example:

- **(Mac)** click the **Do not specify gender** lock, and change the gender
- **(Windows)** simply click in the gender box and change the gender

In case of same sex union, Heredis will alert you in order to make sure it is not a mistake. If it is not, just validate the message.

(Windows) Add a Spouse

Add or Choose Spouse of ROCTON Christian (1962-)

Family Details

Family Event: Marriage | Date: | Age/Rec. He: | Age/Rec. She: | Family Status: Married

Place: | Subdivision: |

Sources: |

Add a new person or choose a matching person

Personal Data

Surname: |

Given Names: | Gender: F

Occupation: |

Child Status: Legitimate | Signature: ?

Birth/Christening

Event Type: Birth | Date: |

Place: | Subdivision: |

Sources: |

Matching Persons

- BERNSTEIN Helena
- von BORK Helena (1842-1921)
- CARFAX Mary (1961-)
- DAVIES
- DAVIS Violet Elizabeth (1875-1966)
- DOBNEY Anna (1818-1858)
- GREGSON Vivian (1932-)
- HAYES Ann (1833-1915)
- HENRY Shannon Jean (1988-)
- LOWENSTEIN Paula (H 5701-)
- de NFMOURS .Insephine (1855-1920)

BERNSTEIN Helena

Parents unknown

No Known Spouse

No Known Child

Add | Choose | Cancel

(Mac) Add a Spouse

Add spouses

The screenshot shows a software window titled "Add or Choose Spouse of DEBACQ Hélène". The window is divided into two main panes: "Add" and "Choose".



Add Pane:

- Birth:** Fields for Date, Time, Place, and Subdivision. A checkbox for "Private Event" and a dropdown for "No search record" are also present.
- Desc./Cause:** A text input field.
- Witnesses (0):** A table with columns: Role, Name, Age, Comments. It includes add, delete, and edit icons.
- Sources (0):** A table with columns: Source, Comments, Evidence. It includes add, delete, edit, and document icons.
- Death:** Fields for Date, Time, and Age/Rec. (Age/Record).

Choose Pane:

- Matching Persons:** A list of 20 potential spouses, each with a person icon and their name and dates (e.g., ACHART François (-< 1767), ALLOIS Antoine (-< 1712), etc.).

Buttons: "Add", "Choose", "Cancel", and "OK" are located at the bottom of the dialog.

Info • Click the indented wheel  or  icon (depending on which screen you are, the wheel doesn't look the same) at the top right of the screen to change the display mode if all desired fields are not displayed. See also Customize Heredis.

Click **Add**.

(Mac) Enter information about the union.

Don't forget to enter the type of union: Marriage, Religious Marriage, Other marital link, Marriage Contract.

Family Group data tab

- Click the **+** button at the bottom of the **Families** entry fields.
- Choose **Add Spouse**.
- Continue the input with the information you have about the union. To validate the new person, click outside the entry field.



Info • For more information on adding the spouse of a child in the **Family Group Data** tab, see Input a Family Group Data.

Don't forget to enter the type of union: Marriage, Religious Marriage, Other marital link, Marriage Contract.

Link an existing person

During data entry

- Place the person for whom you want to add a spouse, as the primary person.
- Create the link.
 - Choose **Person > Add Spouse**

- Click the  button on the toolbar and choose **Add Spouse** .
- Click the + (xx spouse(s)) sign in the display field of the spouse on the **Family** tab.

In the **Add or Choose Spouse** screen, enter the surname and given names in the **Personal Data** field. Select the person to be linked from the list of **Matching Persons** to the right of the screen.

Click **Choose** or double-click the name in the list.

Info • To access this screen from the **Family Group Data** tab, click the red arrow  that appears on the data line.

Enter the information you have about the union. Don't forget to enter the type of union: Marriage, Religious Marriage, Other marital link, Marriage Contract.

Drag and drop

- Place the person for whom you want to add a spouse, as the primary person.
- Take the spouse from a side panel (**Persons, Bookmarks, Relations...**), and release on the display area of the screen (display area for spouses on the **Immediate Family** tab or the **Families** fields on the **Personal Data** and **Family Group Data** tabs).

Information concerning the family

The data input screen for a marriage and the **Families** fields on the **Personal Data** or **Family Group Data** tabs show specific fields to be completed, as well as a field for family media on the **Immediate Family** tab.

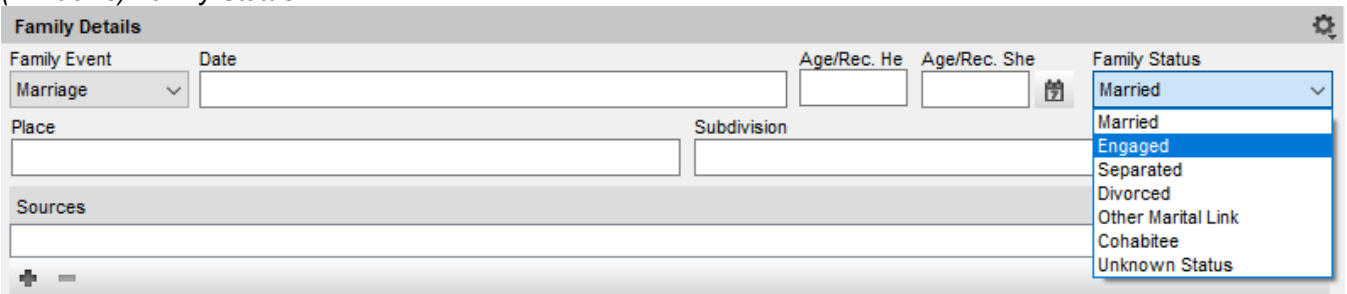
- Indicate date and place of marriage and any other information you have on the family event.
- Specify the family status in the pop-up menu.
- Click **OK**: the spouse is created as well as the link to the primary person.

Family status

Status is additional information indicating the last known status of a union. Are the spouses still married, divorced, separated?

The family status is independent of union events. One may enter a marriage event, but not enter other events for the couple, but clarify the family status as «Separated».

(Windows) Family Status

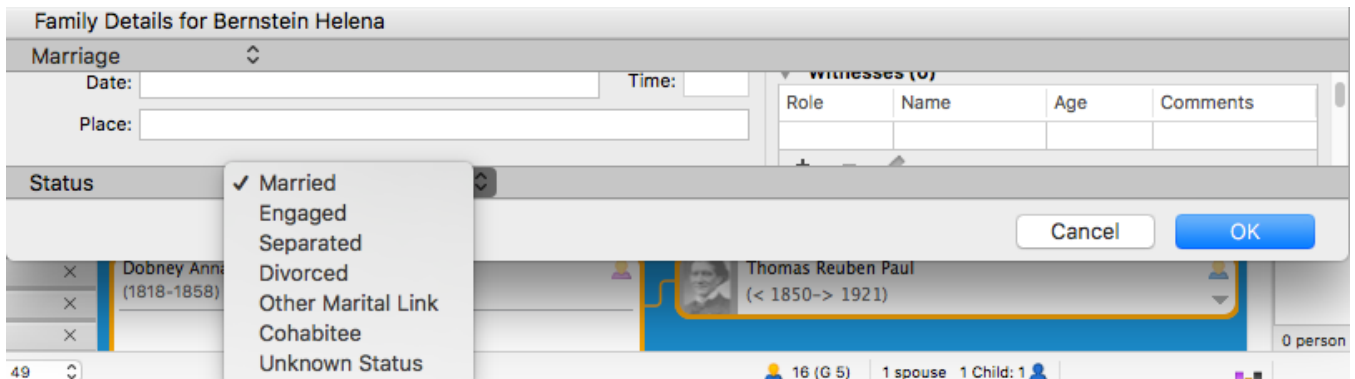


The screenshot shows a 'Family Details' window with the following fields and a dropdown menu:

- Family Event:** Marriage (dropdown)
- Date:** [Empty text box]
- Age/Rec. He:** [Empty text box]
- Age/Rec. She:** [Empty text box]
- Place:** [Empty text box]
- Subdivision:** [Empty text box]
- Sources:** [Empty text box]
- Family Status:** A dropdown menu is open, showing the following options: Married, Engaged, Separated, Divorced, Other Marital Link, Cohabitee, and Unknown Status.

(Mac) Family Status

Add spouses



Specify the family status in the **Add or Choose Spouse** screen or **Families** area of the **Personal Data** tab.

Family number

The family number, when there are several marriages, appears in the **Family** tab. It is assigned automatically according to the dates of marriage. To change the family number, select a spouse and move him/her to the desired position.

Families order

Heredis enters unions based on the date of the main family event. If you know the sequence of unions without knowing the dates, or if the chronology does not seem exact to you, you can change the families order.

Change the families order

(Windows) Click Right on one of the spouses, then choose **Order of spouses**. Use the **Before** and **After** buttons to organize and click **Close**.

(Mac) In **Immediate Family**, use drag and drop. Select the box or line of family to be moved, and release it at the desired location.

A blue line indicates the destination position.

Windows – Leave Heredis determine the order

You may cancel a manual order change of families if you have made mistakes or entered new dates. Right-click the list of families and choose **Order of spouses**, then tick the box **Leave Heredis to determine the order**.

Mac – To change the order again

As before, in **Immediate Family**, use drag and drop. Select the box or line of family to be moved, and release it at the desired location.



Delete a family

Heredis allows you to delete:


- Either the person. In this case the person will no longer exist in your genealogy file.
- Or the family link that links two spouses. In this case both spouses remain in your genealogy file.

Info • If both spouses have had children together, you must first unlink the couple's children for one of the spouses. When you remove the bond of union, the events that were assigned to this family will also be deleted.


All tabs

1. Place one of the spouses as the primary person.
2. Choose **Person > Delete > Selected Spouse Link**, or click  in the toolbar, then .

Personal Data tab

1. Select the spouse to be unlinked in the **Families** fields.
2. Click  (Unlink the selected spouse from the family) at the bottom of the **Families** fields.



Family Group Data tab

1. Select the spouse to be unlinked on the **Families** fields.
2. Click  (Unlink the selected spouse from the family) at the bottom of the **Families** fields.
3. Select the **Unlink Spouse** option.
Info • If you select **Delete Spouse and All Links**, you will remove the person from your genealogy file.

Add children

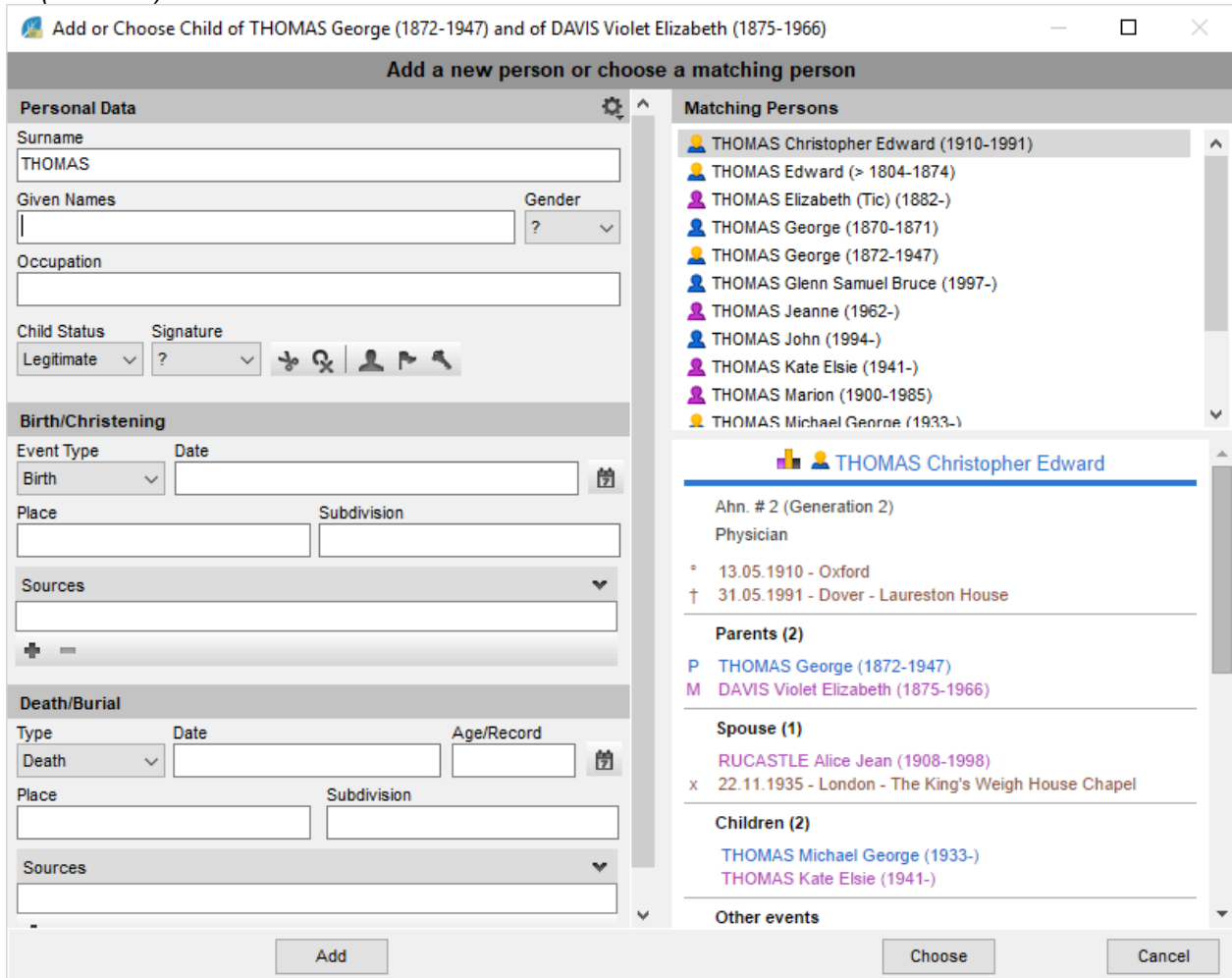
Add a new person

All tabs

- Place the person to whom you want to add a child as the primary person. Select the other parent.
- Create the link.
 - Click **Add Child** in the display screen of the primary person in the **Immediate Family** tab.
 - Choose **Person > Add Child**.
 - Click the  button on the toolbar and choose **Add Child** .
- Enter the new person.

In the **Add or Choose Child** screen, complete the entry fields with the information you have. The child's surname is prefilled with the surname of the father or the mother if you did not select a spouse for the mother. To change the name, click in the box and enter another name.

(Windows) Add a Child



Add or Choose Child of THOMAS George (1872-1947) and of DAVIS Violet Elizabeth (1875-1966)

Add a new person or choose a matching person

Personal Data

Surname: THOMAS

Given Names: Gender: ?

Occupation:

Child Status: Legitimate Signature: ?

Birth/Christening

Event Type: Birth Date:

Place: Subdivision:

Sources:

Death/Burial

Type: Death Date: Age/Record:

Place: Subdivision:

Sources:

Matching Persons

- THOMAS Christopher Edward (1910-1991)
- THOMAS Edward (> 1804-1874)
- THOMAS Elizabeth (Tic) (1882-)
- THOMAS George (1870-1871)
- THOMAS George (1872-1947)
- THOMAS Glenn Samuel Bruce (1997-)
- THOMAS Jeanne (1962-)
- THOMAS John (1994-)
- THOMAS Kate Elsie (1941-)
- THOMAS Marion (1900-1985)
- THOMAS Michael George (1933-)

THOMAS Christopher Edward

Ahn. # 2 (Generation 2)
Physician

° 13.05.1910 - Oxford
† 31.05.1991 - Dover - Laureston House

Parents (2)

P THOMAS George (1872-1947)
M DAVIS Violet Elizabeth (1875-1966)

Spouse (1)


x RUCASTLE Alice Jean (1908-1998)
22.11.1935 - London - The King's Weigh House Chapel

Children (2)

THOMAS Michael George (1933-)
THOMAS Kate Elsie (1941-)


Other events

(Mac) Add a Child

Info • Click the indented wheel  icon at the top right of the screen to change the display mode if all desired items are not displayed.

Before you add the child, check the right part of the screen to make sure he/she is not already created. Click **Add**. The child is created and the links with his/her parents too.

Family Group Data tab

- Click the spouse who is the other parent of the child to select him/her in the **Families** data entry fields.
- Click the  button at the bottom of the **Children** entry fields.
- Complete the entry fields with the information you have. The child's surname is prefilled with the surname of the father or the mother if you did not select a spouse for the mother.

Info • If you made a mistake in selecting a spouse as the other parent, simply change the Family number in the first column of the **Children** fields.



- Continue the input with the information you have. The second part of each Child line contains data fields for the spouse of the child.

For more information on adding the spouse of a child in the **Family Group Data** tab, see chapter Input a Family Group.

- To validate the new person, click outside the entry fields.

Link an existing person

During data entry

- Place the person to whom you want to add a child as the primary person.
- If the primary person has several spouses, click the spouse who is the other parent of the child to select him/her.
- Create the link.
 - Choose **Person > Add Child**.
 - Click the  button on the toolbar and choose **Add Child** .
 - Click the + (xx children) button **Add Child** in the display screen of the primary person on the **Family** tab.

In the **Add or Choose Child** field, enter the given name in the **Personal Data** field. Select the individual to be linked from the list of **Matching Persons** to the right of the screen. Click **Choose** or double-click his/her name in the list.

Info • Creating a Child link automatically creates a family with the father and mother, even if no event has been entered.

Drag and drop

- Place the person to whom you want to add a child as the primary person. Click the spouse who is the other parent of the child to select him/her.
- Take the child from a side panel (**Persons, Bookmarks, Relations...**), and release on the display fields of the screen (children display area on the **Immediate Family** tab or **Children** on **Family Group Data** tab). The child is then linked to both parents (the primary person and the selected spouse).

Order of children

Heredis places children according to their date of birth.

If you know the order of the children without knowing their dates of birth, or if the chronology does not seem exact to you, you may change their order of display.

Change the order of children

(Windows) Make a right-click on one of the children and select **Order of Children**.

(Mac) Use drag and drop. Select the line of the person to be moved, and release it at the desired location. A blue line indicates the destination location.

Windows – Let Heredis determine the order




You may cancel a manual order change of children if you have made mistakes or entered new dates. To do this, right-click the list of children and choose **Order of Children**, then tick the box **Leave Heredis to determine the order/ Let Heredis determine the order**.

Mac – To change the order again


As before, in **Immediate Family**, use drag and drop. Select the box or line of the children to be moved, and release it at the desired location.

Unlink a child and his/her parents

All tabs

- Place the child or one of the parents as the primary person.
- Delete the parent-child link.
 - If the primary person is a parent, select the child to be unlinked from the list of primary person's children. Choose **Person > Delete > Selected Child Link** or click the  button in the toolbar and choose  **Unlink Selected Child**.
 - If the primary person is a child, choose **Person > Delete > Father Link** or **Mother Link**, or click the  button on the toolbar and choose **Unlink Father** or **Unlink Mother**.

Family Group Data tab

- Select the child to be unlinked from the **Children** fields.
- Click the  button at the bottom of the field, and choose **Unlink Child**.

Info • If you select the **Delete Child and All Links** option, you will remove the person from your genealogy file, not just the link.

Add persons

Add a person in general

A click in the **Immediate Family** is enough to create the father, mother, spouses, children and even grandparents.

The family is simply growing.

A new person's input screen displays the most common information. Enter the name and first name to begin with. They get in shape automatically.

As you input, you'll see a list of persons with the same name and first name appear in the right side of the screen. Heredis does everything to prevent you from creating duplicates. Check the matching persons' list on the right and take a look at the summary of the selected person. If you think you've spotted the person you want to add, don't keep inputting, but select it from the list and click **Choose**.

See also Add Parents (voir page 79), Add Children (voir page 93) and Add spouses (voir page 87).
(Windows) Enter a new person

Entering New Person

Add a new person or choose a matching person

Personal Data

Surname

Given Names Gender
 ? v

Occupation

Child Status Signature
 Legitimate ? v

Birth/Christening

Event Type Date
 Birth 📅

Place Subdivision

Sources v

Death/Burial

Type Date Age/Record
 Death 📅

Place Subdivision

Sources v

Matching Persons

- AMBROISE Melissa (1961-)
- BAKER Louis
- BECKER Leon Joseph
- BERNSTEIN Colin (1892-)
- BERNSTEIN Marie Emily (1935-)
- von BORCKE Louis "Henry" (1778-1842)
- von BORK Mary Jane (1816-1900)
- CARPENTER Marion Zoe (1992-)
- CARPENTER Michael (1958-)
- DAVIS Katherine "Emily" (1896-1988)
- DAVIS Louis (1863-1955)

AMBROISE Melissa

editorial writer

Bi. 1961

Preferred Picture

Parents

No Known Spouse

No Known Child

Other Person Events

Other Family Events

Shared Events

Facts

Is the witness of

Whose witness is

(Mac) Enter a new person

Add persons

The screenshot shows the 'Entering New Person' dialog box. The 'Add' tab is active, showing fields for Personal Data, Birth, and Death. The 'Choose' tab is also visible, showing a list of matching persons. A preview window for 'THOMAS John' is open, showing his Ahn. # 48 (G 6), occupation as clerk US Office engineer, birth date 05.1854 - ?, death date > 1921, a preferred picture, and an alternate name 'RUBY'.

For more information on duplicates, see (Windows) Permanent control for duplicates, (voir page 346) (Mac) Permanent control for duplicates and Merging Two Persons (voir page 352).

If no one in the list of matching persons matches, continue filling in the fields.

Dates are displayed in full regardless of the entry format. Most locations in Western Europe or North America are proposed while inputting. Select the location with the **Enter** button or create a new location.

See also Heredis' Preferences/Choose the recognized places (voir page 65), Dates (voir page 121) and Places Index (voir page 267).

When the input screen is completed, click **Add**.

If you add a spouse, take the opportunity to provide all the information about the marriage: what type of marriage, the date and place and the status of that union. See also Add spouses. Then click **OK**.

You can also work with other tabs in the method that suits you. Add parents in **Ancestors** tab, or other family members in **Family Group Data** tab and **XXL Family** tab. See also Add Parents (voir page 79). Complete or modify known information in **Personal Data** tab.

You can customize your input mode to have more or less graspable fields. Click on the indented wheel to customize the input window.



For more details see Customize Heredis/Select data entry method.

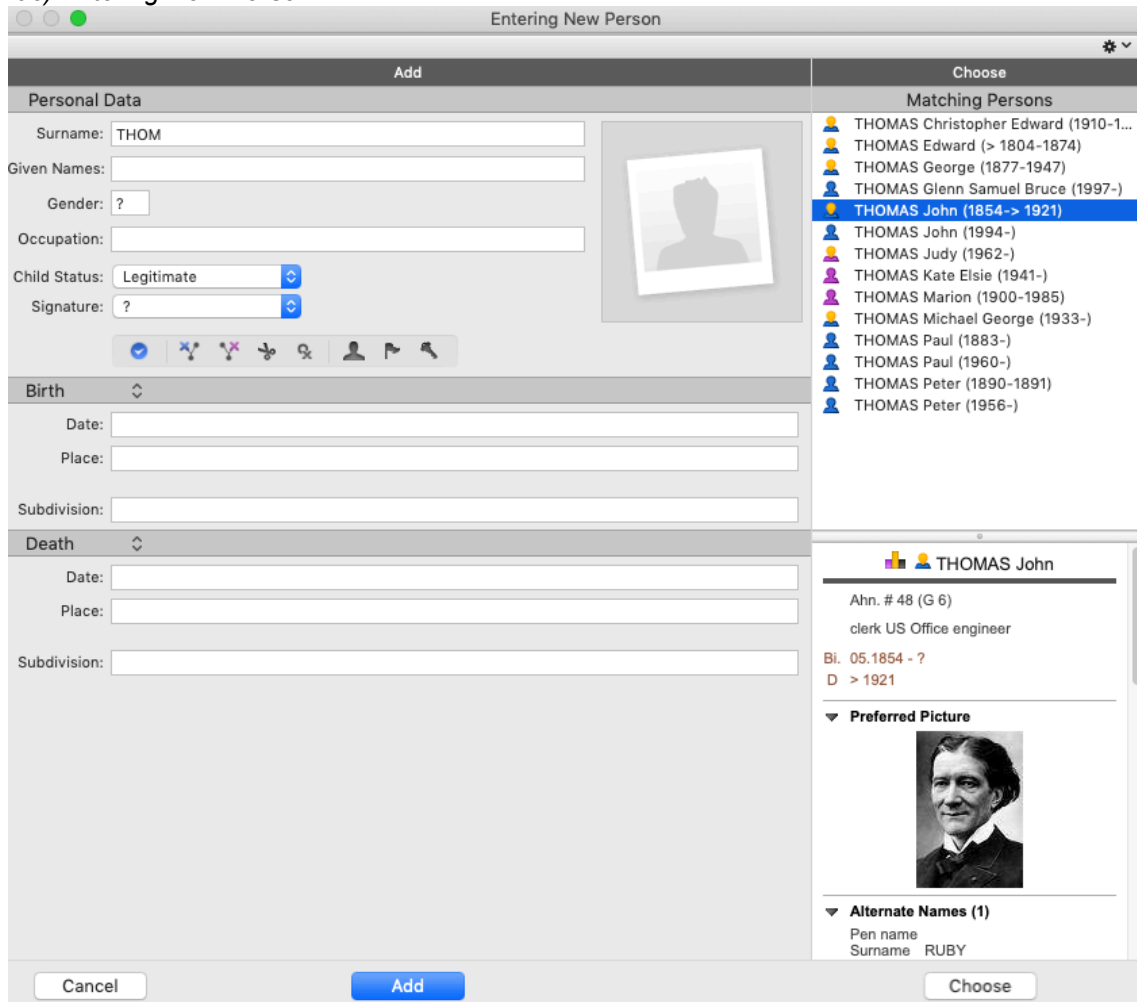
Add a person with no direct connection

Each person in the genealogical file may be linked to other people by kinship, as a witness to an event, or as a related person in another way.

Check out Add other linked persons (voir page 134) to find out all about Heredis' other links.

Heredis allows you to attach an existing person to the genealogical file or create a new person with their kinship.

Click on  button then on . In the **Entering New Person** windows, enter the name and first name into the **Personal Data** section. You see, in the **matching persons** column, the list of persons already registered with that name and first name. As new letters are entered, the list of persons that can match becomes thinner.
(Mac) Entering New Person



The screenshot shows the 'Entering New Person' window on a Mac. The window is divided into two main sections: 'Add' and 'Choose'.

Add Section:


- Personal Data:** Surname: THOM, Given Names: (empty), Gender: ?, Occupation: (empty), Child Status: Legitimate, Signature: ?
- Birth:** Date: (empty), Place: (empty), Subdivision: (empty)
- Death:** Date: (empty), Place: (empty), Subdivision: (empty)

Choose Section:

Matching Persons:

- THOMAS Christopher Edward (1910-1...
- THOMAS Edward (> 1804-1874)
- THOMAS George (1877-1947)
- THOMAS Glenn Samuel Bruce (1997-)
- THOMAS John (1854-> 1921)** (Selected)
- THOMAS John (1994-)
- THOMAS Judy (1962-)
- THOMAS Kate Elsie (1941-)
- THOMAS Marion (1900-1985)
- THOMAS Michael George (1933-)
- THOMAS Paul (1883-)
- THOMAS Paul (1960-)
- THOMAS Peter (1890-1891)
- THOMAS Peter (1956-)

Person Preview (THOMAS John):

- Ahn. # 48 (G 6)
- clerk US Office engineer
- Bi. 05.1854 - ?
- D > 1921
- Preferred Picture:** 
- Alternate Names (1):** Pen name: RUBY, Surname: RUBY

Buttons at the bottom: Cancel, Add, Choose.

(Windows) Entering New Person

Add persons

Select a person from the list and see their summary. It allows you to better compare the different persons found.

If it turns out that the individual you want to add already exists, use the person already created by clicking **Choose**.

If you don't detect duplicates, you can then create a new person by completing the other input topics and then click **Create**.

Automatic filling of fields

Heredis provides databases of thousands of given names and occupations. On the other hand, Heredis memorizes the information you have already entered, field by field.

Type in the first letters: immediately appears the list of data already saved that may match your input.

Continue with new letters, the list becomes thinner.

Use the arrow buttons on the keyboard to select the desired value, and validate with the **Enter** button or click on the chosen proposal with the mouse.


The auto-entry tool is available in all input fields, with the exception of notes and comments.

Delete a person

Heredis removes:

- either the person. In this case the person will no longer exist in your genealogical file.
- or the relationship between the person and his/her relatives or an event in which he/she took part. In this case the person still exists in your genealogical file.



Info – The root person of the file, meaning the person with the Ahnentafel number 1, cannot be deleted. To remove this person, you must first reallocate the number 1 to another person.

- Place the person as a primary person.
- Click the button  in the tool bar or choose **Person menu > Delete > Primary person** or link to remove.

For more details, check out the articles Add Parents, (voir page 79) Add Children, (voir page 93) Add Spouses, (voir page 87) Add Witnesses and Participants, (voir page 129) Sundry Links.

Add an unrelated person

When you want to create a new person without it being attached to the family displayed:
Select the **Person menu- Add – Unrelated Person**.

or click the button  and then the button in the  toolbar.

Type in his surname and given names.

Make sure the new person to be created doesn't already exist in your file by looking at the list of matching persons in your file and the summary of any homonym. You can click on a person in the list of matching persons to see the information about him/her in the **Summary**.

Once the person has been identified, select him/her with a simple click and then click the **Choose** or double-click on his/her name in the list displayed.

He/She then appears as the primary person of a new **Family** screen.

If the new person is not on the list of matching persons, continue to fill the entry window with the information you have and click the **Add** button.

If you want more input fields, click on the indented wheel to change the view mode.

(Windows) Add an unrelated person

Entering New Person

Add a new person or choose a matching person

Personal Data

Surname
Given Names Gender
Occupation
Child Status Signature
Legitimate ?
Birth/Christening
Event Type Date
Birth
Place Subdivision
Sources
Death/Burial
Type Date Age/Record
Death
Place Subdivision
Sources

Matching Persons

- AMBROISE Melissa (1961-)
- BAKER Louis
- BECKER Leon Joseph
- BERNSTEIN Colin (1892-)
- BERNSTEIN Marie Emily (1935-)
- von BORCKE Louis "Henry" (1778-1842)
- von BORK Mary Jane (1816-1900)
- CARPENTER Marion Zoe (1992-)
- CARPENTER Michael (1958-)
- DAVIS Katherine "Emily" (1896-1988)
- DAVIS Louis (1863-1955)

AMBROISE Melissa

editorial writer

Bi. 1961

Preferred Picture

Parents

No Known Spouse

No Known Child

Other Person Events

Other Family Events

Shared Events

Facts


Is the witness of

Whose witness is


Add Choose Cancel

(Mac) Add an unrelated person

Entering New Person

Add	Choose
<p>Personal Data</p> <p>Surname: THOM</p> <p>Given Names: <input type="text"/></p> <p>Gender: ?</p> <p>Occupation: <input type="text"/></p> <p>Child Status: Legitimate</p> <p>Signature: ?</p> <p style="text-align: center;"> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p> <p>Birth</p> <p>Date: <input type="text"/></p> <p>Place: <input type="text"/></p> <p>Subdivision: <input type="text"/></p> <p>Death</p> <p>Date: <input type="text"/></p> <p>Place: <input type="text"/></p> <p>Subdivision: <input type="text"/></p>	<p style="text-align: center;">Matching Persons</p> <ul style="list-style-type: none"> THOMAS Christopher Edward (1910-1... THOMAS Edward (> 1804-1874) THOMAS George (1877-1947) THOMAS Glenn Samuel Bruce (1997-) <li style="background-color: #007bff; color: white;"> THOMAS John (1854-> 1921) THOMAS John (1994-) THOMAS Judy (1962-) THOMAS Kate Elsie (1941-) THOMAS Marion (1900-1985) THOMAS Michael George (1933-) THOMAS Paul (1883-) THOMAS Paul (1960-) THOMAS Peter (1890-1891) THOMAS Peter (1956-) <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p style="text-align: center;"> THOMAS John</p> <hr/> <p>Ahn. # 48 (G 6)</p> <p>clerk US Office engineer</p> <p>Bi. 05.1854 - ?</p> <p>D > 1921</p> <p>▼ Preferred Picture</p> <div style="text-align: center;">  </div> <p>▼ Alternate Names (1)</p> <p>Pen name</p> <p>Surname RUBY</p> </div>
<input type="button" value="Cancel"/> <input style="background-color: #007bff; color: white;" type="button" value="Add"/>	<input type="button" value="Choose"/>

Media

Whenever you see this  display area you may add an illustration: the photo of your great-grandfather, the photo of your baptism, the scanned image of a death certificate from 1715... These are not only images that you can attach to your data files but also sounds, videos, PDF documents, files created with your word processor.

Nothing is easier than to associate media: select it from your hard drive (**Mac**) or in iPhoto and drag to the display area.

Assign to your data any type of media to illustrate your genealogy.

What media for your genealogy?

Besides the usual media (images, sounds and videos), Heredis can assign files that can be opened directly from your genealogy software by launching the application that was used to create the media.

- Assign a text file created with your word processor and Heredis opens your word processor to read it.
- Assign a numbers document and either Excel or another spreadsheet program on your hard drive will open it to read it.
- Integrate PDF files and Adobe Acrobat will open as soon as you double-click the media.
- A Heredis tree chart effectively illustrating a branch? Assign the tree chart file to your ancestor. This tree chart may be opened from the **Media** tab of the person displayed.

Note: files that are not image formats (.jpg, .jpeg, .png, etc.) will not be taken over when creating a document (Book, Sheets, etc.).

The more heavy media you have, the heavier the file will be. This can slow down Heredis.

What data can be illustrated?

- A person: in the media display field of the primary person in the **Immediate Family**, **XXL Family**, **Personal Data** or **Family Group Data** tabs. You may also add media to the **Personal Data** field of **Create or choose...** screen.
- A couple: in the **Families** field of the **Personal Data** tab.
- An event: on the **Personal Data** tab, click the **Media** tab after selecting an event.
- A surname: in the **Surnames Index**, either in the display field of the selected surname or directly in the **Entering Surname** screen.
- A given name: in the **Given Names Index**, either in the display field of the selected given name or directly in the **Entering Given Name** screen.
- An occupation: either in the **Occupations Index**, either in the display field of the selected occupation or directly in the **Entering Occupation** screen.
- A place: in the **Places Index**, either in the display field of the selected place or in the **Entering Place** screen.
- A source: in the **Sources Index**, either in the display field of the selected source or in the **Entering Source** screen.

The profile media of a person once added will be visible in several screens.

For example:

In the input data file

Entering New Person

Add

Personal Data

Surname:

Given Names:

Nickname:

Gender:

Occupation:

Title:

Child Status:

Signature:

Birth

Date:

Place:

Subdivision:

Private Event

Witnesses (0)

Role	Name	Age	Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Choose

Matching Persons

- BAKER Matthew (1948-)
- BAKER Thomas (1992-)
- BERNSTEIN Helena (1899-)
- von BORK Jeanne (1863-1921)
- CARFAX Mary (1961-)
- DAVIES Henry James (1840-...)
- DAVIS Violet Elizabeth (1875-...)
- DOBNEY Anna (1818-1858)
- GREGSON Vivian (1932-)
- HALL Edna (1882-)
- HAYES Ann (1833-1915)
- HENRY Michael Erwin (1958-)
- HENRY Shannon Jean (1988-)
- KAGANOVITCH Elias (1934-)
- KAGANOVITCH Sacha (1966-)
- LOWENSTEIN Paula (H 5701-)
- MORLEY Andrew (1899-1932)
- MULLAN David (1975-)
- MULLAN Jonathan (1931-)
- de NEMOURS Josephine (18...)
- PINKERTON Ann Elizabeth (1...)
- ROCTON Adrian (1988-)
- ROCTON Christian (1962-)
- RUCASTLE Adam (1818-1906)
- RUCASTLE Alice Jean (1908-...)
- RUCASTLE Gilbert (1870-19-...)

Cancel
Add
Choose

In the Immediate Family screen

THOMAS
Michael George

cabinet maker

B: Mon 6 Feb 1933
Margate (Kent) - At his Grandma's Brenda

In the Personal Data screen

Surname: THOMAS Prefix: Suffix:

Given Names: Michael George Gender: Nickname:

Occupation: cabinet maker Title:

Child Status: Legitimate Signature: Yes User Number:

3 / 6

The quantity of media assigned to each item of data is unlimited.
Each media may be assigned to several items of data.

Media

When media have been assigned in your genealogy file, they are visible in the **Media** panel and in the **Media Index**.

A date and/or a note may be added to the media if you edit it by double-clicking on it.

Info • All media assigned to your genealogy are integrated into your file. You may synchronize your file with your mobile phone or another computer without worrying about the media. They will be automatically transferred.

Main image of the person' profile

If you add multiple photos of profile at different ages, for example, you can define which one should be the main image. The profile photo is the one found in the **Data > Personal Data** tab in the identity area or in the **Immediate Family** tab.

This main image will be the one displayed in the summary, in the trees, in the documents...

To choose your main media of the person:

- Double-click the image to open the photo tool. You will then see all the photos attached to this individual.
- Select the photo you want to put as the main photo.
- Click on the star ★ at the bottom of the list.

Import media to your file

You can add one or more media simultaneously to your genealogy file.

Adding media to the file is done either from the media display field for each selected data, or directly into the **Media Index** or the **Media** panel. In this case the media are integrated into the file but not yet assigned to data. They are classified as **Unused Media**.

(Mac) *Drag and drop*

1. Locate the media or several selected media to be imported on your hard drive or from the application that manages your photos (iPhoto, Aperture, etc.).
2. Drag the file to import and drop on the media display field of the data or on the **Media Index** or **Media** panel.

With the Media field buttons

In the Media display field for each data item:

1. Click the + (Add to media) button.
2. Select the media to be assigned:
 - Select (Mac) **Drag from the Media Index** / (Windows) **Choose from media index** if the media has already been assigned to your data.
 - Select **Choose on Disk** if the media to be imported has never been assign to your data.
 - Select **Past from Clipboard** if you previously copied the media in the clipboard.
3. Select the media with the **(Windows)** Windows Explorer ; **(Mac)** Finder tools and click **Open**.

Info • To display the toolbar for media management, move the mouse over the display field of the media.

(Mac) Right-clicking on the display field of the media also gives you access to the **Add New Media** option.

In the **Media** panel or in the **Media Index**:

1. Click the + (Add New Media) button.
2. Select the media to be imported with the **(Windows)** Windows Explorer / **(Mac)** Finder and then click **Open**.

Information on the media

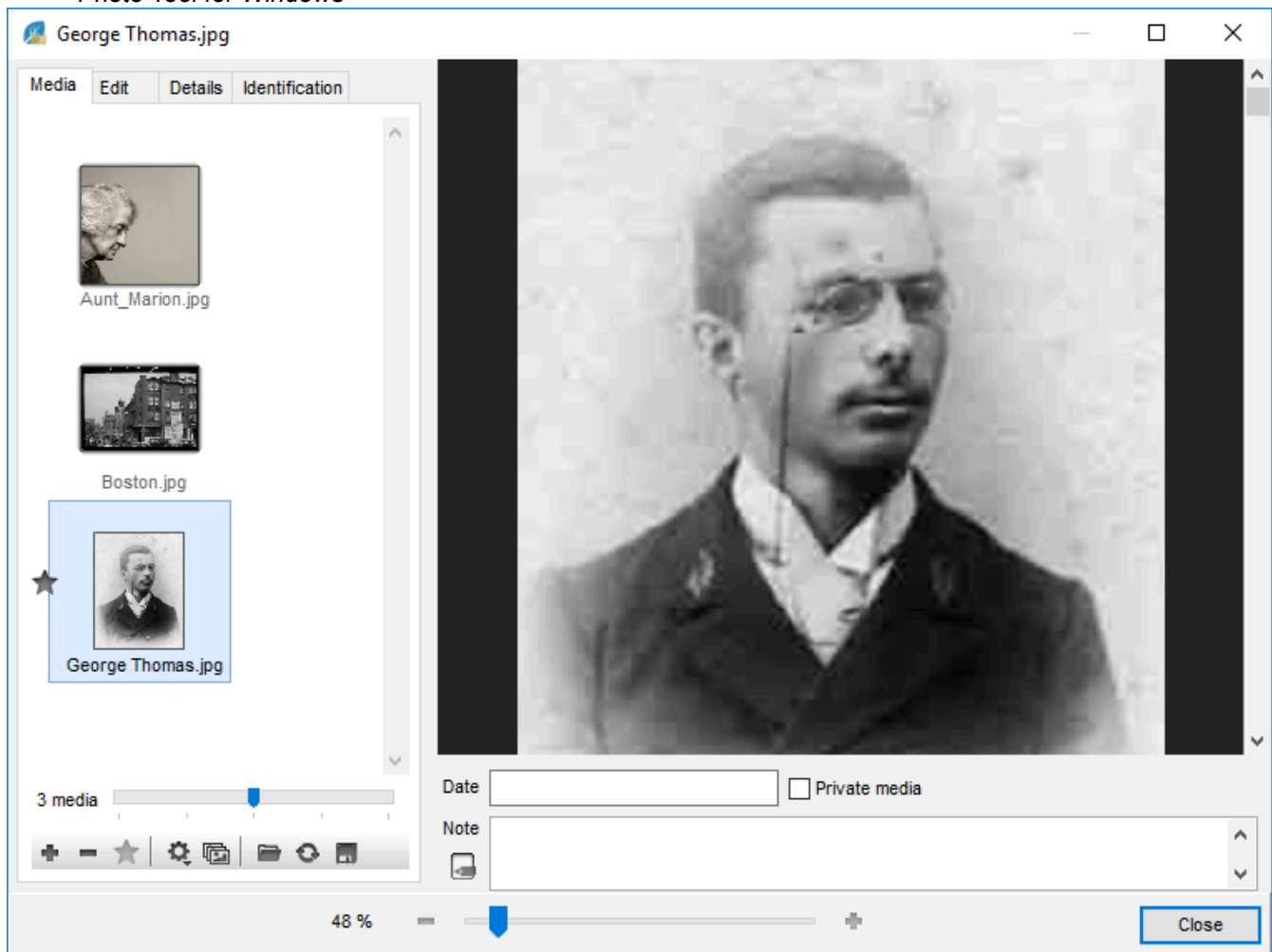
Link between media and data

At any moment, you may assign new media to an item of data, or unlink media assigned by error. Heredis lets you also replace one media with another.

Media details

For each illustrated data in your genealogy file, double-click the media displayed and view the multimedia screen to manage all assigned media. In the **Media Index** or the **Media** panel, double-click the media to display the **Photo tool** screen.

Photo Tool for Windows



Date: The date of the media is a useful guide to illustrate the lives of ancestors, and allows the classification by date of the various media assigned to a person.

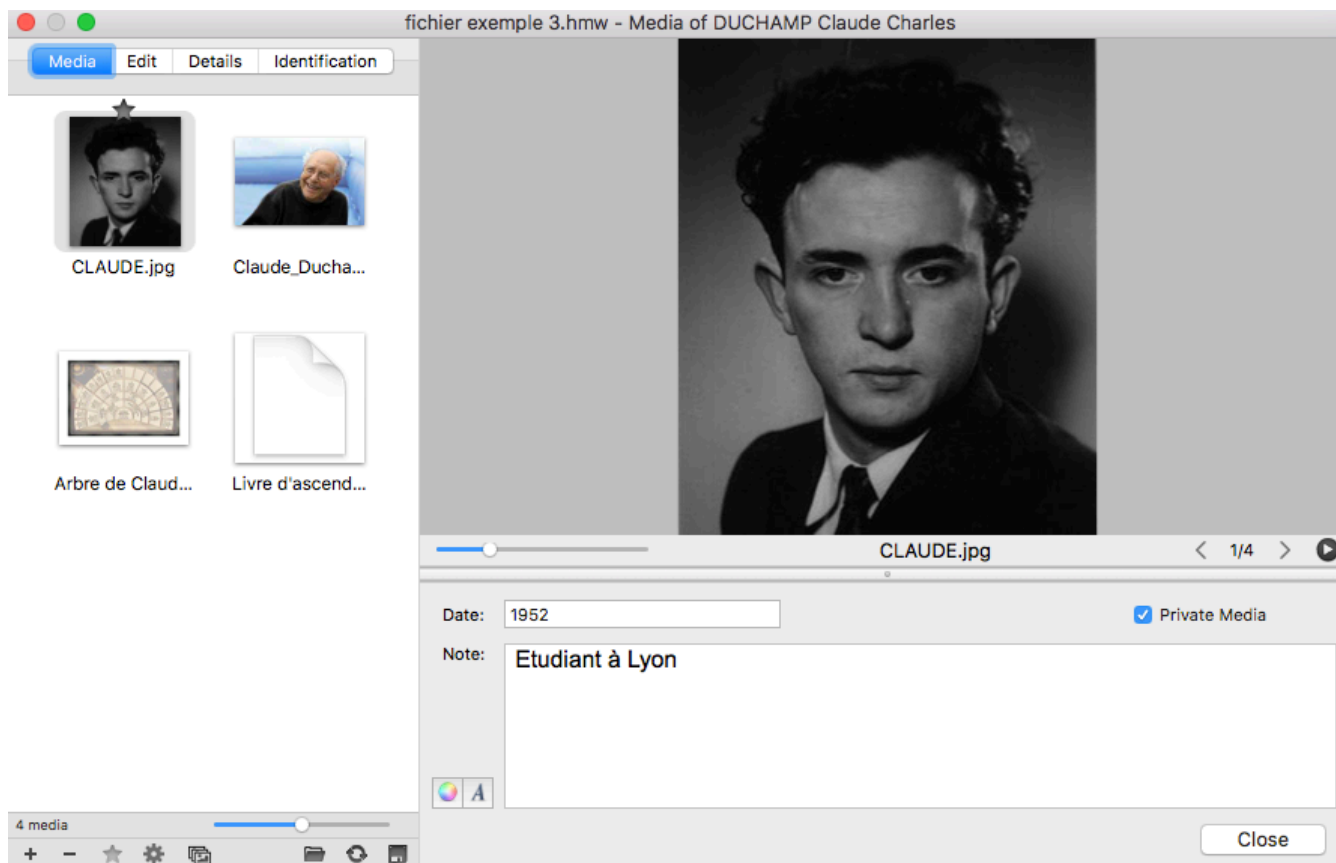
Note: Enter your comments in the notes field. The note may be formatted with tools for text editing.

Private Media: Tick the **Private Media** box to exclude it from export of a file or printing of a document.

Preferred Picture: Among all media assigned to the data, select the image that is displayed in the navigation screens and that illustrates the tree charts and printed documents. Tick the **Preferred Picture** box if your choice is not of the first image you have assigned to the data (person, places etc.). See paragraph above « Main image of the individual profile », it is the same operation.

Photo Tool for Mac

Media





Info • Find in this display field of the selected media its name and the original location of the media.

Info • Media are copied to the genealogical file. Their original location is given as an indication, there is no longer any connection between the media at the original location and media in your genealogy file. You can, however, request an update of the media file from the original media.

Display order of media

Heredis automatically classifies media according to the order in which you have assigned to the data. To change this order, file them by date or name, or manually move the media in the order you want.

From the **Photo Tool** or the **Media Index**.

1. Open the multimedia screen of the data.
 - Double-click the media field.
 - **(Mac)** Click the pencil-shaped  bar in the media buttons.
2. Arrange the media.
 - Click the **Sort** () and select **Sort by date** or **Sort by name**.
 - **(Mac)** Drag the media with the mouse to position in the desired display order. A blue line indicates where the media will be dropped.

For further details see Photo Tool (voir page 337).

Sharing media

Export a file containing media


Media are integrated in your genealogy file. When you export a part of your file by creating a new Heredis file, the media assigned to the exported data are integrated into the new file, unless you had unticked the **Media** box of the Heredis export screen.

When you synchronize your genealogy file with your cellphone or with another computer, they are also integrated in the data.

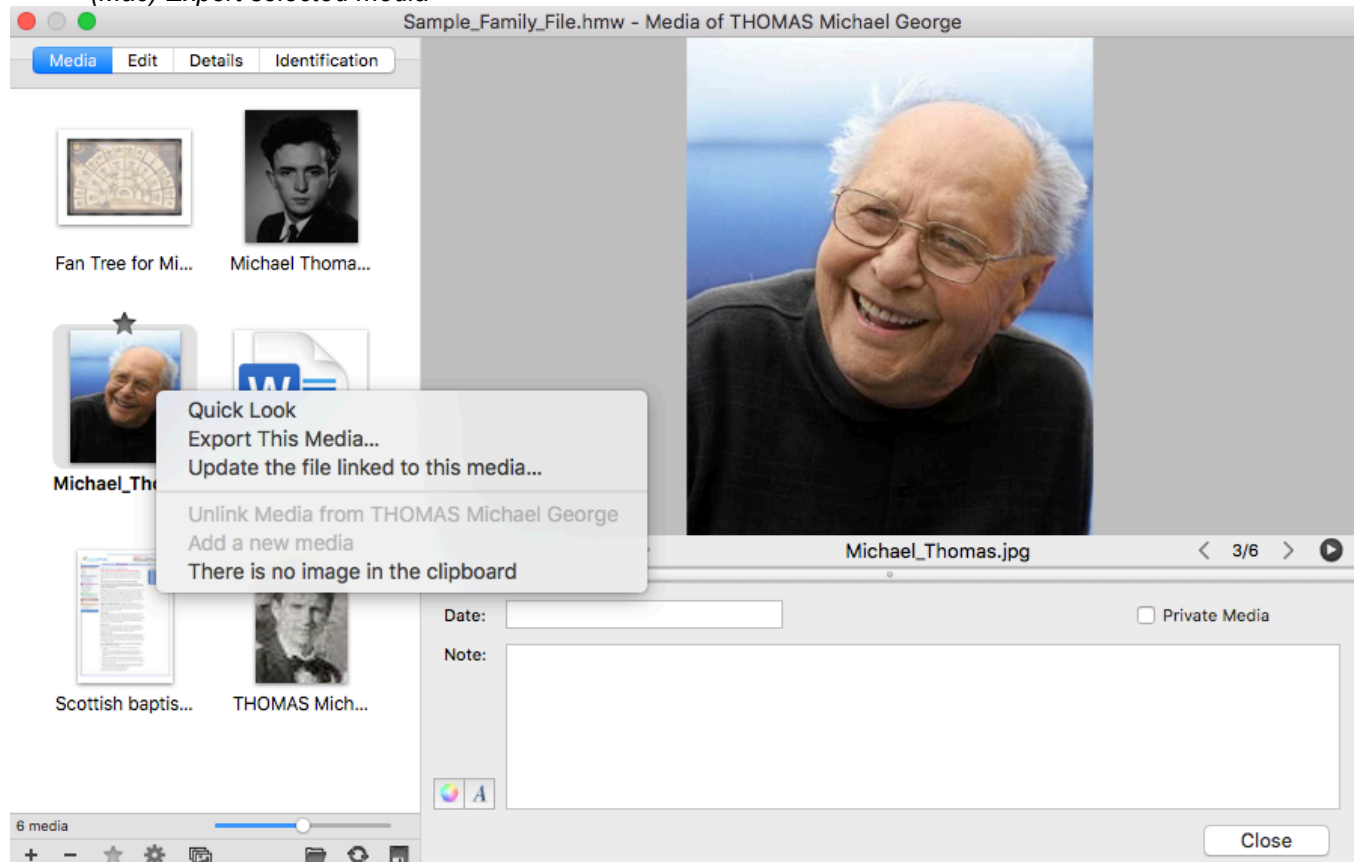
Export media files

You can extract one or more media from your genealogical file for transmission to other people or for another use on your own computer.

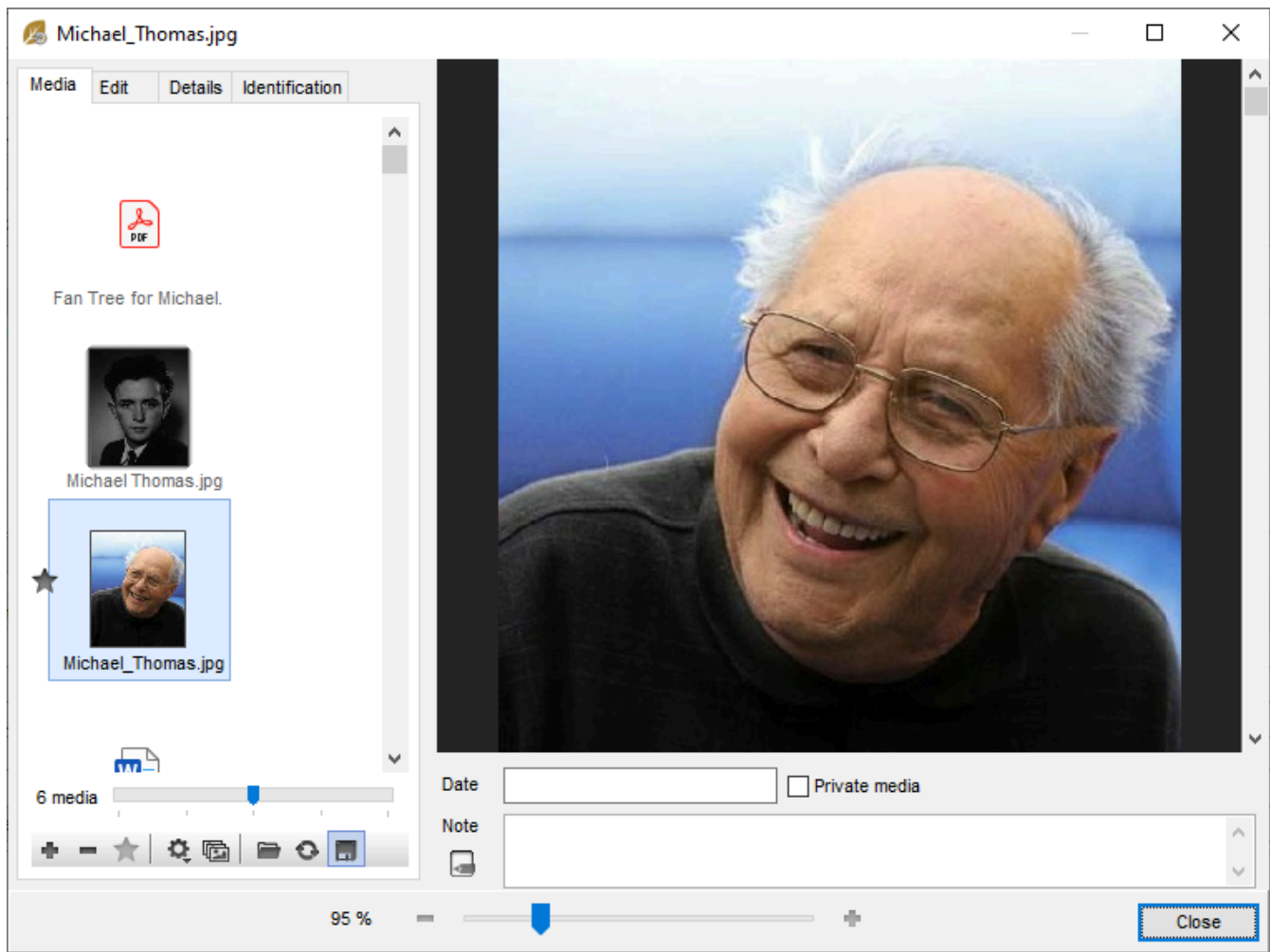
- Double-click on the media to access the edition screen of the media,

1. **(Mac)** Choose **Export This Media...** in the right-click menu on the media, or **(Mac & Windows)** click on the **Export selected media**  button.

(Mac) Export selected media



(Windows) Export selected media



2. Keep the same name or change it and choose the destination location for the exported media.

- In the **Media Index**,

1. Make a selection of media using the display filters for different types of media or uses. Display for example images used for sources in the submenus.

2. Click the (Windows) **Tools** / (Mac) **Options** button on the toolbar of the index and choose **Export Displayed Media....**

(Mac) Export media from Media index

Sample_Family_File - Media Index

100/100 media

Search [] Icons [] All Media [] Whole Index [] Sort by Name [] Options []

Vivian.jpg Vivian.jpg Violet.jpg Violet.jpg US_Federal_19... US_Federal_18...
 Unknown pers... Unknown pers... Thomas_Baker... Thomas_Baker... THOMAS Paul... THOMAS Mic...

Usage Information

1 entry for Vivian.jpg

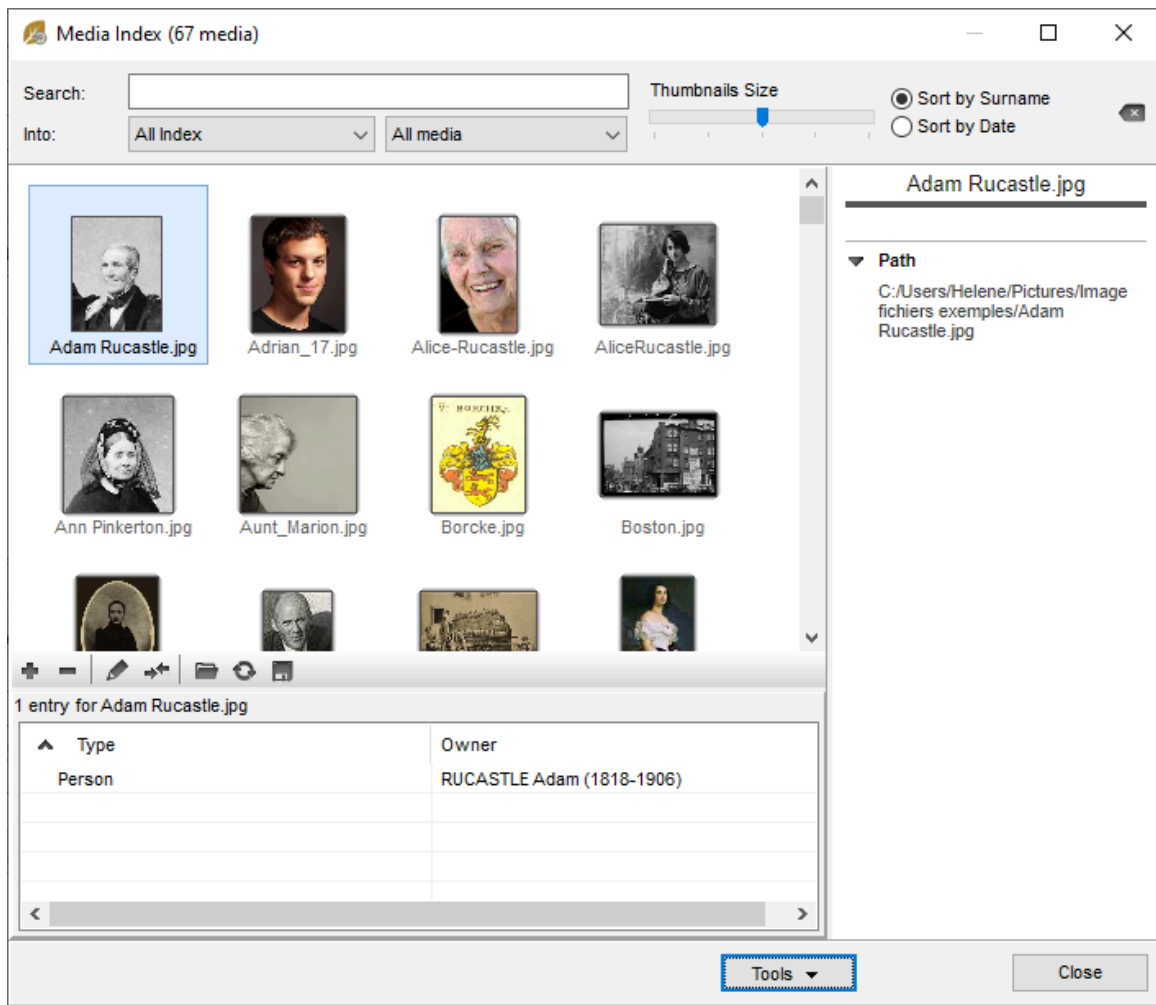
Type	Associated With
Person	GREGSON Vivian (1932-)

Vivian.jpg
 Date: Private Media
 Note: Private Note

- Import new media from a folder
- Check media...
- Remove unused media...
- Remove missing media...
- Export selected media...

(Windows) Export media from Media index

Media



3. Select the destination folder for the exported media.
For further details, see Media Index (voir page 249).

Input events

In the **Personal Data** tab, Heredis proposes a full list of events commonly encountered in genealogy: individual events and shared events which may apply to the couple formed by the primary person and the selected spouse.

Add an event

Add a person event

Add a person event

Events	Year	Age	
Birth	1872		
Graduation	1892	19	
1 Marriage	1899	26	
Death	1947	75	

Date (T)
July 4
Place: (C)
Oxford
 Priv
Note

+ - ✎ 📁 Share

B C M RM MC D BU

- Click on the **+** button on the bar below the list of events. To facilitate the selection of the event, Heredis displays at the top of the list, the events already in use in your genealogy file, and finally the events not yet used in the **Others** group.
- Select the desired event, for example, Will. Will is added to the list of events of the person.

Info • You can also add major events by clicking the **B**, **C**, **D** or **BU** buttons (**Birth – Christening – Death – Burial**) placed below the events list. If these buttons are not visible, change the input mode of the screen.



Add a family event

- Select the spouse of the event from the list of families.
- Click the **+** button on the bar below the list of events.

Info • You may also add the main events of the family by clicking the **M**, **RM**, **MC** buttons (**Marriage – Religious Marriage – Marriage Contract**) below the events list. If these buttons are not visible, check the display mode of the screen.

- Select the desired event, such as Engagement. Engagement is added to the list of events of the person.


Input events



Info • The family events also appear in the input and navigation screens of the spouse.

Create events not proposed by Heredis

You may add events that are not mentioned in the list of events proposed by Heredis.

- Click the **+** button on the bar below the list of events.
- Choose **Others**, then the neutral event called **Event** or **Postmortem Event** (Heredis won't check the consistency of the data, it can be used for event like Inventory after death etc.)
- Double-click on the name of the event that has appeared in the list of events, or after selecting it, click on the  button. A window opens where you can rename the event.

Windows Customize event

A screenshot of a dialog box titled "Edit Event". The subtitle reads "You may change the title and type of event". In the top right corner, there is a logo with a blue and yellow design and the year "2018". Below the subtitle, there are two radio buttons: "Event" (which is selected) and "Fact". Underneath, there is a "Type" label followed by a dropdown menu currently showing "Event". Below that is a "Title" label followed by an empty text input field. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Mac Customize event

- Enter the new name of the event.

Now this new type of event will automatically appear in the list of events to create. You may choose not to display it by clicking on Customize and unchecking the events you do not want to see, or you may select it later by managing the list of events. See the part below.

Info • If the nature of the event to create already exists, modify an existing type of event in the same way. For example, you can create an Estate event by renaming a Will event. You will find this event in a submenu of the original event. By selecting Will, you can choose between Will and Estate.

Share a person event

Heredis allows you to share a minor person event with other persons in your genealogy. This event and all information relating to it will be automatically available to all participants in the event.

Select a person event in the list of events displayed in the **Personal Data** screen > **Person event** and then click the **Share** button below this list. The **Witnesses** tab is replaced by the **Participants** tab and allows you to add the other persons sharing this event.

It is possible no longer to share an event. With this operation, the event no longer to be shared remains associated with the primary person on the screen. Other participants become mere witnesses and the “unshared” event no longer appears in their list of events.

In the list of events for a person, the letter **S**, displayed in front of an event, indicates that this event is shared.

Info • the major person events Birth, Baptism, Union, Death and Burial are not shareable. The Domicile couple event is also shareable.

Customize the display of events

Heredis can present the list of available events according on your work habits. Thus, you will have easy access to the events that you create most often.

The customization affects only the list of events to create and there is no risk to your data, events already created remaining always displayed.

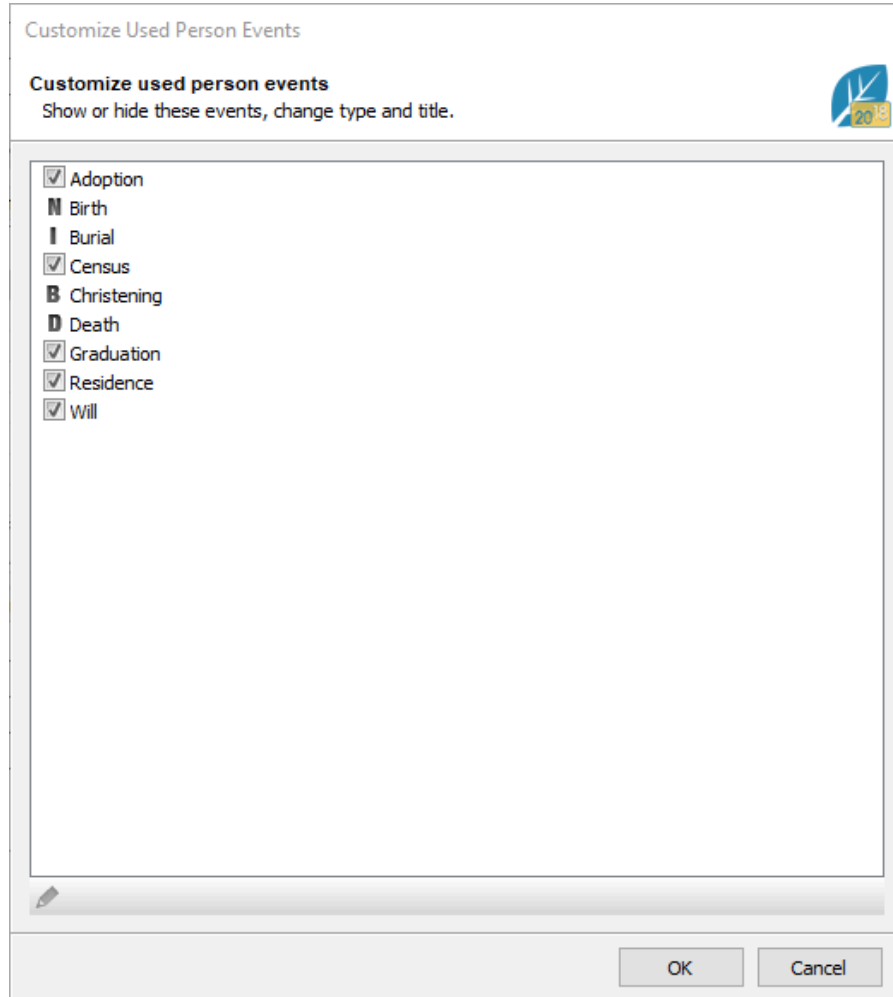
Modify the list of events displayed

1. Click the **+** button on the **Personal Data** tab, in the events list.
2. Choose **Others > Customize...**

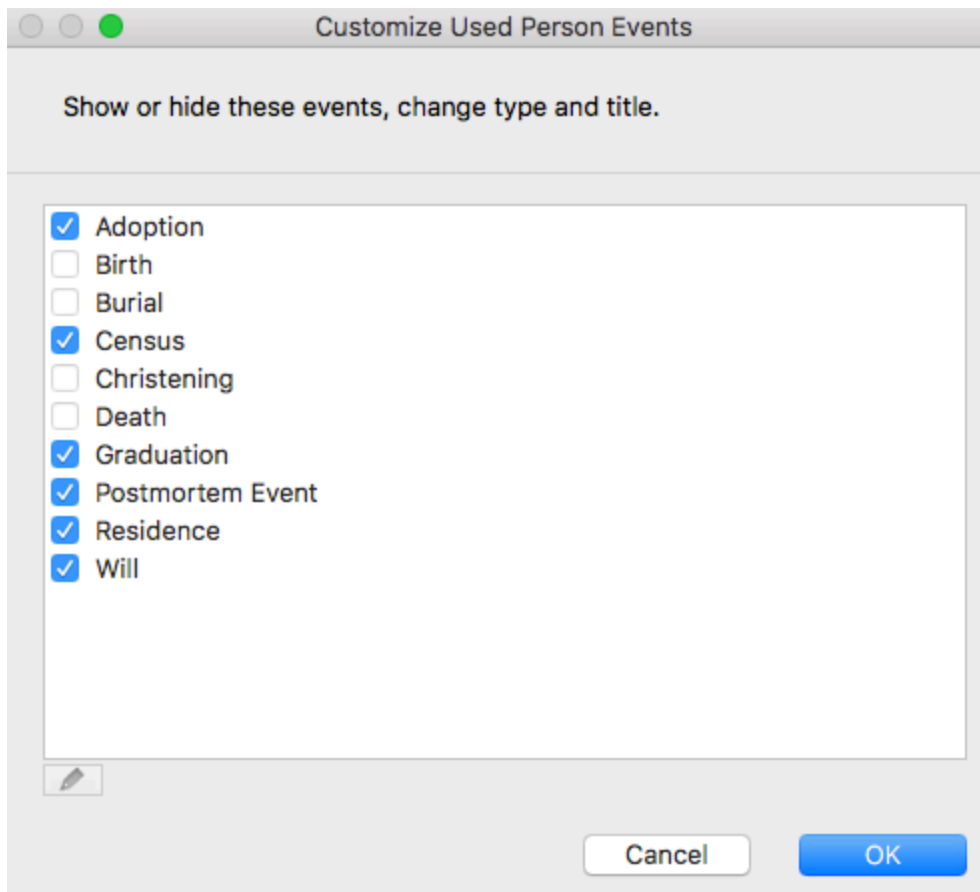
Input events

3. Untick rare events, those which you rarely use, to lighten the list when creating a new event.

Windows Customize Event



Mac Customize Event



Heredis always shows events which you have already used at the top of the list, and events that you have not yet used at the bottom of the list. You see now that the other used events part no longer contains the items you have unticked.

You may always tick any new hidden events to make them reappear.

Information on the event

The detail of each selected event is available on the **Personal Data** tab. If you do not see all the events, change the display mode of the **Personal Data** tab by clicking on the indented wheel. See the article [Customize Heredis](#) for more details.

Information of the event

Input events

The screenshot shows a web form for entering event details. At the top, there are five tabs: 'Details', 'Sources', 'Witnesses', 'Media', and 'Map'. The 'Details' tab is selected. Below the tabs, there are several input fields: a 'Date' field with sub-fields for 'Time' and 'Age/Rec.', a 'Place' field and a 'Place subdivision' field, a 'Description/Cause' field with a 'Private Event' checkbox and a 'No Search Record' dropdown menu, and a large text area for the event description with a scroll bar and a pencil icon for editing.

Date

To enter the date, numerous input options are available, whatever the period concerned, in four different types of calendars: Gregorian, Julian, Hebrew or French Republican. To enter a date in a specific calendar, precede the date of J for Julian or H for Hebrew (the latter is automatically recognized by Heredis since the name of the months is different).

See also Dates (voir page 121) article for further details on Date format and calendars.

Time

Time may be specified as 05:30 or 5:30. To separate hours and minutes, you can type either : or **H** or **h**, with no spaces.

Age on record

Enter the age stated on the deed or record, if it is mentioned. You may specify the age with the words: years, months or days (or y, m, d). No other word will be accepted. An age with numbers only will be considered as years.

If the birth date of the primary person is known, you may compare the age on the deed with the actual age shown in the list of events.

If the date of birth is unknown, Heredis will automatically complete the field with an approximate date calculated from the age on record that you entered.

Place

Indicate the location where the event took place.

Entering a new place

1. Type the name of the city in the **Place** field, not bothering about upper or lower case. With the first letters, Heredis proposes a list of places that may match your entry.
2. Select a place using the mouse, or use the up and down arrow keys and confirm the location selected by pressing **Enter**.
3. If no proposed location matches, (**Windows**) fill in the case and click on the tab key to add this new place to the index; (**Mac**) select **New Place** in the list.
4. Complete the information on the new place to be recorded, and press **OK**. The new location will be added to the **Places Index**. You may geolocate this place. See the articles Places Index (voir page 267), Geolocating

places (voir page 289) and Heredis' Preferences (voir page 65).

Assigning a place already in use in your genealogy

1. Unfold the **Places** panel.
2. Drag the place of the event and drop on the event being entered.
Info • Be sure to visit the place of your ancestor's life by clicking the **Map** tab of the event.

Place Subdivision

The **Place Subdivision** field is to specify a more precise location than the city: the hamlet, parish, district or borough of a large city. Since Heredis 2020, you can geolocate the subdivision, see the details on Geolocating Place Subdivisions (voir page 294).

Cause/Information

The **Cause/Information** field allows you to specify the cause of the event (as for Death, Divorce, Professional transfer events) or any useful precision.

Event Note

Enter your comments about the event directly into the note field. To embellish the entered text, click the pencil icon. Heredis opens the note in a separate screen containing all the formatting tools. Tick the **Private Note** box to exclude the event note from exports or printed documents.


Other elements linked to the event

The Details tab of events displays a **Private Event** box. When this box is ticked, all data in the event may be excluded from exports or hidden in printouts.

To monitor your research, mark the event with its corresponding status of research. Choose **No Search Record**, **Search Record**, or **Untraceable Record**. You may choose the default option for each new event in **Heredis > Preferences > Format**.

Each event may be completed with witnesses, sources, media and an interactive map showing where the event took place. Each of these elements is available in a tab on the Event screen.

Delete an event

Simply select the event to erase and click on the  button at the bottom of the event list.

Dates

Recognized calendars

Heredis treats dates entered in 4 different calendars: Gregorian, Julian, Hebrew and French Republican. The dates must be between the year 4712 BC to the year 3454 AD of the Gregorian calendar.

The Gregorian calendar used today in most countries of the world was applied at widely varying dates in different countries (from the fourteenth to the twentieth century).

The Julian calendar was abandoned in favor of the Gregorian calendar. Certain countries retained it until the twentieth century.

The Hebrew calendar is used in documents of the families of Jewish faith, regardless of the country where they live.

The French Republican calendar was used only in France and covers the period from September 22, 1792 to January 1, 1806.

Entry of dates

Heredis handles dates expressed in numbers (using the separators . or /, or spaces), or the dates expressed with the month in letters (entered in full or abbreviated).

A date may be entered in the Gregorian, Julian, Hebrew or Republican calendars.

To enter an date in the Hebrew calendar, precede it with the letter H (1987).

To enter a date expressed in Julian precede it with the letter J (J June 23, 1654).

To enter a date expressed in the French Republican calendar, enter the year in numbers, Roman or Arabic, preceded or not by the word «An». Enter comp for additional days (for example, «6 comp An III» for the sixth complementary day of the year III of the Republic).

Recognized formats

For Heredis to decode the date according to your desired entry order, choose **Windows: Tools > Preferences > Heredis Preferences > Format; Mac: Heredis > Preferences > Format** and select the order of elements of the date you want Day/Month/Year or Month/Day/Year).

The date of «2 February, 1794» may be entered in the following way, if you have determined the order day/month/year.

Gregorian calendar

- 2 February 1794
- 2 Feb 1794
- 02/02/1794
- 02.02.1794

Julian calendar

- 22 January 1794
- J 22 Jan 1794
- J 22/1/1794
- J 22.01.1794

Hebrew calendar

- 2 Adar 5554

French Republican calendar

- 14 Pluviôse an 2
- 14 pluv an II
- 14 pluv 2
- 14 pluviôse II

Info • For every printed document and for each exported file, tick the **Use Gregorian Dates** option. Some other genealogy programs do not deal with the different calendars in their GEDCOM imports; it will thereby be compatible with all programs.

Interval of dates and approximate dates

Heredis manages the chronology of events according to the dates entered, exact or approximate. Use keywords to express intervals of dates or approximate dates.

Before

Type the word **before** or the symbol < followed by a space or the symbol / with no space and then type the full date or not, in numbers or in words.

- before 23 August, 1845
- < 23/8/1845

After

Type the word **after** or the symbol > followed by a space, then type the full date or not, in numbers or in words. Or type the symbol / with no space after the date.

- after 6 June, 1774
- after 6/6/1774

About

Type the word **about** or the word **circa** or the abbreviation **ca** or the symbol ~ followed by a space, then type the full date or not, in numbers or in words.

- about February 1811
- circa 2/1811
- ca 2.1811
- ~2.1811

Between / and

Type the words **between** and then **and** or the symbols <> and & and then type the full date or not, in numbers or in words or type the symbol // between the two dates with no spaces.

- between 11 October 1914 and April 1917
- between 11/10/1914 and 4/1917
- <> 10 November 1914 & 04 1917

From to

Type the word **from** followed by a space and then type the full date or not followed by a space and then type the word **to** after the full date or not.

- from 1845 to 1846
- from 8/1845 to 9/1845
- October to September 1845
- from 23/8/1845 to 31/8/1845

Before any date, complete or incomplete, you may add the following keywords:

- **Estimated** or **est** to indicate that a date is a mere guess. In this case it is displayed preceded by the estimated or (**est**). It is taken into account in chronology screening (eg. order of families, order of the children...) but it is excluded from printouts.
- **Calculated** or **cal** to indicate that a date has been obtained by calculation. For example if you do not know the birth date of a person but you have found the age at death on the death certificate, the software automatically displays a calculated date of birth. The user may also enter a date named calculated, being the result of deduction. The calculated dates are displayed and printed preceded by the words calculated or (**c**).

Info • The dates entered in a valid format may be followed by any comment that may facilitate your work, provided it is entered in brackets. You can specify 1875 (early summer) or June 1674 (TBC).

Automatic calculation of birth dates

Heredis automatically calculates the date of birth of persons whose age is known at any given event. The age of the father, mentioned in a birth certificate, allows you to create or complete the father indicating the probable year of birth. This will make it easier to find the birth certificate of the father, thus advancing your genealogy.

For the person living the event

1. Create an event and specify the date.
2. Add the witnesses (witness, declarant, etc.), and specify their age in the **Age/Record** field of the input screen for the link.

Dates

Info • Remember to choose the **Customized** or **Comprehensive** input mode to display this field by clicking on the indented wheel .

Witnesses to an event

1. Create an event and specify the date.
2. Add the witnesses (witness, declarant, etc.), and specify their age in the **Age/Record** field of the input screen for the link.

If the date of the start of their life (birth or christening) already exists, your data remains of course unchanged. If the date of the start of their life is unknown, Heredis adds a calculated date of birth.

Info • The dates calculated are shown in italics preceded by a (c) in the list of events on the **Personal Data** tab.
See also Calculate or convert a date (voir page 124).

Calculate or convert a date

In addition to the automatic calculation when entering an event by adding the age on the act, Heredis has a date calculator/converter.

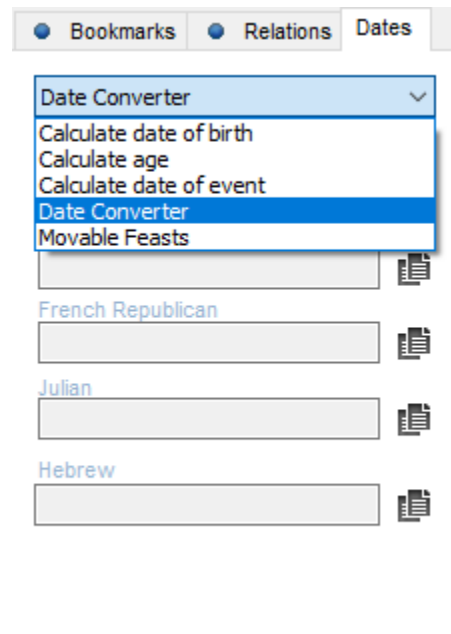
Accessible from the **Dates** tab or from the **Tool** menu > **Date Calculator**, you can calculate a date of birth, an age at an event or the date of an event. It is also possible to convert a date to the Gregorian, Julian, French Republican or Hebrew calendar or to convert a date from movable feasts such as Easter.

Automatic date calculation

The date management module allows you to calculate the date of an event or the age at the event based on two other parameters.

Click the **Dates** tab of the Tools Panels and select the **Calculate Date of Birth**, **Calculate Age**, or **Calculate Date of Event** in the drop-down menu.

(Windows) Dates tab




(Mac) Dates tab


▼ **Dates** ×


Date converter ↕


Date

🔍 Search

Gregorian
No match 

French Republican
No match 

Julian
No match 

Hebrew
No match 

Enter two of the items to get the third, either dates (complete or incomplete) or an age expressed in years, months or days if known.

▼ **Dates**
×

Calculate date of birth
↕

Date of birth

calculated March 3, 1823
📄

Age at event

Years	Months	Days
31		

Date of event

3 3 1854
|

To copy the result found by the date calculator and report it to the event entry screen:

- Select the date and use the **Edit – Copy** menu.

or Click the  button.

To paste the date or age into a **Personal Data** field:

- Right-click in the **Date** or **Age/Rec** section and select **Paste**.

or Click in the topic and select the **Edit – Paste** menu.

The date converter tool

To find out the equivalence of a date expressed in a calendar that is unusual for you, use the **Dates** tab.

1. Choose **Convert Date**.

▼ **Dates**
×

Date converter
↕

Date (Tuesday)

🔍

×

Gregorian

March 3, 1795

📄

French Republican

13 ventôse an III

📄

Julian

J February 20, 1795

📄

Hebrew


AdarI 12, 5555

📄

2. Type the date as you found it, regardless of the calendar in which it is expressed. Heredis displays equivalencies in other calendars.

3. To use one of the displayed dates, click the Copy  button to the right of the date you are interested in.

4. To insert this date expression into an personal data field or note, click at the insertion point and choose the **Edit** menu > **Paste**.

(Windows) To access the date module directly while entering a new person, click on the button at  the end of the event. If this button is not visible, switch to **Comprehensive** input mode or **Customized** mode to have it. See the article Heredis Preferences – Customize Heredis > Select data entry method

(Mac) The **Dates** tab can still be used when you add a person, which is why the calendar button is not in the add a person form.

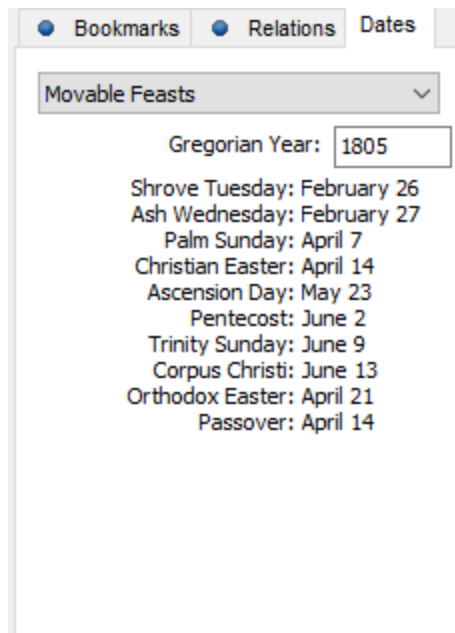
Enter the date you want to convert and copy the converted date into the calendar you are interested in in order to paste it into the event entry field.

Movable feasts dates

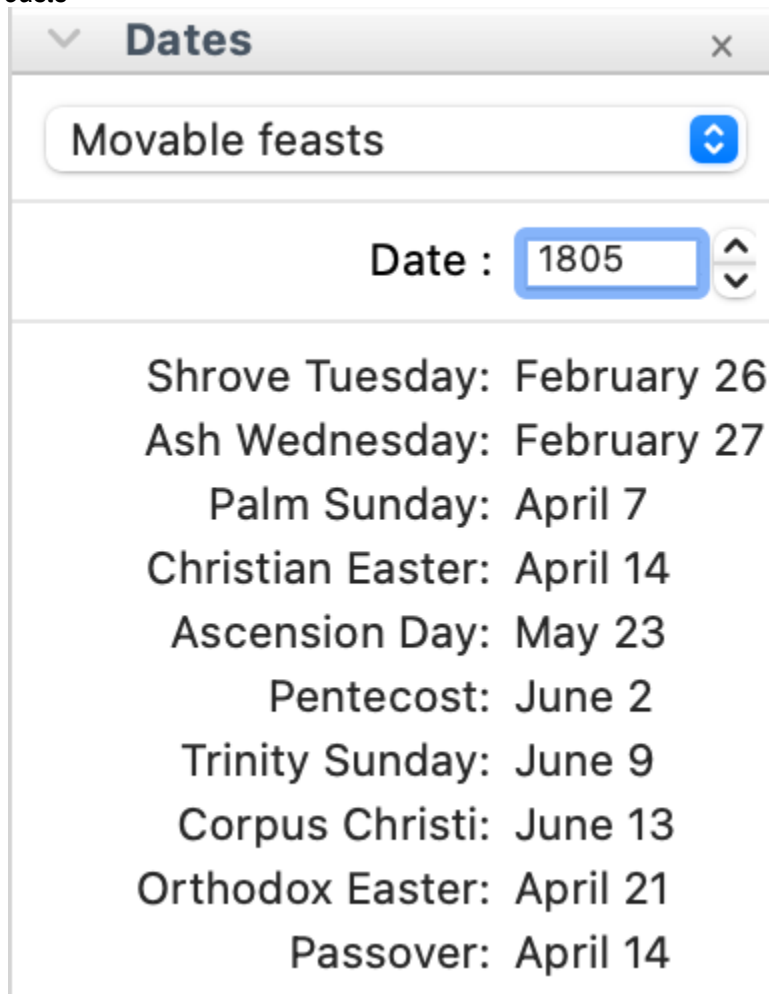
Who hasn't found the mention « Easter Day » or « two days after Easter » in an ancient document? Heredis facilitates your genealogical research by indicating the dates of these movable feasts for all years between the year 325 and the year 2500.

1. Select the Movable Feasts of the **Dates** tab.

(Windows) Movable Feasts



(Mac) Movable Feasts



2. Indicate the year for which you are looking for this holiday. Heredis then displays the dates of the Christian, Orthodox and Jewish movable holidays for this year.

Add witnesses and participants

Based on the act or document that you possess, indicate who are the persons who attended the event, or who are cited (witnesses, those present, registrar, etc..).

Witnesses and participants are displayed on the **Personal Data** tab. For each selected event, you may access them by clicking the **Witnesses** or **Participants** tab. If at least one person was linked to the event, a visual indicator (blue bar) is displayed on the tab, in the list of events.

Add a new person

Add a witness

Role	Witness	Age/Record	Comment
Present	RUCASTLE Gilbert (1870-1955)		

1. Click the **Witnesses** or **Participants** tab in the event information fields. The **Witnesses** tab becomes **Participants** if the event is shared.
2. On the button bar at the bottom, click **+** (Link a witness or participant to the event).
3. The **Assign a Witness or Participant to...** screen opens. Enter the information you know about the person.
4. Click **Add**. The person is now available in the existing persons list of your file.

Link an existing person

During data entry for an event


1. Click the **Witnesses** or **Participants** tab in event information fields.
2. On the button bar at the bottom, click **+** (Link a witness or participant to the event).
3. The **Assign a Witness or Participant to...** screen opens. Enter the surname or first name in the **Personal Data** field and select the person to be linked from the list of **Matching Persons** to the right of the screen. Click the **Choose** button or double-click the name in the list.
4. Complete the information field on the link and press **OK**.

Drag and drop

1. Select the event concerned on the **Personal Data** tab.
2. Take the person to be linked from a side panel (**Persons, Bookmarks, Relations...**), and release him/her on the information fields of the event.

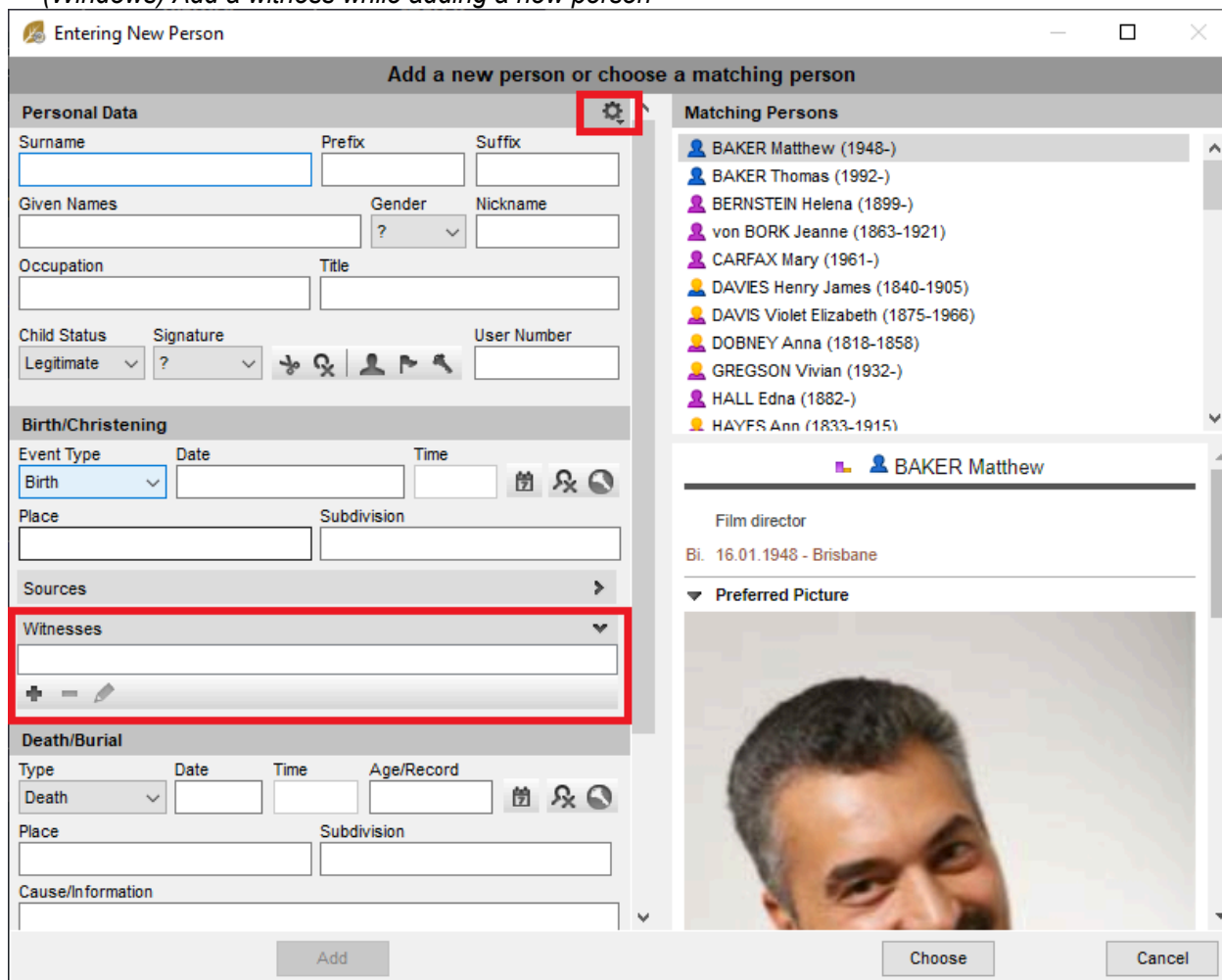
3. Complete the link information fields and press **OK**.

Add a new person with his/her witnesses

To add witnesses to an event during the data entry for a new person, use the **Comprehensive** or **Customized** display mode by clicking the indented wheel  icon at the top right of the **Add or Choose...** screen. See also *Customize Heredis – Heredis Preferences* article.

1. Add the person you want (see also *Add persons (voir page 97)*)
2. Disclose the **Witnesses** field (click the disclosure triangle if it is folded).
3. In the button bar at the bottom of the **Witnesses** field, click the **+** button.
4. The **Assign a Witness to...** screen opens. Enter the information you know about the witness and click **Add**. Or select an existing person and click **Choose**.
5. Provide information on the link with the witness and press **OK**. The witness is added to the **Witnesses** fields of the input screen.
6. Enter another witness or continue typing the data for the primary person.

(Windows) Add a witness while adding a new person



(Mac) Add a witness while adding a new person

Add witnesses and participants

Entering New Person

Add **Choose**

Personal Data

Surname:

Given Names:

Gender: ?

Occupation:

Child Status: Legitimate

Signature: ?

Birth

Date:

Place:

Subdivision:

Private Event No search record

Witnesses (0)

Role	Name	Age	Comments

+ - ✎

Sources (0)

Death

Cancel Add Choose

Matching Persons

- BAKER Matthew (1948-)
- BAKER Thomas (1992-)
- BERNSTEIN Helena (1899-)
- von BORK Jeanne (1863-1921)
- CARFAX Mary (1961-)
- DAVIES Henry James (1840-...
- DAVIS Violet Elizabeth (1875-...
- DOBNEY Anna (1818-1858)
- GREGSON Vivian (1932-)
- HALL Edna (1882-)
- HAYES Ann (1833-1915)
- HENRY Michael Erwin (1958-)
- HENRY Shannon Jean (1988-)
- KAGANOVITCH Elias (1934-)
- KAGANOVITCH Sacha (1966-)
- LOWENSTEIN Paula (H 5701-)
- MORLEY Andrew (1899-1932)
- MULLAN David (1975-)
- MULLAN Jonathan (1931-)
- de NEMOURS Josephine (18...
- PINKERTON Ann Elizabeth (1...
- ROCTON Adrian (1988-)
- ROCTON Christian (1962-)
- RUCASTLE Adam (1818-1906)
- RUCASTLE Alice Jean (1908-...
- RUCASTLE Gilbert (1870-19...

Change a Witness or Participant link

Every person in the genealogy file may be assigned to one or more events. Enter the information known about his/her role in the event.

Change or supplement this information on the **Personal Data** tab.

1. Select the event and click the **Witnesses** or **Participants** tab.
2. Select the Witness link to be changed and click the **Edit and modify the link with the selected witness or participant** button, or double-click the line.
3. Edit the information of the link.

Role

Specify the role of the person in the selected event: it may be a participant in the event (witness, religious officiant, godfather, etc..) or be quoted as not having participated (deceased relative, lawyer who has registered a contract, etc. .).

Choose the role to assign from the pop-up menu.

(Windows) Witness role

Associating a Witness

BERNSTEIN Helena (1899-)

Role
 Godfather - Godmother



Age/Record

Comments

Cancel OK

(Mac) Witness role

Associate a Witness to Birth of THOMAS Judy (1962-)

Witnesses		Add	Choose
Personal Data			Matching Persons
Surname:	<input type="text"/>		BAKER Matthew (1948-)
Given Names:	<input type="text"/>		BAKER Thomas (1992-)
Gender:	<input type="text" value="?"/>		BERNSTEIN Helena (1899-)
Occupation:	<input type="text"/>		von BORK Jeanne (1863-...)
Signature:	<input type="text" value="?"/> 		CARFAX Mary (1961-)
		Add	Choose
Details about the link to BERNSTEIN Helena (1899-)			
Role:	Godfather - God...		
Age/Rec.:	<input type="text"/>	Effective Age:	63 years
Comments:		<input type="text"/>	
		Cancel	OK

Age


• **Age on record:** many deeds indicate the age of the witness on the day of the event. Fill in the field **Age/Record**.

• **Effective Age:** to help you verify the choice of an existing person as a witness, Heredis calculates and displays their actual age on the day of the event. If it is very different from the age on the record, you have probably selected a homonym. Cancel the link and select another person or check the dates which may be incorrect. If the witness or participant has no known date of birth, the age on the record allows Heredis to calculate the date of birth automatically.

Comments

Type a comment on the link between the person and the event. In most cases, you will use here references to occupation, residence and kinship as shown on the acts. Once you have validated the entry or modification of the witness or participant, the comment appears in the list of witnesses or participants.

Unlink a witness or participant and an event




1. On the **Personal Data** tab, select the event and click the **Witnesses** or **Participants** tab.
2. On the bar at the bottom of the event, click  (Unlink the selected witness or participant from the event).
3. Press **OK** to validate.

The person is detached from the event but remains available in your genealogy file.

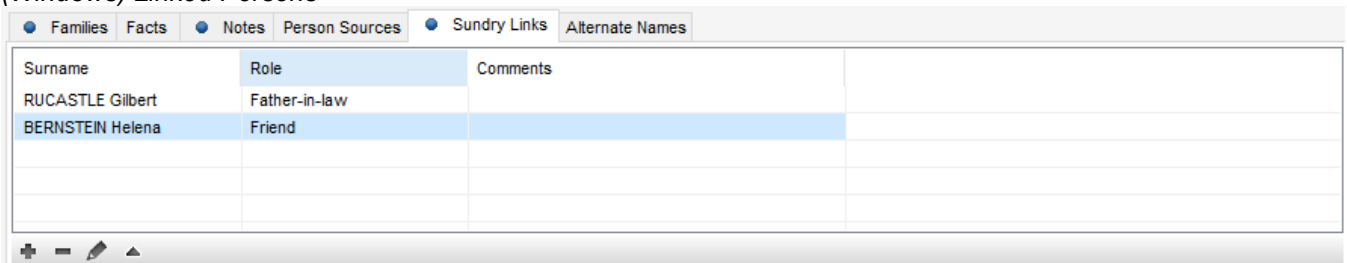
Add other linked persons

The concept of a linked person allows you to specify a link between two persons when:

- The kinship is uncertain. You know that Paul is the uncle of John, but you do not know if he is the paternal or maternal uncle, or the husband of an aunt. Create a personal link between the two individuals until the exact kinship may be determined.
- There are no events to link the two persons. You know that Jane was a friend of Maria. Create a personal link *Friend* between these two persons.

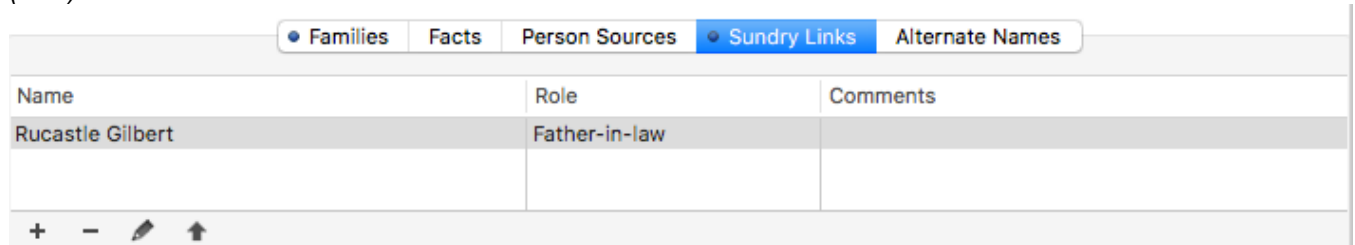
Linked persons are displayed on the **Personal Data** tab. Click the **Sundry Links** tab to add, edit or delete them with   . When at least one person is linked, a visual indicator (blue spot) is displayed on the **Sundry Links** tab. The personal link appears in the **Personal Data** tab of both related persons.

(Windows) *Linked Persons*



Surname	Role	Comments
RUCASTLE Gilbert	Father-in-law	
BERNSTEIN Helena	Friend	

(Mac) *Linked Persons*




Name	Role	Comments
Rucastle Gilbert	Father-in-law	

Add a new person

Put the person you want to add a related person as the primary person.

Click on the **Sundry Link** tab in the **Personal Data** screen. In the button bar of this tab, click the button  (link a person to the primary person).

or Click the  **Add** /  **Add Link**

The windows **Linking a person** opens. Enter the information you know about the person. Make sure the person doesn't already exist in the matching persons list (in the list on the right). Select the possible duplicate and check out the summary. Click on **Add** or select the matching person and click on **Choose** if the person is already in your file. You may access the detailed data of that person later if you wish to expand on the information about the person.

(Windows) *Linking a Person*

Add other linked persons

Linking a Person to THOMAS Michael George (1933-)





Add a new person or choose a matching person

Personal Data


Surname

Given Names Gender
 ? v

Occupation

Child Status Signature
Legitimate ? v    


Birth/Christening

Event Type Date
Birth 

Place Subdivision

Sources v

Death/Burial

Type Date Age/Record
Death 

Place Subdivision

Sources v

Matching Persons

- BAKER Matthew (1948-)
- BAKER Thomas (1992-)
- BERNSTEIN Helena
- von BORK Helena (1842-1921)
- CAREY Andreas
- CARFAX Mary (1961-)
- DAVIES Henry James (1850-1905)
- DAVIS Violet Elizabeth (1875-1966)
- DOBNEY Anna (1818-1858)
- GREGSON Vivian (1932-)
- HAYFS Ann (1833-1915)

BAKER Matthew

Film director

° 16.01.1948 - Brisbane

Parents unknown

Spouse (1)

THOMAS Judy (1962-)
xP 09.08.1997 - Hudson

Child (1)

BAKER Thomas (1992-)

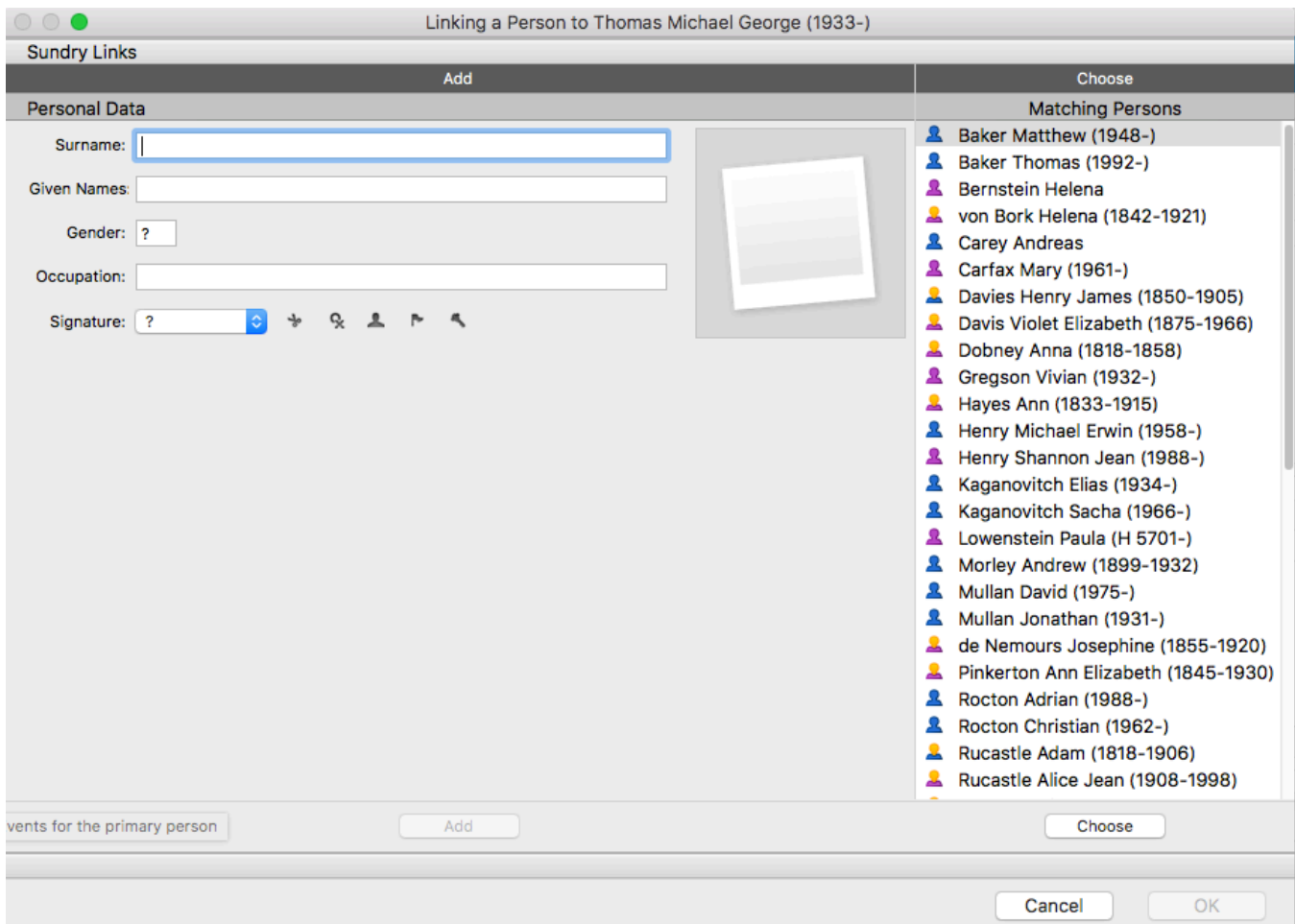
Other events

Shared events


Facts

- Nationality: British

(Mac) Linking a Person

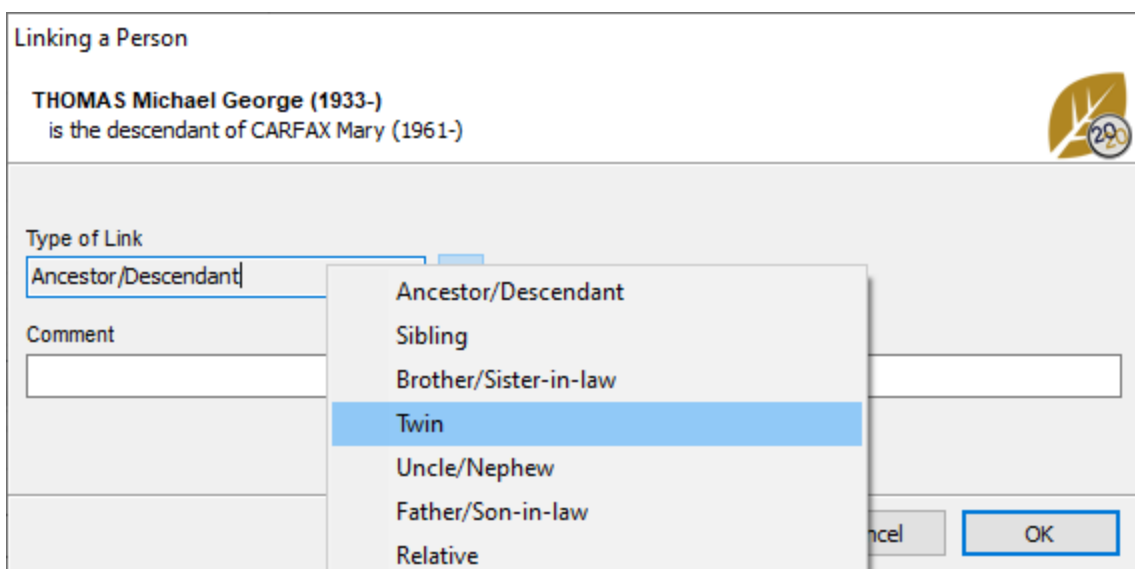


In the **Linking a person** window,

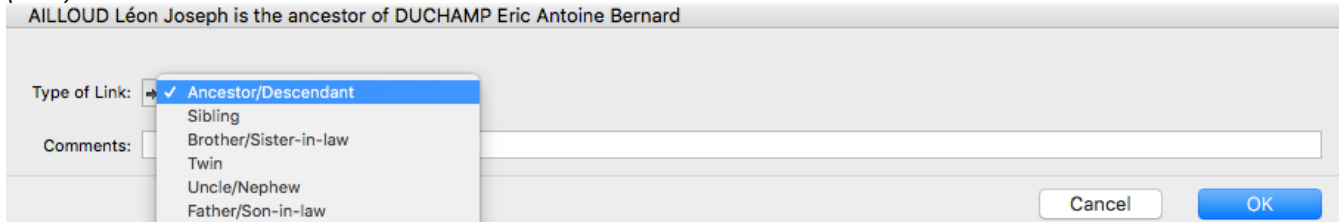
- Precise the link by unrolling the **Type of Link** menu and select friend, heir, cousin, etc.
- Complete with a possible **Comment** of the link to indicate the nature or origin of the bond that unites these two people as for example « maternal side ».
- Check the wording of the link at the top of the window and, if necessary, reverse the terms of the link with the  button. The related person then appears in the **Sundry Link** tab in the **Personal Data** tab. Its link will depend on its gender, if you choose Uncle for example for a woman, then the bond will be Aunt.
- Click **OK** to validate the creation.

(Windows) Creation of the link

Add other linked persons



(Mac) Creation of the link area at the bottom of the Person information section window
AILLOUD Léon Joseph is the ancestor of DUCHAMP Eric Antoine Bernard



Personal links with an existing person

Personal Data tab

1. Click the **Sundry Links** tab.
2. On the button bar at the bottom, click **+** (Add a link to the primary person).
3. The **Linking a Person to...** screen opens. Enter the surname and given name in the **Personal Data** fields and select the individual from the list of **Matching Persons** to the right of the screen. Click the **Choose** button or double-click the name in the list.
4. Complete the information fields for the link and press **OK**.

Drag and drop

1. Click the **Sundry Links** tab.
2. Take the person to be linked from one of the side panels (**Persons, Bookmarks, Relations...**), and release on the **Sundry Links** tab.
3. Complete the information fields on the link and press **OK**.

Change a personal link

Every person in the genealogy file may be linked to one or more individuals by a personal link. Indicate the information known about the nature of the link in the input fields.


Change or supplement the information in the **Personal Data** tab.

Windows' Links

Surname	Role	Comments
RUCASTLE Gilbert	Father-in-law	
BERNSTEIN Helena	Friend	

Mac's Sundry Links

Name	Role	Comments
DUROUCHET Marie-Louise	Testatrix	Elle fait de son petit-fils son légataire universel.

1. Click the **Sundry Links** tab.
2. Select the link to edit and click **Edit and modify the selected link** , Mac: or double-click the line.
3. Edit the information concerning the link.

Type of link


Choose the type of link between the two persons from the pop-up menu.


Info • The position of the two persons may be meaningful (Mark is the heir of Peter therefore Peter is the testator of Mark), or non-differentiating (Maya and Brenda are friends).

Meaning of the link

(Windows) Meaning of the link

Linking a Person

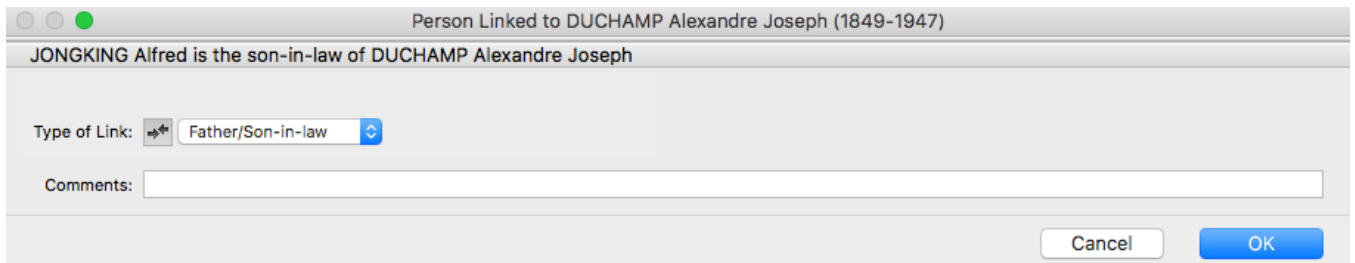
THOMAS Edward (> 1804-1874)
is linked 'Ancestor' to CAREY Andreas 

Type of Link
 

Comment



(Mac) Meaning of the link

Add other linked persons



Person Linked to DUCHAMP Alexandre Joseph (1849-1947)


JONGKING Alfred is the son-in-law of DUCHAMP Alexandre Joseph

Type of Link:  Father/Son-in-law 

Comments:

Cancel OK

Check the link in the window title (Is Mark really said to be the heir of Peter, or the testator?).

To change the link, click the **Swap the link** icon .


Comment

Type a comment justifying the link between these two people.

Once you have validated the entry or modification of the linked person, the comment will appear in the list of linked persons.

The appropriate type of link is specified in the **Sundry Links** tab for each of the two persons and the comment of the link is identical.

Unlink a person

1. On the **Personal Data** tab, open the **Sundry Links** tab.
2. On the button bar at the bottom, click  (Unlink the selected person).
3. Validate with **OK** and the personal link between these two people no longer exists, but both persons remain available in your genealogy file.

Facts

With **Facts**, enrich your genealogy with new data and attach witnesses, places, sources, medias and dates to it.

You can add as much as you wish, unlimited number, and you can organize them.

These facts are displayed in the central part of the screen **Data > Personal Data** in the **Facts** tab.

When a **Fact** is filled, the tab is marked with a blue spot.

Facts

Fact	Description	N
Nationality		

- To add a **Facts**, click on the **+** button and select the fact to add then write directly in the **Description** area.
- If you wish to complete this fact with other information, a date, a place, a source, a media... click on the pencil button displayed in the tab.
- To delete a **Fact**, select it and click on the **-** button.

Note: If you confirm a delete, all information linked to this fact will be lost.

- To organize the display of the facts of your genealogy, click on the indented wheel . Select the facts then click on the **Before** and **After** to change the order of this field.

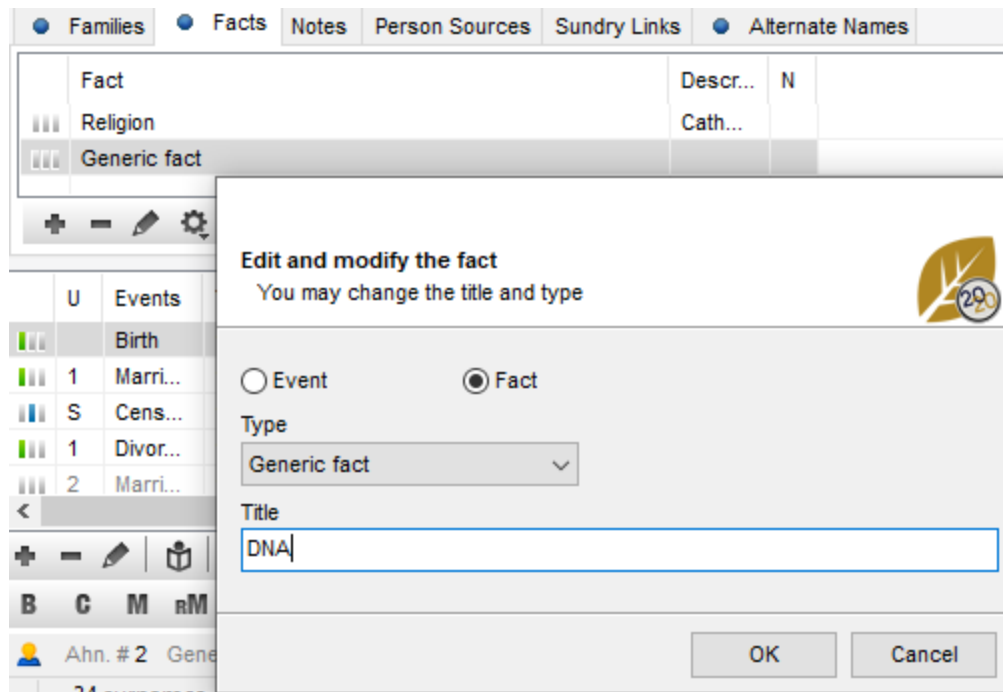
Create customized facts

You can add facts that are not already in the list proposed by Heredis.

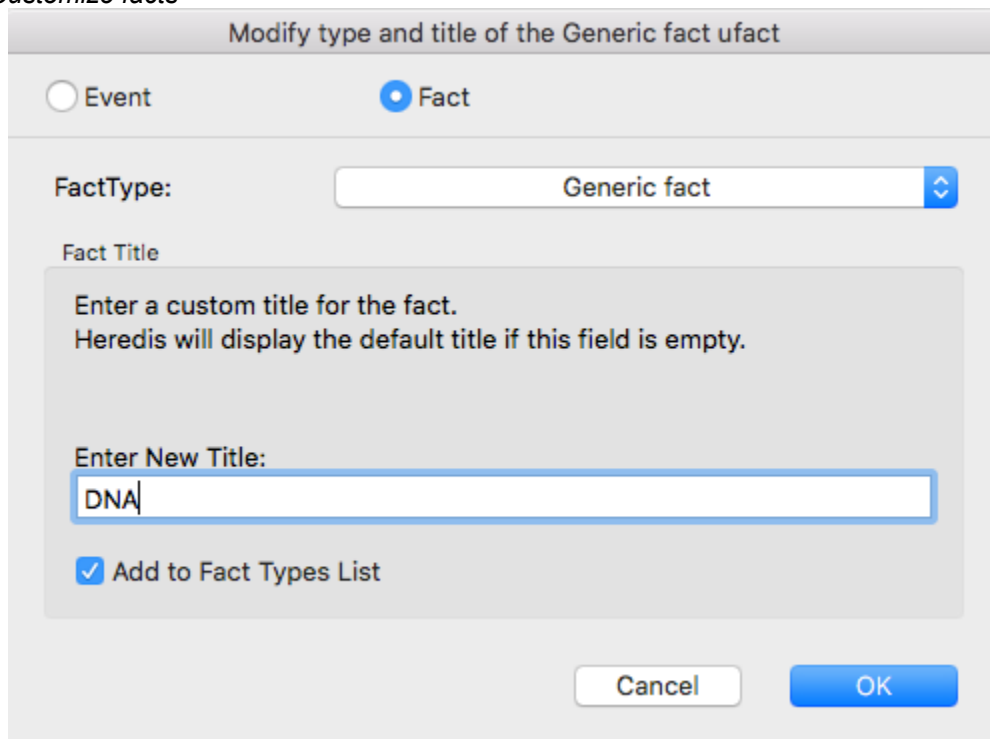
1. Click on **+** button.
2. Choose **Other** and select **Generic fact** or an other fact you wish to add a subcategory to. (for example, Health to add Surgical intervention)
3. Double-click on the name of the new fact in order to customize it. A window opens to edit and rename the fact.

(Windows) Customize facts

Facts



(Mac) Customize facts



4. Enter a new title.

Now this new type of fact will automatically appear in the list of fact to be created. You will now be able to use this fact anytime you need it.

Alternate names

You can make a person's data even more complete by adding alternate names (birth name, maiden name...) in your genealogy.

This type of data is displayed in the center of the **Data>Personal Data** screen, in the **Alternate Names** tab.

(Windows) Alternate names

Surname & Given Names	Type
Mickey	Also ...

Surname: MICKEY Prefix: Suffix: Given Names: Nickname: Type: Also Known As

(Mac) Alternate names

Surname & Given N...	Type
Cloclo	Also Known As

Surname: Cloclo Given Names: Type: Also Known As

Once an other name has been entered, a blue symbol appears in the **Alternate Names** tab.

To add an alternate name, click on the **+** button.

Enter all the data you possess such as prefix, suffix, given names, nickname and select the corresponding type of name in the pop-up menu.

Note: if none of the existing types corresponds to the data you are entering, choose **Others** to create your own type of data. You can also choose to rename the existing types of names predefined in Heredis.

To delete an alternate name, select it in the list and click on the **-** button.

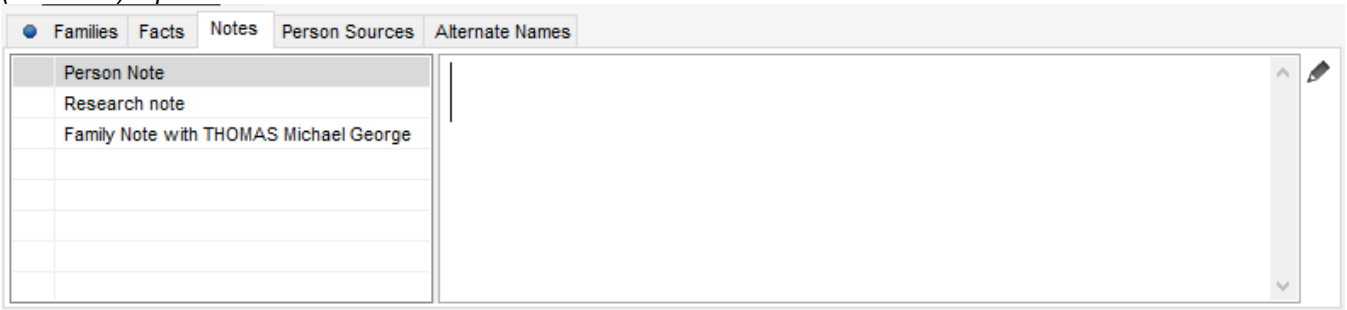
Note: in the Surnames and Given Names indexes, you will not be able to delete these alternate surnames and given names as long as they are used by a person in your genealogy.

Alternate names associated with individuals in your genealogy are automatically processed when you import and export data in GEDCOM or Heredis formats as well as during merges.

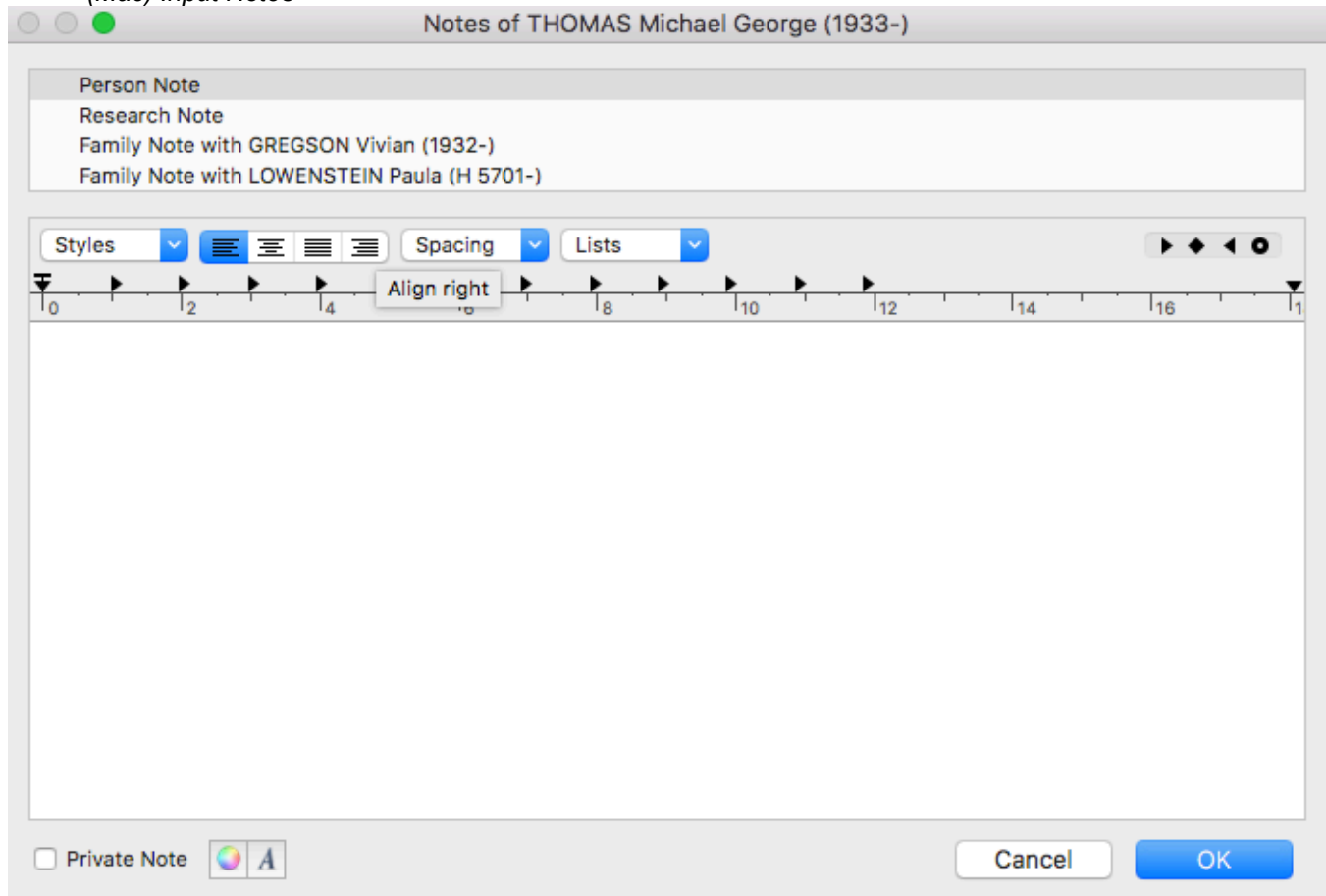
Input notes

Add specific details to your genealogy by using the available notes. You will find entry boxes for notes on persons, families, events, media, sources, surnames, given names, occupations and places. The notes are equipped with formatting tools integrated in the Heredis software. One may also paste formatted text from other applications (word processors, browsers, desktop publishing tools, etc.) though images are ignored. A note is a text block, it is not made to integrate images.

(Windows) Input Notes



(Mac) Input Notes






Individual, family and research notes

1. Display the notes:

- **(Mac)** Choose **Person** menu > **Edit Person Note** or **Edit Family Note**.



- **(Windows)** Choose **Person** menu > **Edit Notes**




- or Click the  ou  button in the toolbar if it is displayed.
- Click directly in the Note field when displayed on the navigation or data input screens (input tabs, indexes, media, etc..).
- In the **Data** screens, click on the pencil  to access the note.

2. Enter the text of the note or paste the contents of the clipboard.

3. Use the formatting tools in the text editor.

4. Tick the **Private Note** box if you wish to keep this note excluded from export of the file, printing or publishing on the Internet.

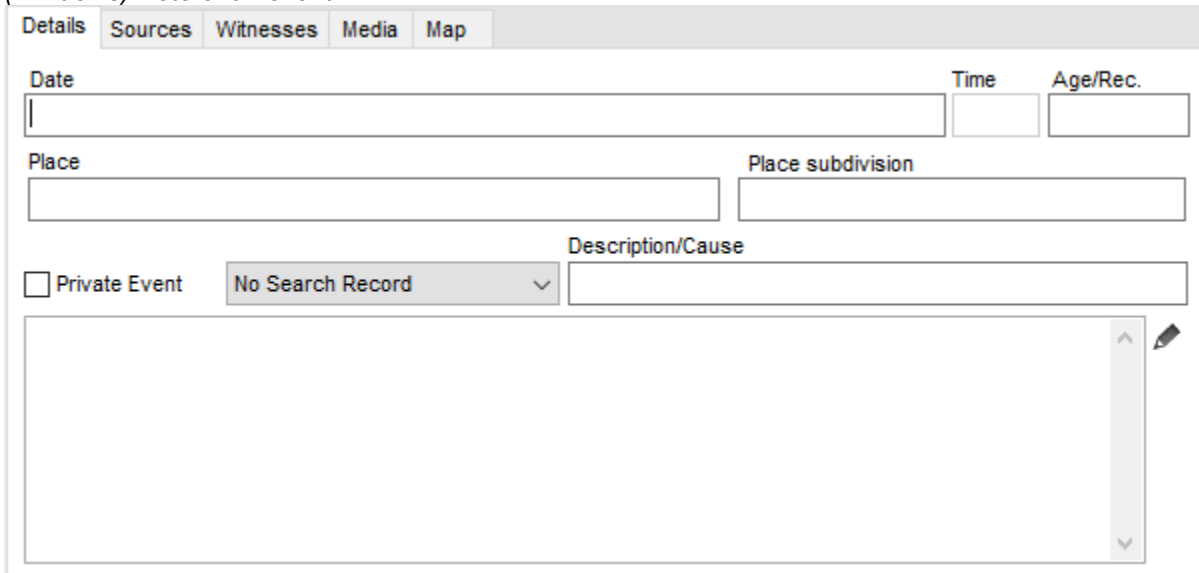
Windows Info • When a note is filled in, the **Notes** tab is preceded by a blue bullet and the button  displayed in the toolbar changes its appearance to .

Mac Info • When a note is filled in, the **Notes** tab is preceded by an icon  and the button  displayed in the toolbar changes its appearance to .

Info • If the note is not visible on the data input tabs, change the data display mode. See [Customize Heredis > Select data entry method](#) for further details.

Note of an event

(Windows) Note of an event



Details Sources Witnesses Media Map

Date Time Age/Rec.

Place Place subdivision

Private Event No Search Record Description/Cause

(Mac) Note of an event

Input notes

Details Sources Witnesses Media Map

Date (Tuesday)
22 June 1971


Age/Record

Place: London - Greater London - London - ENGLAND
London

Place Subdivision
Simons & Tapply

Private No search record

Note
Lawyer - Hanover Square

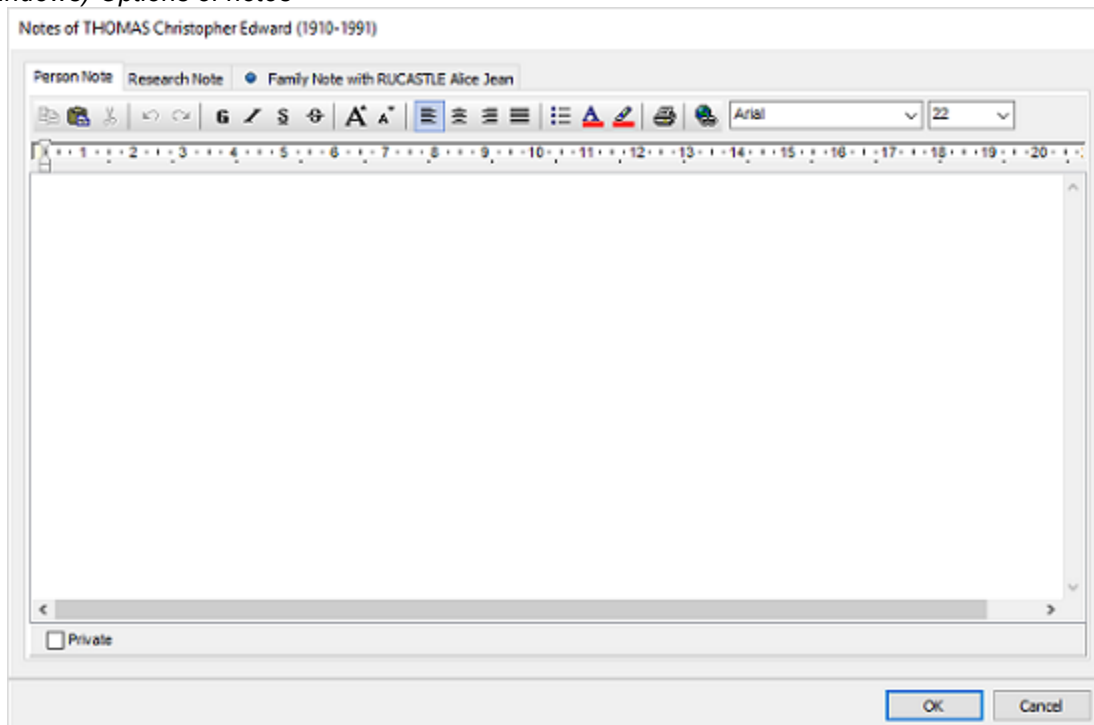
- Type directly your comment in the text box of **Details** tab
- or Click on the pencil  to open the text box in a new window. You can write and modify the format of your note.

They can be formatted with the usual word processing tools.

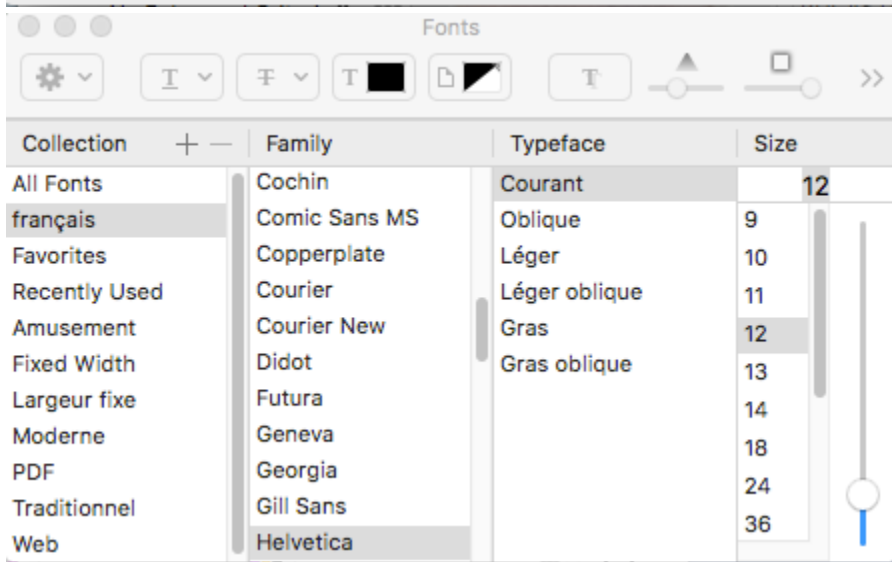
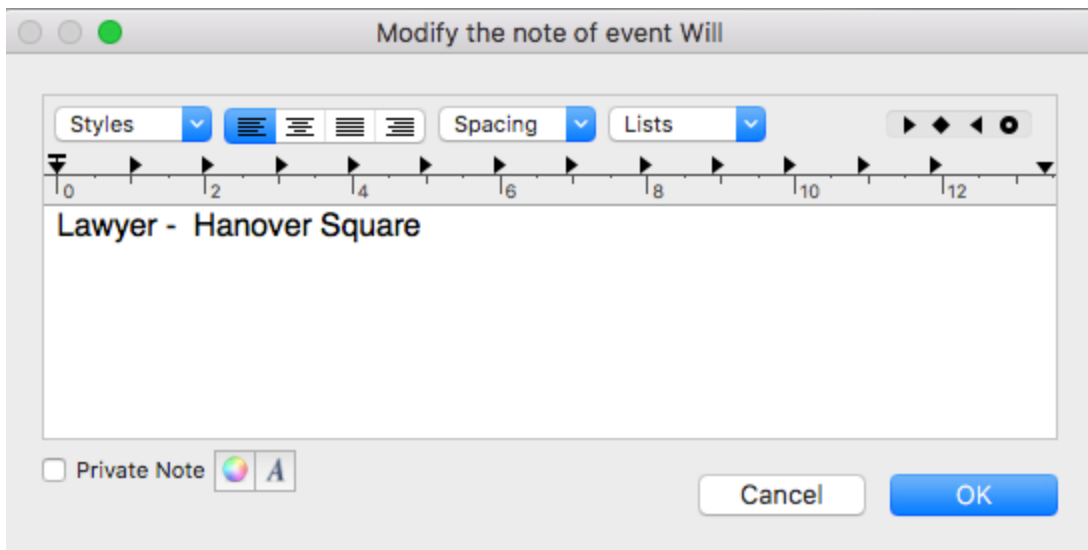
Info • If the note is not visible on the data input tabs, change the data display mode. See Customize Heredis > Select data entry method for further details.

Options of notes

For each notes, you can add a specific format with the text editor:
(Windows) *Options of notes*



(Mac) *Options of notes*



- Typeface: Bold – Italic – Underline
- Alignment: Align Center – Left – Right – Justify
- Choose the font style and size
- Manage the hypertext link
- Cut – Copy – Paste – Print

You can make your note private by ticking the **Private** note box so it won't be published.

Sources

The information gathered about your ancestors will be more or less reliable depending on their origin. Assign one or more sources to each event, fact, or person in order to justify the information recorded.

Each source (an act, a website, a historical work...) may be detailed and illustrated at the time of its creation or later.

- For each source, specify in the proposed boxes, the title, reference, author, quality of data.... A free text box allows you to enter a note or record the transcript of an act.
- You can mark a source as private in order not to export it when exchanging files, nor to publish it.
- Each source may be illustrated with media.

Once a source has been created, you may assign it to one or more events. Each event can have one or more related sources. When you assign a source to an event, add a comment indicating the link between the event and the source.

Create a new source and assign it to an event

Source tab

Source	Comments	Evidence
Family Archives, Misc.		Direct

+

1. Select the event from the **Personal Data** tab.
2. Click the **Sources** tab.
3. Click the **+** button.
4. Click the (Mac) **New Source** button or (Windows) the **+** button in the **Source index** screen.
5. Enter the information for the source and press **OK**. The new source is assigned to the event.

(Mac) Create a source

Entering Source

Type: Private Source

Source Title: Document:


Repository: Author:

Call #: Email: Medium:

Date: Website: Archive:

Quality of Data:

Media
 Note
 Transcription



Private Preferred 100%

(Windows) Create a source

Sources

At least enter : Source type, Title, Call#, Repository and Certainty.
Add media, note, transcription, make the source private by ticking the Private Source box.

Create a source from the source index to attach it later

Open the Source index, click the (Mac) **New Source** button or (Windows) the **+** button in the **Source index** screen.

Note: To save time, you can duplicate a source. Select the source you want to duplicate and click **⌘**. Edit the source with **✎** to edit the fields you want to edit. So if you have the same source but just a reference that is different, you can duplicate the source and only change the reference. This is very useful when you create a source for a complete registry. See also The different modes for Sources & Citations (voir page 157) or see below.

Assign an existing source by drag and drop

1. Select the event from the **Personal Data** tab.
2. Drag the source in the **Sources** panel and drop it in the display field of the event. The source is then assigned.

Assign an existing source from the Sources tab of the event

1. Click the **+** (Link a source) on the button bar to open the **Entering source...** screen.
2. Select the source from the list then validate by clicking **OK**. The source is assigned to the event.

Create Person Sources

You can link sources directly to a person, click on the **Person Sources** tab in the middle of the screen **Data > Personal Data**.

The association of a person source works exactly as the association of a source for an event.

Information for the source

The input/modify screen for a source is composed of fields to be completed, a Note field that can be used for full or partial transcription of the document and a display field for the media assigned to the source.

Type	Record (civil registry, church record, Court...)	Quality of Data	0	3	<input type="checkbox"/> Private Source
Source Name	Arlo E Bernstein in household of Fred Bernstein, "United States Census, 1930"				
Document	"United States Census, 1930," database with images, <i>FamilySear				
Repository	Call Nb.	Date	Medium		
			Internet		
Author	Email	Site WEB (URL)	Archive		
		https://familysearch.org/ark:/61903/			

- **Type:** Specify the type of information that allows you to advance in your genealogy. Is it a deed? A family document? A historical work? Etc.
- **Source Name:** Type a pertinent title for recognizing the document. The title of the source appears in the **Sources** panel and in the **Sources** tab of events, as well as in the genealogy documents you may print.
- **Document:** Specify the type of deed (death certificate, marriage contract, etc.) or what document, official or private, which contains the information (census, invitation, family book, etc.).
- **Repository:** Indicate where the original source is archived or the body where you found the information.
- **Call Number:** If the document is from an archive or library and is listed, enter this here. Specify the volume and page number if it is a published book.
- **Date:** Enter the date of the document that allowed you to find the information. Indicate the date of publication for a book, the date of dispatch for correspondence.

Info • Remember to specify the date of the source if it differs from the date of the event to which it relates (date of birth certificate issued 20 years after the event).

- **Author:** Enter the author of the document that allowed you to find information. The author of the source can be very different depending on the source. Quote a journalist for an article in a magazine, an amateur genealogist for a GEDCOM file, a ministry department or local authority for an administrative document, a parent who took a photo...
- **Email:** Note the email of the person or organization that holds the information.
- **URL:** Specify the address (URL) of the Internet website where you found the information.
- **Medium:** Select the medium where you store information or where you saw it. Do you have the original family book? Do you have a copy of the original or do you have a scanned image of the deed? Have you seen the information by consulting a microfilm? Have you found the information in an online genealogy?
- **Archive:** This section concerns only you and allows you to specify where the document is in your personal archives: in a specific file, in a specific folder of your hard disk, etc.
- **Quality of Data:** To qualify the validity of the information, set the certainty of the source by using the cursor, from 0 (not sure) to 3 (completely certain).
- **Note:** In the **Note and transcription** field, enter the information on the source: the details of the genealogy that gave you the information, the circumstances when you collected it by interviewing an old aunt, etc. You can type in the partial or complete transcript of the act. You have available the text editing tools for formatting.
- Tick the **Private Note** box to exclude the note from exports or from printed documents.

Transcript your sources

Heredis understands the difficulty of your work in deciphering the acts and proposes a **Display mode** get the best possible display of the media and of the note. Click on Display mode button of a source or citation to view the media next to the transcription text block.

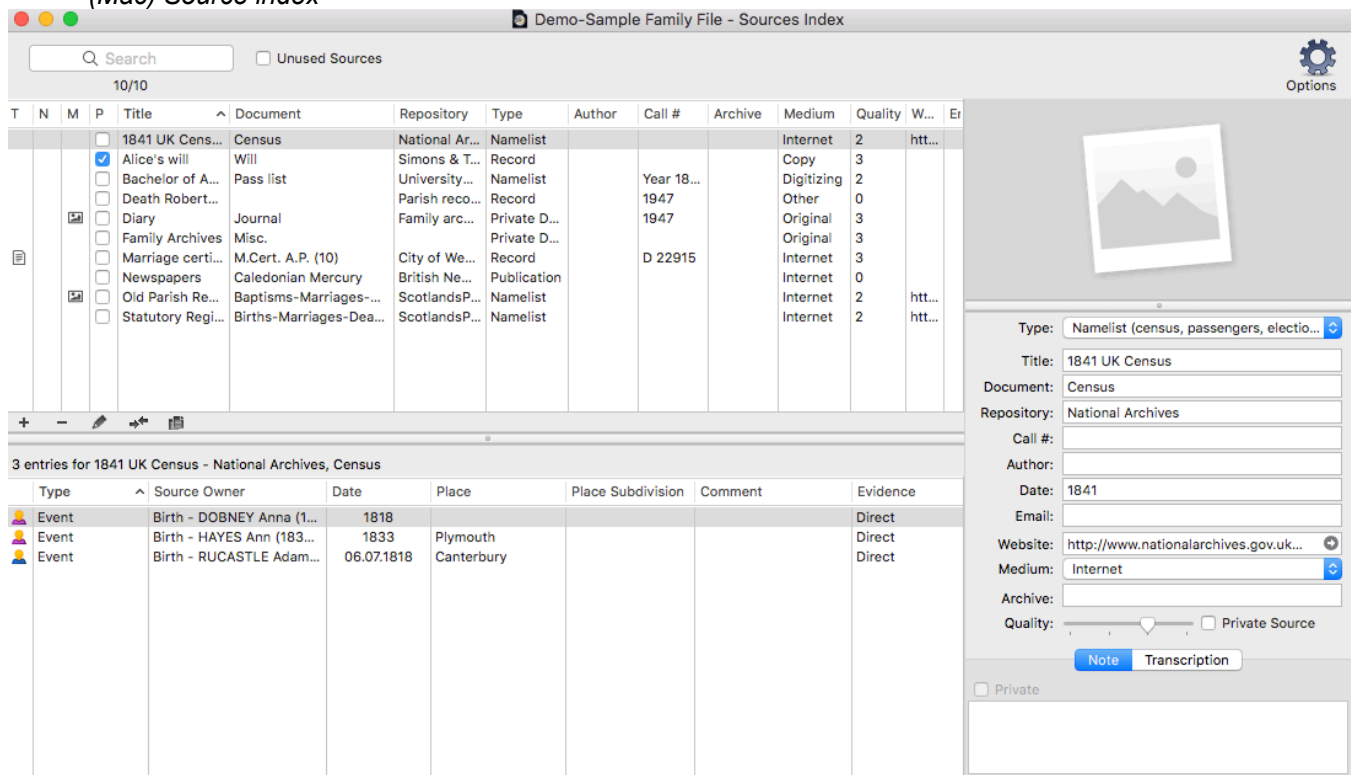
Click the **Horizontal Display** button to visualize the entire width of the scanned document, even if you have zoomed the image. You may enter text below the displayed lines. Click the **Vertical Display** button to visualize the document as a whole, including marginal notes. You may enter text to the right of the displayed image.

Generalities

All sources entered are managed by the **Sources Index** .

Warning: Any modification in a source will be applied to all its uses.

(Mac) Source index



The screenshot shows the Heredis Sources Index application. The main window displays a table of sources with columns: T, N, M, P, Title, Document, Repository, Type, Author, Call #, Archive, Medium, Quality, W..., and Er. The selected source is '1841 UK Census' from National Archives, which is a Namelist. The right-hand pane shows the details for this source, including its title, document type, repository, call number, date, website, medium, and quality. Below the main table, there is a section for '3 entries for 1841 UK Census - National Archives, Census' with columns for Type, Source Owner, Date, Place, Place Subdivision, Comment, and Evidence. The entries are: Birth - DOBNEY Anna (1818), Birth - HAYES Ann (1833), and Birth - RUCASTLE Adam (06.07.1818).

T	N	M	P	Title	Document	Repository	Type	Author	Call #	Archive	Medium	Quality	W...	Er
			<input type="checkbox"/>	1841 UK Cens...	Census	National Ar...	Namelist				Internet	2	htt...	
			<input checked="" type="checkbox"/>	Alice's will	Will	Simons & T...	Record				Copy	3		
			<input type="checkbox"/>	Bachelor of A...	Pass list	University...	Namelist		Year 18...		Digitizing	2		
			<input type="checkbox"/>	Death Robert...		Parish reco...	Record		1947		Other	0		
			<input type="checkbox"/>	Diary	Journal	Family arc...	Private D...		1947		Original	3		
			<input type="checkbox"/>	Family Archives	Misc.		Private D...				Original	3		
			<input type="checkbox"/>	Marriage certi...	M.Cert. A.P. (10)	City of We...	Record		D 22915		Internet	3		
			<input type="checkbox"/>	Newspapers	Caledonian Mercury	British Ne...	Publication				Internet	0		
			<input type="checkbox"/>	Old Parish Re...	Baptisms-Marriages-...	ScotlandsP...	Namelist				Internet	2	htt...	
			<input type="checkbox"/>	Statutory Regi...	Births-Marriages-Dea...	ScotlandsP...	Namelist				Internet	2	htt...	

Type	Source Owner	Date	Place	Place Subdivision	Comment	Evidence
Event	Birth - DOBNEY Anna (1...	1818				Direct
Event	Birth - HAYES Ann (183...	1833	Plymouth			Direct
Event	Birth - RUCASTLE Adam...	06.07.1818	Canterbury			Direct

(Windows) Source index

Sources Index (10 sources)

Search: Unused Sources Only
 Private Sources Only

N	T	M	P	Title	Type	Repository	Document	Call #	Medium	Archiv
				1841 UK...	Namelist	National Archives	Census		Internet	
				Alice's will	Record	Simons & Tapply	Will		Copy	
				Bachelo...	Namelist	University archi...	Pass list	Year ...	Digitizing	
				Death R...	Record	Parish records		1947	Other	
				Diary	Private Do...	Family archives	Journal	1947	Original	
				Family A...	Private Do...		Misc.		Original	
				Marriage...	Record	City of Westmin...	M.Cert. A...	D 22...	Internet	
				Newspa...	Publication	British Newspa...	Caledonia...		Internet	
				Old Pari...	Namelist	ScotlandsPeople	Baptisms...		Internet	
				Statutor...	Namelist	ScotlandsPeople	Births-Mar...		Internet	

Record

▼ Note
No note

▼ Transcription
No note

3 entries for 1841 UK Census - National Archives, Census

Type	Sourc...	Date	Place	Subdi...	Comm...	Evide...
Ev...	Birth ...	1818				Direct
Ev...	Birth ...	1833	Plym...			Direct
Ev...	Birth ...	07.06...	Cant...			Direct

Tools Print Close

When you attach a source, add a comment to indicate the connection between the event, the facts or person and the source.

You can also register the quality of the proof you have, click on the displayed list in Evidence column and select the appropriate value according to the detained certificates.

(Mac) Source tab

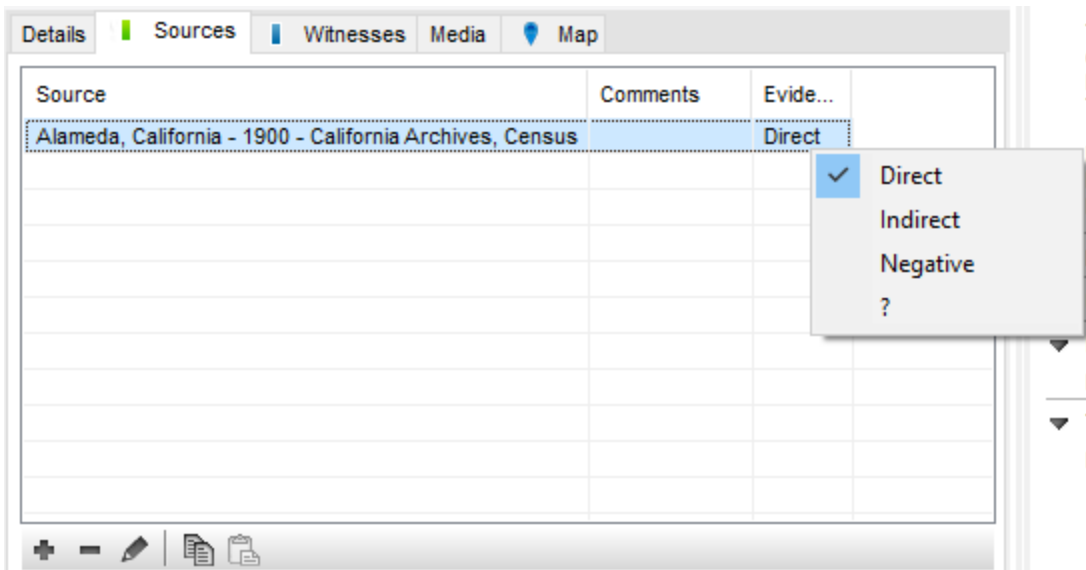
Details Sources Witnesses Media Map

Source	Comments	Evidence
Alameda, California - 1900 - Calif...		<input checked="" type="checkbox"/> Direct <input type="checkbox"/> Indirect <input type="checkbox"/> Negative <input type="checkbox"/> ?

+ - [edit] [add] [remove]

(Windows) Source tab

Sources



Direct: the source responds to the searched question by itself.

Indirect: the source is relevant but needs more information.

Negative: the source is relevant by the lack of information it should contained.

Note: When you add a source to an event, the proof is automatically fixed to direct. You can change this setting in Format tab of Heredis's preferences. (Mac) **Heredis** menu > **Preference** > **Format tab** > **Evidence**, (Windows) **Tools** menu > **Preferences** > **Heredis Preferences** > **Evidence**, choose the option that matches best to your work.

Report to Source index (voir page 256) and Indexes: Generalities (voir page 241) for more details.

Managing citations in comprehensive mode

Heredis allows you to enrich the note associated to the sources in order to make it a full citation.

To switch in comprehensive mode,

- (Mac) click **Heredis** menu > **Preference** > **Format tab**,
- (Windows) **Tools** menu > **Preferences** > **Heredis Preferences**,
- Tick the **Comprehensive mode** box and check the "**Comprehensive mode**" alternative in the Default source citation options.

New options appear allowing you to register the quality of the source and the information.

Original: the source is in its original form.

Derivative: the source is extracted, transcribed, translated or derived from the original.

Primary: the source comes from a person who did have direct knowledge of the event or person.

Secondary: the source comes from a person who did not have a direct knowledge of the event or person (local history, tradition, family history...).

Source's Preferences

Quality		
Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Original: the source is in its original form.
Derivative: the source is extracted, transcribed, translated or derived from the original.

In comprehensive mode, when you want to associate a source to an event, Heredis display a citation

windows allowing you to:

- link the citation to a generic source, a specific record for example
- qualify and eventually declare as private citation
- add the certificate that you detain as media of the citation
- transcribe this certificate and add a note

(Windows) Source Citation

Source citation for 'Marriage - THOMAS Christopher Edward (1910-1991) & RUCASTLE Alice Jean (1908-1998)'

Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)

Citation

Details Media Note Transcription

Comments: Marriage of Christopher Thomas and Alice Rucastle

Private Citation

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Direct: information in the source plainly states the fact by itself.
Indirect: the source is relevant but needs to be combined with additional information.
Negative: the source is relevant because of the lack of information it should contain.

Display mode OK Cancel

(Mac) Source Citation

Sources

Source citation for the Marriage event of THOMAS Christopher Edward

Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)

Citation

Details Media Note Transcription

Comments: Marriage of Christopher Thomas and Alice Ruscatle

Quality



Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Primary: the information was provided by someone having firsthand knowledge of the event or person.
Secondary: the information was provided by someone having secondhand knowledge of the event or person (local history, tradition, family history...).

Private Citation

Display mode Cancel OK

Duplicate a citation of a source

If you want to duplicate the citation and all the elements which compose it in another event, use the  copy & paste  buttons.

Details Sources Witnesses Media Map

Source	Comments	Evidence
Family Archives, Misc.		Direct

Copy the selected source citation en: 2 1

Summary of the source

In the **Data** screen > **Personal Data**, next to the list of **Events**, click once on any source under the **Sources** tab: a summary of the source – or of the source citation if you have selected the **Comprehensive** mode under the Default Source Citation Options – will be displayed in the **Summary** panel.

Source Citation

Source Citation

Family Archives, Misc.

1 media

Comments

Quality

Source: original

Information: primary

Evidence: direct

Note

No note for this citation

Transcription

No transcription for this citation

For further details, see The different mode for Sources & Citations (voir page 157)

The different mode for Sources & Citations

The information gathered about your ancestors will be more or less reliable depending on their origin. Assign one or more sources to each event in order to justify the information recorded.

Basic Mode

This source management mode is set by default in Heredis. It corresponds to 1 source = 1 deed. The source can then be used for the information resulting from this deed.

Add a source to an event by clicking **+** button on Sources tab. See also Sources (voir page 147).

(Windows) Source's Basic Mode

The screenshot shows the 'New Source' dialog box in Heredis. The title bar reads 'New Source'. The dialog is divided into several sections. At the top, there is a 'Type' dropdown menu set to 'Record (civil registry, church record, Court...)', a 'Quality of Data' slider ranging from 0 to 3, and a 'Private Source' checkbox. Below this are two rows of input fields: 'Source Name' and 'Document'. The next row contains 'Repository', 'Call Nb.', 'Date', and 'Medium' (a dropdown menu set to 'Other'). The following row has 'Author', 'Email', 'Site WEB (URL)', and 'Archive'. Below these fields are three tabs: 'Media', 'Note', and 'Transcription'. The 'Media' tab is selected, showing a large area with the text 'Add a picture'. At the bottom of the dialog, there is a toolbar with icons for zooming, adding, deleting, and editing, and buttons for 'Save', 'Display Mode', 'OK', and 'Cancel'.

(Mac) Source's Basic Mode

Each source (an act, a website, a historical work...) may be detailed and illustrated at the time of its creation or later.

- For each source, specify in the proposed boxes, the title, reference, author, quality of data.... A free text box allows you to enter a note or record the transcript of an act.
- You can mark a source as private in order not to export it when exchanging files, nor to publish it.
- Each source may be illustrated with media.

Comprehensive Mode

To switch in comprehensive mode,

- (Mac) click **Heredis** menu > **Preference > Format tab**,
- (Windows) **Tools** menu > **Preferences > Heredis Preferences**,
- tick the **Comprehensive mode** box and check the “**Comprehensive mode**” alternative in the Default source citation options.

The comprehensive mode allows to have a generic source associated with a citation for several uses, 1 source = several deed. For example a source created for a registry and a citation per deed inside of this registry.

In comprehensive mode, when you click **+** on Sources tab of an event, you can associate a source already in your Source Index or create a New source if not already created.

(Windows) Source's Comprehensive Mode

The different mode for Sources & Citations

Sources Index (10 sources)
— □ ×

Search:
 Unused Sources Only
 Private Sources Only

N	T	M	P	▲	Title	Type	Repository	Document	Call #	Medium	Archiv
					1841 UK...	Namelist	National Archives	Census		Internet	
				🔍	Alice's will	Record	Simons & Tapply	Will		Copy	
					Bachelo...	Namelist	University archi...	Pass list	Year ...	Digitizing	
					Death R...	Record	Parish records		1947	Other	
				📄	Diary	Private Do...	Family archives	Journal	1947	Original	
					Family A...	Private Do...		Misc.		Original	
				📄	Marriage...	Record	City of Westmin...	M.Cert. A...	D 22...	Internet	
					Newspa...	Publication	British Newspa...	Caledonia...		Internet	
				📄	Old Pari...	Namelist	ScotlandsPeople	Baptisms-...		Internet	
					Statutor...	Namelist	ScotlandsPeople	Births-Mar...		Internet	

3 entries for 1841 UK Census - National Archives, Census

Type	Sourc...	Date	Place	Subdi...	Comm...	Evide...
👤 Ev...	Birth ...	1818				Direct
👤 Ev...	Birth ...	1833	Plym...			Direct
👤 Ev...	Birth ...	07.06...	Cant...			Direct

Tools ▾
Print
Close

Source citation for 'Marriage - THOMAS Christopher Edward (1910-1991) & RUCASTLE Alice Jean (1908-1998)'
— □ ×

Source

Marriage certificate - City of Westminster, M.Cert. A.P. (10) 👁️ ↗️

Citation

Details
Media
Note
Transcription

Comments:

Private Citation

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Direct: information in the source plainly states the fact by itself.
 Indirect: the source is relevant but needs to be combined with additional information.
 Negative: the source is relevant because of the lack of information it should contain.

Display mode
OK
Cancel

(Mac) Source's Comprehensive Mode

Demo-Sample Family File - Sources Index

Search Unused Sources Options

10/10

T	N	M	P	Title	Document	Repository	Type	Author	Call #	Archive	Medium	Quality	W...	Er
			<input type="checkbox"/>	1841 UK Cens...	Census	National Ar...	Namelist				Internet	2	htt...	
			<input checked="" type="checkbox"/>	Alice's will	Will	Simons & T...	Record				Copy	3		
			<input type="checkbox"/>	Bachelor of A...	Pass list	University...	Namelist		Year 18...		Digitizing	2		
			<input type="checkbox"/>	Death Robert...		Parish reco...	Record		1947		Other	0		
			<input type="checkbox"/>	Diary	Journal	Family arc...	Private D...		1947		Original	3		
			<input type="checkbox"/>	Family Archives	Misc.		Private D...				Original	3		
			<input type="checkbox"/>	Marriage certi...	M.Cert. A.P. (10)	City of We...	Record		D 22915		Internet	3		
			<input type="checkbox"/>	Newspapers	Caledonian Mercury	British Ne...	Publication				Internet	0		
			<input type="checkbox"/>	Old Parish Re...	Baptisms-Marriages-...	ScotlandsP...	Namelist				Internet	2	htt...	
			<input type="checkbox"/>	Statutory Regi...	Births-Marriages-Dea...	ScotlandsP...	Namelist				Internet	2	htt...	

3 entries for 1841 UK Census - National Archives, Census

Type	Source Owner	Date	Place	Place Subdivision	Comment	Evidence
Event	Birth - DOBNEY Anna (1...	1818				Direct
Event	Birth - HAYES Ann (183...	1833	Plymouth			Direct
Event	Birth - RUCASTLE Adam...	06.07.1818	Canterbury			Direct

Type:

Title:

Document:

Repository:

Call #:

Author:

Date:

Email:

Website:

Medium:

Archive:

Quality: Private Source

Private

The different mode for Sources & Citations

Source citation for the Marriage event of THOMAS Christopher Edward

Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)

Citation

Details Media Note Transcription

Comments: Marriage of Christopher Thomas and Alice Ruscatle

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Primary: the information was provided by someone having firsthand knowledge of the event or person.
Secondary: the information was provided by someone having secondhand knowledge of the event or person (local history, tradition, family history...).

Private Citation

Display mode Cancel OK

New options appear allowing you to register the quality of the source and the information.

Original: the source is in its original form.

Derivative: the source is extracted, transcribed, translated or derived from the original.

Primary: the source comes from a person who did have direct knowledge of the event or person.

Secondary: the source comes from a person who did not have a direct knowledge of the event or person (local history, tradition, family history...).

Source's Preferences

Quality


Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Original: the source is in its original form.
Derivative: the source is extracted, transcribed, translated or derived from the original.

In comprehensive mode, when you want to associate a source to an event, Heredis display a citation windows allowing you to:

- link the citation to a generic source, a specific record for example
- qualify and eventually declare as private citation

- add the certificate that you detain as media of the citation
- transcribe this certificate and add a note

You can modify the Source by clicking on the  eye button. Be aware that if you do modify it, it will be changed for all the utilisation of this source.

(Windows) Source's Comprehensive Mode

Source citation for 'Marriage - THOMAS Christopher Edward (1910-1991) & RUCASTLE Alice Jean (1908-1998)'

Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)

Citation
Details | Media | Note | Transcription

Comments: Marriage of Christopher Thomas and Alice Rucastle

Private Citation

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Direct: information in the source plainly states the fact by itself.
 Indirect: the source is relevant but needs to be combined with additional information.
 Negative: the source is relevant because of the lack of information it should contain.

Display mode | OK | Cancel

(Mac) Source's Comprehensive Mode

The different mode for Sources & Citations

Source citation for the Marriage event of THOMAS Christopher Edward

Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)

Citation

Details Media Note Transcription

Comments: Marriage of Christopher Thomas and Alice Ruscatle

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Primary: the information was provided by someone having firsthand knowledge of the event or person.
Secondary: the information was provided by someone having secondhand knowledge of the event or person (local history, tradition, family history...).

Private Citation

Display mode Cancel OK

Input a Family Group Data

The **Data** tab > **Family Group Data** tab is designed to add easily to expanded family groups and is particularly suited for the entry of descendants.


Family Group Data

Parents (2)									
	Surname	Given Names	B	Birth Date	Birth Place	D	Death D...	Death Place	
F	Thomas	George	B	7/4/1872	Oxford	D	8/1/1947	Oxford	
M	Davis	Violet Elizabeth	B	1875	Blackpool	D	1966	Oxford	
+ - ↑									
Families (1)									
	Surname	Given Names	x	Marriage Date	Marriage Place				
1	Rucastle	Alice Jean	M	11/22/1935	London				
+ - ↑									

Each generation has an adapted data entry field: parents, spouses and children and their spouses may be entered one after another.

Click on the **+** button to add parents, a spouse or a child.

Enter the surname and given name. Then type the date and place of the required events (Birth, Death or Marriage).

To avoid duplicates, Heredis will indicate with a red arrow , any existing person who may match the person you are entering. Click the red arrow to see the list of potential duplicates. If you think you have identified the person you wish to add, stop typing and select the person from the list and then click **Choose**.

Family Group Data


Parents (2)									
Families (3)									
#	Surname	Given Names	M	Marriage Date	Marriage Place				
1	GREGSON	Vivian	M	07/01/1954	Hudson				
2	LOWENSTEIN	Paula	M	03/03/1976	Troy				
3	DAVES	<input type="text"/>							
+ - ↑									

If no person displayed in the list corresponds to your individual, continue filling out the data fields.

Each data input is validated as soon as you click outside the line. Thus, without displaying any other screen, individuals are simply added generation after generation.


Each field of the **Family Group Data** tab is equipped with the same tools as the other input screens (modular input modes, drag and drop input, automatic formatting, real-time duplicate control).

To delete a person from the family data group, simply select it and click on the **■** button.

To modify it use the  button in the selected line.

To add a spouse to a child, use the rings icon .

To display the selected person, click on the **↑** button.


Note: As usual in Heredis, you can display more or less fields by using the  indented wheel and change the entering mode.

See also Add children (voir page 93), Add parents (voir page 79), Add spouses (voir page 87).

Census

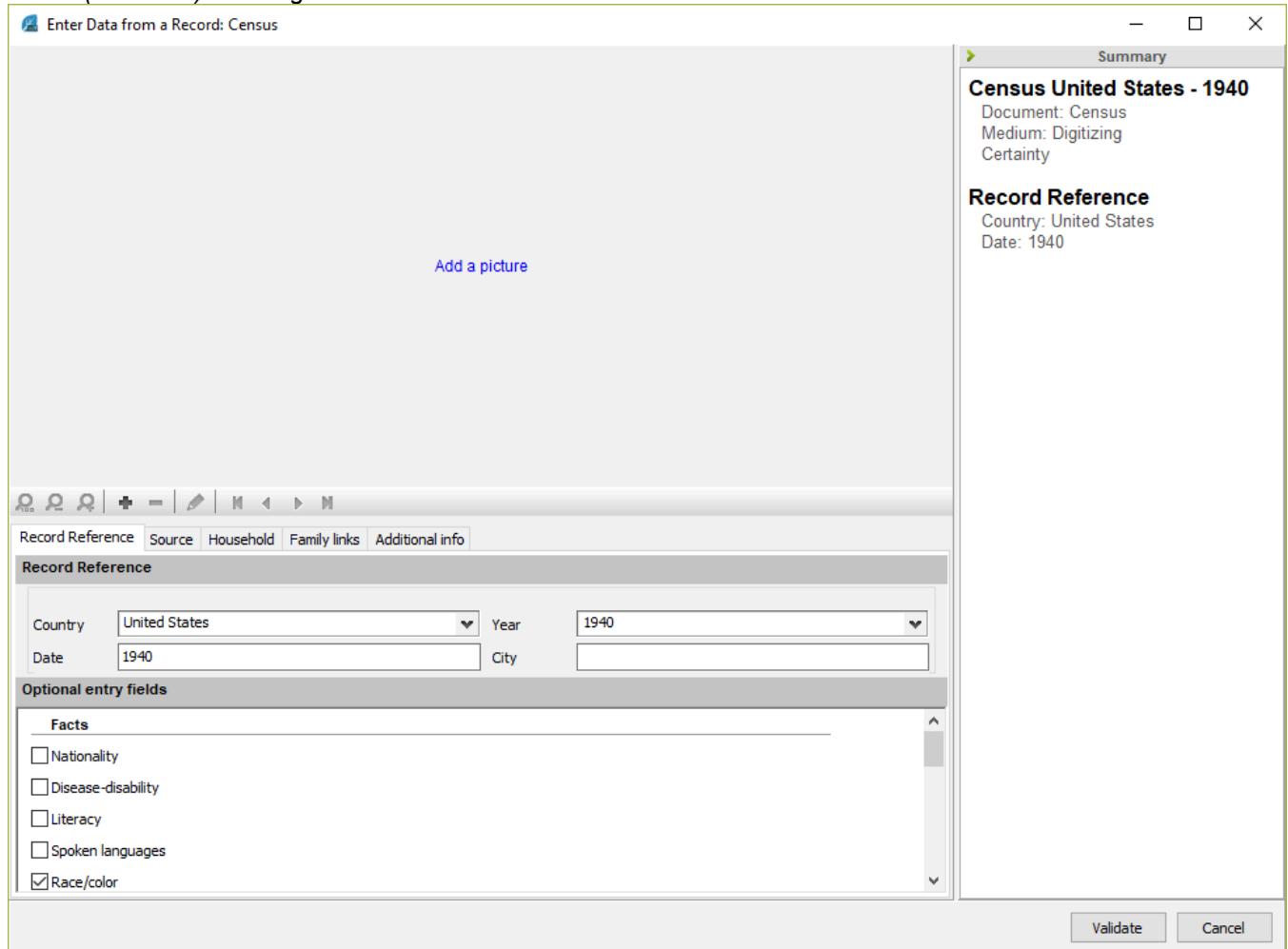
Entering Data from a Census

During your searches, you may need to consult census records. As a matter of fact, such documents can help you narrow down the range of a search period. Imagine you are missing the death date for one of your ancestors. If he/she appears on the records of the 1830 census but is no longer listed on the 1840 one, then you can hypothetically presume that he/she passed away between 1830 and 1840. Moreover, the census will provide data on the household composition, occupations, place of dwelling...

To easily enter data from census records, click on the shortcut  Census of your toolbar or from the menu **Person > Census**.

A window opens up so you can easily enter the data found on this type of documents. An area is available for you to add a media. Click the + button to add the media from your hard-drive disk, from the media index, or from the clipboard.

(Windows) Entering data from a census



Enter Data from a Record: Census

Summary

Census United States - 1940
Document: Census
Medium: Digitizing
Certainty

Record Reference
Country: United States
Date: 1940

Record Reference | Source | Household | Family links | Additional info

Record Reference

Country: United States | Year: 1940
Date: 1940 | City:

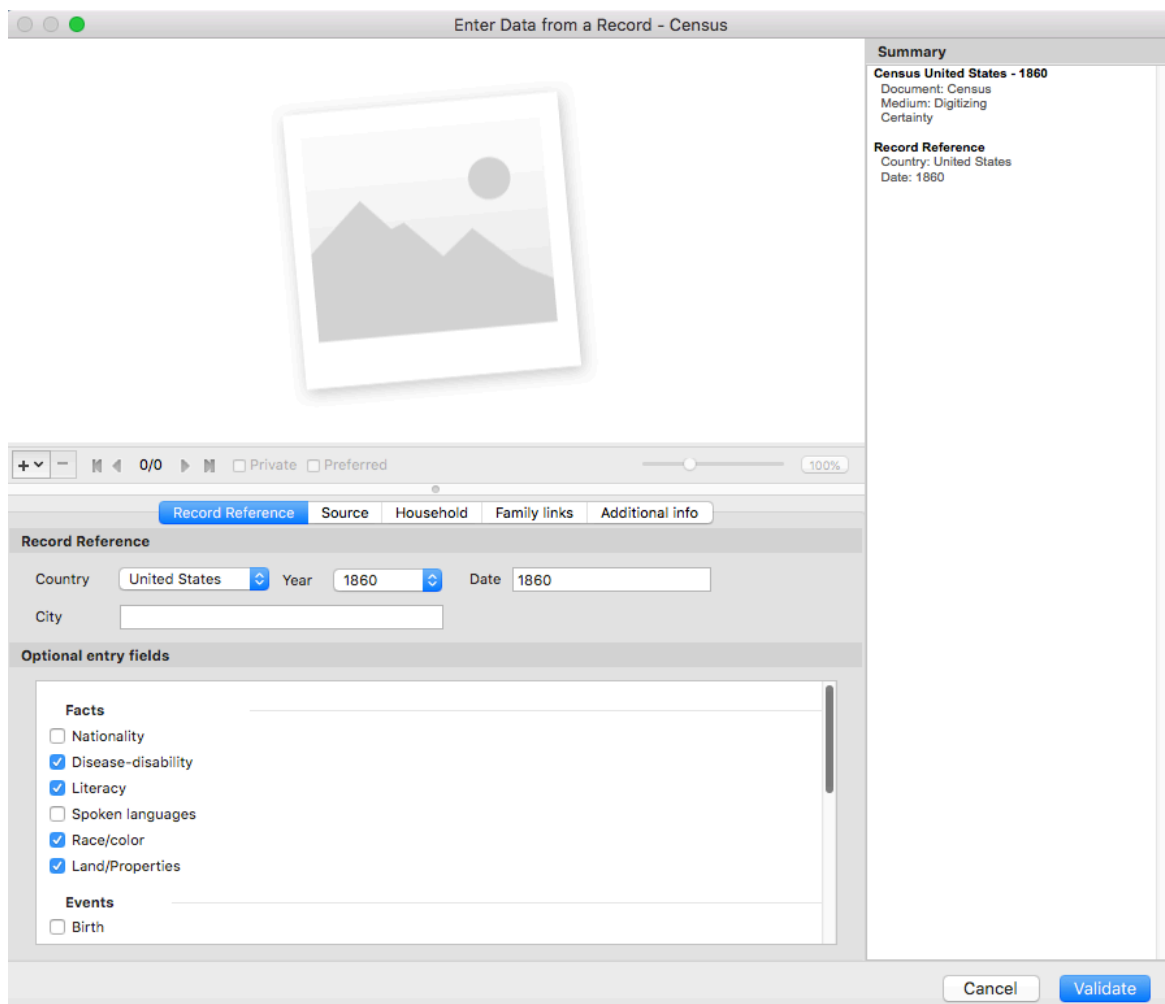
Optional entry fields

Facts

- Nationality
- Disease-disability
- Literacy
- Spoken languages
- Race/color

Validate Cancel

(Mac) Entering data from a census



The usual Heredis tools are available so you can **zoom in** and **out**, **add**, **delete**, or **edit** a media. In the lower area, several tabs are available for you to easily enter data from the census.

The Record Reference tab

First, start with the **Record Reference** tab. Select the desired **Country**. If the country is not listed, select **Other** in the scroll-down menu. In the same way, you can modify the year in the **Date** field.

Enter the **City**.

You will probably notice that **Optional entry fields** will vary according to the year and country selected. Indeed, Heredis has prerecorded for you the most frequent entry fields for each census, year after year, in the US and in some other countries. You are given the possibility to modify them by selecting or unselecting each entry field according to your needs. Optional entry fields are listed according to the place where the data you enter will be stored. As an example, you will be able to later find the data on Nationality in Facts section.

(Windows) Record Reference Tab

Census

The screenshot shows the 'Record Reference' tab in a software application. At the top, there are five tabs: 'Record Reference', 'Source', 'Household', 'Family links', and 'Additional info'. The 'Record Reference' tab is active. Below the tabs, there are four input fields: 'Country' (a dropdown menu with 'United States' selected), 'Year' (a dropdown menu with '1850' selected), 'Date' (a text input field containing '1850'), and 'City' (an empty text input field). Below these fields is a section titled 'Optional entry fields' which contains a list of checkboxes under the heading 'Facts':

- Nationality
- Disease-disability
- Literacy
- Spoken languages
- Race/color

(Mac) Record Reference Tab

The screenshot shows the 'Source' tab in a software application. At the top, there are five tabs: 'Record Reference', 'Source', 'Household', 'Family links', and 'Additional info'. The 'Source' tab is active. Below the tabs, there are four input fields: 'Country' (a dropdown menu with 'United States' selected), 'Year' (a dropdown menu with '1860' selected), 'Date' (a text input field containing '1860'), and 'City' (an empty text input field). Below these fields is a section titled 'Optional entry fields' which contains two sections of checkboxes: 'Facts' and 'Events'.

- Facts**
 - Nationality
 - Disease-disability
 - Literacy
 - Spoken languages
 - Race/color
 - Land/Properties
- Events**
 - Birth

You may then enter the data related to the **Source**. As you will see, fields are partially filled out. You can modify them as you please.

Source Tab

You are given the option to enter source details for your census. Some data are already filled based on what you previously entered in Record References. You may change it if you wish.

(Windows) Source Tab

Record Reference Source Household Family links Additional info

Source

Title
 Private Source

Origin of the document

Document <input type="text" value="Census"/>	Medium <input type="text" value="Digitizing"/>	Quality of Data <input type="text" value="Certainty"/>
Repository <input type="text"/>	Call # <input type="text"/>	Date <input type="text"/>
Author <input type="text"/>	Email <input type="text"/>	Website <input type="text"/>

Archive

(Mac) Source Tab

Record Reference Source Household Family links Additional info

Source

Title
 Private Source

Origin of the document

Document <input type="text" value="Census"/>	Medium <input type="text" value="Digitizing"/>	Quality of Data <input type="text" value="Certainty"/>
Repository <input type="text"/>	Call # <input type="text"/>	Date <input type="text"/>
Author <input type="text"/>	Email <input type="text"/>	Website <input type="text"/>

Archive

Then, go to **Household** tab.

Household Tab

Under the **Household** tab, enter the **Address** then the household **Composition** – in other words, the number of persons living together under the same roof.

In the **Persons** area, click the + button to add a person; by default, the first person you enter will be considered the Head of Household.

Specify his/her **Surname** and **Given Names**. Just like every time a person is entered in Heredis, the magnifying glass will turn into a red arrow when the person is possibly already in the file. If you know he/she is in your file but his/her name is written in a different way, click on the magnifying glass to select him/her. If you don't and keep entering you'll create a duplicate.

Specify **Occupation**.

Select this person's **Household Status** by clicking on the pull-down list.

Continue entering data according to the fields available for your census.

(Windows) Household Tab

Census

Record Reference Source Household Family links Additional info

Household

Address/Place Subdivision

Composition

Persons

THOMAS* - Head of Household

Surname THOMAS

Given Names Michael Gender ?

Occupation

Household Status

Head of Household

(Mac) Household Tab

Record Reference Source Household Family links Additional info

Household

Address/Place Subdivision

Composition

Persons (1)

THOMAS* - Head of Household

Surname THOMAS

Given Names Michael Gender ?

Occupation

Household Status

Head of House...

Facts

Disease-disability Health Fact - renamed

Literacy Instruction Fact - renamed

Race/color Physical Description Fact -...

Note: If necessary, entry fields can be added at any time by going back to the **Optional Entry Fields**.

Add the other persons. For each one of them, specify his/her **Household Status** in relation to the Head of Household.

Note: The persons who are not already part of your genealogy file are marked with an asterisk and will be created after the census record is validated.

Mac only: You can drag and drop from the **Persons** panel in order to add a person to a household. Make sure to check **Family Links** or to create them if needed.

Family Links tab

Under the **Family Links** tab, double check the links between each person and the head of household. When entering data from a census, Heredis will assist you in creating persons and the links between them.

If you do not find the appropriate link, select **Other** and specify, under the **Family Links** tab, the relationship between the two persons.

Heredis allows you to specify the links between two persons, even if they are not blood related. Therefore, no data is lost and you will be able to find them again under **Sundry Links** in the **Personal Data** tab.

(Windows) Family Links Tab

Record Reference Source Household Family links Additional info

THOMAS John: Head of Household
Click the + button to create a family link.

von BORK Jeanne: Spouse of THOMAS John
Click the + button to create a family link.

HALL Edna: Servant

Has a personal link with THOMAS John

Other type of link

(Mac) Family Links Tab

Record Reference Source Household Family links Additional info

Household

Address/Place Subdivision

Composition

Persons (3)

- THOMAS John (1854-> 1921) - Head of Household
- von BORK Jeanne (1863-1921) - Spouse
- HALL Edna * - Servant

Surname: HALL

Given Names: Edna Gender: F

Occupation:

Household Status: Servant

Facts:

- Disease-disability: Health Fact - renamed
- Literacy: Instruction Fact - renamed
- Race/color: Physical Description Fact -...


Note: Pre-existing spouses/parents/children links in your file will not be modified – if necessary, an alert will notify you of a conflict.

The non-existing links will be created for you automatically.

Additional Info tab

Add any extra data you may have under the **Additional Info** tab.

Validation Window

When you are done entering data, click on **Validate**. Double check the data entered under the **Persons** area. If a  red triangle appears, it means there is a conflict between the new data you have just entered and what was previously recorded in Heredis: choose what suits you best by clicking on the list of suggestions.

(Windows) Validation Window

Check data before creating
— □ ×

Matching Persons

THOMAS John: Head of Household

Surname: THOMAS Given Names: John

Gender: M

Birth

Date: May 1854

City: ?

Occupation: clerk US Office engineer - clerk !

von BORK Jeanne: Spouse of THOMAS John

Surname: von BORK Given Names: Jeanne

Gender: F

Birth

Date: December 1862 !

Summary

Census United States - Alameda - 1900

Document: Census
Medium: Digitizing
Certainty
Repository: National Archives

Record Reference

Country: United States
Date: 1900
City: Alameda

Household

- **THOMAS John**
M
Household Status: Head of Household
Occupation: clerk US Office engineer - clerk
Birth - May 1854 - ?
- **von BORK Jeanne**
F
Household Status: Spouse
Birth - December 1862

Save in:
Source note

Assign media to:
Source

Source

Create source
 Do not create a source
 Choose an existing source

! < Choose which events to assign the source to >

Comment

Next Validate Back

(Mac) Validation Window

Check data before creating

Persons created	Summary
<div style="border-bottom: 1px solid #ccc; padding: 2px;"> <p>▼ HALL Edna *: Servant</p> <p>Gender: F Surname: HALL Given Names: Edna</p> </div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"> <p>Matching Persons</p> <p>▼ THOMAS John: Head of Household</p> <p>Gender: M Surname: THOMAS Given Names: John</p> <p>Occupation: <input type="text" value="clerk US Office engineer - clerk"/> ⬇ ⚠</p> </div> <div style="padding: 2px;"> <p>▼ von BORK Jeanne: Spouse of THOMAS John</p> <p>Gender: F Surname: von BORK Given Names: Jeanne</p> </div>	<p>Census United States - 1860</p> <p>Document: Census Medium: Digitizing Certainty</p> <p>Record Reference</p> <p>Country: United States Date: 1860</p> <p>Household</p> <ul style="list-style-type: none"> • THOMAS John M Household Status: Head of Household Occupation: clerk US Office engineer - clerk • von BORK Jeanne F Household Status: Spouse • HALL Edna * F Household Status: Servant
<div style="border-bottom: 1px solid #ccc; padding: 2px;"> <p>Source</p> <p><input checked="" type="radio"/> Create Source</p> <p><input type="radio"/> Do not Create a Source</p> <p><input type="radio"/> Choose an existing source</p> <p><input type="text" value=" < Choose which events to assign the source to >"/> ⬇</p> <p>Comments: <input type="text"/></p> </div>	<p>Save in:</p> <p><input type="text" value="Source note"/> ⬇</p> <p>Assign media to:</p> <p><input type="text" value="Source"/> ⬇</p>
Back Next Validate	

You are free to **create a new source**, to **choose an existing source**, or even **not to create a source**. Remember to assign the source either to the census or to the events and facts related to the census. On the right-hand side, you will see the summary of your recent data entry, which you can:

- Save in the source note,
- Save in the source transcription,
- Save in the note or citation transcription if you work in Comprehensive Mode (see the The different mode for Sources & Citations (voir page 157) article),
- Decide not to save.

Source note

Source transcription

Citation Note

Citation Transcription

Event Note

Do not save

You are also given the option to choose where the media should be saved: in the source, in the citation, or in the event.

Census

Source
Citation
Event


Then click on **Validate** once you are certain you are done.

Note: if you have several entries to make from a single census, all you need to do is click on the **Next** button.


Check out our online video on Census on our Youtube channel for more explanations.

How to delete?

Delete a link or a person


Sometimes you need to fumble about, make mistakes, and be able to fix them. The toolbar has a **Delete**  button and offers a list of persons to be “deleted”.

This feature actually allows you to unlink a person from the primary person without deleting it. The primary person is the only one who can be (completely) deleted this way.

If the “father” is not the right person, you can unlink him from the primary person by selecting  **Unlink father**. You may still link him as a father to another primary person at a later time. The same thing is true for any other person in your genealogy.

In the same manner, you may delete a family link such as a spouse or a child.

Delete an item from an index

- Open the index you are interested in and select the item to be deleted.
- Click the  button (Delete). Confirm you want it removed from the index by clicking **OK**.

Info • Surnames, given names, and places cannot be deleted if they are in use.

Delete unused items from an index

You may choose to remove, in one simple process, all unused items in your genealogy file. As a precaution, start with displaying a list of all unused items by checking the **Unused [...]** box next to the Search field.

- **(Mac)** Click the **Options** button in the toolbar of the index then select **Remove all unused [...]**
- **(Windows)** Click the **Tools** button of the index then select **Remove all unused [...]**
- Confirm their removal by clicking **OK**.

The – button to delete

Generally speaking, when you see this button , it means you will be able to delete data.

Delete a Heredis file

Your genealogy file is stored on your computer hard drive. Heredis needs it to be on the hard drive to be able to work properly, you should not launch the file from a removable drive (USB drive or external hard drive).

You can delete a genealogy by placing the file in the recycle bin of your computer.

Heredis is a desktop software, which means that your files are saved on your computer. Only you can access it, we do not have your files. This is why it is always necessary to make backups on USB drive or cloud or external hard drive.

To find your files, see the article Find a file on your computer (voir page 179).

Implex (duplicate branches)

The same person may appear several times in an ascendancy, and appear in several branches of a tree. This is due to consanguineous marriages.

The ratio between the total number of ancestors and the number of ancestors that really exist (smaller) is called the Implex rate. One person may therefore bear several Ahnentafel numbers.

Imagine that Jack marries Marianne. However, Jack's father was the brother of the grandfather of Marianne. Jack and Marianne therefore have common ancestors, which will appear in two different branches of the family tree.

Heredis manages the different numbers automatically and symbolizes it with ++ symbol after the Ahnentafel number.

In the Immediate Family view, if you click on the Ahnentafel number, you'll see all numbers corresponding to the same person. Heredis will show you all Ahnentafel numbers for the person and the way to the root person for each number. Therefore you'll see how the implex was created.


The screenshot shows a family tree interface. At the top, a person is identified as 'de NEMOURS John' with an Ahnentafel number of '198++ (G 8)'. Below this, a person 'de NEMOURS Mary Katherine' is shown with a portrait and birth/death dates. To her right, a box contains '99++ (G 7)'. Below her, there are buttons for 'One spouse' and '2 children'. Further down, two other people are shown: 'von BORCKE Louis "Henry"' and 'SMITH Mary Madeline'. Below SMITH, another person 'von BORK Mary Jane' is listed. The interface uses a dark blue color scheme.


(Mac) Multiple Ahnentafel Numbering

The screenshot shows a Windows application window titled 'Sample_Family_File_2021 - Different Ahnentafel Numbers'. The main content area displays the name 'HAYES Ann (1833-1915)' and the text 'This person has 2 different Ahnentafel numbers'. Below this is a table with two columns: 'Ge...' and 'Ahnentafel Number'. The first row is highlighted in blue and shows '6' and '53'. The second row shows '7' and '111'. To the right of the table is a list of names with person icons: 'HAYES Ann (1833-1915)', 'RUCASTLE Gilbert (1870-1955)', 'RUCASTLE Alice Jean (1908-1998)', 'THOMAS Michael George (1933-)', 'THOMAS Judy (1962-)', and 'BAKER Thomas (1992-)'.

Ge...	Ahnentafel Number
6	53
7	111








(Windows) Multiple Ahnentafel Numbering

 Multiple Ahn. Numbers ✕

de NEMOURS Mary Katherine (1787-1856) 

This person has 2 Ahnentafel numbers

Generation	Ahn. numbers
7	99
7	103

-  de NEMOURS Mary Katherine (1787-1856)
-  von BORK Mary Jane (1816-1900)
-  THOMAS Alexander Joseph (1849-1947)
-  THOMAS Christopher Edward (1885-1983)
-  THOMAS Michael George (1931-)
-  THOMAS Sophie (1965-)
-  THOMAS Matthew (1991-)

In Descendants view (Family tab) and in Search Tracking, the name of implex persons will appear in red.

Implex (duplicate branches)

Family Data History Search Graphs

Immediate Family XXL Family Ancestors Descendants

Mary Katherine de NEMOURS - Ahn. # 99++ (G 7)
Bi: Sun, Nov 18, 1787 - D: Sun, Nov 16, 1856

de NEMOURS Mary Katherine - (11.18.1787 - Amsterdam / 11.16.1856 - Amsterdam)

- SMITH née??? Mary Madeline - (1810 - / -)
- (-) PINKERTON Francis - (- / -)
- PINKERTON Jane "Emily" aka Milie - novelist (10.29.1860 - Geneva / 4.17.1949 - Boston)
- (12.27.1886 - Geneva) THOMAS Alexander Joseph - general practitioner (11.16.1849 - London / 3.3.1947 - Boston)
- THOMAS Christopher Edward - Physician (4.26.1885 - Boston / 3.26.1983 - Boston)
- (10.12.1925 - Boston) DAVIS Katherine "Emily" - none (9.8.1896 - Harwich / 1.25.1988 - Boston)
- THOMAS Michael George - Engineer (2.3.1931 - Boston / -)
- (8.12.1951 - Boston) KLEIN Charlotte - journalist (3.21.1930 - Boston / 9.11.1953 - Boston)
- THOMAS Peter - bookseller (12.6.1952 - Boston / -)
- (6.29.1977 - Philadelphia) RUCASTLE Alicia Mary - (- / -)
- (7.16.1955 - Boston) BERNSTEIN Marie Emily - accountant (3.10.1935 - London / -)
- THOMAS Paul - physicist (10.8.1956 - Boston / -)
- (5.10.1980 - New York City) LOWENSTEIN Maggie - none (7.23.1957 - New York City / -)
- THOMAS Lucas - Physical therapist (4.23.1982 - Paris / -)
- (7.9.2011 - New York City) WRIGHT Elizabeth - ((c) 1983 - / -)
- THOMAS Judy - school teacher (5.18.1960 - Paris / -)
- THOMAS Melckior - research assistant (5.18.1989 - Montreal (06) / -)
- (-) CARPENTER Michael - farmer (8.6.1958 - Waterloo / -)
- CARPENTER Marion Zoe - student in marketing (1.8.1992 - Waterloo / -)
- THOMAS Sophie - editorial writer (8.25.1965 - Boston / -)
- THOMAS Matthew - student (5.1991 - Port-Au-Prince / -)
- THOMAS Paul Andreas - film director (H 2.3.5695 - Boston / -)
- (10.8.1957 - Paris) LIBENSTEIN Paula - violinist (H 5.6.5698 - Paris / -)
- (1.24.1815 - Amsterdam) von BORCKE Louis "Henry" - Physicist (10.12.1778 - Hanover / 8.18.1842 - London)
- von BORK Mary Jane - (2.9.1816 - Amsterdam / 6.7.1900 - Amsterdam)
- (2.7.1843 - London) THOMAS John - pharmacist (4.29.1817 - London / 2.15.1878 - Amsterdam)
- TOMAS Charles Mary - medical coroner (9.11.1847 - London / 7.23.1879 - London)
- THOMAS Alexander Joseph - general practitioner (11.16.1849 - London / 3.3.1947 - Boston)
- (5.12.1877 - Geneva) HENRY Anna-Carolyn - teacher (11.13.1848 - Geneva / 1.20.1895 - Amsterdam)
- THOMAS George - military officer (1.23.1883 - Geneva / 9.7.1914 - Vitry-Le-François)
- (12.27.1886 - Geneva) PINKERTON Jane "Emily" aka Milie - novelist (10.29.1860 - Geneva / 4.17.1949 - Boston)
- THOMAS Christopher Edward - Physician (4.26.1885 - Boston / 3.26.1983 - Boston)

Edit a report of implexes

Since Heredis 2021, you can use the smart search to search for implexes persons and edit a report of it. Iplexes are findable only on a direct line from the root person.

- Launch **Smart Search** from **Search** tab
- Choose **Persons** > **Ahn. number** > **Duplicate branch** > **Yes**
- Click on **Search**.
- Check the results.
- To edit a report of the results, click on the **Edit** button (from the Processing selected persons area) and choose the type of report you want.

Family Data History Search Graphs

Search Wizard Smart Search Find/Replace Family Search

Criteria

< Choose a search model >

Persons Ahn. Number

Duplicate Branch Yes

Search All criteria in the entire file

I'm looking for persons who are Sosa, and who are in duplicate branch.

Search

Results

Persons (2) Families (1) Events (6) Facts (0)

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
de NEMOURS	John	* 03.30.1737	Amsterdam (NORTH HOLLAND)	† > 1787	
de NEMOURS	Mary Katherine	* 11.18.1787	Amsterdam (NORTH HOLLAND)	† 11.16.1856	Amsterdam (NORTH HOLLAND)

Processing selected persons (2)

Marked Confidential Secondary Person Unmarried Childless

Child Status Signature Declared as consistent Declared as complete Add to note Link a source

Edit Export Heredis File Export GEDCOM Delete Find/Replace

Ahn. # 1 (G 1) 2 Spouses 4 Children: 2

Find a file on your computer

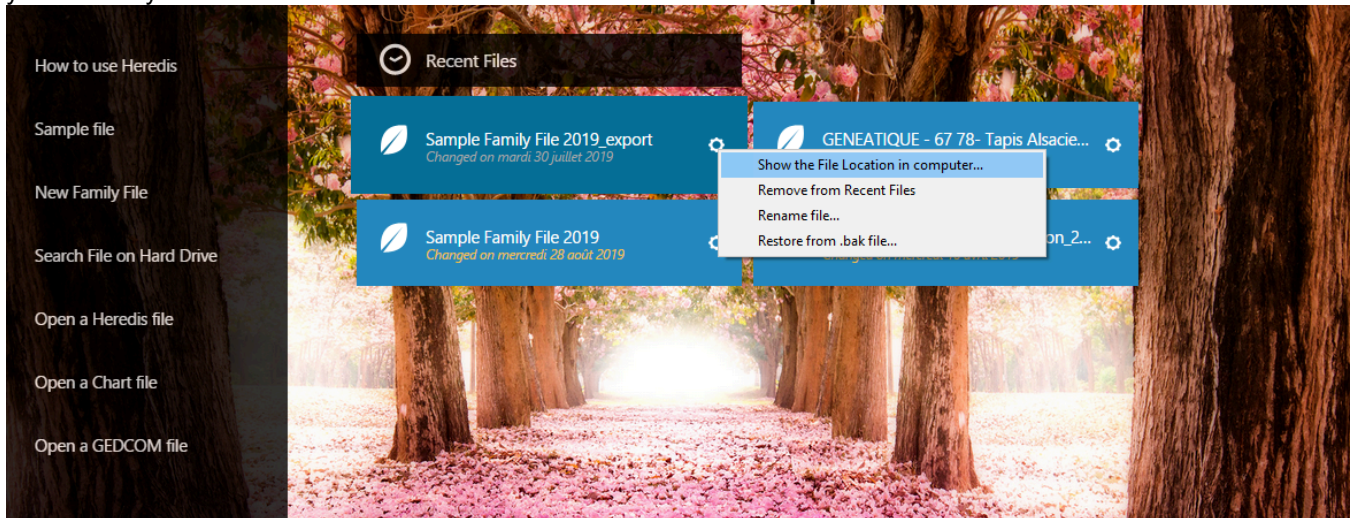
Heredis is a desktop software, which means that your files are saved on your computer.

Note: It is essential that your files are stored and launch from your computer's hard drive disk and not from a USB key or an external drive or a cloud. If the device is disconnected for any reason even for a second, Heredis will shut down and your file can be damage.

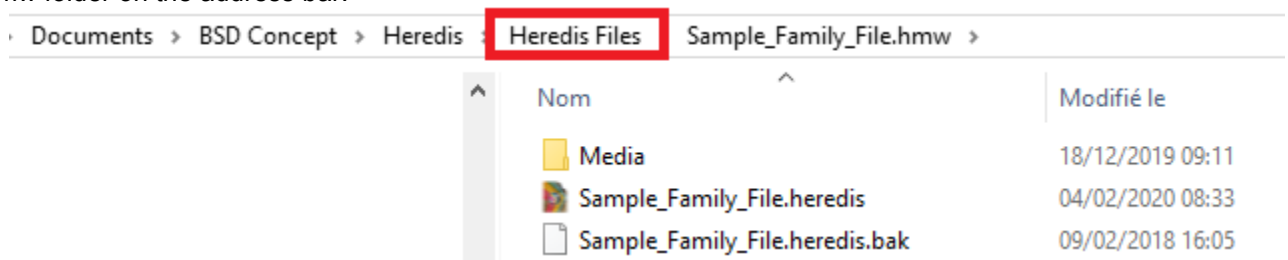
You are the only one who can retrieve them, as we do not have access to your files. Which is why you should always back them up either on a USB drive, a cloud, an external hard drive (just use it to store a backup not open it).

Find your files in Windows

To find your Heredis files in Windows, look in Documents / BSD Concept / Heredis / Heredis files, as this is where they are usually stored. If not, on the Heredis home page, click on the indented wheel near the name of your recently used file. Then select **Show the File Location in computer...**



Heredis will open Windows Explorer to show you the content of your .hmw folder. Click on the folder before the .hmw folder on the address bar.



You'll be able to copy the .hmw folder with a right click on it and click on Copy. Then Paste it on a USB key or external hard drive.

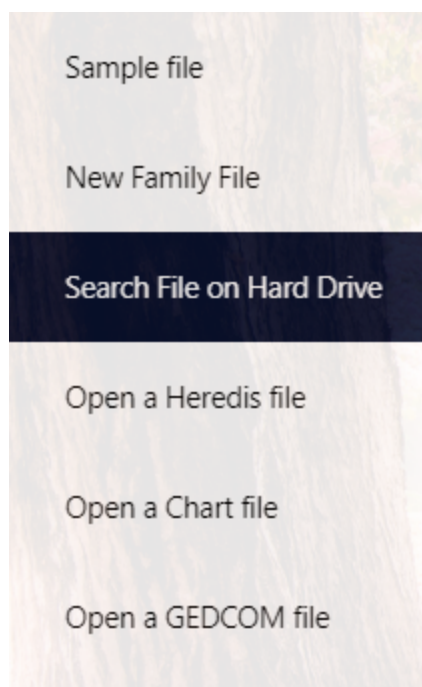
Find files missing from your list of Recent Files

If your file is no longer showing in your recently used files, it does not necessarily mean that it has been deleted. It is simply not displayed in the list of recent ones.

Heredis will not remove genealogy files. If your files are no longer on the computer, it means they were manually deleted, e.g. during a disk cleanup or by your antivirus software.

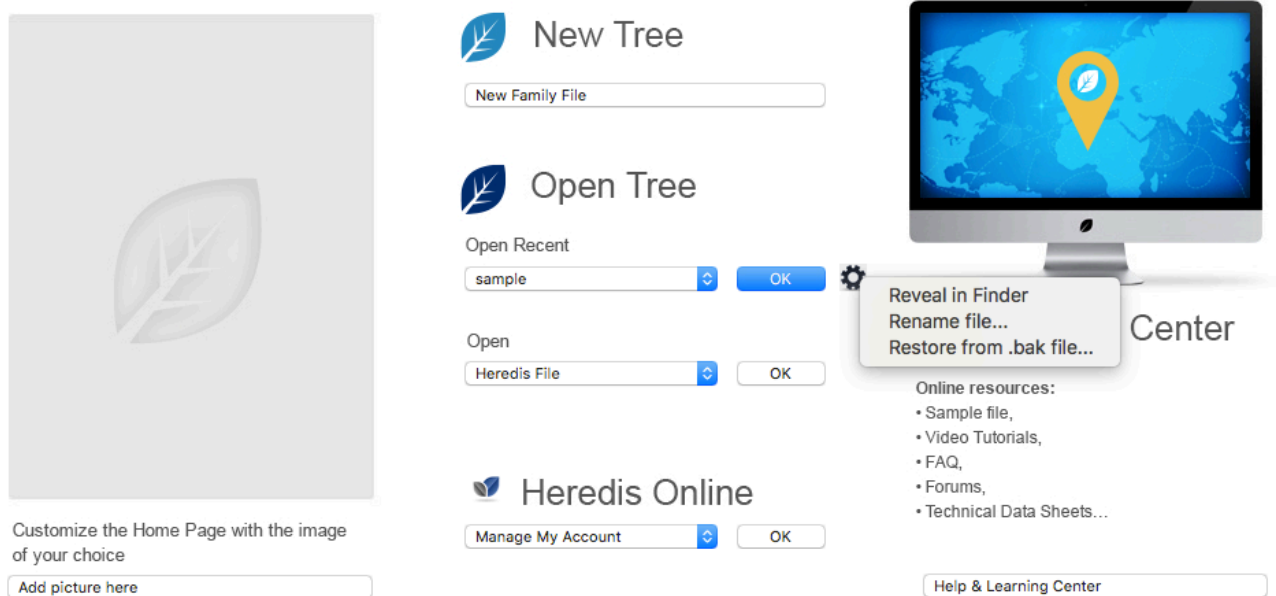
You can start a search from the Heredis home page to scan your entire computer for all potential genealogy files. It can be a lengthy process.

From the home page, click **Search File on Hard Drive** on the left side banner.



How to find your files on Mac

From the Heredis home page, click on the indented wheel next to the name of your recently used file. Then select **Reveal in Finder**.



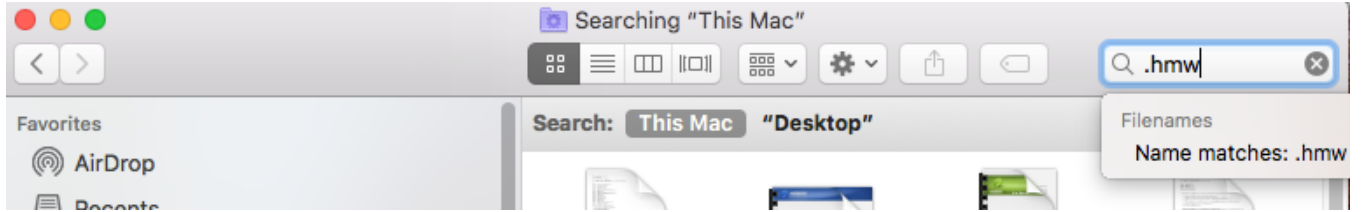
You'll be able to copy the .hmw folder with a right click on it and click on Copy. Then Paste it on a USB key or external hard drive.

How to find files missing from your list of Recent Files

If your file is no longer showing in Recent Files, it does not necessarily mean that it has been deleted. It is simply not displayed in the list of recent ones. Heredis will not remove genealogy files. If your files are no longer on the computer, it means they were manually deleted, e.g. during a disk cleanup or by your antivirus software or the list has been cleaned in the Mac system.

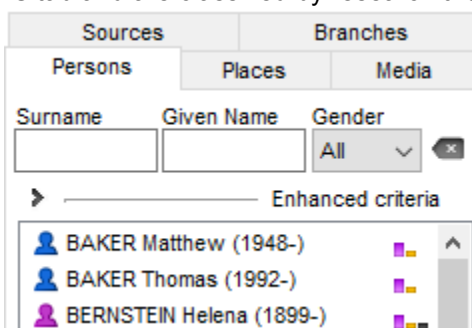
Find a file on your computer

- Open Finder
- Enter .hmw into the search box
- Launch the search



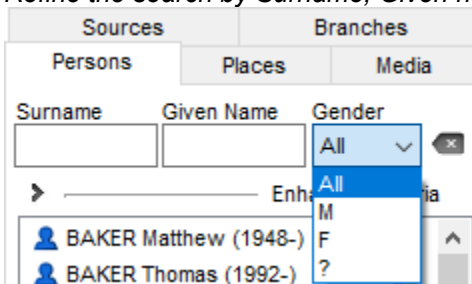
(Windows) Searching by theme (enhanced criteria) from Persons panel


Heredis offers a simple and rapid search for persons based on their **Surname**, **Given Names** and **Gender**. If this research does not easily isolate the person you are looking for, you have available other search criteria corresponding to all the information you have entered. These advanced research criteria are grouped in the **Persons** tab and are classified by research theme (**Personal Data**, **Relations**, **Events**, etc.).



1. Open the **Persons** tab in the **Search** panels.
2. Enter if needed the **Surname**, **Given Names** and **Gender**.

Refine the search by Surname, Given names, Gender




When the list of results is too long and fails to isolate the search person, click the **Show/Hide Enhanced Criteria**  arrow to unfold the advanced search criteria.
Search in Persons' panel

(Windows) Searching by theme (enhanced criteria) from Persons panel

- Select from the drop-down menu which data is to apply to the search: **Search Entire File, Search Ancestors, Search Descendants, Ascendancy and Descendancy, Inconsistent data, Smart Search Results, Last added or modified persons.**

- Indicate a place, name of spouse and define a range of years.
- Apply a filter by **Any event, Birth, Marriage, or Death.**

- Tick the **Without source** box if you wish to search for person with event without source.
- Make limitations on **Direct-Line** ancestors (Anhentafel line)
- Choose to display only **Childless Family, Single-Parent Family, Parents Unknown** or **Linked to**

FamilySearch. Since Heredis 2021 , it is also possible to search for untraceable parents.

None
Childless Family
Single-Parent Family
Living Only
Parent(s) unknown
Untraceable Parent(s)
Linked to FamilySearch


To display the persons corresponding to these Enhanced criteria, click the **Search** button to update the list.

The list of corresponding individuals is updated as you enter details. When you click the name of a person in the list, his/her summary appears in the **Summary Tool** panel. To view a person as primary person in a new **Immediate Family**, just double-click the name. To start a new search, click **Remove criteria** icon. All individuals in the file are displayed again.

Searching for persons



Find the Root Person

The Root Person is the individual who lies at the base of your genealogical research and who bears the Ahnentafel No. 1.

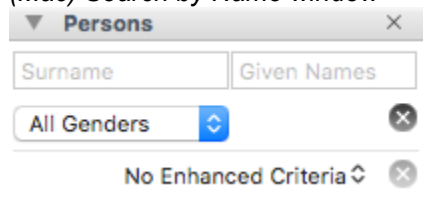
- Click  **Root** on the toolbar.
- Choose **Find** menu > **View Root Person**.

See also The Root Person (voir page 78) for more details.

Search by Name

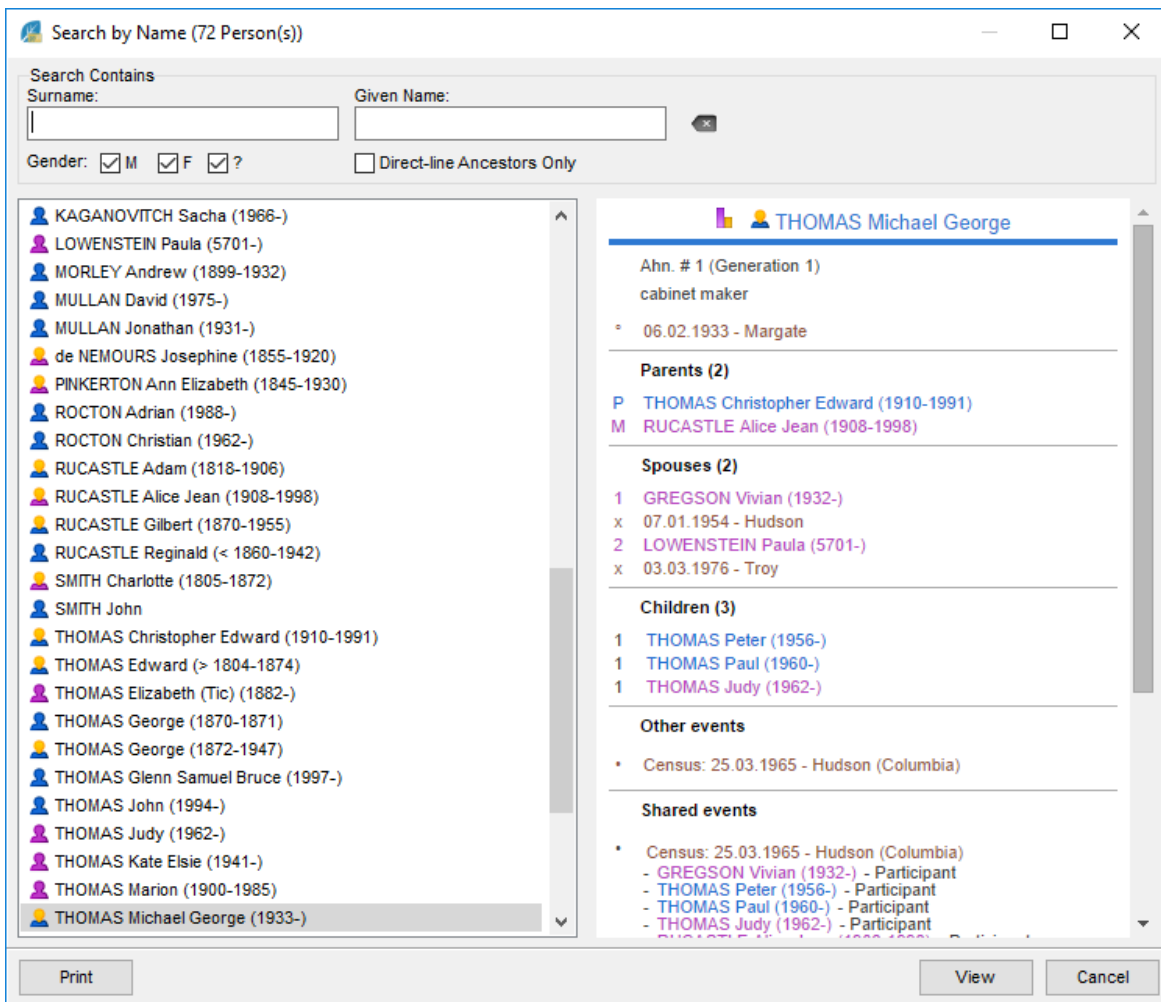
- Select **Find** menu > **Search by Name**
- or click the **Find**  button on the toolbar and then click  **Search by Name**.

(Mac) Search by Name window



The screenshot shows a window titled "Persons" with a close button (X) in the top right corner. Below the title bar, there are two input fields: "Surname" and "Given Names". Underneath these fields is a dropdown menu currently set to "All Genders" with a close button (X) to its right. At the bottom of the window, there is a label "No Enhanced Criteria" with a double-headed arrow icon and a close button (X) to its right.

(Windows) Search by Name window



1. Type the first letters of the Surname in the **Surname** input field. Heredis will display all persons with this surname and variations that you will have defined in the **Names Index**.
(**Windows**) The search is carried out in the mode you have chosen. To change it, select **Tools** menu > **Heredis Preferences**. Select the **Search** option on the first letters of the name (**Search Starts with**) or Search the name (**Search Contains**) in the **General** tab.
2. In the **Given Name** box, type the first letters of the given name to narrow your search.
3. Tick the boxes **M**, **F** or **?** to limit the search to men, women or persons of indeterminate gender.
4. Tick the **Direct-Line Ancestors** box to limit the search to direct ancestors.

Info • In front of each individual, a colored square indicates the gender of the individual: blue for men, pink for women and green for individuals whose gender is not determined. If a square appears with yellow in the center, it is that of a direct ancestor bearing a Sosa number.

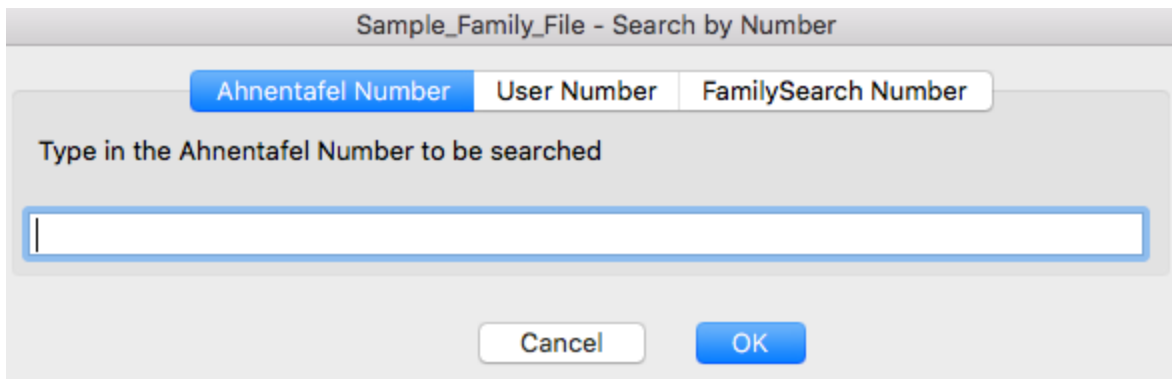
To be sure to correctly identify the person you want, select him/her and check all the information that appears in the Summary area. Click View or double-click the name to display the selected individual as the primary person in a new Immediate Family.

Search for a direct ancestor

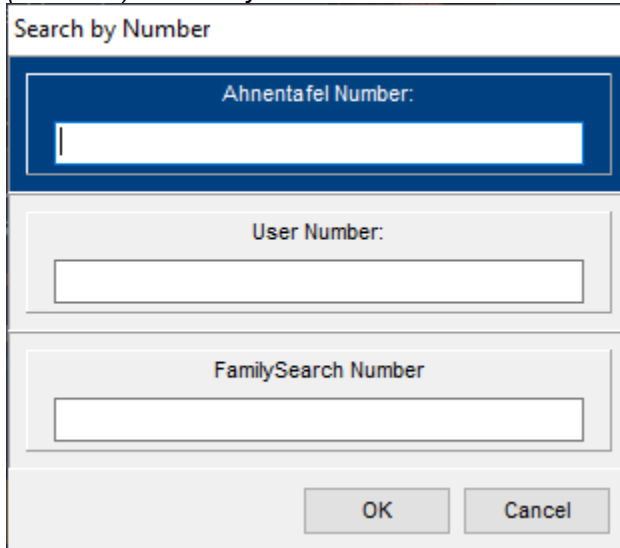
If the person is a direct ancestor in the lineage of the **Root Person**, Heredis has automatically assigned an **Ahnentafel number** to this person.



(Mac) Search by Ahnentafel number

Searching for persons



(Windows) Search by Ahnentafel number




- Click **Find**  > **Search by Number**  on the toolbar or choose **Find** menu > **Search by Number**.
- Click the **Ahnentafel Number** tab and type the number to be searched.
You can type any one of the numbers carried by the person you are searching for if there is more than one (implex).
- Click **OK** to display the person corresponding to the selected number as the primary person.

If no person corresponds to the number typed, try another number. Click **Cancel** to abandon the search.

Search for a person by his/her personal number or FamilySearch number

You may perhaps have indicated a personal number to some persons in your genealogy. You can find these people with this number.

Info • Use the **Comprehensive** or **Customized** input mode to view the **User Number** input field.

1. Click the **Find > Search by Number**  button on the toolbar or choose **Find** menu > **Search by Number**
2. Click the **User Number** or **FamilySearch Number** tab and type in the number to search.
3. Click **OK** to display the person corresponding to the number as the primary person.

(Windows) Search by number

Search by Number

Ahnentafel Number:

User Number:

FamilySearch Number

OK Cancel

(Mac) Search by number

Sample Family File 2018 - Search by Number

Ahnentafel Number User Number FamilySearch Number

Type in the FamilySearch Number to be search:

Cancel OK

Search for a bookmarked person

Open the **Bookmarks** panel that will display a temporary list of persons you require to access frequently. Double-click a person in the list to view as the primary person.

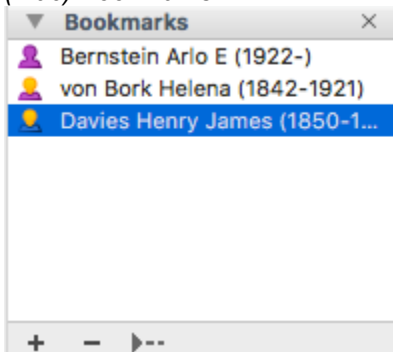
Info • To add a person to the **Bookmarks** list, use drag and drop, or click the **+** (Add primary person to bookmarks) button on the panel toolbar.

(Windows) Bookmarks

Searching for persons



(Mac) Bookmarks

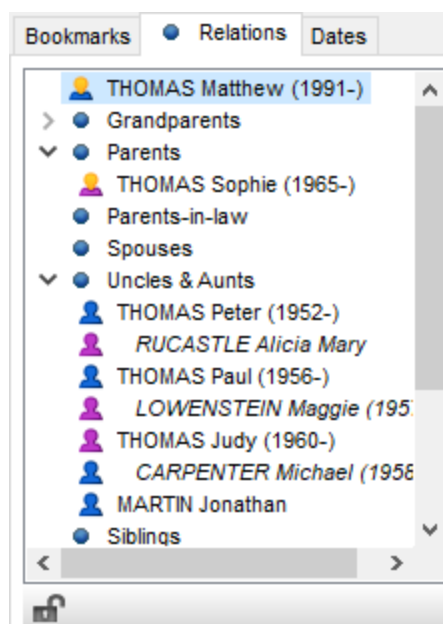


Search for family connections

Open the **Relations** panel. It displays all the persons who are directly linked to the primary person: they are related, they are cited in one of the events, they played a role in his/her life or you have established a personal link between them.

Unfold the fields according to the type of relation linking the individual and the primary person: **Parents-in-Law, Cousins, Grandchildren**, etc.

(Windows) Relations Panel



(Mac) Relations Panel



Info • When a category contains persons connected with an event (godfather, declarant, witness...), it is marked with a blue symbol in Sundry Links tab of personal Data screen. See also Sundry Links.

Level 1 Information

Open the top level to see the names of parents or persons related to the primary person. Consult the list of direct relatives, persons connected to an event for the primary person (godfather, best man, etc.) or those for whom you have created a personal link.

Info • The step relations (aunts and uncles by marriage, step-brothers and sisters, etc.) are shown in italics under the name of their spouse. Half-brothers and sisters are shown in grey.

Level 2 Information

If additional information is available, click the disclosure triangle next to their name to unfold this level. Double-click the person sought to display him/her as the primary person on a new **Immediate Family** screen. Double-click the event to open it directly in the **Personal Data** tab.

Look for links between two individuals

Heredis allows you to search for links between two persons. For further details, see Find Relationship article.

Search for duplicates in the file

The search for duplicate identifies persons entered several times in the genealogy file.



For further details, see (Windows) Permanent control for duplicates, (Mac) Permanent control for duplicates.

Searching for persons



Research of Branches




The **Branches** panel allows you to memorize the different family branches as a base for your research and its evolution.

If the **Branches** panel is not open, it will be displayed and updated by clicking

- the  **Display Family Branch** icon on the **Search** tab > **Search Wizard** of the primary person displayed.
- or click on  on the left of the name of the person whose branch is displayed.

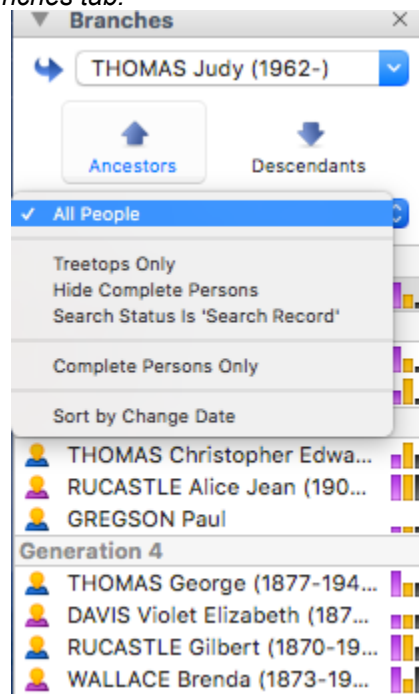
This function allow you to work through each family branch and carry out all the necessary research.

Click the  **Ancestors** or  **Descendants** button to display the required lineage in the **Branches** panel.

Each person displayed in the branch has an icon showing the completeness of data for the three main life events: Birth or Baptism in violet  / Marriage in yellow  / Death or Burial in black . Double-click any person to display the details. A simple click displays the summary in the summary panel.

You have a display filter available in a pop-up menu. You may choose between **All people**, **Treetops**, **Hide Complete Persons**, **Search Status is 'Search Record'**, **Complete Persons Only** and **Sort by Change Date**. As an example, you will display **Complete Persons Only** to display a positive status of your work on this branch. If you **Hide Complete Persons**, you will have a clear idea of the work still to be done on the branch.

(Mac) Display criteria in the Branches tab.



(Windows) Display criteria in the Branches tab.

Research of Branches

The screenshot shows a genealogy software interface. At the top, there are tabs for 'Persons', 'Places', and 'Media'. Below these, there are buttons for 'Sources' and 'Branches'. A search bar contains the name 'THOMAS Michael George (1933-)' with a dropdown arrow. Below the search bar are two buttons: 'Ancestors' (with an upward arrow) and 'Descendants' (with a downward arrow). A pop-up menu is open, showing a list of options: 'All People', 'All People', 'Treetops Only', 'Complete Persons Only', 'Search Status Is Search Record', 'Hide Complete Persons', and 'Sort by Change Date'. Below the menu, there is a list of people with their names and birth-death dates, along with small colored bars indicating their status. The list is organized into generations: 'RUCASTLE Alice Jean (1908-19...)', 'Generation 3' (THOMAS George (1877-1947), DAVIS Violet Elizabeth (1875-1...), RUCASTLE Gilbert (1870-1955), WALLACE Brenda (1873-1937)), and 'Generation 4'.

If you decide that there is much more work to be done on the descendants of a given ancestor, you may select **Memorize This Branch** from the pop-up menu.

The list of persons displayed in the pop-up menu corresponds to the family branches you will have memorized, both ancestors and descendants. Select the name to redisplay the memorized branch.

When you select a memorized branch from the pop-up menu, it will replace the previous branch displayed. You may also display the branch of the primary person by clicking the button to the left of the pop-up menu.

Do not overlook to suppress the memorized branch once you have finished your research of this lineage. Open the pop-up menu and select **Clear This Branch**.



Search for Sources

Find a source simply among all the sources assigned to events in your file.

With the Sources panel

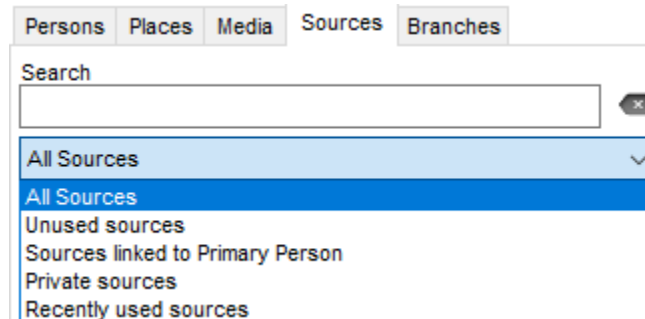
Use the **Search** box in the **Sources** panel to type a word contained in any input field for the source selected: the document, the name of the author, the call number, etc.

The number of items found matching your search is displayed at the bottom of the panel.

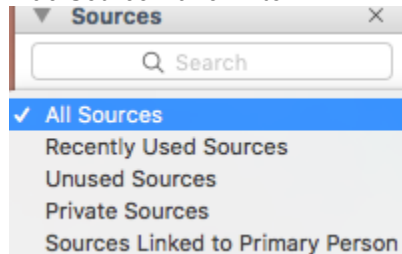
To cancel a search on any word, click the (Windows)  (Mac)  Delete icon to the right of the search box.

Refine the search by selecting sort criteria from the pop-up menu: **Recently Used Sources, Unused Sources, Private Sources, Sources Linked to Primary Person**. The list is updated according to the selected criteria.

Windows Sources Panel Filter




Mac Source Panel Filter




To cancel the sort criteria, select **All Sources** from the pop-up menu.



With the Sources Index

Open the **Sources Index** from the **Tools** menu, or by clicking the button  **Sources Index** on the toolbar.

In the **Search** box, type any word contained in any input field of the source desired.

The number of items found matching your search is displayed beneath the Search box.

(Mac) Click on the magnifying glass icon  to select the search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.

To cancel a search on any word, click the (Windows)  (Mac)  **Delete** icon to the right of the search area.

You will limit the search to unused sources by checking the **Unused Sources** box.

The results can be classified by the presence of a note (N), media (M), private source (P) or Title, Document, Origin... by clicking on the column header.

See the list of events in which this source is used in the (Windows) **Entries** (Mac) **Usage** field at the bottom of the screen. Double-click the line of the event to navigate and view this person and this event.

Search for Sources

See the Sources Index and The different mode for Sources & Citations (voir page 157) articles for further details.

Search for Places



You know that the person has lived in this city or region? Consider using the event places to find someone in your genealogy.

To find a place among the places of your file, you have several options:

With the Places panel

Use the search box on the **Places** panel to type a word in any entry field for the place you are looking for: the city, postal code, county, state, country.

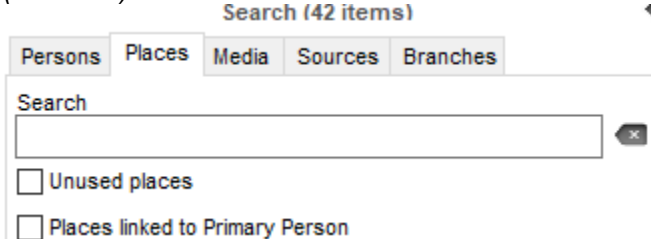
The number of items found matching your search is displayed at the bottom of the panel.

To cancel a search on one element of the place, click the (Windows)  (Mac)  **Delete** icon to the right of the Search box.

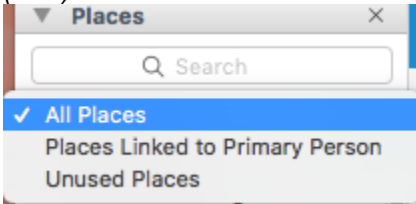
Refine the search by selecting sort criteria from the pop-up menu: **Unused Places**, **Places Linked to Primary Person**. The list is updated according to the selected criteria.

To cancel the sort criteria, select **All Places** in the pop-up menu.



(Windows) *Places Panel*



(Mac) *Places Panel*






With the Places Index

Open the **Places Index** from the **Tools** menu, click the **Index** button  on the toolbar or (Mac) click on the book symbol  on the **Places Panel**.

In the **Search** box, type a word in any input field of the source being searched.

The number of items found matching your search is displayed (**Windows**) in the Title of the Index (**Mac**) beneath the search box.

(Mac) Click on the magnifying glass  to select the search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.

To cancel a search on elements of the index, click the (Windows)  (Mac)  **Delete** icon to the right of the **Search** box.

You will limit the search to unused places by checking the **Unused Places** box.

(Mac) The results can be classified by the presence of a variant (V), note (N), media (M), or City, County... by clicking on the column header.

See the list of events/facts in which this place is used by clicking the **Usage** tab. Double-click the line of the event to navigate and view this person and this event.

See the Places Index article for further details.

Heredis also has tools to Geolocating Place subdivisions (voir page 294), Zoom in on a place (voir page



Search for Places

301), Zoom in on the World-Family Tree Mapping, (voir page 306)consult these article to know all details.

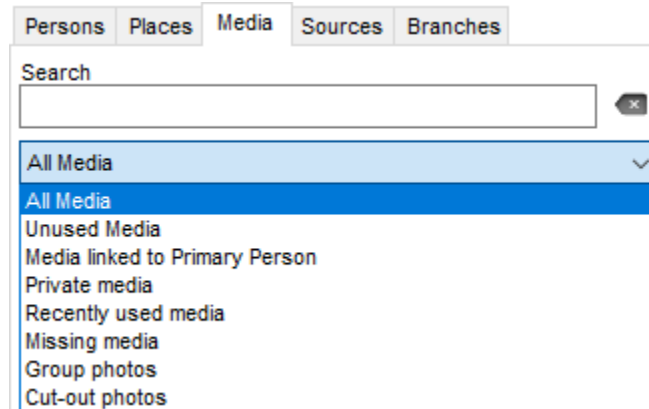
Search for Media

You have several tools available for finding an item of media for assignment to data or for replacement.

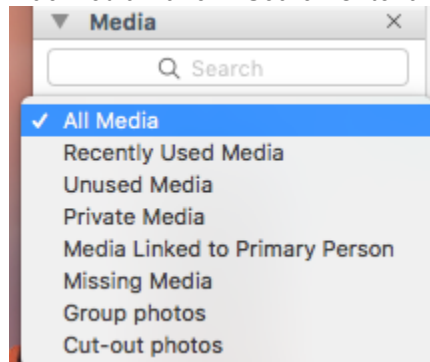
With the Media panel

1. Open the **Media** panel.
2. Type the name or partial name of the media sought in the search box. Cancel the search by clicking on the (Windows)  (Mac)  Delete icon to the right of the search area.
3. Refine the search by selecting sort criteria from the pop-up menu: **Recently Used Media, Unused Media, Private Media, Media Linked to Primary Person, Missing Media**. The list is updated according to the chosen criteria. To cancel the sort criteria, select **All Media** on the pop-up menu.
4. To better identify the media selected, change the display mode for the media, as a list or in thumbnail images, by clicking the corresponding buttons. You may also enlarge the thumbnails by using the zoom slider.

Windows Media Panel – Search Criteria





Mac Media Panel – Search Criteria




The number of items found matching your search is displayed at the bottom of the panel. The media may be easily assigned to a data item of your file by drag and drop.

In the Media Index

Open the **Media Index** from the Tools menu, click the **Index** button  on the toolbar or **(Mac)** click on the book symbol  on the **Media Panel**.

- In the **Search** box, type all or part of the name of the desired media. The number of items found matching your search is displayed **(Windows)** in the title of the Media Index oder **(Mac)** beneath the Search box.

Search for Media

(Mac) Click on the magnifying glass  to select the search mode **Search Contains** the word entered, or **Search Starts With** the entered letters.

To delete or replace the search word, click the (Windows)  (Mac)  Delete icon to the right of box.

- Limit the search to a type of media by selecting from the pop-up menu: (Windows) **All Media, All Pictures, Other Media, Missing Media, Private Media** (Mac) **All Media, All Image Files, Audio Files, Video Files, Other Types, Missing Media, Private**.
- Limit the search based on the type of data to which the media is assigned by selecting from the second pop-up menu: **Whole Index, Persons, Families, Events, Facts usw...**

To better identify the media selected,

- Sort the thumbnails or (Mac) the list by the name of the media file or the date you entered.
- (Mac) Change the display mode of the media, as a list or thumbnails, by clicking the corresponding buttons in the first pop menu.

Info: You may also enlarge the thumbnails by using the zoom slider.


Mac Info • The results displayed in a list can be classified according to the presence of a note (N), a private media (P) or by the file name or date, by clicking the column header.

When media are selected from the list, see the data to which the media are assigned in the table at the bottom. **(Mac)** Double-click the data for display in a new screen.


For further details, see Media Index.

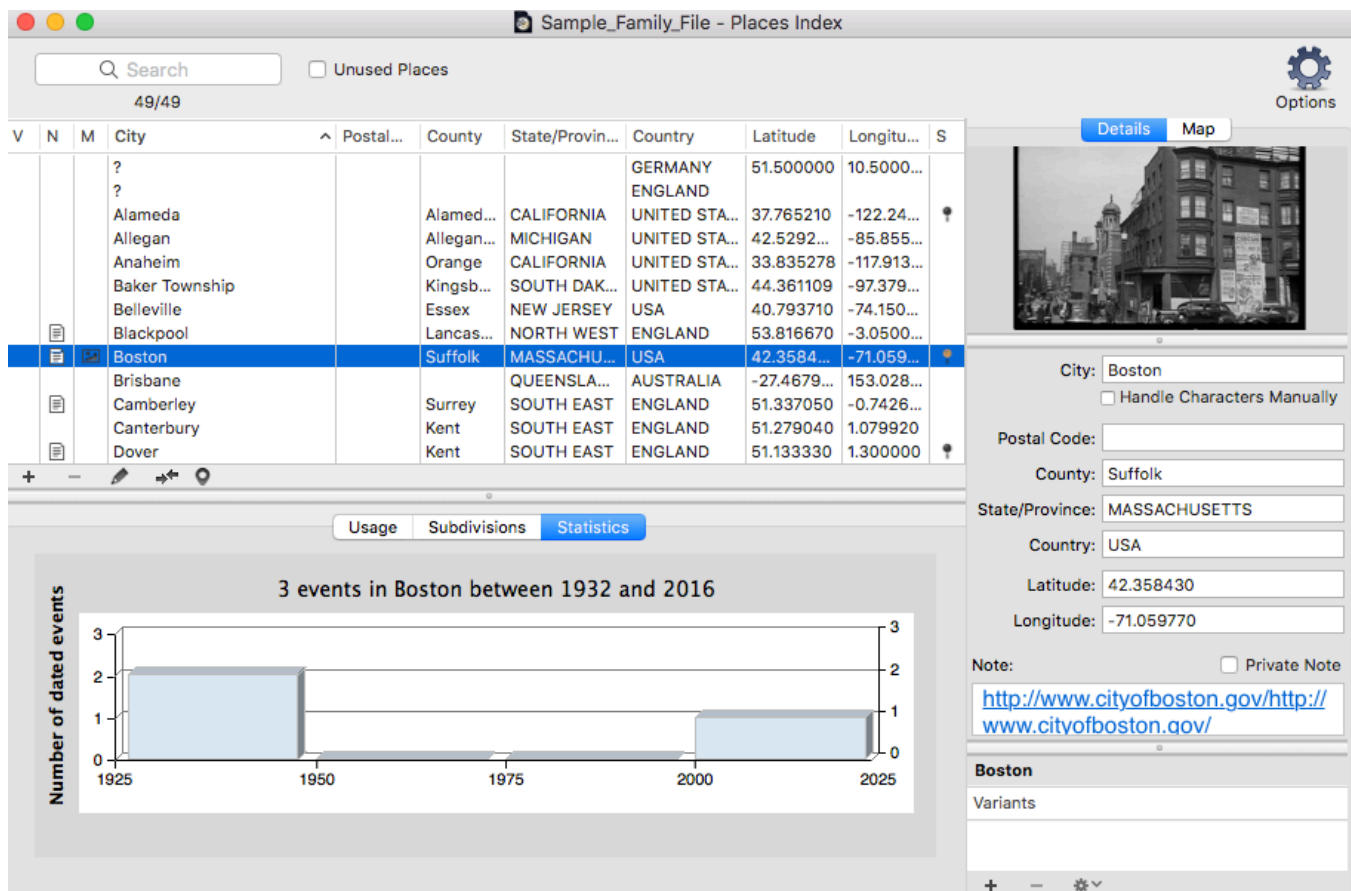
Search for other data types

The indexes list the information you have entered and display the uses for each type of data. By using the Indexes, you can find sources, places, media, but also occupations, surnames, given names and repositories . Each item of data can be illustrated or commented, which brings infinite richness to your genealogical research. What village was part of the «Pencader Hundred»? What was the family crest of «Bolgan»? What is the origin of the name «Andrew»? What was a «balancer»? You have taken care to note this information relating to the life of your ancestors and you will find them by searching in the index in question.

- Open each of these indexes, from the **Tools** menu, or clicking the  **Indexes** button on the toolbar.
- Scroll the contents of the Index or use the search box to limit the number of items displayed. Type all or part of the search item. The number of items found matching your search is displayed beneath the search box.

Mac

- Click on the magnifying glass  to select search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.
- **(Mac)** Click the **Statistics** tab to see periods of use of the element.



The screenshot displays the 'Sample_Family_File - Places Index' application. At the top, there is a search bar with the text '49/49' and a checkbox for 'Unused Places'. Below the search bar is a table with columns: V, N, M, City, Postal..., County, State/Provin..., Country, Latitude, Longitu..., and S. The table lists various cities, with 'Boston' highlighted in blue. To the right of the table is a sidebar with a 'Details' tab and a 'Map' tab. The 'Details' tab shows a street view image of Boston and a form with fields for City, Postal Code, County, State/Province, Country, Latitude, and Longitude. Below the form is a 'Note' field with a 'Private Note' checkbox and a link to the city website. At the bottom of the window, there are tabs for 'Usage', 'Subdivisions', and 'Statistics'. The 'Statistics' tab is active, showing a bar chart titled '3 events in Boston between 1932 and 2016'. The chart has a y-axis labeled 'Number of dated events' ranging from 0 to 3, and an x-axis with years 1925, 1950, 1975, 2000, and 2025. The chart shows three bars: one at 1925 with a value of 2, one at 1950 with a value of 1, and one at 2000 with a value of 1.

V	N	M	City	Postal...	County	State/Provin...	Country	Latitude	Longitu...	S
			?				GERMANY	51.500000	10.5000...	
			?				ENGLAND			
			Alameda		Alamed...	CALIFORNIA	UNITED STA...	37.765210	-122.24...	
			Allegan		Allegan...	MICHIGAN	UNITED STA...	42.5292...	-85.855...	
			Anaheim		Orange	CALIFORNIA	UNITED STA...	33.835278	-117.913...	
			Baker Township		Kingsb...	SOUTH DAK...	UNITED STA...	44.361109	-97.379...	
			Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150...	
			Blackpool		Lancas...	NORTH WEST	ENGLAND	53.816670	-3.0500...	
			Boston		Suffolk	MASSACHU...	USA	42.3584...	-71.059...	
			Brisbane			QUEENSLA...	AUSTRALIA	-27.4679...	153.028...	
			Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.7426...	
			Canterbury		Kent	SOUTH EAST	ENGLAND	51.279040	1.079920	
			Dover		Kent	SOUTH EAST	ENGLAND	51.133330	1.300000	

Statistics: 3 events in Boston between 1932 and 2016

City: Boston
 Postal Code:
 County: Suffolk
 State/Province: MASSACHUSETTS
 Country: USA
 Latitude: 42.358430
 Longitude: -71.059770

Note: Private Note
<http://www.cityofboston.gov/http://www.cityofboston.gov/>

- Click the **Usage** tab and check the list of persons for whom you typed the given name, the surname or occupation.

Search for other data types

Sample_Family_File - Places Index

Search Unused Places 49/49

V	N	M	City	Postal...	County	State/Provin...	Country	Latitude	Longitu...	S
			?				GERMANY	51.500000	10.5000...	
			?				ENGLAND			
			Alameda		Alamed...	CALIFORNIA	UNITED STA...	37.765210	-122.24...	
			Allegan		Allegan...	MICHIGAN	UNITED STA...	42.5292...	-85.855...	
			Anaheim		Orange	CALIFORNIA	UNITED STA...	33.835278	-117.913...	
			Baker Township		Kingsb...	SOUTH DAK...	UNITED STA...	44.361109	-97.379...	
			Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150...	
			Blackpool		Lancas...	NORTH WEST	ENGLAND	53.816670	-3.0500...	
			Boston		Suffolk	MASSACHU...	USA	42.3584...	-71.059...	
			Brisbane			QUEENSLA...	AUSTRALIA	-27.4679...	153.028...	
			Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.7426...	
			Canterbury		Kent	SOUTH EAST	ENGLAND	51.279040	1.079920	
			Dover		Kent	SOUTH EAST	ENGLAND	51.133330	1.300000	

Details Map

City: Boston

Handle Characters Manually

Postal Code:

County: Suffolk

State/Province: MASSACHUSETTS

Country: USA

Latitude: 42.358430

Longitude: -71.059770

Note: Private Note

<http://www.cityofboston.gov/http://www.cityofboston.gov/>

Boston

Variants

Usage Subdivisions Statistics

3 entries for Boston - Suffolk - MASSACHUSETTS - USA

Event/Fact	Persons	Date	Subdivision
Birth	GREGSON Vivian (1932-)	07.11.1932	Mass Gen
Birth	GREGSON Vivian (1932-)	07.11.1932	
Residence	THOMAS Michael George (1933-)	2016	Nursing Home

- Double-click the line to display the individual as the primary person.

Windows

- Select the desired item from the list and consult all the details you entered.

Sources Index (10 sources)

Search: Unused Sources Only Private Sources Only

N	T	M	P	Title	Type	Repository	Document	Call #	Medium	Archiv
				1841 UK...	Namelist	National Archives	Census		Internet	
				Alice's will	Record	Simons & Tapply	Will		Copy	
				Bachelo...	Namelist	University archi...	Pass list	Year ...	Digitizing	
				Death R...	Record	Parish records		1947	Other	
				Diary	Private Do...	Family archives	Journal	1947	Original	
				Family A...	Private Do...		Misc.		Original	
				Marriage...	Record	City of Westmin...	M.Cert. A...	D 22...	Internet	
				Newspa...	Publication	British Newspa...	Caledonia...		Internet	
				Old Pari...	Namelist	ScotlandsPeople	Baptisms-...		Internet	
				Statutor...	Namelist	ScotlandsPeople	Births-Mar...		Internet	

Record

▼ Note
No note

▼ Transcription
No note


3 entries for 1841 UK Census - National Archives, Census

Type	Sourc...	Date	Place	Subdi...	Comm...	Evide...
Ev...	Birth ...	1818				Direct
Ev...	Birth ...	1833	Plym...			Direct
Ev...	Birth ...	07.06...	Cant...			Direct

Tools Print Close


- Click the **Entries** tab (or consult them in the lower part of the index depending on the type of index) and check the list of persons for whom you typed the given name, the surname or occupation. Double-click the line to display the individual as the primary person.

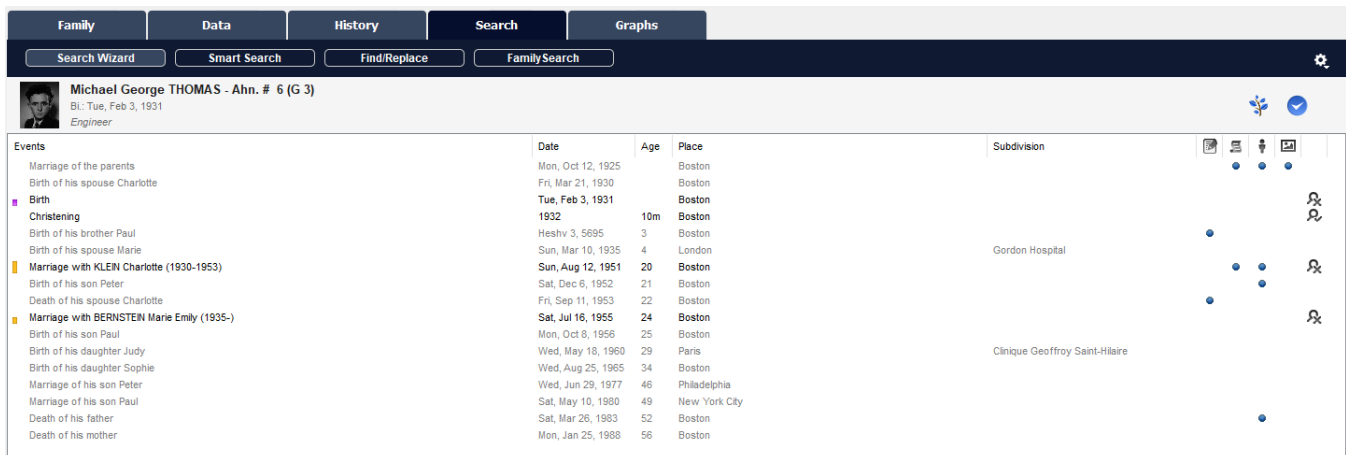
Search Wizard

Visual cues tell you whether or not a search is necessary for the primary person displayed, based on the criteria you set in **Heredis' Preferences**, see Heredis' Preferences (voir page 65) for more details on data completeness. The completeness icon  appears in the status bar, in the **Searches** tab, in the **Persons** and **Branches** tabs in the search panel. It tells you whether, for the main life events (Birth or Baptism – Union – Death or Burial), the information entered is complete, incomplete or missing.

- Click on the **Search** tab > **Search Wizard**.





Primary Person data


- Heredis allows you to see events that have been experienced or of importance to your ancestor's history and gives you the age he was if he were alive. You see the data of the primary person and his/her loved ones (Parents, Spouses, Children, Fratrie), click on the indented wheel at the  top right to change the display. Choose to view only the primary person's data by unchecking all the crossover events, or select which events you want to see.




Events	Date	Age	Place	Subdivision
Marriage of the parents	Mon, Oct 12, 1925		Boston	
Birth of his spouse Charlotte	Fri, Mar 21, 1930		Boston	
Birth	Tue, Feb 3, 1931		Boston	
Christening	1932	10m	Boston	
Birth of his brother Paul	Heshv 3, 5695	3	Boston	
Birth of his spouse Marie	Sun, Mar 10, 1935	4	London	
Marriage with KLEN Charlotte (1930-1953)	Sun, Aug 12, 1951	20	Boston	Gordon Hospital
Birth of his son Peter	Sat, Dec 6, 1952	21	Boston	
Death of his spouse Charlotte	Fri, Sep 11, 1953	22	Boston	
Marriage with BERNSTEIN Marie Emily (1935-)	Sat, Jul 16, 1955	24	Boston	
Birth of his son Paul	Mon, Oct 8, 1956	25	Boston	
Birth of his daughter Judy	Wed, May 18, 1960	29	Paris	
Birth of his daughter Sophie	Wed, Aug 25, 1965	34	Boston	Clinique Geoffroy Saint-Hilaire
Marriage of his son Peter	Wed, Jun 29, 1977	46	Philadelphia	
Marriage of his son Paul	Sat, May 10, 1980	49	New York City	
Death of his father	Sat, Mar 26, 1983	52	Boston	
Death of his mother	Mon, Jan 25, 1988	56	Boston	

The search wizard also displays:

- the completeness icon of major events 
- blue chips if you have a Note, a Source, a Witness, a Media attached to the event
- the primary person's event search status. Click on the icon to change the search status to  **No Search Record**,  **Search Record** or  **Not Found**. You will then be able to see which event requires research.

Indicate manually that a person is complete by clicking on  if you do not have more data to search for. Since Heredis 2021, this icon is also available in **Data** tab > **Personal Data**.

Click on  to display the branch of the primary person in the **Branches** panel.

The lower area of the search wizard

To complete your analysis of the searches to be undertaken, check out the tabs located in the lower area of the screen.

The screenshot shows a software interface with tabs for 'Web Search', 'Research Note', 'Sources', 'Media', and 'Map'. The 'Sources' tab is active, displaying a list of sources under the heading 'Family Archives, Misc.'. One source is selected: 'Marriage certificate - City of Westminster, M.Cert. A.P. (10) Family Memories - Family archives'. To the right, a details pane for this source shows: Type: Private Document, Quality of Data: Certainty, Title: Family Archives, Document: Misc., Nature: Original. Below this, there are sections for 'Use (20)', 'Note' (No note), and 'Transcription' (No note).

- **Sources** attached to all the events mentioned above may contain a crucial element for your approach.
- **Media** allows you to view documents that may have clues.
- The **Map** will allow you to see if the cities mentioned in the events displayed are close to each other or not.

Don't hesitate to fill out the **Research Note** by indicating which track you want to focus on. You will be able to resume your steps later and continue your reasoning.

Start a search on the Internet

In the lower area of the **Search Wizard**, you can search one or more websites with a publishing database.

The screenshot shows a search wizard interface for 'Michael George THOMAS - Ahn. # 6 (G 3)'. The interface includes tabs for 'Family', 'Data', 'History', 'Search', and 'Graphs'. Below these are buttons for 'Search Wizard', 'Smart Search', 'Find/Replace', and 'Family Search'. The main area displays a list of events with columns for Date, Age, Place, and Subdivision. The events include: Marriage of the parents (1925), Birth of his spouse Charlotte (1930), Birth (1931), Christening (1932), Birth of his brother Paul (1935), Birth of his spouse Marie (1935), Marriage with KLEN Charlotte (1930-1953) (1951), Birth of his son Peter (1952), Death of his spouse Charlotte (1953), Marriage with BERNSTEIN Marie Emily (1935-) (1955), Birth of his son Paul (1956), Birth of his daughter Judy (1960), Birth of his daughter Sophie (1965), Marriage of his son Peter (1977), Marriage of his son Paul (1980), Death of his father (1983), and Death of his mother (1988). Below the events list is a search wizard section with a 'Search Location' dropdown menu showing options like 'Heredis-Online EN', 'Ancestry EN', 'Archives.com', 'Facebook EN', 'Family Search EN', 'Find a grave', 'Find my past', 'Fold 3', 'Genealogy bank', 'Geneanet EN', 'Geneanet Premium EN', 'Google EN', 'MyHeritage EN', and 'World Vital Records'. There are also input fields for 'Surname' (THOMAS), 'Place', and 'Period', and buttons for 'Search' and 'Search on all sites'.

Click on the **Web Search** tab to select which data to take into account and which operator you want to search on.

1. Choose the search operator. Unroll the **Search Location** menu to select **Heredis Online** or another site suggested in the **indented wheel**.
2. Choose the criteria from those available from the selected operator. Some criteria may be grayed out if they are not usable in the operator's search fields.


Search Wizard

- Keep the surname of the primary person or type in another surname.
- Choose a given name or all given names from the list on the drop-down menu. The given name selected by default is the usual given name.
- Check the **Place** box to include this data in the search if the chosen operator can manage it. Choose a location in the drop-down menu: a common one that corresponds to events related to the primary person, department or country.
- Check the **Spouse** box to include this data in the search. Choose a spouse from the drop-down menu if the primary person has more than one. To search with a new spouse, type his/her surname and given name into the entry fields.
- Check the **Period** box to indicate a range of dates. Validate or change the start and end years for online search.

3. Click **Search** to send your search criteria to the selected operator. Heredis opens your Internet browser and displays the requested site. It's up to you to complete the search based on any additional tools available at the default selected operator.

The screenshot shows the Heredis search interface. At the top, there are search criteria fields: 'Main person: Name: smith', 'Spouse: Spouse name', 'Place / Date: Place', 'Event Type: All', and 'Published since:'. A search button with a magnifying glass icon and a 'RESET' button are also visible. Below the search criteria, a table displays 50/146 results. The table has columns for Name, First names, Birth-Death, Spouses, Places, and Author. The first result is for SMITH, Abel, born 1717-1788, with spouse BIRD / de BEAUMONT. The table lists several other results for SMITH with various first names and spouses.



Name	First names	Birth-Death	Spouses	Places	Author
SMITH	Abel	1717 - 1788	BIRD / de BEAUMONT		greg_heredis
SMITH	Abel	1748 - 1779			greg_heredis
SMITH	Abel	1788 - 1859			greg_heredis
SMITH	Ada	1863 - 1881		London	greg_heredis
SMITH	Addison		TEEPLES	Michigan	henrikkrub
SMITH	Adelia Estella	1867 - 1951		Vermont / Vermont	henrikkrub
SMITH	Alfred	1815 - 1886			greg_heredis
SMITH	Alice	1476 - 1515	CAVENDISH	?	greg_heredis
SMITH	Alice Maud Smith	1859 - 1931			greg_heredis
SMITH	Alyssa Whitall Pearsall	1867 - 1951		Philadelphie	greg_heredis

If you want to add a search operator or change the proposed list, click on the indented wheel  icon. See also Search on Heredis Online (voir page 536).

Check or uncheck the boxes to see, in the drop-down menu, the sites you are interested in. Some websites are available in several languages, they are offered by default in English.

You may be familiar with other websites that may help you find information about your ancestors. You can add websites, which will always appear in the drop-down menu of the operator's choice.

To add a personal website:

- Click on the indented wheel  icon.
- Click the **button**  at the bottom of the **Web Sites** window.
- In the first column, type the name of the website as you want to see displayed in the list of available operators.
- Open your Internet browser and log on to the search page of this site.
- Copy the URL address in your browser's address bar and paste it in the **URL** area of the Web Sites window.

To remove a website added by you, select it from the bottom of the Web Sites window and click the button

Web Sites

Sites Proposed by Heredis

- Heredis-Online DE
- Heredis-Online EN
- Heredis-Online FR
- Heredis-Online FR Premium
- Ancestry DE
- Ancestry EN
- Ancestry FR
- Archives.com
- Facebook DE

Your Own Sites

Site Name	URL address


+ -

OK Cancel

Relaunch a previous search

Haven't found the information you need? Didn't have time to study all the data on the genealogical website you were looking at? You can, at any time, restart a search you've already done.

1. Click the **History** button. All previous searches for the primary person can be found in this window. Rank them by date, or by operator name by clicking on column headers.

2. Just click the button  to restart the same search, with the same criteria.


Click the **Clear History** button to clear the list of previous searches for that person.



(Windows) Search history

Search Wizard

Search History

Web search
You can restart a previous Web Search




▼	Date	Web Search Query
	2020-08-03 12:15:21	Ancestry EN - Surname: THOMAS - Given Name: Michael
	2020-08-03 12:15:15	Heredis-Online EN - Surname: THOMAS - Given Name: Michael

Clear History Close

(Mac) Search history

Search History
You can restart a previous Web Search

Date	Web Search Query	
2020-08-03 12:16:34	Heredis-Online EN - Surname: THOMAS - Given Nam...	

Clear History Close

Smart Search

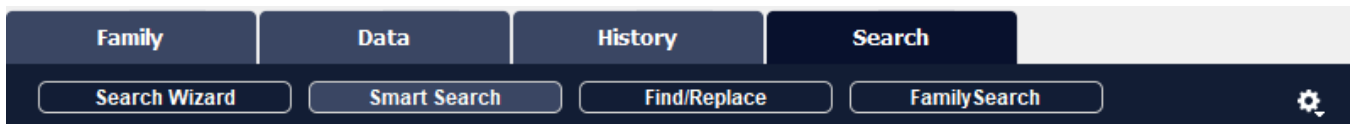
Smart Search

This function allows you to find specific data in your genealogy by combining different search criteria; you may then modify or process the data you have found.

It is impossible to quote all possible combinations so try, read the blue sentence carefully to see if the configured query matches what you are looking for.

To access **Smart Search**:

- choose **Smart Search** in the **Find** drop-down menu
- or select the **Search > Smart Search** tab



- or click on the **Find**  icon and select  **Smart Search** in the drop-down menu

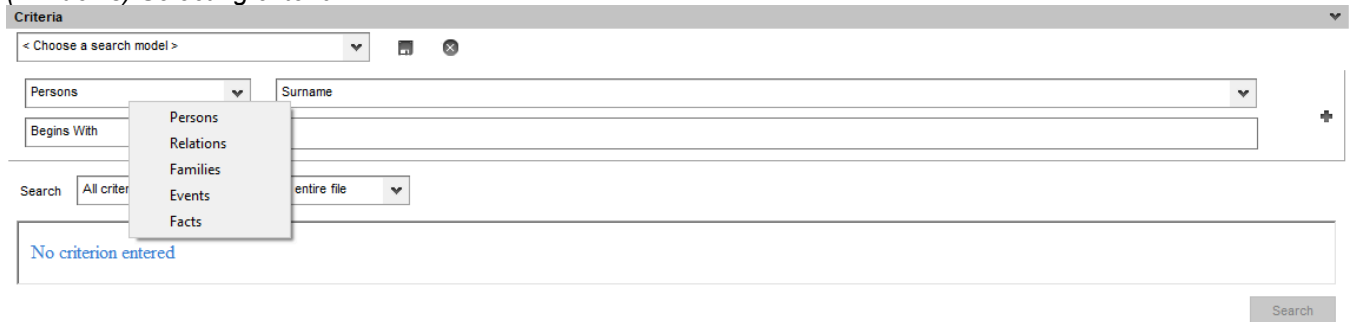
The **Smart Search** tool is composed of a “Criteria” field, a “Results” section, and a “Processing selected results” section. **(Mac)** This screen is also linked to a specific side panel entitled “Results”.

Search Criteria

The Heredis default display shows **<Persons>** as the first search criterion, then the **<Surname>** field, and the **<Begins With>** operator. In the entry field to the right of **<Begins With>**, type in the first letters of the surname you are looking for and click on the **Search** button to find all relevant persons in your genealogy.

The initial search criterion will determine what the next field options are.

(Windows) Selecting criteria



(Mac) Selecting criteria

Smart Search

The screenshot shows the 'Criteria' section of the Smart Search interface. At the top, there is a dropdown menu labeled '< Choose a search model >'. Below it, a list of criteria is shown. The first criterion is 'Persons', which is selected and has a dropdown menu open showing options: 'Relations', 'Families', 'Events', and 'Facts'. The search criteria is 'Surname' and the search model is 'the entire file'. A 'Search' button is visible at the bottom right.

Click on each of the fields and specify the type of information you are looking for in your genealogy. You can combine criteria such as **Persons, Relations, Families, Events, Facts** to build more or less intricate searches depending on the number of criteria you have selected.

- The button to the right of the **<Choose a search model>** pop-up menu allows you to remove all existing criteria and to clear the list of results.
- The and buttons to the right of a criteria line allow you to add or remove a criterion. Note that the button won't be displayed unless you have already added at least one criterion.

Additionally, you can organize the combination of your criteria by clicking on the pop-up menu located below the criteria selection area.

(Windows) How to combine search criteria

The screenshot shows the 'Criteria' section of the Smart Search interface for Windows. The search criteria is 'Surname' and the search model is 'the entire file'. The search mode is set to 'All criteria'. A pop-up menu is open showing options: 'All criteria' and 'One of the criteria'. A 'Search' button is visible at the bottom right.

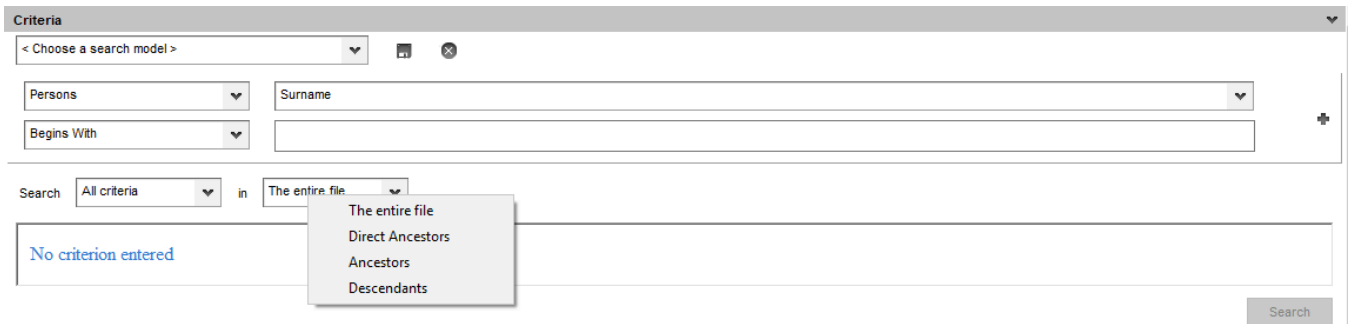
(Mac) How to combine search criteria

The screenshot shows the 'Criteria' section of the Smart Search interface for Mac. The search criteria is 'Surname' and the search model is 'the entire file'. The search mode is set to 'All criteria'. A pop-up menu is open showing options: 'All criteria' and 'At least one criterion'. A 'Search' button is visible at the bottom right.

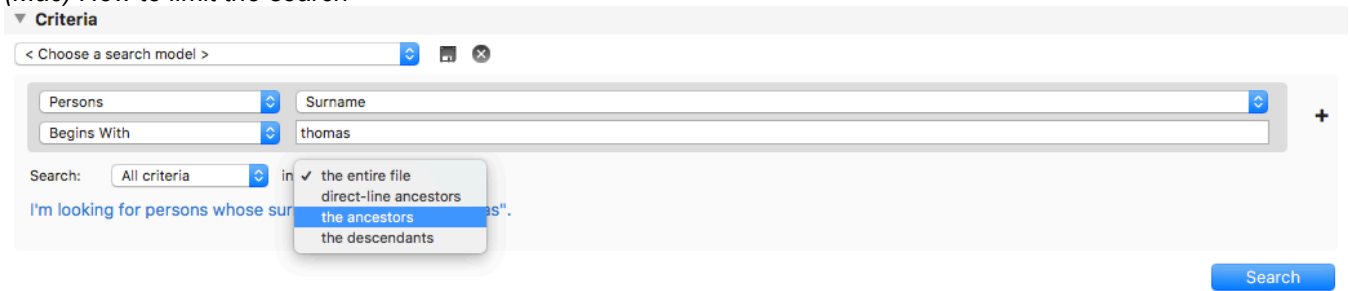
The default search mode is set on **<All criteria>**. This option allows Heredis to search all data that match at least one of the criteria you have selected. You can also narrow your searches down to specific parts of your genealogy or use the entire file.

Click on the pop-up menu that reads **<the entire file>** and select **<direct-line ancestors>**, **<the ancestors>**, or **<the descendants>**.

(Windows) How to limit the search



(Mac) How to limit the search



Existing models

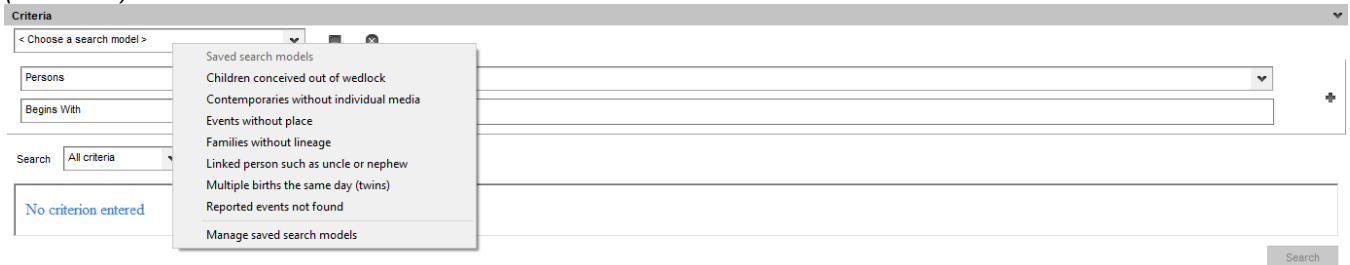
Heredis provides pre-saved search models to help you create your searches step by step.

Click on **<Choose a search model>** and select the model you are looking for.

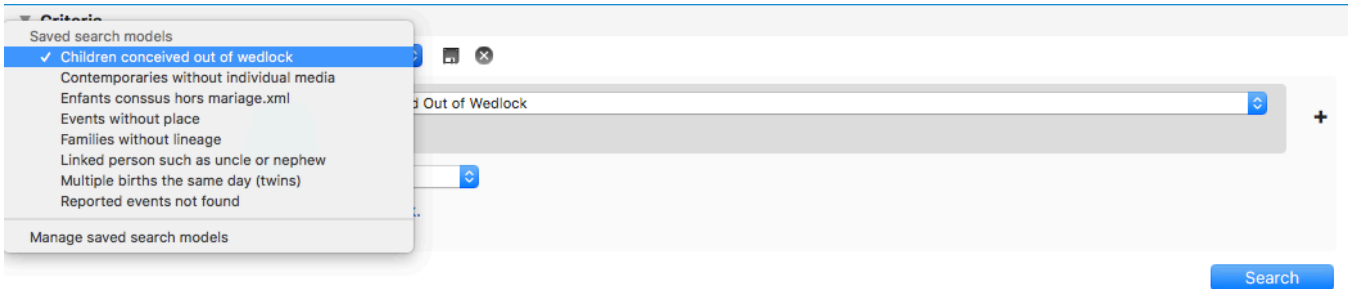
The fields associated with the model you choose are automatically prefilled. You can modify a search model by changing or adding criteria and save these modifications by clicking on the **Save As** button located to the right of the field entitled **<Choose a search model>**.

To manage your models or to reload the saved search models, click on **<Choose a search model>** and select **Manage saved search models**.

(Windows) List of saved search models



Mac List of saved search models




Additional options for research

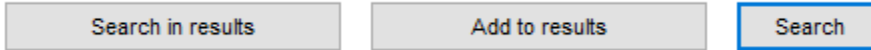
A phrased version of your search is automatically displayed below the criteria fields area. This allows you

Smart Search

to verify that the search you have created matches your needs. A message alerts you in case the search you are creating is incorrect.

Other options are available from the indented wheel  in the upper right corner. If you tick **Search in variants**, the searches will be extended to the variants you entered in your genealogy. If you activate the **Comprehensive** mode, two additional buttons will be displayed to the left of the **Search** button: **Search in results** and **Add to results**.

Extra buttons in Comprehensive mode in Smart Search

















Search in results allows you to research data within the results of your previous search in order to refine your results.


Add to results allows you to add your search results to the results of your previous search. Thanks to this option, you can build a list of results, adding up data from a series of searches.

If you enable **Comprehensive** mode, two additional columns appear on the left in the search results: you can select the row and sort by gender.

Results

Persons (29) Families (22) Events (71) Facts (6)							
		Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
<input checked="" type="checkbox"/>		THOMAS	Christopher Edward	° 05.13.1910	Oxford (Oxford...	† 05.31.1991	Dover (Kent)
<input checked="" type="checkbox"/>		THOMAS	Christopher Edward	° 05.13.1910	Oxford (Oxford...	† 05.31.1991	Dover (Kent)
<input checked="" type="checkbox"/>		THOMAS	Edward	° > 1804		† 1874	Hull (East Ridin...
<input checked="" type="checkbox"/>		THOMAS	Edward	° > 1804		† 1874	Hull (East Ridin...
<input checked="" type="checkbox"/>		THOMAS	Elizabeth (Tic)	° 1882			
<input checked="" type="checkbox"/>		THOMAS	Elizabeth (Tic)	° 1882			
<input checked="" type="checkbox"/>		THOMAS	George	° 12.06.1870		† 04.11.1871	
<input checked="" type="checkbox"/>		THOMAS	George	° 07.04.1872	Oxford (Oxford...	† 08.01.1947	Oxford (Oxford...
<input checked="" type="checkbox"/>		THOMAS	George	° 07.04.1877	Oxford (Oxford...	† 08.01.1947	Oxford (Oxford...
<input checked="" type="checkbox"/>		THOMAS	George	° 12.06.1890		† 04.11.1891	
<input checked="" type="checkbox"/>		THOMAS	Glenn Samuel Bruce	° 07.11.1997	Paris (Paris)		
<input checked="" type="checkbox"/>		THOMAS	Glenn Samuel Bruce	° 07.11.1997	Paris (Paris)		
<input checked="" type="checkbox"/>		THOMAS	Jeanne	° 08.15.1962	Hudson (Colu...		
<input checked="" type="checkbox"/>		THOMAS	John	° 05.1854	? (ENGLAND)	† > 1921	

Select all Deselect all

Note: When you consider your research is complete, hide the Criteria area (**Mac**) by clicking on the **Criteria** banner (**Windows**) by clicking on the arrow on the right side. This will leave more space available to display the results from searches and processing. More space can also be freed by deactivating the phrasing of your search: click on the  indented wheel in the upper right corner and untick **Show the edit**.

Since Heredis 2021

Since Heredis 2021, it is possible to search one or multiple words in all notes : media, sources (or in transcription), events in addition to the notes of persons or unions previously present.

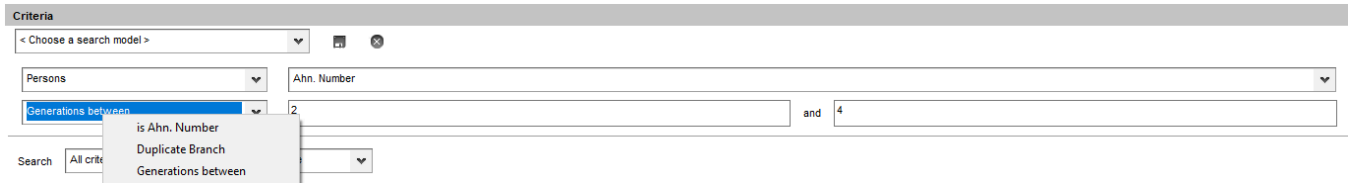
Example of search for note in media



The screenshot shows the search criteria configuration window. It includes a dropdown for search models, a list of criteria with filters for 'Persons' and 'Media', a search term 'New York', and a search scope of 'the entire file'. A preview box at the bottom shows the resulting search query: "I'm looking for persons whose media note contains 'New York'".

You can also easily search for

- persons of the Ahnentafel line (Persons > Ahn. Number > Is Ahn. number > Yes or No) or those who are not
- persons who are in duplicate branch also called implex (Persons > Ahn. Number > Duplicate Branch > Yes or No)
- persons of the Ahnentafel line between generation X and generation Y (Persons > Ahn. Number > Between Generations > X and Y)



Search for all persons you indicated to have father and/or mother untraceable...

Search results

When you click the **Search**, **Search in results** or **Add to results** buttons, Heredis displays the data found under the **Persons**, **Families**, **Events** and **Facts** tabs.

Within each tab, a number (in brackets) indicates how many persons, families, events and facts were found.

(Windows) Display of Smart Search results

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
von BORK	Helena	c 21.06.1842	Edinburgh (City Of Edinburgh)	† 08.11.1921	Oxford (Oxfordshire)
CARFAX	Mary	* 17.03.1961	Mexico City (Federal District)		
DAVIES	Henry James	* 1850		† 1905	
DAVIS	Violet Elizabeth	* 1875	Blackpool (Lancashire)	† 1966	Oxford (Oxfordshire)
GREGSON	Vivian	* 11.07.1932	Boston (Suffolk)		
HAYES	Ann	* 1833	Plymouth (Devon)	† 1915	Margate (Kent)
HENRY	Michael	* 24.06.1958	Portland (Oregon)		

Processing selected persons (29)

Marked ▼ Confidential ▼ Secondary Person ▼ Unmarried ▼ Child Status ▼ Signature ▼ Declared consistent ▼ Declared complete ▼ Edit ▼ Export Heredis File Export Gedcom File Delete

Ahn. #1 Generation 1 3 Spouses 3 Children: 2 1

(Mac) Display of Smart Search results

Smart Search

Criteria

< Choose a search model >

Events Marriage Exists

Yes

Search: All criteria in the entire file

I'm looking for all "Marriage" events.

Search

Results

Persons (28) Families (15) Events (15) Facts (8)

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
BLACHIER de la CHAUX	Marie Françoise	* 11.18.1787	Satillieu (Ardèche)	† 11.16.1856	Satillieu (Ardèche)
COLIGNY	Catherine Émilie	* 09.08.1902	Saint-Rambert-l'Île-Barbe...	† 01.25.1988	Lyon (Rhône)
COLIGNY	Louis	* 12.20.1863	Lyon (Rhône)	† 03.15.1955	Caluire-et-Cuire (Rhône)
COSTET	Jeanne "Émilie"	* 10.29.1860	Saint-Vallier (Drôme)	† 04.17.1949	Lyon (Rhône)
DEMARI	Annie Marguerite Marie	* 07.23.1957	Annecy-le-Vieux (Haute-S...		
DUBOIS	Pierre				
DUCHAMP	Alexandre Joseph	* 11.16.1849	Annonay (Ardèche)	† 03.03.1947	Lyon (Rhône)
DUCHAMP	Aurélien Lucas	* 04.23.1982	Paris (Paris)		
DUCHAMP	Charles Alexandre	* 04.29.1817	Annonay (Ardèche)	† 02.15.1878	Satillieu (Ardèche)
DUCHAMP	Claude Charles	* 02.03.1931	Lyon (Rhône)		
DUCHAMP	Eric Antoine Bernard	* 12.06.1952	Lyon (Rhône)		
DUCHAMP	Jean-Marie	* 04.26.1899	Saint-Vallier (Drôme)	† 03.26.1993	Lyon (Rhône)

Open the **Summary** panel. To verify the results displayed in the list are correct, click on any line in the list of results and the details will appear in the **Summary** panel. The data displayed in this panel varies according to the tab you selected under **Results**.

Should you notice a mistake to be corrected, double-click on the line in the list of results to directly access the person's **Personal Data** in your genealogy file.

Mac Specificity: Results panel

The results of your smart search are also available in the **Results** panel.

Results Panel – List of found persons



You can navigate in Heredis while keeping your search results on hand. Use the **<Persons>** pop-up menu to select and display results from the **Families**, **Events** or **Facts** tab. At any point, you can go back to the Smart


Search screen by clicking the button  to the right of the pop-up menu.

From this panel, select a person and use the drag and drop feature to easily complete your genealogy.

Processing results

Now that you have found persons, families, events or facts in your file, you may want to update this data, share it with a cousin, or even publish it in a document.

The Processing feature allows you to do this and much more, based on the data you have selected in the **Results** section under the current tab.

Note: in **Comprehensive** mode, by clicking the  indented wheel in the upper right corner, checkboxes appear at the beginning of each data line so you can select the data you wish to process. All lines are selected by default; you can untick, one at a time, the lines of results you do not want to include in your processing. Or you can decide to **Deselect all** and then tick the data lines you want to include in your processing. If you want to go back to including all results, click **Select All**.

Unfold the **Processing selected** **<persons>**, **<families>**, **<events>**, or **<facts>** banner: action buttons related to the **Results** tab you selected will be displayed.

(Windows) Processing results

Smart Search

Results

Persons (5) Families (5) Events (11) Facts (2)

▲ Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
DAVIES					
DAVIES	Henry James	* 1850		† 1905	
DAVIS	Violet Elizabeth	* 1875	Blackpool (Lancashire)	† 1966	Oxford (Oxfordshire)
DOBNEY	Anna	* 1818		† 1858	
de NEMOURS	Josephine	* 24.01.1855	Dunfermline (Fife)	† 31.08.1920	Edinburgh (City Of Edinbur...

Processing selected persons (5)

Marked ▼	Child Status ▼	Edit ▼
Confidential ▼	Signature ▼	Export Heredis File
Secondary Person ▼	Declared consistent ▼	Export Gedcom File
Unmarried ▼	Declared complete ▼	Delete
Childless ▼	Add to note ▼	Find/Replace
	Link a source	

(Mac) Processing results

Results

Persons (28) Families (15) Events (15) Facts (8)

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
BLACHIER de la CHAUX	Marie Françoise	* 11.18.1787	Satillieu (Ardèche)	† 11.16.1856	Satillieu (Ardèche)
COLIGNY	Catherine Émilie	* 09.08.1902	Saint-Rambert-l'Île-Barbe...	† 01.26.1988	Lyon (Rhône)
COLIGNY	Louis	* 12.20.1863	Lyon (Rhône)	† 03.15.1955	Caluire-et-Cuire (Rhône)
COSTET	Jeanne "Émilie"	* 10.29.1860	Saint-Vallier (Drôme)	† 04.17.1949	Lyon (Rhône)
DEMARI	Annie Marguerite Marie	* 07.23.1957	Annecy-le-Vieux (Haute-S...		
DUBOIS	Pierre				
DUCHAMP	Alexandre Joseph	* 11.16.1849	Annonay (Ardèche)	† 03.03.1947	Lyon (Rhône)
DUCHAMP	Aurélien Lucas	* 04.23.1982	Paris (Paris)		
DUCHAMP	Charles Alexandre	* 04.29.1817	Annonay (Ardèche)	† 02.15.1878	Satillieu (Ardèche)
DUCHAMP	Claude Charles	* 02.03.1931	Lyon (Rhône)		
DUCHAMP	Eric Antoine Bernard	* 12.06.1952	Lyon (Rhône)		
DUCHAMP	Jean-Marie	* 04.26.1899	Saint-Vallier (Drôme)	† 03.26.1993	Lyon (Rhône)

Processing selected persons (28)

Marked ▼	Child Status ▼	Edit ▼
Confidential ▼	Signature ▼	Export Heredis File
Secondary Person ▼	Declared consistent ▼	Export Gedcom File
Unmarried ▼	Declared complete ▼	Delete
Childless ▼	Add to note ▼	Find/Replace
	Link a source	

Processing selected persons

If the **Persons** tab is highlighted in the Results section, you may then decide to:

- Modify a series of additional information for the persons you selected
=> declare them as marked or unmarked, confidential, secondary, unmarried, childless, consistent, complete
=> change the field value under Child Status and Signature
=> add an identical text to all selected persons using **Add to note**
=> link a common source to all selected persons
- Create a Custom report, chronological or alphabetical report listing the persons you selected (**Edit by Date** or **by Name**). See also Custom Reports (voir page 383), (Mac) Create and Edit a Report, (Windows) Pre-established reports (voir page 390).
- Export the selected persons as a Heredis or Gedcom file
- Delete the selected persons
- Launch Find/Replace screen. See also Find/Replace (voir page 217) article.

Processing selected families

If the **Families** tab is highlighted in the results section, you may then decide to:

- Modify a series of information for the families you selected
 - => change the field value **Family Status** in the scroll-down list.
 - => add an identical text to all selected families using **Add to note**
- Create a report listing the families you selected (**Edit report**)
- Launch Find/Replace screen. See also Find/Replace (voir page 217) article.

Processing selected events

If the **Events** tab is highlighted in the results section, you may then decide to:

- Modify a series of information for the events you selected
 - => change the field value under **Search Status**
 - => declare them as private or not private
 - => share or no longer share them
- Add an identical text to all selected events using **Add to note**
- Link a common source to all selected events
- Create a report listing the events you selected (**Edit report**). See also Custom Reports (voir page 383), (Mac) Create and Edit a Report, (Windows) Pre-established reports (voir page 390).
- Since Heredis 2021, you can delete all events of the smart search at once by clicking on **Delete** button. Warning, this action is irreversible.
- Launch Find/Replace screen. See also Find/Replace (voir page 217) article.

Processing selected facts

If the **Facts** tab is highlighted in the Results section, you may then decide to:



- Modify a series of information for the facts you selected
 - => change the field value under **Search Status**
 - => declare them as private or not private
- Add an identical text to all selected facts using **Add to note**
- Link a common source to all selected facts
- Create a report listing the facts you selected (**Edit report**)
- Launch Find/Replace screen. See also Find/Replace (voir page 217) article.

Note: the Processing section banner indicates the type of data you are about to process (Persons, Families, Events, Facts) and the number of records you have selected.

You can search for text entered under:

- one of the following **Persons** fields: **Prefix**, **Suffix**, **Nickname**, **Title**, **User Number**, **Person** or **Research Note**.
- a **Family Note** for a Spouse
- one of the following **Events** or **Facts** fields: **Place Subdivision**, **Description/Cause**, **Note** or **Name**.

You may access this feature:

- from the drop-down menu **Find > Find/Replace**
- or by selecting the **Search** tab and the **Find/Replace** sub-tab
- or by clicking on the **Find**  icon then on the **Find/Replace**  button.

Searching for Text

- Enter the text you are looking for in the Text field.

Note: if you leave this field blank, Heredis will look for all empty fields.

- Use the Item pop-up menu to select the type of data you wish to edit.
- Specify where to search for the text you have just entered: **In the entire file** or **In Smart Search results**. (For more details on this feature, refer to the Smart Search (voir page 208) section).
- Check the **Case sensitive** box for Heredis to distinguish upper- and lower-case. It will be able, for instance, to look for "honest" and replace it with "Honest".
- Check the **Entire word** box to prevent modifications within a word. This way you can replace, e.g. in the Place Subdivision field, the abbreviation "st" with "Street" without affecting words such as "Newcastle".
- Click the **Find** button to display all relevant matches found in your genealogy. The number of found

Find/Replace

occurrences is mentioned between parentheses in the Matches banner.

(Windows) Matches

Family
Data
History
Search

Search Wizard
Smart Search
Find/Replace
Family Search

Find

Text:

Item:

Where to look?

In the entire file

In Smart Search results
0 person - 0 family - 0 event - 0 fact

Options

Case sensitive

Entire word

Matches (2)

Events	Subdivision
<input checked="" type="checkbox"/> Death - RUCASTLE Alice Jean (1908-1998)	Laureston House
<input checked="" type="checkbox"/> Death - THOMAS Christopher Edward (1910-1991)	Laureston House

Laureston House

Replace (2)

Search text:

Replace with:

Ahn, #2 Generation 2 1 Spouse 2 Children: 1 1

(Mac) Matches

Find

Text: ✕

Item: ▾

Where to look?

In the entire file

In Smart Search results
18 persons - 6 families - 38 events - 12 facts

Options

Case sensitive

Entire word

Matches (1)

Events	Place Subdivision
<input checked="" type="checkbox"/> Christening - DUCHAMP Alexandre Joseph (1849-1947)	Paroisse St François

Paroisse St François

Replace (1)

Search text:

Replace with:

Right below the list of matches, the searched text is displayed in red within each occurrence that was found. By default, all matches are selected – but you can uncheck, one by one, matches you do not want to modify. Conversely, you may prefer to click **Deselect all** and then check (only) the matches you want to modify.

Replacing text in your genealogy


- Enter your new text in the field entitled **Replace with**.
- Click the **Replace** button to apply your changes to all the matches you have selected.

FamilySearch

Heredis integrates various functions that allow you to search, compare, link, and import persons from FamilySearch universal Family Tree.

Click on the **Search > FamilySearch** tab if you wish to access it.

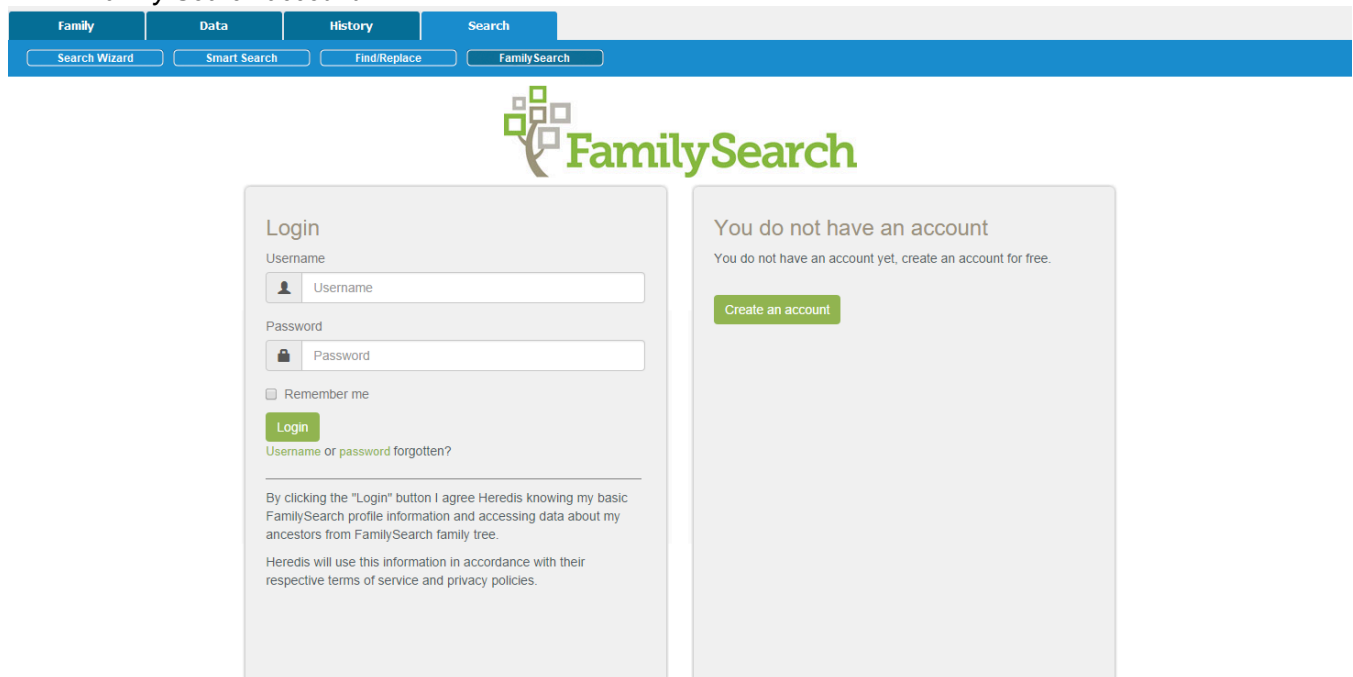
Important: Verify the compatibility of your Heredis version and FamilySearch.

Note: for an easy access to these functions, customize your toolbar by adding the button  .

Connecting to FamilySearch

In order to enjoy these features, you must connect to your FamilySearch account directly from Heredis. If you are new to FamilySearch, you can create a free account online.

Family Search account



The screenshot shows the FamilySearch interface within Heredis. At the top, there is a navigation bar with tabs for 'Family', 'Data', 'History', and 'Search'. Below the 'Search' tab, there are buttons for 'Search Wizard', 'Smart Search', 'Find/Replace', and 'Family Search'. The main content area features the FamilySearch logo and two panels. The left panel is titled 'Login' and contains fields for 'Username' and 'Password', a 'Remember me' checkbox, a 'Login' button, and a link for 'Username or password forgotten?'. Below the login fields is a disclaimer: 'By clicking the "Login" button I agree Heredis knowing my basic FamilySearch profile information and accessing data about my ancestors from FamilySearch family tree. Heredis will use this information in accordance with their respective terms of service and privacy policies.' The right panel is titled 'You do not have an account' and contains the text 'You do not have an account yet, create an account for free.' and a 'Create an account' button. At the bottom of the screenshot, a status bar shows 'Ahn #1 Generation 1' and '2 Spouses 3 Children: 2 1'.

Primary Person

In this tab, you can compare, link or unlink a person from your Heredis genealogy file to a person found in FamilySearch.

The banner under this tab in Heredis displays:

- the primary person's data, as saved in your Heredis genealogy file, his/her surname, given names, dates and places of birth and death.
- the person's first name and last name, his/her FSID if the primary person is already linked to a person in FamilySearch, as well as the current status of any family ordinance request.

Other content in this tab varies according to context.

Heredis primary person for Family Search.

Primary Person	Import
----------------	--------

Michael George THOMAS
B: 6 Feb 1933
Person not linked to FamilySearch

1) The primary person is not linked to a FamilySearch Person

You must find the Ancestor's Name in FamilySearch's International Genealogical Index (IGI) that corresponds to your primary person so you can link the two together.

Heredis displays a search form that includes the surname, given names, dates and places of birth and death for the primary person. These fields are automatically prefilled with the data already entered for this person in your genealogy.

If you click on the **More criteria** button, additional search fields for the primary person's parents and spouse will appear, which should allow you to refine your search on FamilySearch. The **Reset** button will delete the content of all search fields displayed on the screen.

Click on the **Search** button, Heredis will directly access FamilySearch servers and display the list of persons found.

If you click on a person in the list of results, detailed information on the FamilySearch person you selected will be displayed in the **Summary** side panel.

If a person listed in the results seems to correspond to your primary person, click on the **Compare** button at the end of the line to compare the Heredis and FamilySearch persons in details.

Compare Heredis to Family Search.

FamilySearch

The screenshot shows the FamilySearch interface with a navigation bar at the top containing 'Family', 'Data', 'History', and 'Search'. Below the navigation bar are buttons for 'Search Wizard', 'Smart Search', 'Find/Replace', and 'FamilySearch'. The main content is split into two columns: 'Heredis' on the left and 'FamilySearch' on the right. In the Heredis column, a primary person 'Christopher Edward THOMAS (1910-1991)' is shown with a spouse 'Alice Jean RUCASTLE (1908-1998)'. Below them is a child 'Michael George THOMAS' with birth information: 'B: 6 February 1933 - Margate - Kent - South East - ENGLAND'. Underneath are two sections: 'Spouses' with 'Vivian GREGSON (1932-)' (married 7 January 1954) and 'Paula LOWENSTEIN (H 5701-)' (married 3 March 1976); and 'Children' with 'Peter THOMAS (1956-)', 'Paul THOMAS (1960-)', and 'Jeanne THOMAS (1962-)'. In the FamilySearch column, a primary person 'Alton Leons Pelt - L9PD-4MJ (1899-1944)' is shown with a spouse 'Bertha A Chason - LHF2-4D7 (1891-1969)'. Below them is a child 'George Thomas - LVQF-8LS' with birth information: 'B: 1933 - Florida, United States'. At the bottom of the comparison are 'Back' and 'Link' buttons. A status bar at the very bottom shows 'Ahn. #1 Generation 1' and '2 Spouses 3 Children: 2 1'.

To make it easier for you to compare the two, Heredis displays the Heredis primary person's immediate family next to the immediate family of the FamilySearch person you selected.

If you click on the **Link** button, Heredis will attach the FamilySearch person's ID number to the primary person in your Heredis genealogy file. The two persons are now linked.

If you do not wish to link the two persons together, click on the **Back** button.

2) The primary person is linked to a FamilySearch Person

If the individual displayed as the primary person in Heredis is already linked to a person in FamilySearch, Heredis displays a window showing the data already saved for this person in Heredis next to the corresponding data saved in FamilySearch.

Family Search Linked Person.

Family Data History Search

Search Wizard Smart Search Find/Replace FamilySearch

Primary Person Import Hello, helene debacq Logout

Elizabeth (Tic) THOMAS
B: 1882
Person linked to Elizabeth Thomas - LDQ7-WTX

Heredis

Reuben Paul THOMAS
(< 1850-> 1921)

Helena von BORK
(1842-1921)

Elizabeth (Tic) THOMAS - LDQ7-WTX
B: 1882

Spouses

Children

FamilySearch

Elizabeth Thomas - LDQ7-WTX
B: about 1882 - Mississippi, United States

Spouses

Children

William Ross - LDQ7-W5S
(1860)

Viola Ross - LDQ7-HR2
(1904)

L.D. Ross - LDQ7-HB3
(1914-1969)

Robert Lee Ross - LDQ7-CS4
(1915-1992)

Charlie Ross - L8Y4-FK4
(1918-1963)

Dudley E Ross - LDQ7-CHZ
(1919-1996)

Unlink

No Ahn. Number
Unmarried
No Child

3) The primary person is linked to a FamilySearch person who has been deleted

Heredis informs you in the banner of the **Primary person** tab that the FamilySearch ID number was not found.

If you wish to link this person to another FamilySearch person, click on the **Unlink** button displayed in the banner.

Consult the History

Directly from Heredis, you can consult the history of modifications that have been made to the FamilySearch record of the linked person. Click the History button to access it.

Modifications History - Michael Thomas (LC6R-M3R)

Person Source Reference Added

6/26/2014

A Spangler - cis.user.MMMQ-7SZM

Birth Name Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Gender Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Death Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Birth Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Close

Note: Modifications made in FamilySearch after your import is processed will not be automatically updated in your file.

Import

From this tab, you can import a FamilySearch branch into a Heredis genealogy file.

To access it:

Click on the following tabs: **Search > FamilySearch > Import**
or select from the menu: **File > Import > FamilySearch...**

Family Search Import.

Import Tree from FamilySearch

Starting person

You (B3RJ-3C8)

Heredis Primary Person

FamilySearch ID Number

Options

Number of ancestors generations

Number of descendants generations

Import children of ancestors

Import alternate names

Import

1) Set the parameters for your import

Source Person

- Yourself: select this option to recover all or a portion of the genealogical data you have already entered in FamilySearch.
- Primary person in Heredis: if the individual displayed as the primary person in Heredis is already linked to a person in FamilySearch, you can select this option and thus complete his/her ancestors or descendants thanks to the data already gathered in FamilySearch's global tree.

Note: if the primary person is not linked to a person in FamilySearch, this option is greyed out.

- FamilySearch ID number: enter a person's FamilySearch ID number in order to retrieve a FamilySearch branch that will complete your genealogy.

Additional Options

Choose the number of generations for ancestors and descendants (limited to 5 maximum).

Tick **Import Children of ancestors** to retrieve the primary person's siblings, uncles, aunts, etc. You may also tick **Import Alternate Names** to retrieve additional names that might have been entered in FamilySearch.

Note: if you set the number of generations for ancestors and descendants to 1, the import will include the Source person and his/her spouse(s).

2) Imported data

When you click on the **Import** button, the following information is retrieved from FamilySearch's global tree:

- persons
- events
- notes
- sources

All the persons imported into your Heredis genealogy are linked to in FamilySearch's global tree and are recognizable thanks to their FamilySearch ID number.

Rules applied during data import from FamilySearch to Heredis:

When importing persons from FamilySearch, you may face a number of situations such as:

- the person to be imported is already in your genealogy with the exact same FamilySearch ID (FSID): this person will not be imported again to prevent the creation of duplicates; the import process will move on to the ancestors' or descendants' branch, according to your import settings.
- the person to be imported is already in your genealogy but does not have a FamilySearch ID (FSID) number or the FSID number is different: this person and his/her ancestors' or descendants' branch will not be imported to avoid creating inconsistent data.

Notes: If the person to be imported is already in your genealogy – without a FamilySearch ID number – and if he/she is not linked to the branch being imported, he/she will be added to your genealogy as a homonym. The data imported from FamilySearch will never overwrite personal data in your Heredis file.

Persons in Heredis linked to Persons in FamilySearch

In Heredis, various functions are available to help you find persons in your Heredis genealogy file who are linked to FamilySearch persons.

1) Search by numbers

Search Menu > Search by number

Enter the FamilySearch ID number you are interested in and Heredis will automatically take you to the matching person, who will be displayed as the primary person.

2) Advanced search

The advanced search will allow you to apply filters to your list of persons in order to only display the persons linked to FamilySearch.

From the Persons panel, on Windows in the **<Enhanced criteria>** replace **<None>** with **<Persons linked to FamilySearch>**. On Mac, select **<Genealogical Criteria>** and replace **<None>** with **<Persons linked to FamilySearch>**.

(Windows) Family Search Enhanced Criteria.

Persons Places Media Sources Branches

Surname Given Name Gender All

Enhanced criteria

Search in Entire File

Place

Spouse's name

Years Betw. and

Any event Without Source

Persons linked to FamilySearch Direct-Line

(Mac) Family Search Advanced Criteria.

Persons

Surname Given Names

All Genders

Genealogical Criteria

Persons linked to FamilySearch

Search in Entire File

3) Smart Search

To access it, click on the **Search>Smart Search** tab.

Select **<Persons>** and replace the **<Surname>** field with **<Linked to FamilySearch>** then click on the **Search** button to start searching. All persons linked to FamilySearch are displayed just below the Results area. Refer to our **Smart Search** (voir page 208) section for more details on this feature.

(Windows) Smart Search.

Criteria

< Choose a search model >

Persons Linked to FamilySearch

Yes

Search: All criteria in The entire file

I'm looking for persons linked to FamilySearch.

(Mac) Smart Search.

Criteria

< Choose a search model >

Persons Linked to FamilySearch

Yes

Search: All criteria in the entire file


I'm looking for persons linked to FamilySearch.

Note: if the primary person in your genealogy is directly linked to a person in FamilySearch, Heredis will

FamilySearch

display his/her FamilySearch ID number in the status bar. This number is also displayed in the Summary panel, under the person's name.

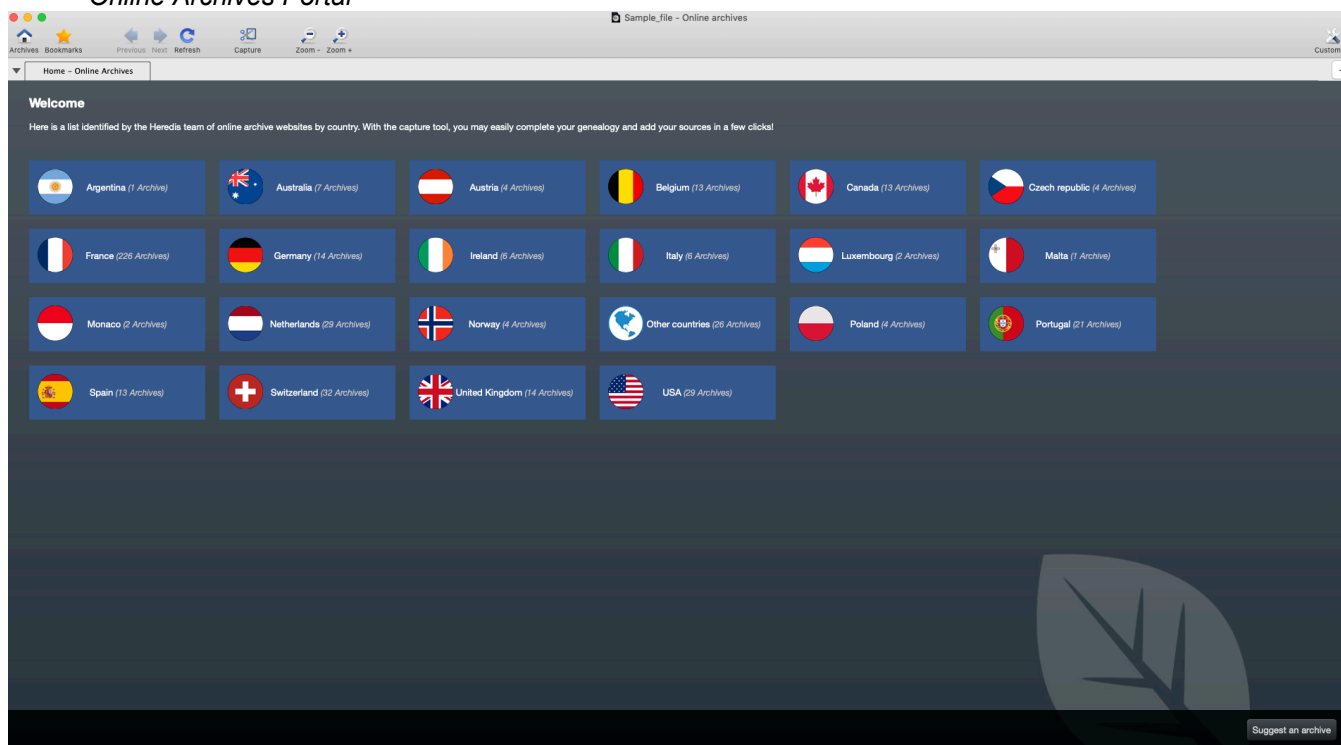
Searching in Online Archives

The **Search in Online Archives**  tool allows you, from your software, to access the Online Archives portal. Heredis facilitates your research and also allows you to integrate acts you have found and cut into your family tree, by creating the event and the associated source for example.

Click on the button  or choose from the menu **Find > Search in Online Archives...**






Access and navigation in Online Archives sites

Heredis displays the Online Archives search portal in a real web browser.
Online Archives Portal



Online Archives

You have a button bar with the following options:

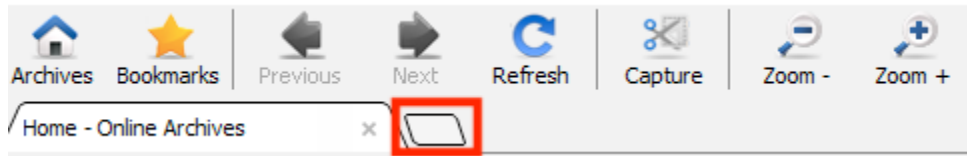
-  **Archives Button:** displays the home page of the online archives.
-  **Bookmarks Button:** lists the sites you have added as bookmarks and allows you to manage the list of bookmarks.
-  **Previous, Next Navigation buttons:** they give you an indication of the history of your browsing and allow to re-display pages already consulted.
-  **Update Button:** updates the page displayed on the screen.
-  **Capture Button:** Captures the whole page displayed in the browser. If you have already made a

Searching in Online Archives

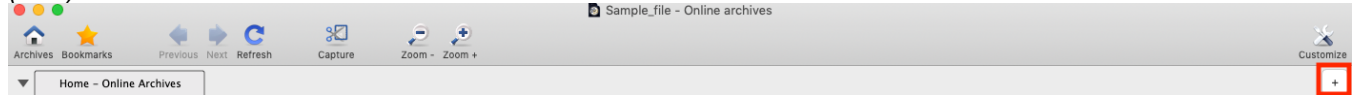
capture, this button opens a menu either for you to make another capture, or see the list of already captured but not processed sites.

As in any internet browser, you can add a new tab by clicking (Windows) on the little tab, (Mac) on the + button on right side.

(Windows) New tab




(Mac) New tab

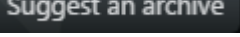


Close a tab by clicking the cross to the right of the title of the displayed tab.



The Archives portal concerns a a lot of countries. If you do not find a country, check on **Other Countries** section.

By clicking on the  button on the button bar, you return to the home page.


Use the  navigation buttons to navigate as on a website.

If a website appears to be missing from the list, share it via the  button at the bottom right of the footer band. Each proposal will be submitted to the Heredis team. If accepted, it will appear on the portal and will be permanently accessible to all users. We add website if screenshot can be made of records.

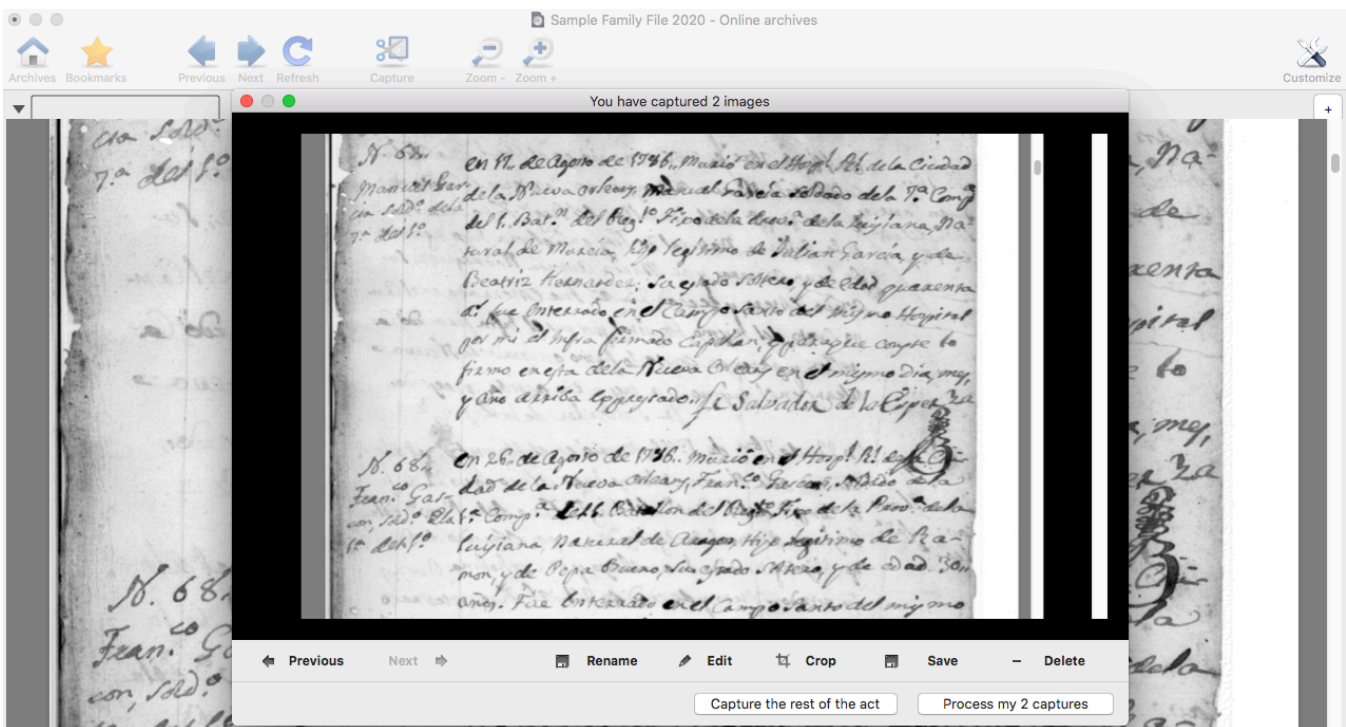
Your research will often focus on a given territory: select the sites you visit most frequently and add them

by clicking the  button > **Add Bookmark**. To make changes to your bookmarks, click  > **Edit Bookmarks**: you can add other sites and delete them with the + and – buttons. By clicking on a line, you may change the name or address of the sites.

Capture images

Once the certificate found, Heredis allow you to make a screenshot of this certificate. Click on  **Capture** button.

Online Archives Capture



When you capture a deed or any other document, you capture all of the displayed page in the browser.

Once your certificate captured, rename the picture by clicking on **Rename** button. Otherwise, it will be difficult to find your picture in Media index.

You can edit the capture by clicking the **Edit** button. Your image is displayed in the **Photo tool** and you can edit the image to make the document more readable (see the article on Photo Tool (voir page 337) to see the details of this feature). Once the editing parameters are right for you, close this window and treat your captures.

Crop the image to remove unwanted parts with the **Crop** button: when you click this button, your mouse cursor changes shape. Place your cursor at the spot where the picture should be adjusted. Hold down the left mouse button and slide the selecting window to encompass the desired area. When you release the mouse, the **Crop** button appears on the image; then click this button. Your image is now framed.

When you have captured several images, the **Previous** and **Next** buttons allow you to scroll through the list of your captures. You'll need to rename, edit, and crop every capture you make.

We advice you to keep a copy on your computer, click the **Save** button and choose the location on your computer.

The **Delete** button will delete the capture displayed in this window.

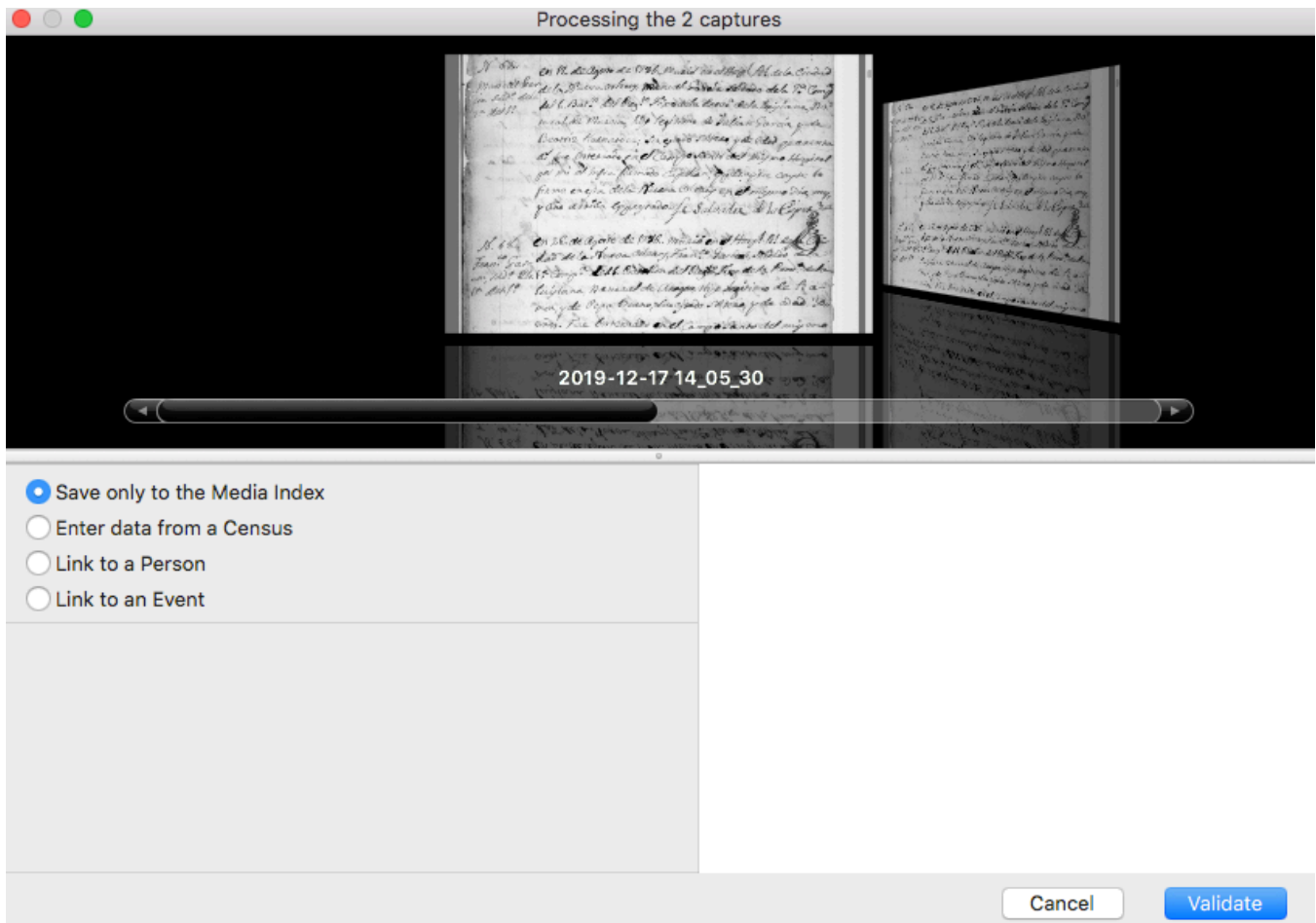
Info • All the captured images are declared as being private by default in order to respect the terms of use of the Archives. Remember that if you close the **Archives Online** tool without managing your captures, they will be retained in the list of captures only as long as the Heredis session is still open.

If you have managed to capture all of the act, click **Process my capture**, or on the **Capture the rest of the act** button in order to cover the act in its entirety.

Processing captures

Heredis allows you to process the capture of acts to associate them with an event of your genealogy and save the information concerning the act.

Online Archives Capture



Multiple choices are available to you for treating these captures:

Save only in the media index

If you do not have the time, tick the **Save only in the media index** box for treating it at a later date.

Link to an event/person

Since Heredis 2020, you may **Link to a person** the image you just captured.

Select **(Mac) Link to an event / a person** or **(Windows) Associate with an event / Link a person**.

Click on **Select the person** to select or create the person whom the captures are to be associated. Then, in case of a link to an event, unfold the dropdown list to select an existing event or create one if it has not already been created.

You can choose between different option to save the source and the media. To do so, choose between **Create a Source, Do not create a source** and **Choose an existing source**. Make sure to choose to save the media in the source or the event by unfolding the dropdown list to **Assign media to**.

Note: If you use Comprehensive mode of sources, you can add the citation in **Comments** area and assign the media to the citation. If you choose **Not to create a source**, the media will automatically go to the event.

(Windows) Processing capture

Save only to the Media Index

Enter Data from a Census

Link to a Person

Associate with an event

Select the person DAVIES Henry James (1840-1905)

Birth: 1840

Saving Options

Create source

Do not create a source

Choose an existing source

Comments:

Assign media to: Source

The image will be associated with the event source

Cancel Validate

(Mac) Processing capture

Searching in Online Archives

The screenshot shows a window titled "Processing the capture" with a document image in the center. Below the image is a search bar with the text "Search Our Collection - Royal BC Museum". The main interface is divided into two panels. The left panel contains radio buttons for "Save only to the Media Index", "Enter data from a Census", "Link to a Person", and "Link to an Event" (which is selected). Below these is a "Select the person" section for "COLIGNY Catherine (1896-1988)" with a dropdown menu showing "Birth: September 8, 1896 - Saint-Ramber-l'Île-Barbe (Rhône)". Underneath are "Saving Options" with "Create a Source" selected, and a "Comments" field. The right panel displays a profile for "COLIGNY Catherine aka Emilie" with details: "Ahn. # 3 (G 2)", "sans profession", "Bi. 09.08.1896 - Saint-Ramber-l'Île-Barbe (6900)", "D 01.25.1988 - Lyon (69000) - à son domicile 53 avenue de Saxe". It lists "Preferred Picture", "Parents" (COLIGNY Louis and LOUIS Léontine), "Spouse (1)" (DUCHAMP Jean-Marie), "Children (2)" (DUCHAMP Claude Charles and DUCHAMP Paul André), "Other Person Events", "Other Family Events", and "Shared Events" (Census: 1926 - Lyon (69000) - 53 avenue de Saxe - Spouse). At the bottom are "Cancel" and "Validate" buttons.

When you click **Validate**, Heredis opens the source and prefills known information, the type of the source, the title of the source, the Archive depository, the nature of the source, its quality, the website and automatically associates the capture or captures with the source. Fill in any missing information if necessary and click **OK** to create the source.

See our MOOC on Online Archives for more explanation.

Enter data Census

Since Heredis 2019, you can also **Enter Data from a Census**. It will open the Census Grid feature. Please see Census (voir page 165) article or see our MOOC for further details.

Launch Online Archives from an event

The **Online Archives search** tool may be launched directly from the file of the person.
Events

Events	Year	Age	
Birth	1872		
Graduation	1892	19	
1 Marriage	1899	26	
Death	1947	75	

Date (T)
 July 4
 Place: Oxford
 Priv
 Note

+ - Share
 B C M RM MC D BU


From the **Personal Data** entry tab, select the event you want to complete. Start the online archives search by clicking the **Online Archives** button below the list of events. Heredis displays directly the list of available archives of the country for the selected event provided you have previously entered this information. When you have found and captured the act of the event to be completed, Heredis prefills the treatment of captures with the relevant information on the person and the event selected in the **Personal Data** entry tab.



It remains for you to validate and possibly complete the missing information for the source.

Find Relationships

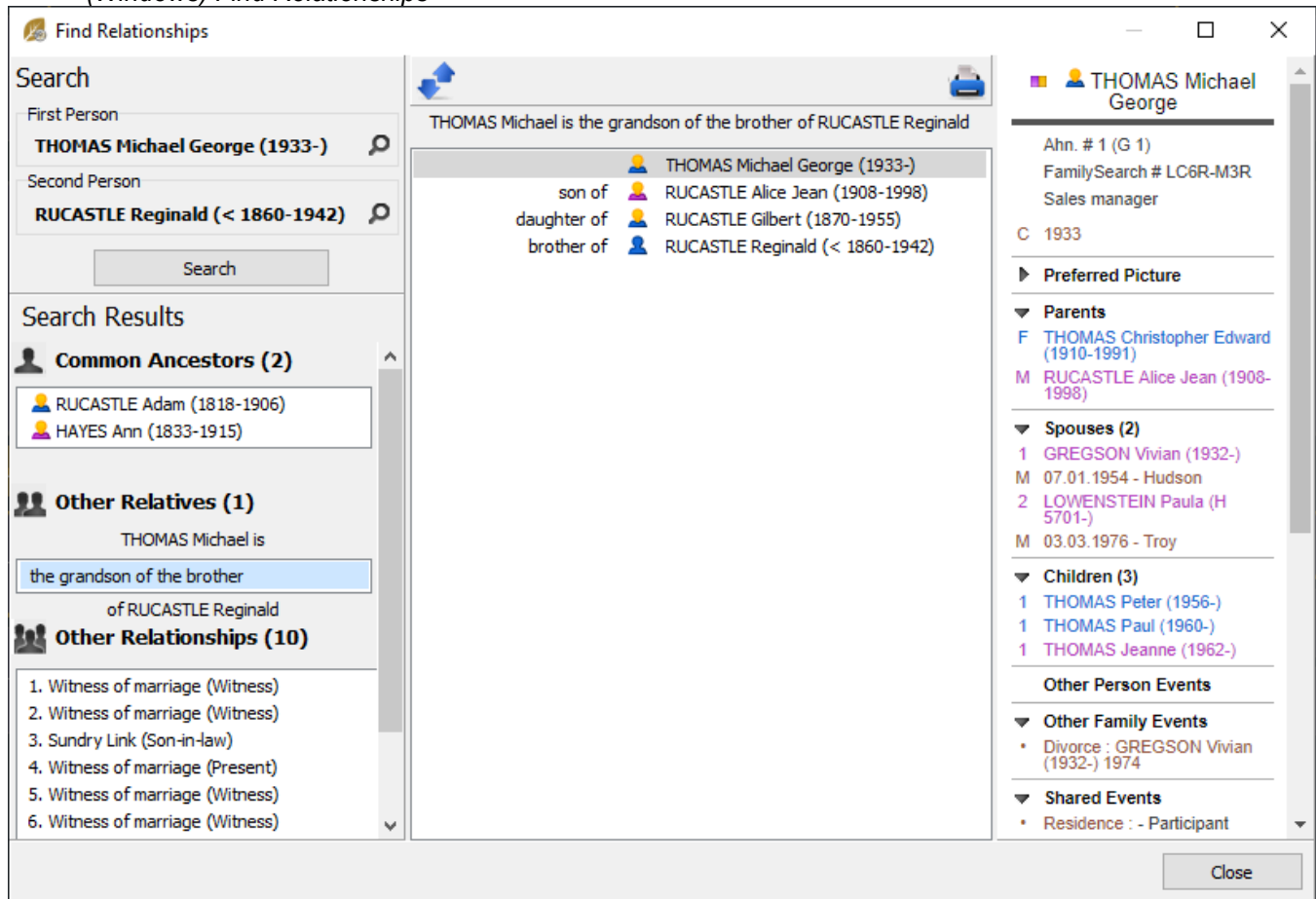
The Find Relationships feature **scans** all the connections in your genealogical file to find out how two people can be linked, even if they're not directly related or allied.

- Click on the **Find > Find Relationships** menu.
- or Click the button  and then the  button.

The primary person is proposed by default as the first individual to analyze. You can change it by clicking on the magnifying  glass.

Under the title Second Person, then click on the magnifying glass  to choose the second person from the matching list or, from Heredis 2021 , click on **Root Person** or **Primary Person** button for a faster choice. Finally click **Search** to start searching for relationships.

(Windows) Find Relationships



The screenshot shows the 'Find Relationships' window with the following content:

- Search:**
 - First Person: THOMAS Michael George (1933-)
 - Second Person: RUCASTLE Reginald (< 1860-1942)
 - Search button
- Search Results:**
 - Common Ancestors (2):**
 - RUCASTLE Adam (1818-1906)
 - HAYES Ann (1833-1915)
 - Other Relatives (1):**
 - THOMAS Michael is the grandson of the brother of RUCASTLE Reginald
 - Other Relationships (10):**
 1. Witness of marriage (Witness)
 2. Witness of marriage (Witness)
 3. Sundry Link (Son-in-law)
 4. Witness of marriage (Present)
 5. Witness of marriage (Witness)
 6. Witness of marriage (Witness)
- Main View:**
 - THOMAS Michael is the grandson of the brother of RUCASTLE Reginald
 - THOMAS Michael George (1933-)
 - son of RUCASTLE Alice Jean (1908-1998)
 - daughter of RUCASTLE Gilbert (1870-1955)
 - brother of RUCASTLE Reginald (< 1860-1942)
- Person Profile (THOMAS Michael George):**
 - Ahn. # 1 (G 1)
 - FamilySearch # LC6R-M3R
 - Sales manager
 - C 1933
 - Preferred Picture
 - Parents:
 - F THOMAS Christopher Edward (1910-1991)
 - M RUCASTLE Alice Jean (1908-1998)
 - Spouses (2):
 - 1 GREGSON Vivian (1932-)
 - M 07.01.1954 - Hudson
 - 2 LOWENSTEIN Paula (H 5701-)
 - M 03.03.1976 - Troy
 - Children (3):
 - 1 THOMAS Peter (1956-)
 - 1 THOMAS Paul (1960-)
 - 1 THOMAS Jeanne (1962-)
 - Other Person Events
 - Other Family Events:
 - Divorce : GREGSON Vivian (1932-) 1974
 - Shared Events:
 - Residence : - Participant
- Close** button

(Mac) Find Relationships

Demo-Sample Family File - Find Relationships

SEARCH

First Person
THOMAS Michael Georg...

Second Person
RUCASTLE Reginald (< 1...

Search

SEARCH RESULTS

Common Ancestors (2)

RUCASTLE Adam (1818-190...
HAYES Ann (1833-1915)

THOMAS Michael and RUCASTLE Reginald are grand-nephew/great-uncle

Other Relatives (1)

THOMAS Michael is the grandson of the brother of RUCASTLE Reginald

Other Relationships (10)

1. Witness of marriage (Witn...
2. Witness of marriage (Wit...
3. Sundry Link (Son-in-law)
4. Witness of marriage (Pres...
5. Witness of marriage (Wit...
6. Witness of marriage (Wit...
7. Witness of birth (Present)
8. Witness of marriage (Pres...
9. Witness of death (Declara...
10. Witness of birth (Declara...

THOMAS Michael is the grandson of the brother of RUCASTLE Reginald


son of	THOMAS Michael George (1933-)
daughter of	RUCASTLE Alice Jean (1908-1998)
brother of	RUCASTLE Gilbert (1870-1955)
	RUCASTLE Reginald (< 1860-1942)

RUCASTLE Adam

Ahn. # 12 (G 4)
Businessman

Bi. 06.07.1818 - Canterbury
D 11.08.1906 - Margate

Preferred Picture



Parents

Spouse (1)

- HAYES Ann (1833-1915)

M 11.11.1858 - Plymouth

Children (2)

- RUCASTLE Reginald (< 1860-1942)
- RUCASTLE Gilbert (1870-1955)

Other Person Events

Other Family Events

Shared Events

Facts

Is the witness of

- Declarant Birth of RUCASTLE Gilbert (1870-1955) - 1870 - Margate

Whose witness is

Other Relationships

Common ancestors

In the **Search Results** area, Heredis looks for possible common ancestors. By selecting one of the common ancestors found, a table shows you the parallel paths leading each of the two persons to this ancestor.


Find Relationships

The screenshot displays a genealogy software interface. On the left, a search panel shows 'First Person' as THOMAS Michael George (1933-) and 'Second Person' as RUCASTLE Reginald (< 1860-1942). Below the search results, 'Common Ancestors (2)' lists RUCASTLE Adam (1818-1906) and HAYES Ann (1833-1915). 'Other Relatives (1)' shows THOMAS Michael is 'the grandson of the brother' of RUCASTLE Reginald. 'Other Relationships (10)' lists six types of relationships, including 'Witness of marriage (Witness)', 'Sundry Link (Son-in-law)', and 'Witness of marriage (Present)'. The main area shows 'Common Ancestors Of THOMAS Michael And RUCASTLE Reginald' with a tree structure. On the right, a profile for HAYES Ann is shown, including birth and death dates, a preferred picture, and a list of children: RUCASTLE Reginald (< 1860-1942) and RUCASTLE Gilbert (1870-1955).


In case of implex due to inbred marriages, several paths can lead a person to the common ancestor. The number of paths is specified at the top of its column. Click on the lines of the different links to see the different parentages that lead to the common ancestor.

Other Relatives

Heredit then searches whether they are related by parentage or marriage: maternal great-great-uncle, brother-in-law of the son-in-law, spouse of the second cousin.

Select the link or unroll the menu to see all the links and select another one. The table shows the parentages and alliances that connect the two persons. Each link is named. To make it easier to understand the link, you can click the button  (Change the meaning of the reading).

This close-up screenshot shows the 'Other Relatives (1)' section. It displays 'THOMAS Michael is' followed by a dropdown menu with the selected option 'the grandson of the brother' and 'of RUCASTLE Reginald'. Below this, the 'Other Relationships (10)' section is visible, listing six relationship types: '1. Witness of marriage (Witness)', '2. Witness of marriage (Witness)', '3. Sundry Link (Son-in-law)', '4. Witness of marriage (Present)', '5. Witness of marriage (Witness)', and '6. Witness of marriage (Witness)'.

All links representation tables are printable by pressing  .


Other Relationships

Heredis is finally looking for all the non-kinship ties: do they have in their relationship a person who witnessed marriage, declaring death?

Regardless of the type of link, it is represented in the form of a table in which each line names the relationship: son of, mother of, witness of death, etc. This makes it easy to find the thread that connects the two persons.

As for relatives, eventually click the button  (Change the meaning of the reading) to better understand the link.

Click on any person mentioned in the links table to view their summary in the right part of the Find Relationships window.

Click the print button  to start your word processing software and print out the detail of the selected link as well as the summary of all the links found.

Indexes: generalities


As you input data, Heredis groups the data by type and creates the corresponding indexes: surnames – given names – occupations – places – sources – media – repositories.

Each Index groups all data entries of the same type, and provides tools to illustrate, edit or delete data throughout the genealogy file.

Below are the general information for all indexes. Consult the articles Sources Index (voir page 256), Media Index (voir page 249), Places Index (voir page 267), Repositories Index (voir page 261) for specifics related to these indexes.

Accessing Indexes

Indexes are permanently available.

- From the toolbar, click on the  **Indexes** button then select the one you want to open.
- From the **Tools** menu then choose the index you want to open.
- Click on the corresponding panel of the **Search panel**. You can access **Places**, **Sources**, or **Media Index**.

Exploring the Indexes


You may use the indexes for finding any data, modify or complete them, and simply navigate throughout your genealogy. Each Index gives you an overview of your data, indicates where they are used and permits you to edit them throughout your genealogy file.

As you enter all data, Heredis will record the details to the right place in the appropriate Indexes: names, occupations, places, sources, media.


(Mac) Given names Index

Sample_Family_File - Given Names Index

Search Unused Given Names

79/79 Options 

V	N	M	Given Name	G
			Adam	M
			Adrian	M
			Alice	F
			Alma	F
			Ambrose	M
			Andreas	M
★			Andrew	M
★			Angelina	F
★			Ann	F
★			Anna	F
★			Ario	F



Andrew

Handle Characters Manually

Default Gender: Male

Note: Private Note

Andrew is the English form of a given name and surname common in many countries. The word is derived from the Greek: Ανδρέας,



Andrew

Variants

+ - ⚙

Usage Statistics

2 entries for Andrew

	Surname	Birth	Death
	MORLEY Andrew	12.20.1899	06.30.1932
	MORLEY Andrew	12.20.1899	06.30.1932


(Windows) Given names Index

Indexes: generalities

Ge...	Given Name	Usual Given Name
	Adam	
	Adrian	
	Alice	
	Alma	
	Ambrose	
☆	Andreas	Andrew
★	Andrew	
	Angelina	
★	Ann	
☆	Anna	Ann
	Arlo	
	Brenda	
	Bruce	

Gender	Surname	Birth	Death
♂	MORLEY Andrew	20.12.1899	30.06.1932

You may consult the list of assignments for every item of data and **(Mac)** the relevant statistics by period.

Edit by double-clicking or selecting and clicking on the pencil , comment in notes, illustrate your data in the Index for transmitting throughout your genealogy.


Change the spelling of «SHELITO» to «SHILLITO» so that it applies to all holders of this surname. Change the default gender assigned to all new «Lindsey» given names which you may enter. Consult the list of all the «Master builders» and navigate throughout their families. Show photos of the places where your ancestors lived and refine their geolocation. Enter a transcript of an old deed, which you may then consult in each event where the source is assigned. Import folders of photos to the **Media Index** so that you have them to hand for associating by a simple drag and drop.

Indexes allow you to apply overall treatment for any data of the same type: spelling, specific formatting, associating of variants, notes, illustrations, replacement by another given item of data.

Search and sort

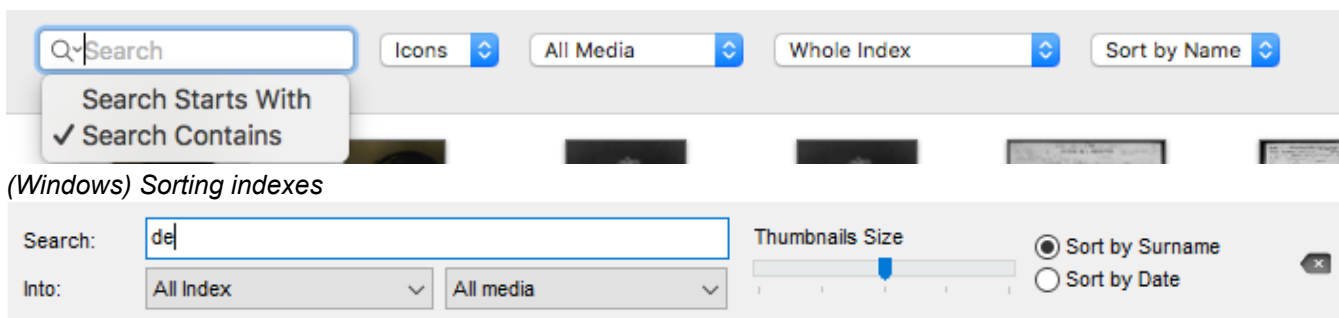
Search for an element in an index

Each Index has a search field at the top left of the screen. Enter the word or phrase to be searched. The search is performed in real time and the displayed list is updated.

(Mac) Click the **Search**  icon to select the Search mode: «Search Contains» the word, or «Search Starts With» the entered letters.

You also have display filters to refine your search. You can display items that are not used in your genealogy by ticking the **Unused...** box and then delete them from (Windows) **Tools** button; (Mac) **Option** Button.

(Mac) Sorting indexes



(Windows) Sorting indexes

In the **Media Index**, choose from the pop-up menu to display media type (Image – Video – Missing...) and use (Sources – Persons...).

Only results that match your search criteria are displayed.

The counter (**Mac**) below the search box, (**Windows**) in the title of the index window, indicates the number of results compared with the total number of elements in the Index.

Manage the displayed results

You can sort the list of elements in the Index according to the type of information.

Click the column header to rank sites by county, to classify sources by type, classify occupations according to the presence of a note, classify media according to their private character...

The Media Index may be displayed sorted either by file name or by date. Click the buttons on the toolbar of the list.

Display all the elements of an index

To see the complete list of all items in an index, make sure you have no active search criteria or filters.

To cancel a search, click the **Delete** icon to the right of the search field.

To cancel the filter, uncheck the options. In the **Media Index** choose **All Media** and **Whole Index in the pop-up menus**.

Consulting usage




You can easily visualize the various occurrences of a specific item in your genealogy and conveniently navigate from the indexes.

- Open the index you are interested in.
- Select the line corresponding to the item you want to research.
- (**Windows**) In the bottom part, the number of occurrences (Usage) will be displayed either directly or under a tab, depending on the index you are using. In the right end column or at the bottom, depending on the index, you will see the variants, attached media and/or notes

15 entries for THOMAS			
Gender	Surname	Birth	Death
	THOMAS Peter	03.12.1956	
	THOMAS Paul	10.10.1960	
	THOMAS Paul	1883	
	THOMAS Michael George	06.02.1933	
	THOMAS Marion	1900	1985
	THOMAS Kate Elsie	24.06.1941	
	THOMAS Judy	15.08.1962	
	THOMAS John	05.10.1954	1994

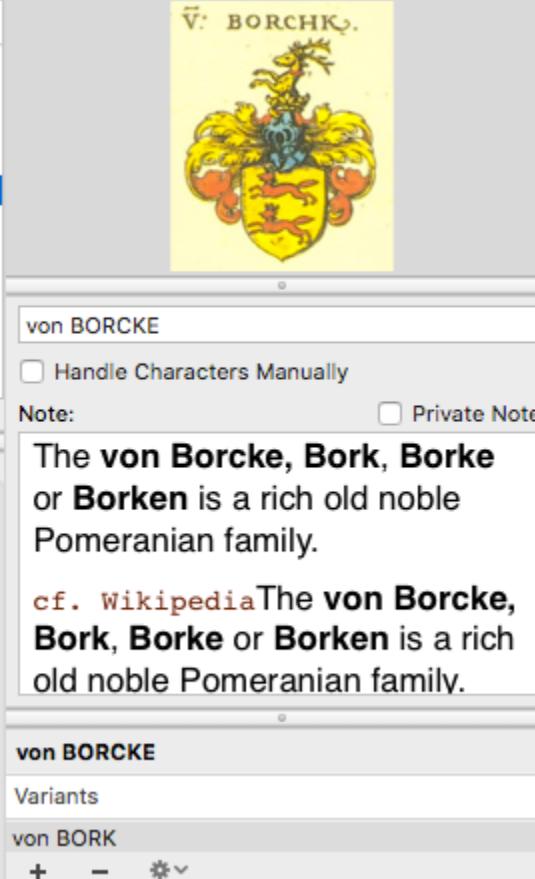
- (**Mac**) Click on the **Usage** tab in the lower part of the window.

Indexes: generalities

		Usage	Statistics
29 entries for THOMAS			
	Surname	Birth	Death
	THOMAS Christopher Edward	05.13.1910	05.31.1991
	THOMAS Christopher Edward	05.13.1910	05.31.1991
	THOMAS Edward	> 1804	1874

- Double-click on the person's name to display the person's data.
- In some indexes, you can view variants, media path, or other information in the right column.

(Mac) Surnames index



The screenshot shows a window titled "von BORCKE". At the top is a coat of arms with a yellow shield, a blue crest, and a red dragon. Below the coat of arms is a text box containing the following information:

von BORCKE

Handle Characters Manually

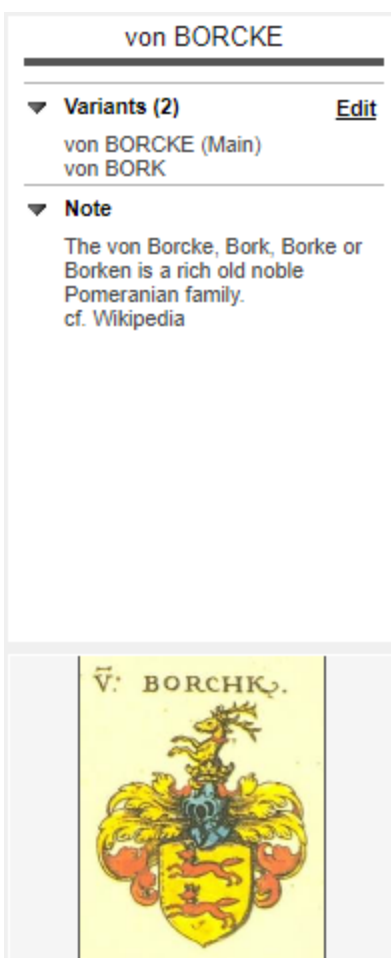
Note: Private Note

The **von Borcke, Bork, Borke** or **Borken** is a rich old noble Pomeranian family.

cf. [Wikipedia](#)The **von Borcke, Bork, Borke** or **Borken** is a rich old noble Pomeranian family.

Below the text box, there is a section titled "von BORCKE" with a sub-section "Variants" containing "von BORK". At the bottom, there are navigation icons: a plus sign, a minus sign, and a gear icon.

(Windows) Surnames index



- All indexes allow you to see where the information is attached. For example: If you want to know who of your family was a doctor, you click on doctor in the occupation index and you will see who had this occupation.

Each item of the index is analyzed so you can improve your knowledge of your genealogy.


(Mac) Click on the **Statistics** tab to consult usage stats on the item you selected. Heredis will display a graph showing the number of occurrences over a time period.

(Mac) The index window will remain open until you close it. You can go back to it at any time to switch to another usage or to do another search.

Modifying data throughout the file

You have mistakenly added the occupation «Lawyer» instead of «Solicitor»? You want the given name of «LaToya» to be written with a capital T? You realize that you have entered two different sources for the same document?

No need to spend time editing each person in your genealogy. By using the Indexes, you manage globally Surnames, Given Names, Occupations, Places, Sources and Media, and **any change is automatically applied wherever the element is used in your file.**

1. Select the item to be modified. If necessary run a search or sort to find it easily.
2. Edit the item:
 - **(Mac)** by entering directly on the right of the Index screen,
 - by double-clicking on the line,
 - by clicking the **Edit and modify...** button  on the toolbar of the list to open the editing screen.

Modify upper or lower case

Most data managed in the indexes are automatically formatted when entered. The automatic formatting is defined in

- (Windows) **Tools** menu > **Preferences > Appearance**;
- (Mac) **Heredis** menu > **Preferences**.

You can choose to display the surnames, given names and places in uppercase, or with only the first letter in capitals. However Heredis allows you to change the formatting for a single item and then apply the changes to all uses of this element.

You want to make an exception for a surname, a given name or a place where the spelling is unusual.


1. Open the index and find the item in question to be changed.
2. Open the editing screen and tick **Handle Characters Manually**.
3. Edit the item. You may type upper and lower case wherever you want for the word. The automatic formatting will not apply to this element that will keep the format that you have chosen.

(Mac) Handle Characters Manually

(Windows) Handle Characters Manually

Replace an element with another

After many data entries, you may have created duplicates: this source is identical to another, such an occupation was spelled in two different ways. Tidy up in the index in question by using the **Replace...** function.

1. Open the index and find the item in question to be replaced.
2. Click the **Replace...**  on the toolbar of the list.
3. Select the replacement item in the list. Click **Choose** to confirm the replacement.

The element is replaced in the Index, and therefore wherever it has been used in your genealogy. The Index now contains one element less than before.

Info: An element with variants can't be replaced. You first have to unlink the variants.


Manage variants

The notion of a variant allows you to assign several elements to an Index entry. You can define variants of Surnames, Given Names, Occupations and Places.

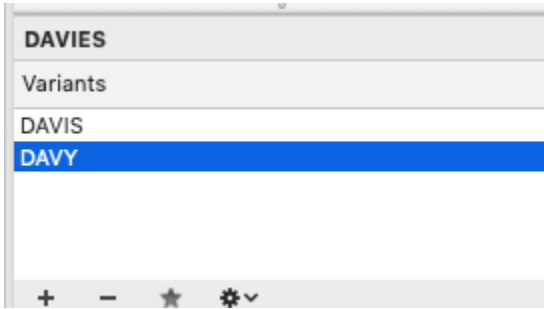
Place names have sometimes changed over the centuries. As part of your genealogical research, you may find a number of variants for the same place. «New Amsterdam» was renamed «New York» in 1665, «Philipstown (Leinster)» became «Daingean» in 1929. Similarly, you may encounter a name spelled differently depending on the date of the certificate found: the «Taylor» family is sometimes noted with the spelling «Taylour» or «Tayler».

Specify the variants

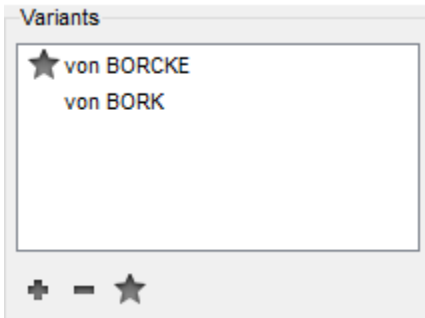
- Open the index in question.
- Select the surname, given name, occupation or place you choose as the standard version.

In the **variants** field at the bottom right of the screen, click the  (Link a variant...).

- (Mac) click on the **+** button in **Variants** area.



- (Windows) click on the link **Edit**, then on **+** button in **Variants** area.



- (Windows & Mac) Select the item to be the variant and press the **Choose** button.

You can repeat this as necessary to add several variations to the main element.

Choose the main variant

You can choose the main variant for a surname, given name, or occupation. Select the variant you wish to see as the main and click on the **★** button. The main variant appears with a grey star **★** and its variants with a white one **☆**.

To change the main variant, select the element to be the main element, then click on the **★** button.

Unlink variants

To unlink a variant, select **Variants** in the screen and click the **■** (Unlink the selected variant) button.

To remove all variants of a group: click the indented wheel icon in the **Variants** field, and choose **Remove this group of variants**.

To remove all variants from your genealogy file, click the **Options** button on the toolbar and choose **Unlink All Variants...**

Info • Deleting a variant does not remove the item from the index. Only the link of the element in the index is deleted.

Delete unused data from an Index



You can delete at one go all the elements that are not used in your genealogy file.

As a precaution, review first the list of unused data by ticking the **Unused...** box in the search field.

1. Click the (Windows) **Tools** / (Mac) **Options** button on the toolbar of the Index and select **Remove All Unused...**
2. Confirm the deletion by clicking **OK**.

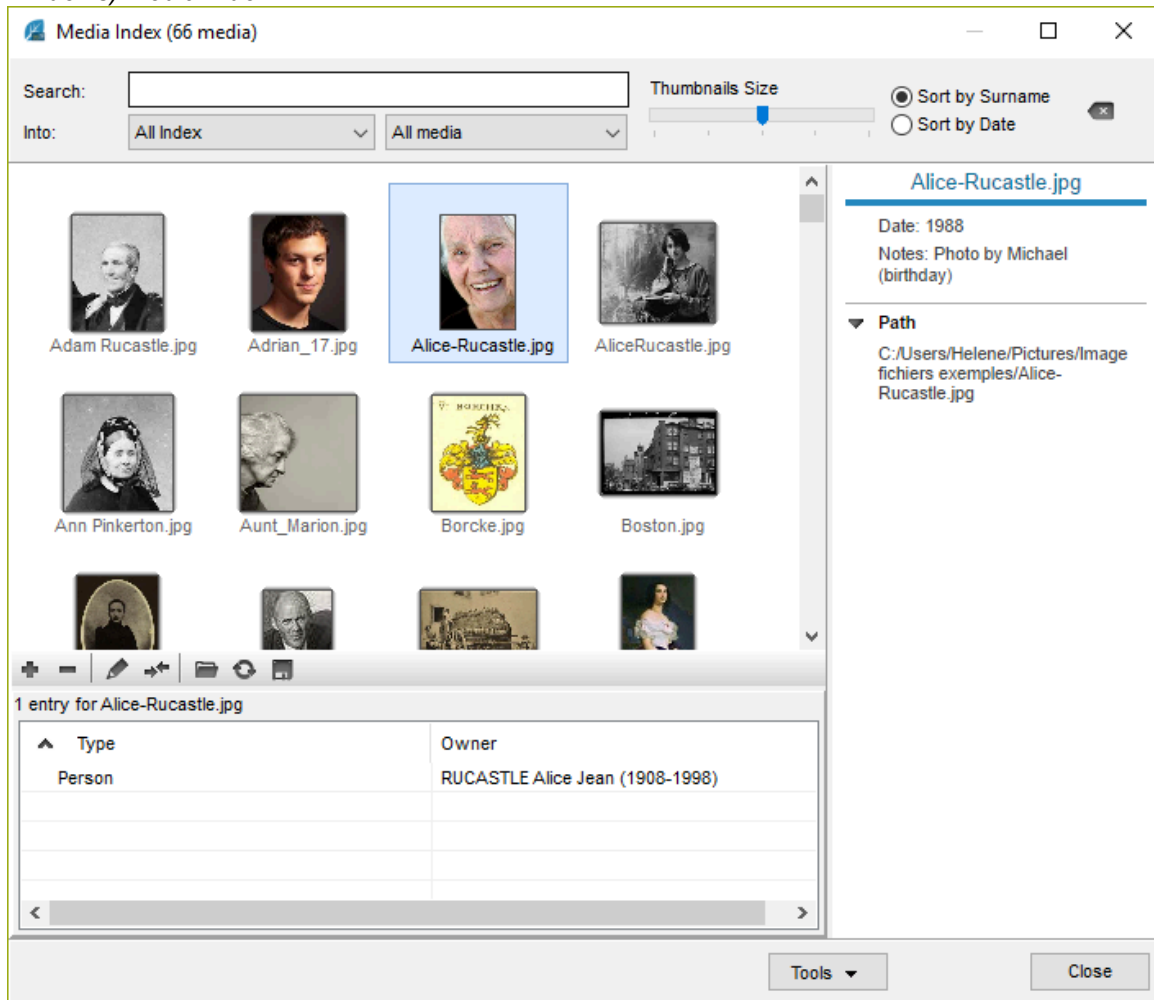
Media Index

Read also the article Indexes: generalities (voir page 241) for tools available on all indexes.

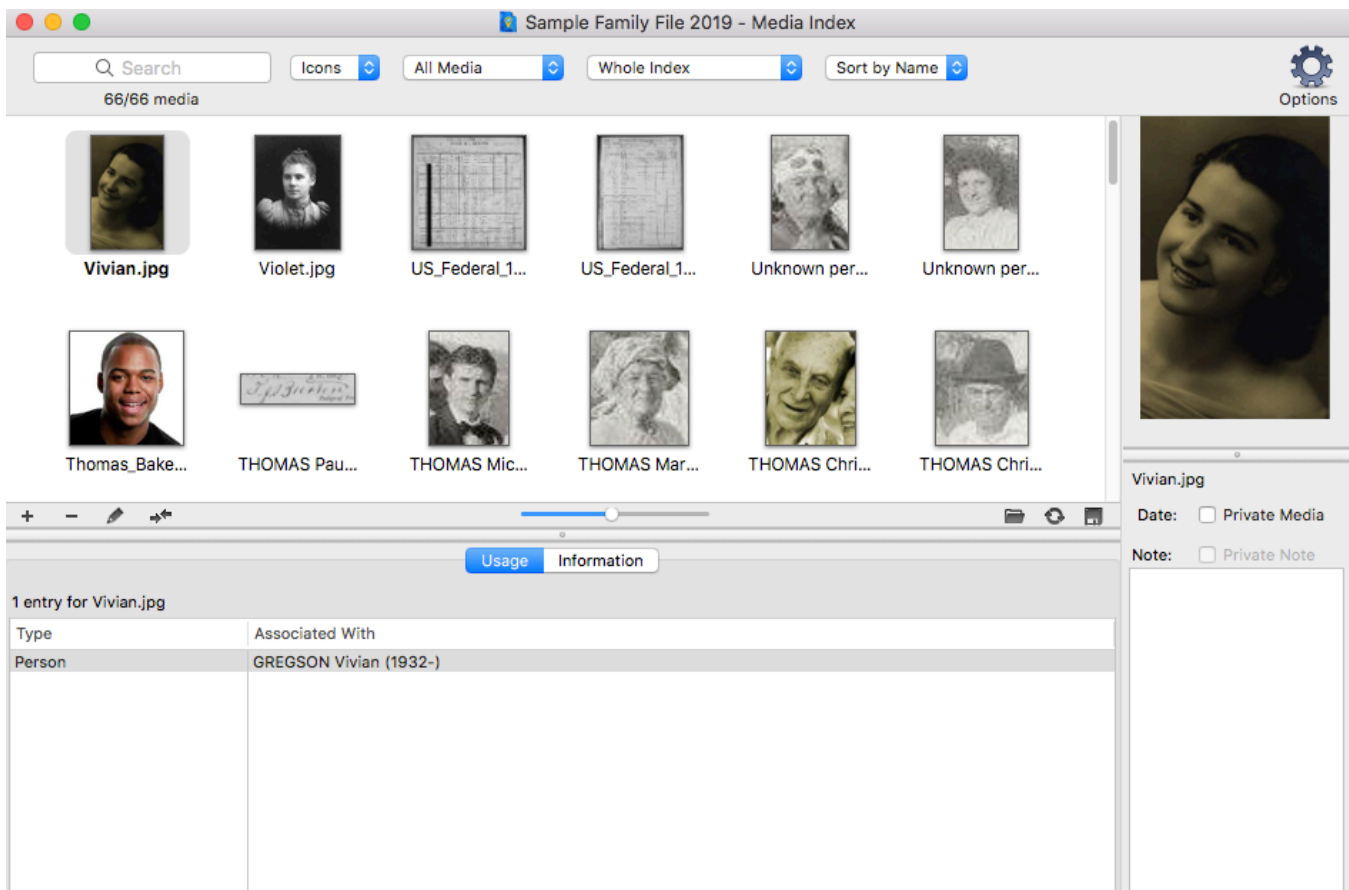
Open the **Media Index** from the **Tools** menu, from the toolbar , (Mac) or by clicking the  **Index** button in the **Media** panel toolbar.

- In the **Search** section, type in the name (or part of the name) of the media you are looking for. The number of items matching your search is displayed right underneath the **Search** section.



(Windows) *Media Index*



(Mac) *Media Index*



(Mac) Click the **Magnifying Glass** icon to select the search mode: “Search Starts With” or “Search Contains” the letters typed in.

In order to delete or replace the searched word, click on the **(Windows)**  or **(Mac)** , which appears in the input area.

- The search can be limited to a single type of media by selecting it from the first pull-down menu: **Image files, Audio files, Video files, Other types, Missing Media, Private**.
- Filter your search according to the type of data the media is assigned to by selecting in the second pull-down menu: **Persons, Families, Sources, Events, Surnames, Given Names, Places, Unused Media**, etc.

To better identify the selected media:

- Sort the list or icons according to the name of the media or to the date you have entered.
- Change the media display mode – List or Icons – by clicking on the related buttons. You can also enlarge the icons using the zoom cursor.

Info • The results displayed as a list can be sorted according to the presence of a Note (N), of a Private media (P), or according to their name, by simply clicking on the column header. If a media is selected on the list, you can consult the data it is related to by clicking the Usage tab. Double-click the data you are interested in and it will be displayed in a new window.

For more details, please consult the Media (voir page 105) article.


Searching for missing media

Check missing media

You have imported a file from an earlier version of Heredis or GEDCOM? If the original location of the

Media Index

media was changed at the time of import, or if a folder containing the media did not accompany the GEDCOM file, the media may be missing. A GEDCOM file only contain the name of the media and way to access the original. They are displayed differently if Heredis had the thumbnails or not.

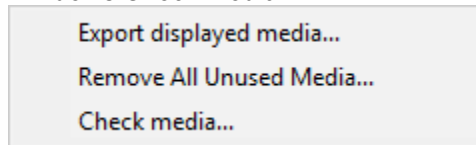
- For a Heredis file where there was a displayed thumbnail, the words « original not found » follows the media name in the media edit window, but you still see its representation.
- For a file where there was no displayed thumbnail, the icon of the media not found  is displayed instead of the media.

Find a group of media

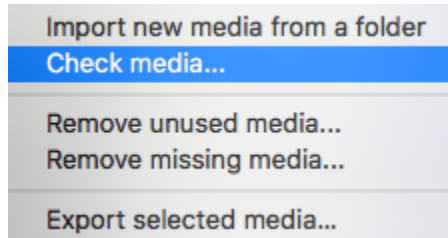
Open the **Media Index**.

1. Click the **(Windows) Tools / (Mac) Options** button (indented wheel icon) on the toolbar of the Index.
2. Select **Check media...**

Windows Check Media



Mac Check Media



Heredis reviews all the media in your genealogy and detects, if any:

- media not found following deletion from the Media folder managed by Heredis
- media of which the original has been modified by third party software other than Heredis
- and finally, media for which the original has changed location and is no longer present on your computer.

In the **Media check** window, you can:

- in the **Missing Media** tab, designate a folder to search and update these media. Click on **Choose folder and update**. Indicate the location of the media on your computer.
- in the **Original changed** tab, select all or part of the media managed by Heredis to update them from the originals. Click on **Update the selection**.
- in the **Missing Original Media** tab, specify the folder where your original is located. Click on **Choose a folder**.

Note: If your media are stored in multiple folders, you will have to do as many times the manipulation to indicate which folder you have folders.

(Windows) Media check window

Check of the media

Updated the media index



No missing media No original changed 52 missing original media

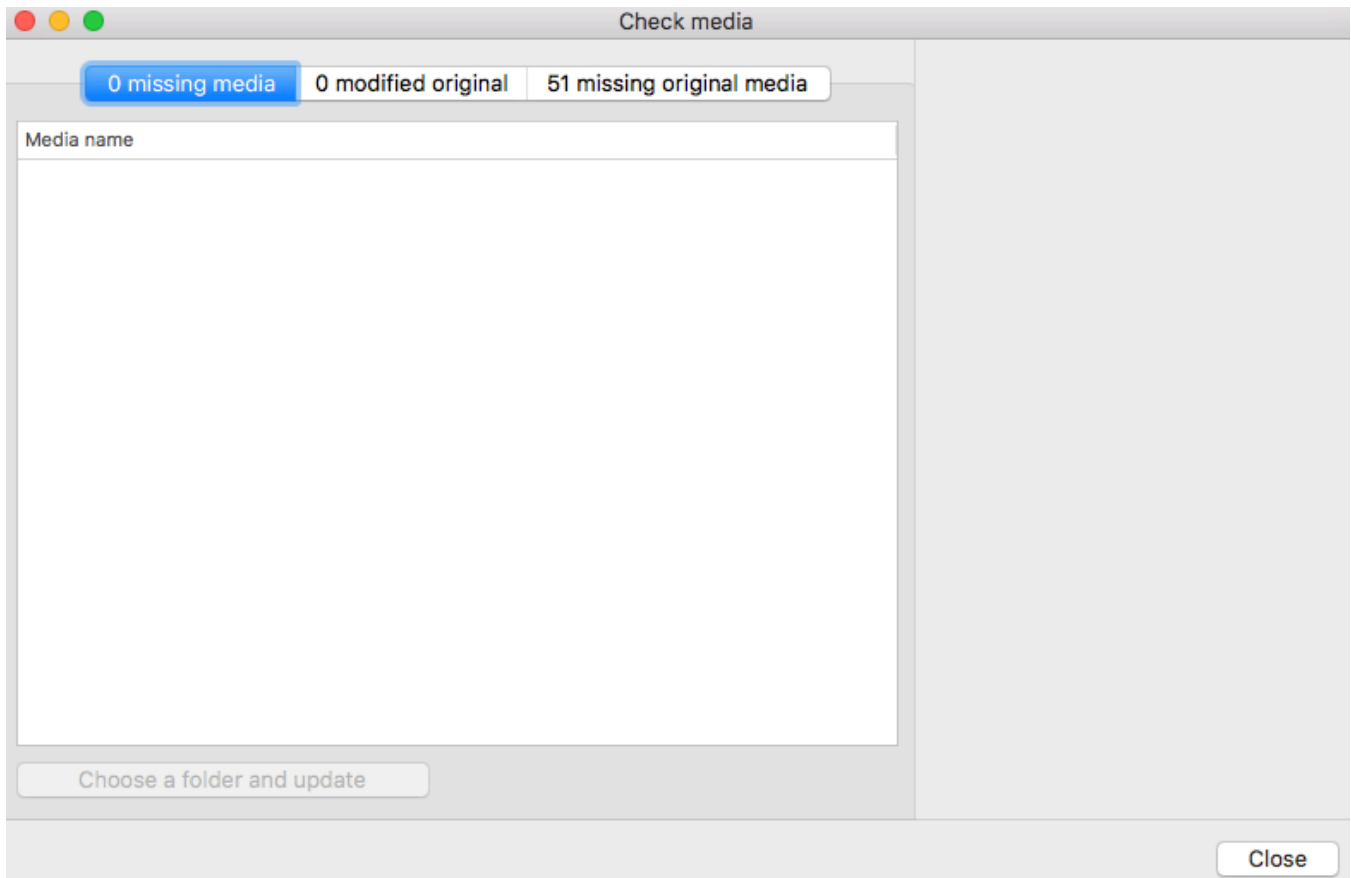
Media name

Choose a folder and update

Close

(Mac) Media check window

Media Index




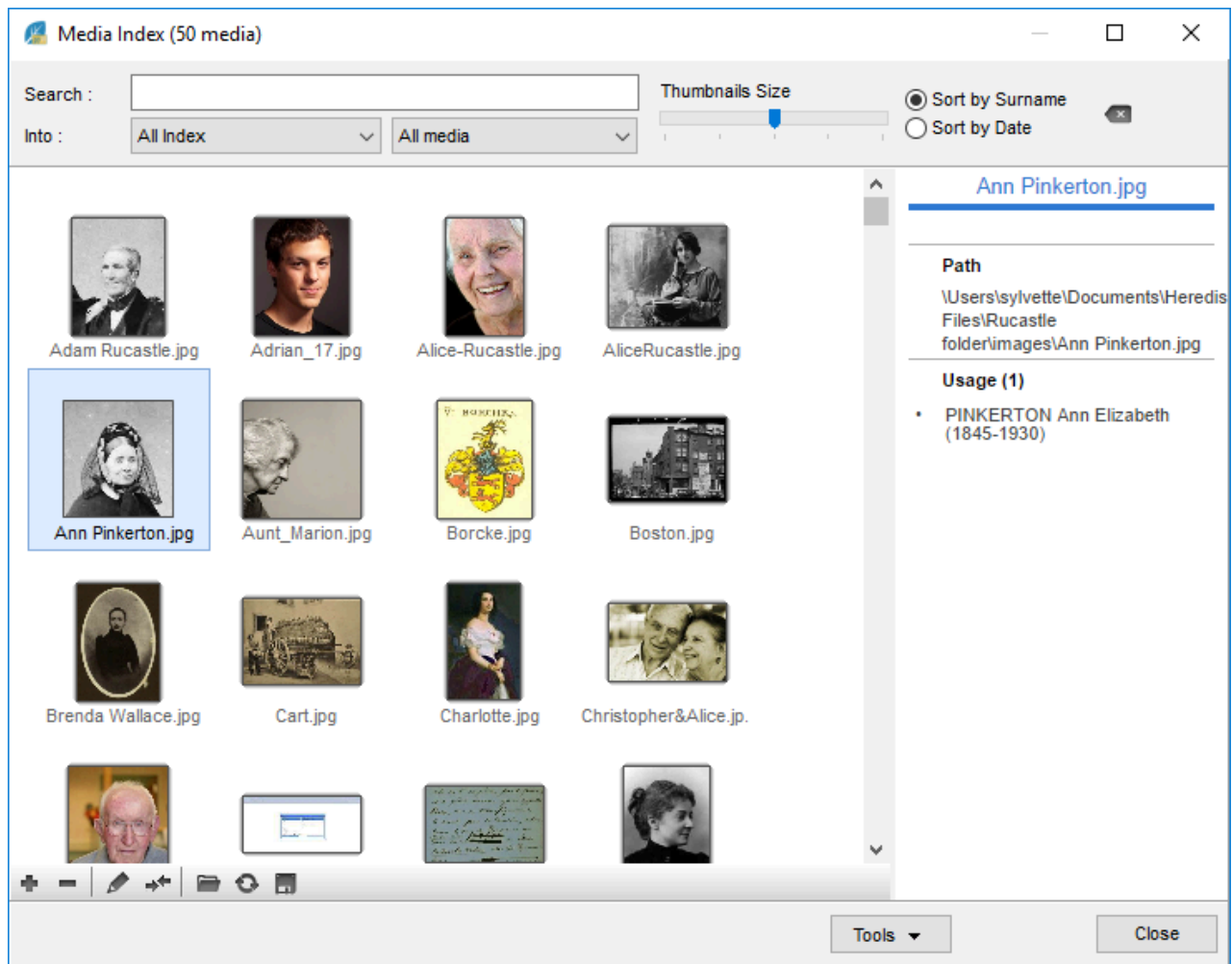
If your originals have changed their names, Heredis will not be able to reinstate them automatically. Indeed, the software cannot know that you have changed the name of a media. In this case, see the paragraph below.

Replacing or deleting media

Replace media with other media

You may have assigned two different media but they were the same (an image of a source saved with two different names, the same image on the selected hard drive and in iPhoto ...). You may only keep one assigned media but use it several times.

1. Open the **Media Index**  and select the media to be replaced.
Media Index for Windows



Media Index for Mac

Media Index

fichier exemple 3 - Media Index

Q Search Icons All media Whole Index Sort by Name Options

51/51 media

Sophie.jpg Saint-andre.jpg Ruth.jpg Rodrigue.jpg Paul_D.jpg

Pauline et Mario... Naissance.jpg M_F_Blachier.jpg MLDUR.jpg Michel_C.jpg

Sophie.jpg

Date: Private Media

Note: Private Note

Usage Information

1 entry for Sophie.jpg

Type	Associated With
Person	DUCHAMP Sophie Léopoldine (1965-)

2. Click **Replace with another Media from...** or on the button bar of the display field and choose the duplicate image in the index or the replacement image in its folder on your hard drive.

3. Select the media to be kept and click the **Choose** button.

The initial media has been replaced by the second for all its uses.

Delete media

Display the **Media** panel, or open the **Media Index**.

- Select the media to remove
- Click the (Remove the selected media) button on the toolbar for media management.
- **(Mac)** Right-click the media and choose **Remove...**
- Confirm the deletion of the media with **OK**.

This will delete the media from your genealogy file. If it had been used, it will no longer appear in the illustrations of data or persons to whom it was assigned.

The Sources Index



The **Sources Index** includes all sources associated with events entered into the genealogical file. To manage the sources stored in the genealogical file, select the **Tools** menu > **Sources Index**.

New sources can also be entered using the **+** button in **Sources tab** of an event, or directly in the **Sources Index**. Read the Sources (voir page 147) article for more details on creating a source.

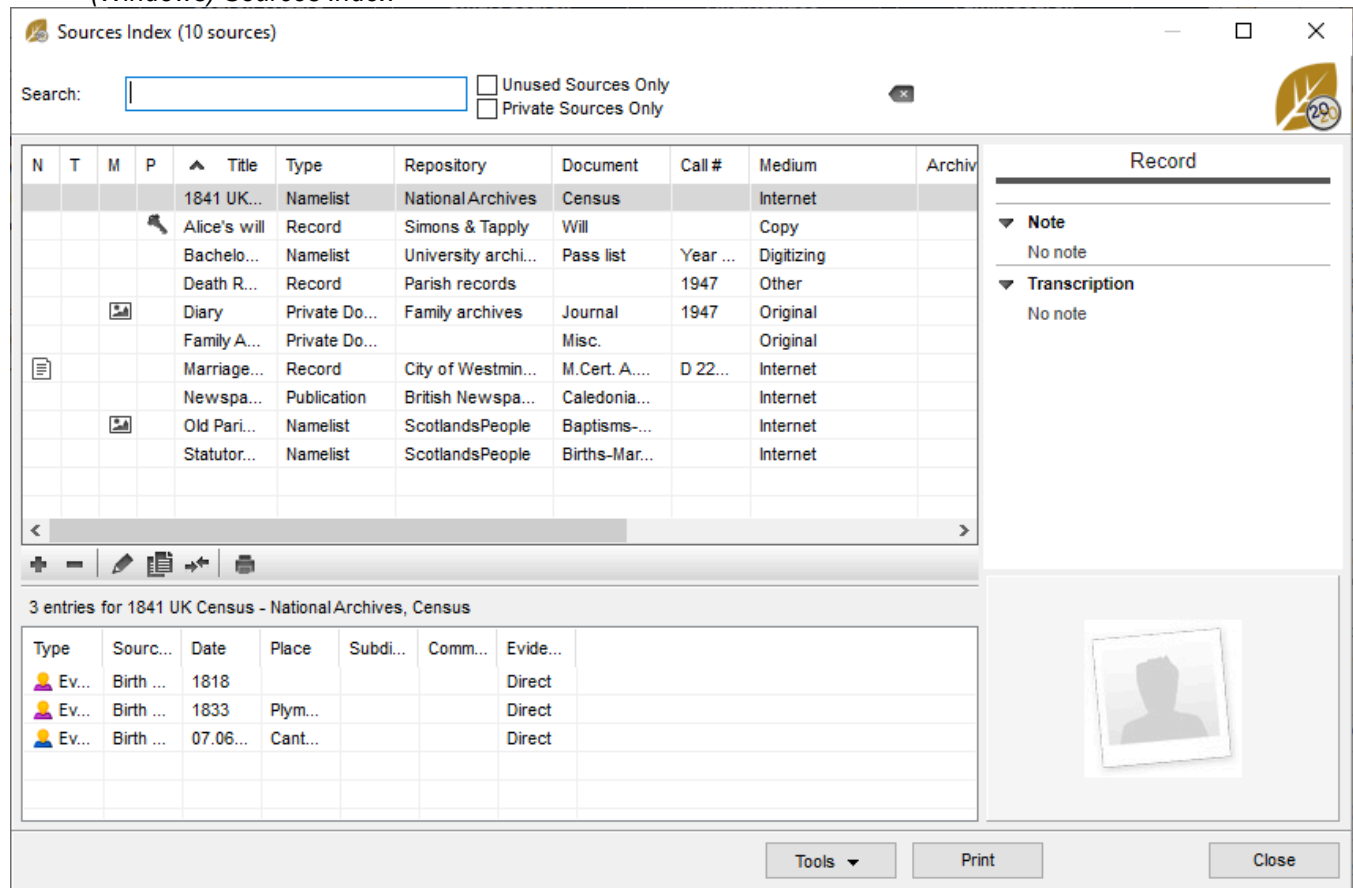
Check out the article Indexes: Generalities (voir page 241) for the tools available in all indexes.

Open the sources index

Open the **Sources Index**:

- from the **Tools** menu,
- via the toolbar by clicking on **Indexes** button then on  **Sources Index** button in the toolbar,
- **(Mac)** by clicking  on in the **Sources** panel.

(Windows) Sources Index



The screenshot shows the 'Sources Index (10 sources)' window. It features a search bar, checkboxes for 'Unused Sources Only' and 'Private Sources Only', and a table of sources. The table has columns for N, T, M, P, Title, Type, Repository, Document, Call #, Medium, and Archiv. A detailed view on the right shows 'Record' information for a selected source, including 'Note' and 'Transcription' sections. At the bottom, there are 'Tools', 'Print', and 'Close' buttons.

N	T	M	P	Title	Type	Repository	Document	Call #	Medium	Archiv
				1841 UK...	Namelist	National Archives	Census		Internet	
				Alice's will	Record	Simons & Tapply	Will		Copy	
				Bachelo...	Namelist	University archi...	Pass list	Year ...	Digitizing	
				Death R...	Record	Parish records		1947	Other	
				Diary	Private Do...	Family archives	Journal	1947	Original	
				Family A...	Private Do...		Misc.		Original	
				Marriage...	Record	City of Westmin...	M.Cert. A....	D 22...	Internet	
				Newspa...	Publication	British Newspa...	Caledonia...		Internet	
				Old Pari...	Namelist	ScotlandsPeople	Baptisms...		Internet	
				Statutor...	Namelist	ScotlandsPeople	Births-Mar...		Internet	

Type	Sourc...	Date	Place	Subdi...	Comm...	Evide...
Ev...	Birth ...	1818				Direct
Ev...	Birth ...	1833	Plym...			Direct
Ev...	Birth ...	07.06...	Cant...			Direct

(Mac) Sources Index


The Sources Index

T	N	M	P	Title	Document	Repository	Type	Author	Call #	Archive	Medium	Quality	W...	Er
			<input type="checkbox"/>	1841 UK Cens...	Census	National Ar...	Namelist				Internet	2	htt...	
			<input checked="" type="checkbox"/>	Alice's will	Will	Simons & T...	Record				Copy	3		
			<input type="checkbox"/>	Bachelor of A...	Pass list	University...	Namelist		Year 18...		Digitizing	2		
			<input type="checkbox"/>	Death Robert...		Parish reco...	Record		1947		Other	0		
			<input type="checkbox"/>	Diary	Journal	Family arc...	Private D...		1947		Original	3		
			<input type="checkbox"/>	Family Archives	Misc.		Private D...				Original	3		
			<input type="checkbox"/>	Marriage certi...	M.Cert. A.P. (10)	City of We...	Record		D 22915		Internet	3		
			<input type="checkbox"/>	Newspapers	Caledonian Mercury	British Ne...	Publication				Internet	0		
			<input type="checkbox"/>	Old Parish Re...	Baptisms-Marriages-...	ScotlandsP...	Namelist				Internet	2	htt...	
			<input type="checkbox"/>	Statutory Regi...	Births-Marriages-Dea...	ScotlandsP...	Namelist				Internet	2	htt...	

Type	Source Owner	Date	Place	Place Subdivision	Comment	Evidence
Event	Birth - DOBNEY Anna (1...	1818				Direct
Event	Birth - HAYES Ann (183...	1833	Plymouth			Direct
Event	Birth - RUCASTLE Adam...	06.07.1818	Canterbury			Direct

Duplicate a source

Save time and duplicate a source when you only have the reference to change for example.

- Select the source to duplicate.
- Click the button  at the bottom of the source list.
- Edit the duplicate source, it has no use.
- Change the data to get a new source.

Search the sources

In the search area, type a word contained in any input topic of the search source.

The number of items found that match your search is displayed under the search area.

(Mac) Click on the **Magnifying glass** icon to choose the search mode: the search « contains » the entered word, or the search « starts with » the letters entered.

To undo a search on a word, click the erase icon ( Windows,  Mac) to the right of the search area.

See the list of events in which this source is used in the lower part of the window.

To find a source registered in the **Sources Index**:

- Click directly on the source in the list displayed.
- or Tap the arrow keys of your keyboard to access them.
- or Enter the first letters of one of the items from the searched source in the **Search** area. You can search for a source by name, origin, rating, etc.

You can refine the list of sources displayed:

- To limit the list to unused sources, check the corresponding box.
- **(Windows)** To view only private sources, check the corresponding box.
- Click in the column header to see the sources recorded in alphabetical or numerical order of the Title or Repository or Document or Call #, etc. A new click in the header reverses the order displayed. An arrow appears in the column on which sorting is performed. Columns N, T, M, P allow you to sort sources with

a Note, Transcript, Media or the Private ones. Click on the header of these columns to see the sources sort as you see fit.

When you select a source from the list, the detail of that source appears on the right (title, name of repository, document, private source, ...).

(Mac) You can change the fields of the selected source directly from the detail on the right.

Uses of this source are displayed under the source list.

(Windows) *Uses of a source*

7 entries for Statutory Registers - Scotland - ScotlandsPeople, Births-Marriages-Deaths Registers

Type	Source owner	Date	Place	Subdi...	Comm...	Evide...
Event	Birth - de NEMOURS Josephine (1855-1...	24.01.1855	Dunfermline (Fife)			Direct
Event	Birth - WALLACE Brenda (1873-1937)	14.10.1873	Edinburgh (City Of Edinb...			Direct
Event	Death - SMITH Charlotte (1805-1872)	25.03.1872	Leith (City Of Edinburgh)			Direct
Event	Death - WALLACE James William (1801...	15.08.1888	Leith (City Of Edinburgh)			Direct
Event	Marriage - RUCASTLE Gilbert (1870-19...	11.09.1900	Edinburgh (City Of Edinb...			Direct

(Mac) *Uses of a source*

3 entries for 1841 UK Census - National Archives, Census

Type	Source Owner	Date	Place	Place Subdivision	Comment	Evidence
Event	Birth - DOBNEY Anna (1...	1818				Direct
Event	Birth - HAYES Ann (183...	1833	Plymouth			Direct
Event	Birth - RUCASTLE Adam...	06.07.1818	Canterbury			Direct

Double-click on one of the uses to navigate directly to the event or the person concerned.

This source is selected and can be deleted or modified. If you modify it, the changes will be made for all the uses of this source.

Merge two sources

You may have recorded several sources in the **Sources Index** that corresponds to the same reference: for example, you created a source with the digitized certificate and created another with the transcript of the certificate.

You can create a single source that will replace the two sources currently in the index.

- Select source A to be eliminated.
- Click the button.
- Select source B to keep.
- Click the **Choose** button.

Heredis indicates the number of changes that will be made.

- Confirm the replacement of source A with source B by clicking the **Yes** button. All events to which source A was attached will be changed.

Delete a source

Select the source from the source list.

- Click the button.
Heredis warns you when the source is being used. If you confirm the deletion, the source will no longer appear in the list of sources of events to which it was assigned.

Delete unused sources

To remove all unused sources in the genealogical file, select **Remove All Unused Sources** in the drop-

down menu **(Windows) Tools, (Mac) Options**.

Multi-selection

To process multiple sources in a single operation:

- **(Windows)** Press the Ctrl or Maj button and, while keeping that key pressed, click on the different sources you want to select.
- **(Mac)** Press the Command or Maj button and, while keeping that key pressed, click on the different sources you want to select.
- Then choose the appropriate action, deletion, replacement or printing of the list (from Print button on Windows, from Options button on Mac).

Swap two columns

This feature allows you to easily exchange the values of 2 headings from a source.

- Select one or more sources, via multi-selection
- **(Windows)** Click the **Tools** button > **Swap**, then choose the 2 topics to trade.
- **(Mac)** Click the **Options** button > **Swap**, then choose the 2 topics to trade.

Change the value


To change the value contained in one topic by another possible value for this topic:

- Select one or more sources, via multi-selection,
- **(Windows)** Click the **Tools** button > **Change the Value** > select the section > choose the new value for this topic.
- **(Mac)** Click the **Options** button > **Change Value** > select the section > choose the new value for this topic.

Note: Before applying the changes, Heredis displays a confirmation message telling you how many sources are impacted by the desired change. Click the Yes or No button to apply the changes or not.

(Windows) Print buttons

Print the source sheet

To print the listing for the selected source in the index, click the button  in the index toolbar. You'll find all the topics of the source, its uses, and the transcripts you've entered if you wish.

Print the index

The **Print** button allows you to edit all the sources stored in the file as they are displayed. If you have done a search, only the results of this search will be printed. Also, Heredis will keep the sorting order you have chosen by clicking on the columns corresponding to the different topics of the sources. You can also launch a list of all the sources stored in the file from the **Reports** menu > **Custom reports** > **Sources Reports**. If you no longer need to refer to the index, return to the viewing screen by clicking the **Close** button.

Print Lists of Sources

(Mac) Click the **Options** button > **Print** and choose the type of list you want to print.

(Windows) Click the **Tools** button > **Print** and choose the type of list you want to print. Check out the articles Custom Reports, (voir page 383) (Mac) Create and Edit a Report, (Windows) Create and Edit Reports (voir page 390).



Import an index into a Heredis file

You can import an index into an other Heredis file if, for example, you need to use the data you entered in an other file. See Import an index into a Heredis file (voir page 286) article for further details.

Repositories Index

A repository corresponds to who holds the original document. It may be your aunt who keeps the family documents or the State Archives which keep the originals of the registers of civil status.

Every new entry is inserted in the **Repository Index**. Heredis verify every data in the repository section. To manage all repositories registered in your genealogy file

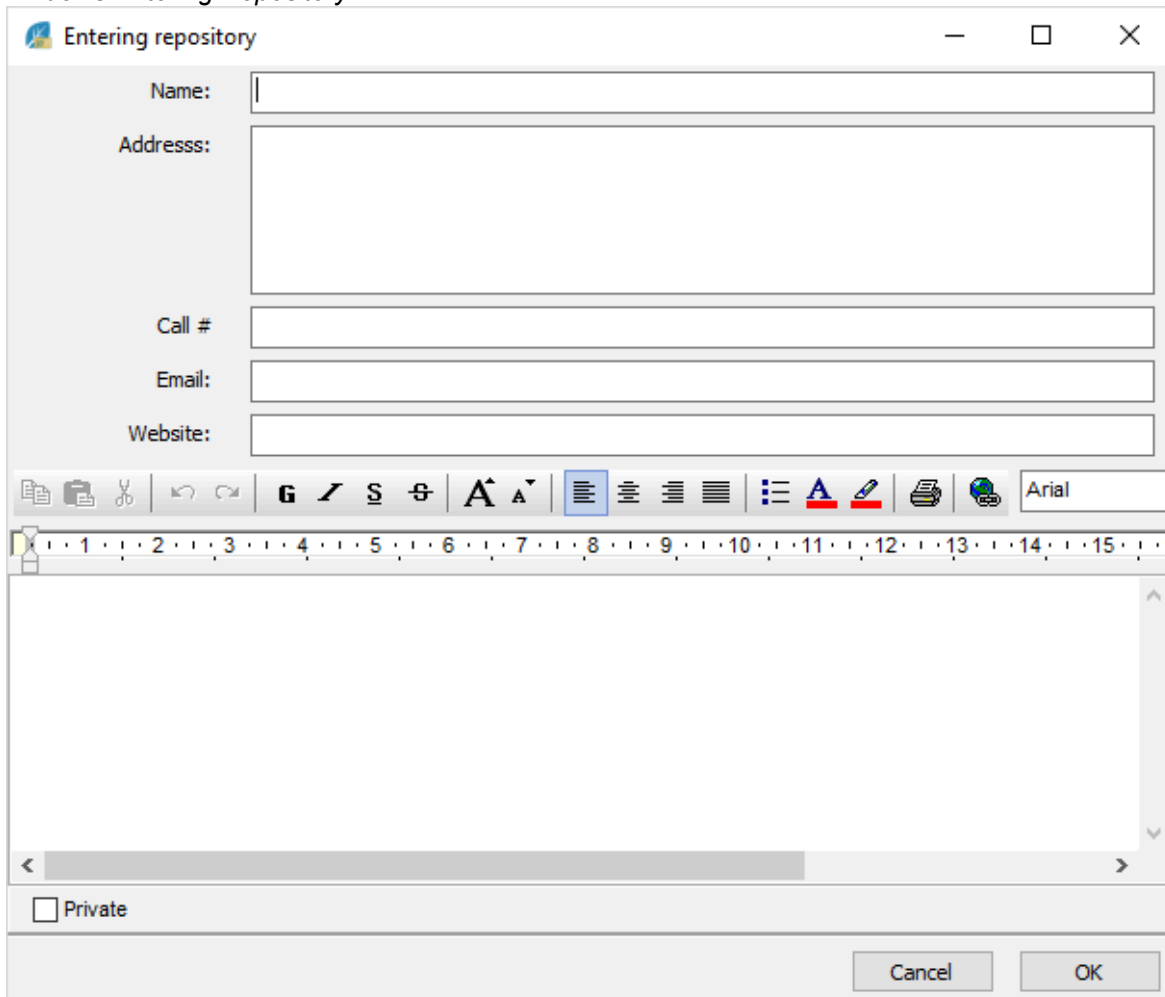
- select the **Tools Menu > Repositories Index**
- or directly from the **Sources index**,
- click on **(Windows) Tools button / (Mac) Option (indented wheel) button** then select **Repositories Index**;
- or from the toolbar click on the  button in the Index  button.

See also Indexes: generalities (voir page 241).

Create a new repository

When entering a new source, the **Entering repository** screen automatically opens if the repository doesn't already exist in your file.

Windows Entering Repository



The screenshot shows a Windows-style dialog box titled "Entering repository". It features a title bar with standard window controls (minimize, maximize, close). The main area contains several input fields: "Name:" (a single-line text box), "Addresss:" (a multi-line text area), "Call #", "Email:", and "Website:" (all single-line text boxes). Below these fields is a rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, indent, and print. A horizontal ruler is positioned below the toolbar, marked from 1 to 15. At the bottom of the dialog, there is a "Private" checkbox and "Cancel" and "OK" buttons.

Mac Entering Repository

The image shows a dialog box titled "Entering repository". It has several input fields: "Name:" (a single-line text box), "Address:" (a large multi-line text area), "Call #:" (a single-line text box), "Email:" (a single-line text box), and "Website:" (a single-line text box). Below these is a "Note:" section which includes a rich text editor toolbar with options for "Styles", "Spacing", and "Lists", and a "Private Note" checkbox. At the bottom right, there are "Cancel" and "OK" buttons.

To add a new repository from **Repository Index** :

- Click on the **+** button to enter a new repository.
- Write all the data you dispose of on the new repository in the sections: name, address, call #, email, website.

You can also add a note: write directly in the word pressing, and use the toolbar if you wish to edit. Check the **Private Note** box to exclude this note from file exports and publishing.

Access to a repository

Click directly in the **Repository index** in the displayed list.
or Press the arrow touch of your keyboard to access it.

or Enter the first letters of the repository in the search bar. You can reduce the repository list by ticking the box "**unused repositories**" to see only the unused repositories and eventually delete them.


When you select a repository in the list, find directly to the right the entered information: name, address, call #, email, website and note.

The sources using the repository are displayed under the repositories index.

Double-click on one of the use to display directly the detail of the concerned source.

Modify a repository

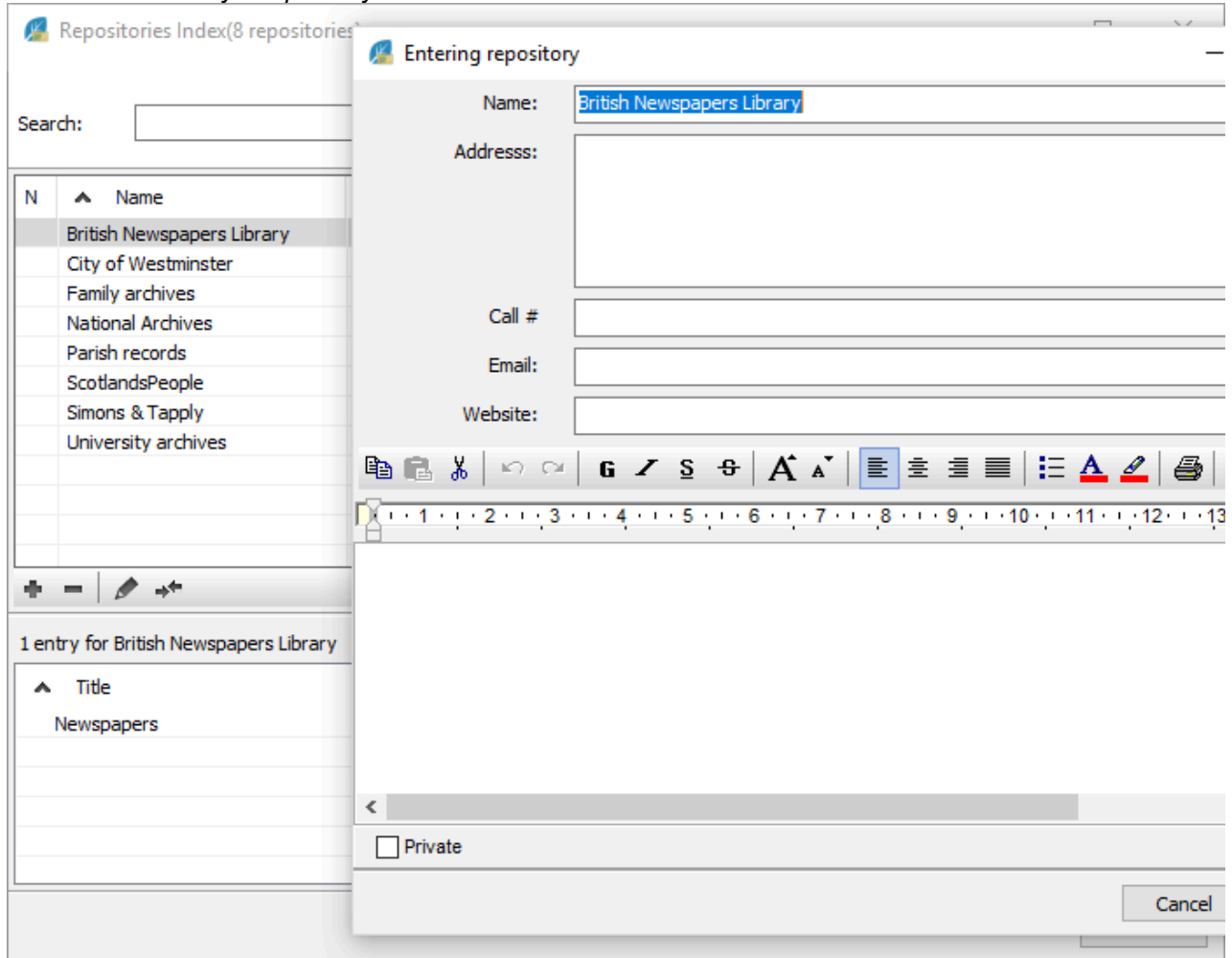
Heredis allows you to modify a repository at any time.

Select the repository to modify then click on the pencil  button.

Repositories Index

Or double click on the displayed repository in the list.
Modify directly the sections you want. If you change the name of the repository, Heredis will impact this modification on every source linked to this repository.

Windows Modify a repository



Mac Modify a repository

Entering repository

Name:

Address:

Call #:

Email:

Website:

Note:


Styles Spacing Lists

0 2 4 6 8 10 12

Private Note

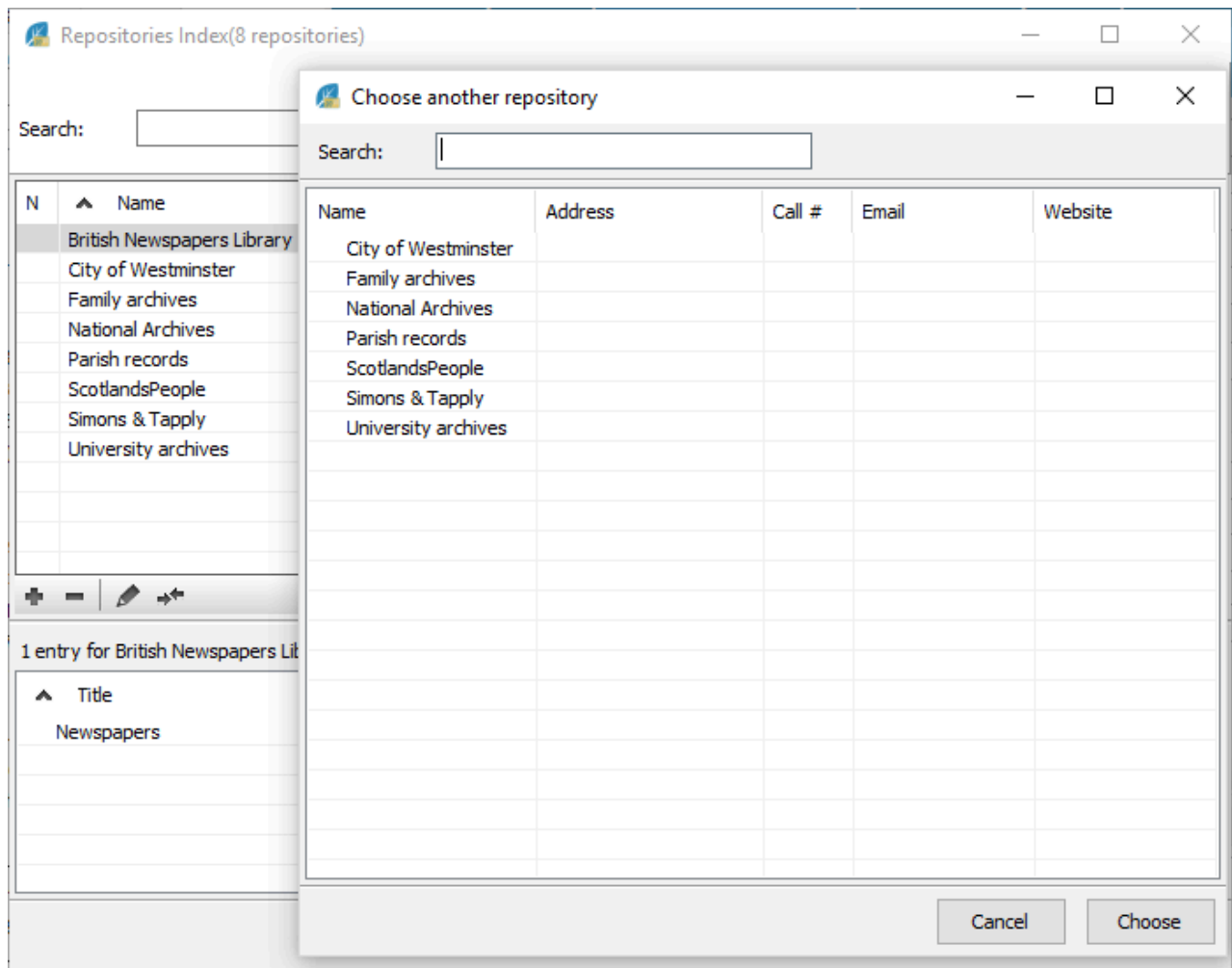
Merge 2 repositories

You may have save duplicates in the **Repositories Index**, merge them to keep only one in the **Index**.

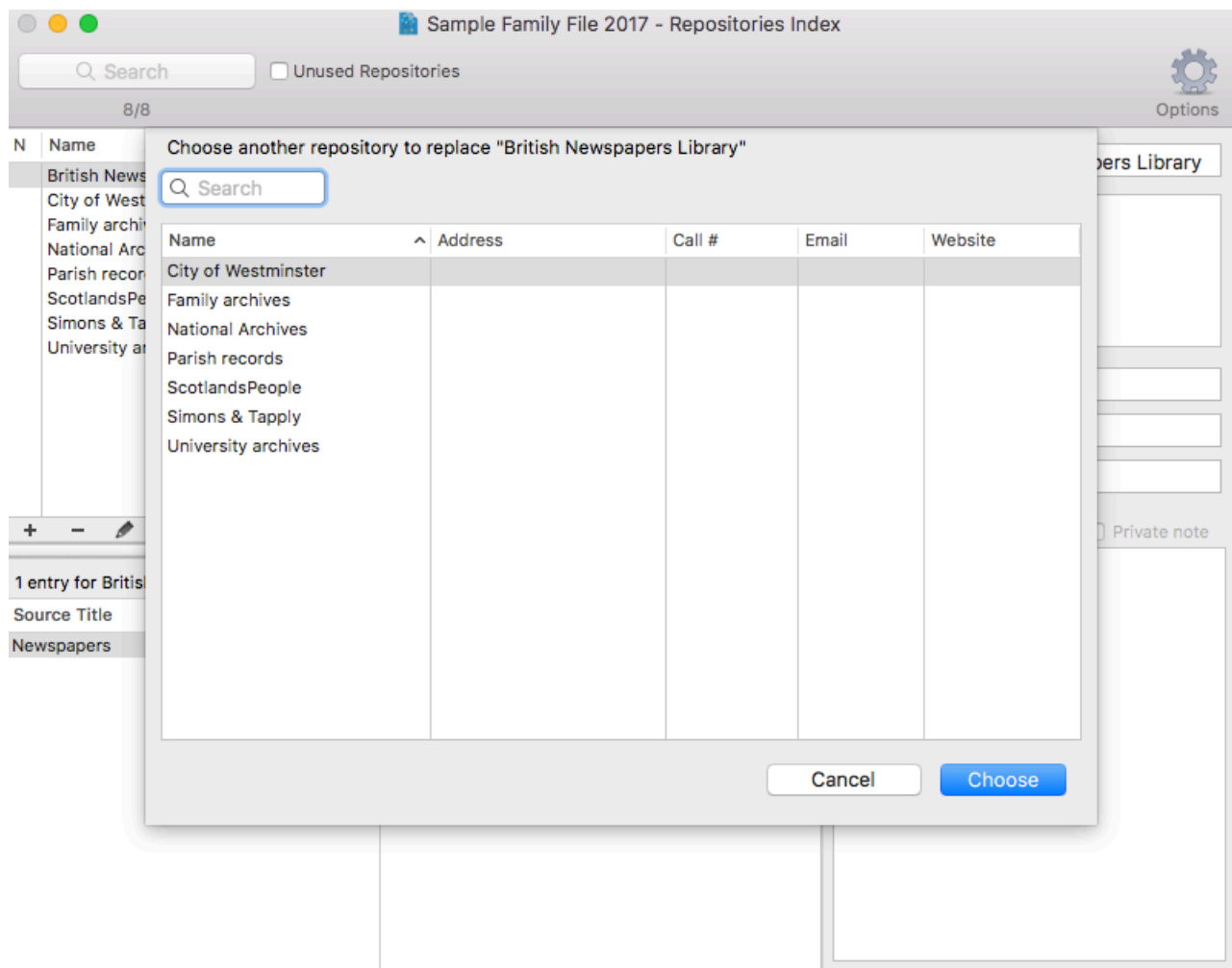
- Select at first the repository to erase
- Click on the  button
- Select then the repository to keep
- Click on the **Choose** button

Windows Merge 2 repositories

Repositories Index



Mac Merge 2 repositories



Erase a repository

- Select the repository to delete
- Click on the  button. If you erase a used repository, it will also be erased from the linked source.

Multi-Selection

To treat multiple repositories at the same time:

- Press the **(Windows)** Ctrl or Maj / **(Mac)** Cmd or Maj key and, while holding this key down, click on the different repositories you wish to select.
- Then choose the appropriate action, erasing or replacement.

Places Index

Heredis attaches considerable importance to the places where your ancestors lived. By its structured data entry, it identifies places in many countries and views them on an inter-active map. You get closer to the lives of your ancestors by discovering their geographical environment. Did they live in a forest, near a river, in a large city or small village?

Info • You were using a software that did not have a defined structure for places? Heredis studies your GEDCOM file and identifies the largest possible number of locations, offering you this essential feature for effective knowledge of your past.

Places assigned to events are displayed in the **Personal Data** screen by selecting each event. You can consult the list of all places in your genealogy in the **Places** panel or in the **Places Index**. Places referring to immediate family members appear in the **History > Migrations** tab as well as in the **Search** tab.

See also Indexes: generalities (voir page 241) article to know more about tools available for all indexes.

Assign an existing place to an event

Drag and drop

1. Select the event from the **Personal Data** tab.
2. Drag the place from the **Places** panel and drop it on the display area of the event. The place is displayed in the **Place** field. Other details of the location are displayed above the **Place** field.

(Windows) Drag a place from Places panel > drop in the event

The screenshot shows the Heredis software interface. On the left is the 'All Places' panel with a list of locations including 'London - Greater London - London'. The main window is in the 'Personal Data' tab for a person named THOMAS, Judy. The 'Events' table at the bottom shows a 'Residence' event. A red arrow points from the 'London - Greater London - London' entry in the 'All Places' panel to the 'Place' field in the event details, which currently contains 'London - Greater London - London - ENGLAND'.

(Mac) Drag a place from Places panel > drop in the event

The screenshot shows the Heredis software interface. On the left is a sidebar with a tree view of 'Places'. The main area is divided into tabs: 'Family', 'Data', 'History', and 'Search'. Under 'Data', there are sub-tabs for 'Personal Data' and 'Family Group Data'. The 'Personal Data' tab is active, showing a profile for 'Judy THOMAS' with fields for Surname, Given Names, Occupation (Film director), and others. Below this is a table of 'Facts' with columns for Fact, Description, and N. An 'Events' table is also visible, with columns for Event, Year, and Age. A red arrow points from the 'London - Greater London - LON...' entry in the sidebar to the 'Place' field in the 'Details' tab of an event window, which shows 'London' as the selected place.

In the Details fields of the event

1. Type the name of the place in the **Place** field, without bothering about upper or lower case. With the first letters, Heredis displays a list of places that may match your entry. The displayed list offers in the upper part, places already registered in this genealogy, and below the places recognized by Heredis.

(Windows) Input a place in Details tab of an event

The screenshot shows the 'Details' tab of an event window. The 'Date (Wednesday)' field is set to '3 February 1971'. The 'Place' field is active, and a dropdown list of places is displayed. The list includes 'London Greater London London ENGLAND' (selected), 'Lon Webster County MO UNITED STATES', 'Lonaconing Allegany County MD UNITED STATES', 'Lonay (1027) Vaud Région lémanique SUISSE', 'Loncin (4431) Liège Wallonie BELGIQUE', 'Londerzeel (1840) Brabant Flamand Flandre BELGIQUE', 'London Ontario CANADA', 'London Borough of Harrow Greater London ENGLAND', and 'London Greater London ENGLAND'. The list is scrollable, and the selected item is highlighted in blue.

(Mac) Input a place in Details tab of an event

Places Index

The screenshot shows a software interface with a top navigation bar containing tabs: 'Details' (active), 'Sources', 'Witnesses', 'Media', and 'Map'. Below the tabs, there are input fields for 'Date (Tuesday)' with the value 'March 2, 1971' and an empty 'Time' field. A 'Place' input field contains the text 'Lon'. A dropdown menu is open below the 'Place' field, showing a list of suggestions. The first suggestion is 'New Place...'. Below that is a section 'Places registered in this genealogy file' with a list of places. The first item in this list, 'London - Greater London - LONDON - ENGLAND', is highlighted in blue. Below this is a section 'All Places' with a list of other locations: 'Lon - Webster County - MO - UNITED STATES', 'Lonaconing - Allegany County - MD - UNITED STATES', 'London - ONTARIO - CANADA', 'London - Greater London - ENGLAND', 'London - Madison County - OH - UNITED STATES', and 'London - Tulare County - CALIF - UNITED STATES'. To the right of the 'Place' field is a 'Place Subdivision' field.

2. Select a place using the mouse or use the up and down arrow keys and confirm the place selected with the **Enter**.

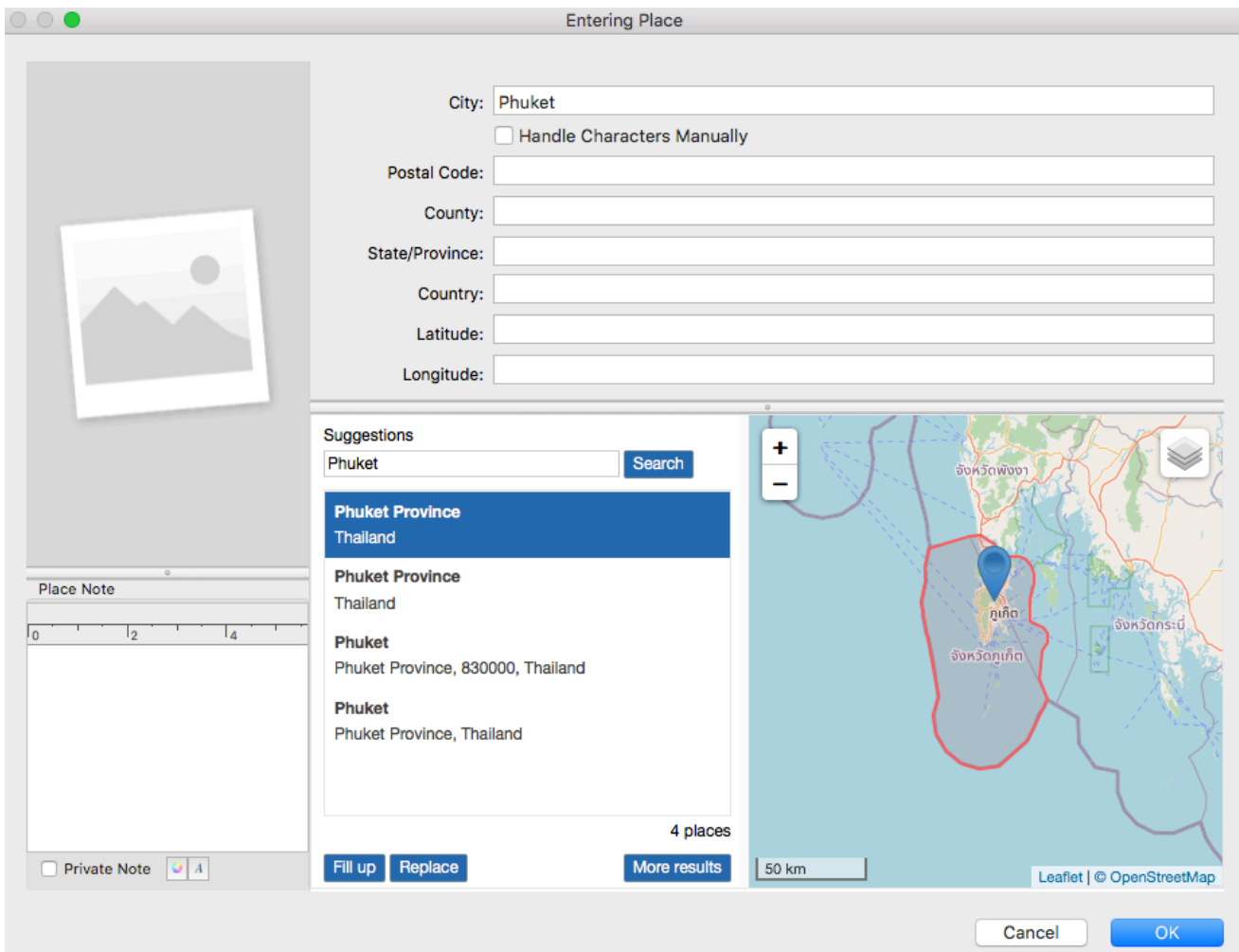
Create a new place and assign it to an event

If no proposed place matches the place you want to enter,

- **(Windows)** fill in the case and click on the tab key to add this new place to the index
- **(Mac)** select **New Place** at the top of the list.

A window opens, complete the various administrative details of the new place, use the automatic research (available in Map tab on Windows) to locate the place. Once the data completed and press **OK**. The new place will be added to the **Places Index**.

(Mac) New Place window




(Windows) New Place window

Places Index

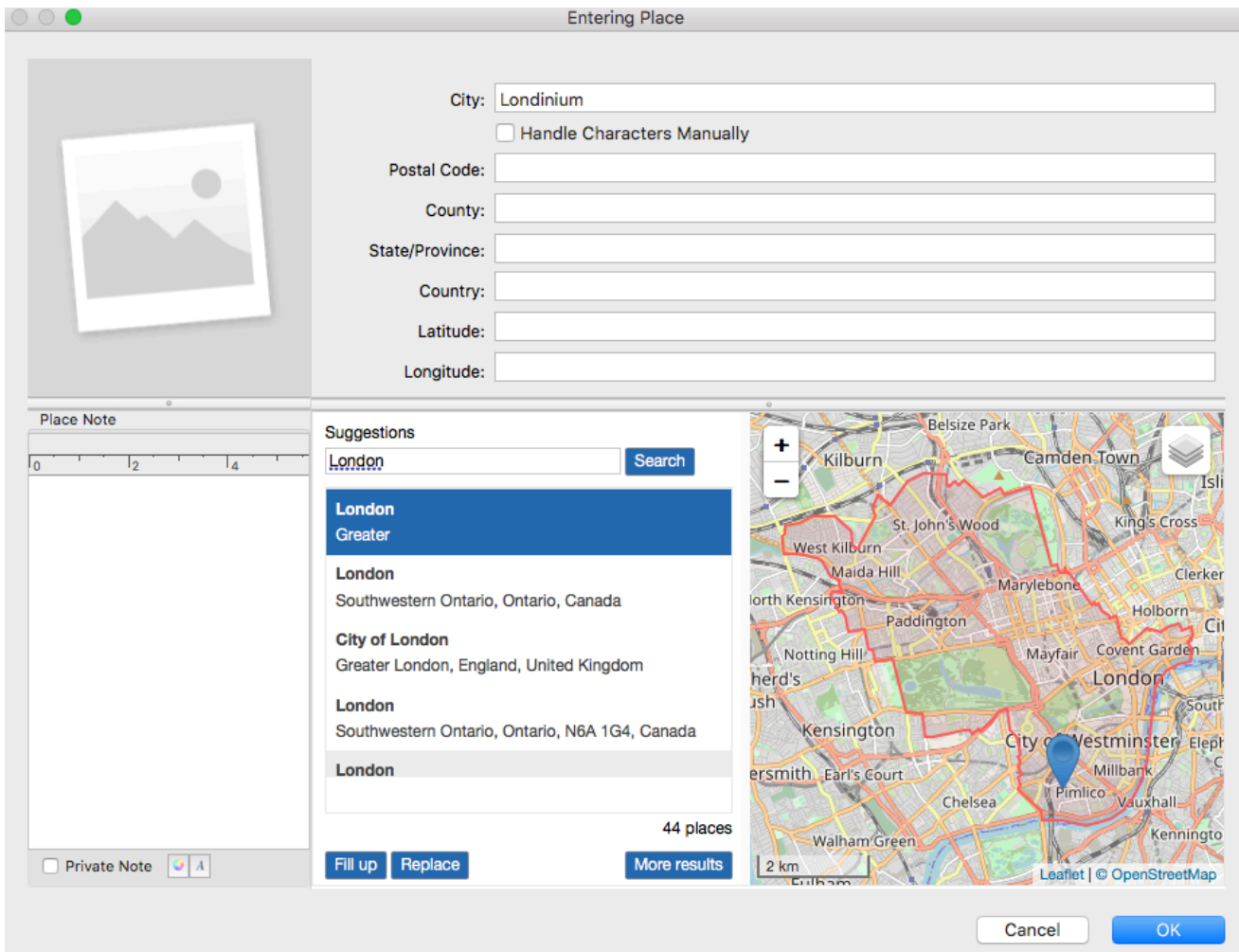
Note: Sometimes cities have changed their names or disappeared. Enter the old name and then in the New Place window, enter the current name of the city in the suggestions area. Launch the search and choose the one that suits you. You can click **Fill up** to keep the old name.

Create a new place to be assigned later

1. Display the **Places** panel or open the  **Places Index**.
2. Click **+** (Add New Place).
3. Enter the name of the place. With the first letters, Heredis proposes a list of known places which may match your entry. By choosing one of these known places, the different administrative fields and geolocation of the place will be filled in automatically.
4. Click on **Fill up** to complete the fields or on **Replace** to replace all fields.
5. If no place corresponds to the place you want to enter, complete the input field with the various administrative levels of the new place and press **OK**.

A new place has been created but it is not yet assigned to an event. This place will now be proposed in the list of existing places when you type in the **Places** field of an event. It will also be in the **Places index** and **Place panel**.

(Mac) Enter new place for old name of city



(Windows) Enter new place for old name of city

Places Index

Entering a new place

Add New Place
Enter New Place Details

City: Londinium
 Handle Characters Manually

Postal Code: County:

State/Province:

Country:

Latitude:

Longitude:

Variants

Note Map

Suggestions

London

London
Greater
London
Southwestern Ontario Ontario Canada

44 places

London

City of Westminster

3 km

Leaflet | © OpenStreetMap

Note: You can create the old cities that have been merged with other cities. Geolocate the current location and click on **Fill up** to indicate the coordinates only. Add to your index the current place and add to it in variants the old city's name. **(Windows)** Edit the place in **Place index**, **(Mac)** Select the place in **Place index**, click on the + to add and select the common variant. This is also how you can indicate the old spellings of a place. **(Mac)** Add a variant

Sample_Family_File - Places Index

Search Unused Places

50/50

V	N	M	City	Post...	Cou...	State/Pro...	Country	Latitude	Longi...	S
			Londinium							
			London		Grea...	LONDON	ENGLAND	51.508...	-0.12...	
			Margate		Kent	SOUTH E...	ENGLAND	51.381...	1.386...	
			Maryport		Cum...	NORTH...	ENGLAND	54.714...	-3.49...	
			Mccook			SOUTH D...	UNITED S...	43.68...	-97.2...	
			Mexico City			FEDERAL...	MEXICO	19.428...	-99.1...	
			Montgomery				UNITED S...	41.500...	-99.7...	
			Nebraska				USA	40.714...	-74.0...	
			New York			NEW YORK	USA	40.714...	-74.0...	
			Oldham		King...	SOUTH D...	UNITED S...	44.22...	-97.3...	
			Oxford		Oxfo...	SOUTH E...	ENGLAND	51.752...	-1.25...	
			Pargolovo			SANKT-P...	RUSSIA	60.08...	30.27...	
			Paris		Paris	ÎLE-de-F...	FRANCE	48.85...	2.34...	

Usage Subdivisions Statistics

16 entries for London - Greater London - LONDON - ENGLAND

Event/Fact	Persons	Date	Subdivision
Birth	MULLAN Jonathan (1931-)	06.11.1931	
Birth	MULLAN David (1975-)	09.08.1975	
Birth	MULLAN Jonathan (1931-)	06.11.1931	
Birth	MULLAN David (1975-)	09.08.1975	
Death	WALLACE James William (~ 1780...	12.20.1843	
Death	WRIGHT Angelina (-> 1812)	> 12.20.1812	
Death	WALLACE James William (~ 1780...	12.20.1843	
Death	WRIGHT Angelina (-> 1812)	> 12.20.1812	
Marriage	WALLACE James William (1801-1...	03.15.1831	
Marriage	THOMAS Christopher Edward (1...	11.22.1935	The King's Wei...
Marriage	MULLAN Jonathan (1931-) & TH...	08.03.1974	

City: London
 Handle Characters Manually
 Postal Code:
 County: Greater London
 State/Province: LONDON
 Country: ENGLAND
 Latitude: 51.508530
 Longitude: -0.125740
 Note: Private Note

London
 Variants
 Londinium
 + - *

(Windows) Add a variant

Places Index

The screenshot shows a software window titled "Entering Place" with a sub-header "Editing Place" and "London". On the left is a placeholder for a profile picture. The main form contains the following fields:

- City: London
- Handle Characters Manually
- Postal Code: [] County: Greater London
- State/Province: London
- Country: ENGLAND
- Latitude: 51.508530
- Longitude: -0.125740

A "Variants" panel on the right, outlined in red, lists "Londinium" and "★ London". Below the form is a "Map" section with a "Suggestions" search bar and a map of London with a blue location pin. The map includes a 3 km scale bar and "Leaflet | © OpenStreetMap" text. At the bottom right are "OK" and "Cancel" buttons.

Information for the place

The input and modify screen of the place contains items to be filled in, a Notes field, an assigned media field, a display field for a map, and a field reserved for geolocation if it is not known.

Input fields for the place

Each administrative item has a separate input field. This organization method allows you to edit documents by town, region, country and facilitates the geolocation of the place where your ancestors lived.

Complete the fields **City – Postal Code – County – State/Province – Country**.

If you know them, you may also complete the **Latitude** and **Longitude** fields. However they will be filled automatically when the geolocation of the town will be done.

(Mac) Administrative item

City:

Handle Characters Manually

Postal Code:

County:

State/Province:

Country:

Latitude:

Longitude:

(Windows) Administrative item

City:

Handle Characters Manually

Postal Code: County:

State/Province:

Country:

Latitude:

Longitude:

Tick **Handle Characters Manually** box if you don't want the default Heredis Preferences to apply for formatting the place.

For further details on automatic filling of places, see Heredis' Preferences\Choose the recognized places (voir page 65).

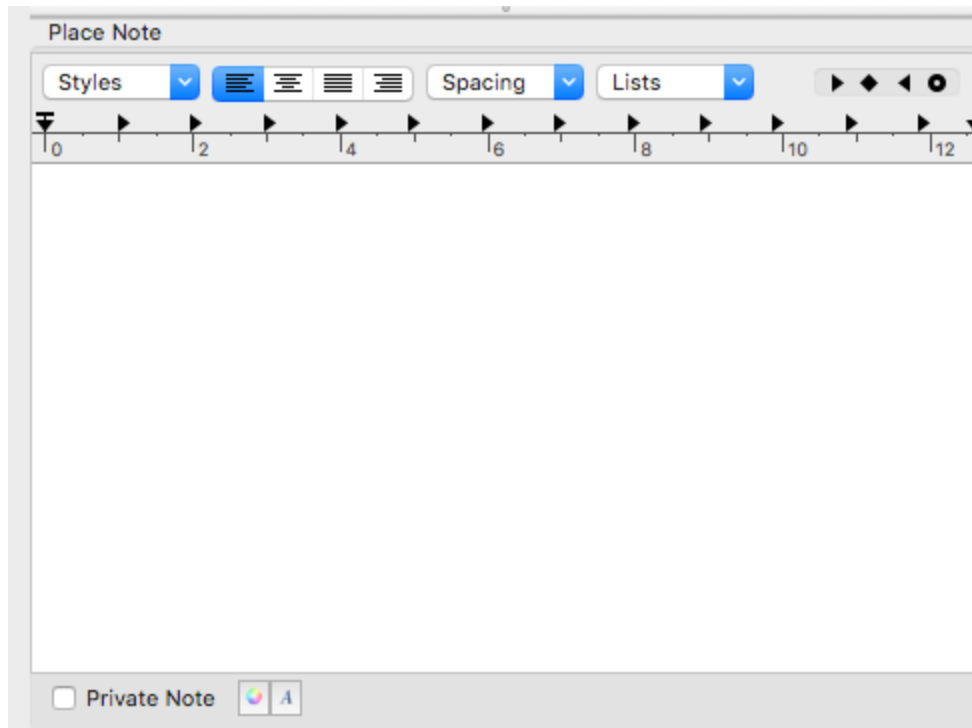
Place Note

Enter information about the place in the **Note** field, for example the history of this place. You have available the text editing tools to format the note.

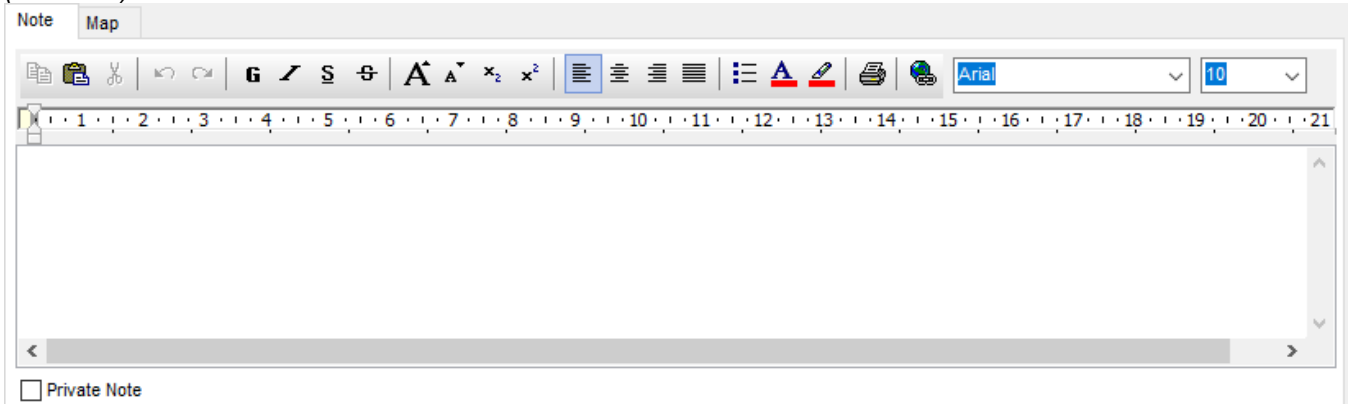
Tick the **Private Note** box to exclude exports of the note or printed documents.

(Mac) Place's Note

Places Index



(Windows) Place's Note



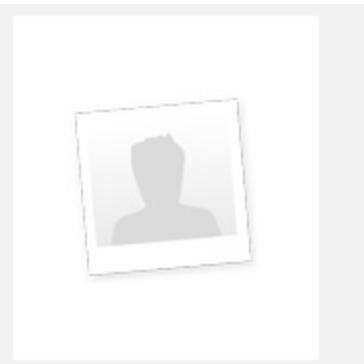
Media assigned to the place

To assign one or more media to a place:

- Click the **+** (Add a Media) button in the display field of the media.
- **(Mac)** Drag and release the media selected from **Media** panel or from the Finder.
(Mac) In Place index, area to add a media



(Windows) In Place index, area to add a media



Mac Info • The right-click menu in the display field of the media provides access to the **Add New Media** option.

Subdivisions

Subdivisions tab inform you of subdivision attached to the selected place.
(Windows) Places index

Places Index (47 places)

Search: Unused Places Only Variants

City	Postal Code	County	State/Province	Country	Latitude	Longitude	S
?				GERMANY	51.500000	10.500000	
?				ENGLAND			
Alameda		Alameda County	CALIFORNIA	UNITED ST...	37.765210	-122.241640	
Allegan		Allegan County	MICHIGAN	UNITED ST...	42.529200	-85.855300	
Anaheim		Orange	CALIFORNIA	UNITED ST...	33.835278	-117.913610	
Baker Township		Kingsbury	SOUTH DAKOTA	UNITED ST...	44.361109	-97.379170	
Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150140	
Blackpool		Lancashire	NORTH WEST	ENGLAND	53.816670	-3.050000	
Boston		Suffolk	MASSACHUSETTS	USA	42.358430	-71.059770	
Brisbane			QUEENSLAND	AUSTRALIA	-27.467940	153.028090	
Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.742610	
Canterbury		Kent	SOUTH EAST	ENGLAND	51.279040	1.079920	
Dover		Kent	SOUTH EAST	ENGLAND	51.133330	1.300000	
Dunfermline		Fife	SCOTLAND	56.071560	-3.458870		
Edinburgh		City Of Edinburgh	SCOTLAND	55.952060	-3.196480		
Hackney		Greater London	ENGLAND	51.550000	-0.050000		

Entries Place Subdivisions Data

Boston : 2 Place subdivisions

Place subdivision	Latitude	Longitude	Number of entries
Mass Gen	42.367859	-71.064938	1
Nursing Home	42.344706	-71.137318	1

Leaflet | © OpenStreetMap

Tools Print... Close

(Mac) Places index

Places Index

Sample Family File 2020 - Places Index

Search Unused Places 47/47

V	N	M	City	Posta...	County	State/Provin...	Country	Latitude	Longitu...
			?				GERMANY	51.500000	10.5000...
			?				ENGLAND		
			Alameda		Alam...	CALIFORNIA	UNITED STA...	37.765210	-122.24...
			Allegan		Alleg...	MICHIGAN	UNITED STA...	42.529200	-85.855...
			Anaheim		Orange	CALIFORNIA	UNITED STA...	33.835278	-117.913...
			Baker Township		Kings...	SOUTH DAK...	UNITED STA...	44.361109	-97.379...
			Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150...
			Blackpool		Lanca...	NORTH WEST	ENGLAND	53.816670	-3.0500...
			Boston		Suffolk	MASSACHU...	USA	42.358430	-71.059...
			Brisbane			QUEENSLAND	AUSTRALIA	-27.4679...	153.028...
			Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.7426...
			Canterbury		Kent	SOUTH EAST	ENGLAND	51.279040	1.079920
			Dover		Kent	SOUTH EAST	ENGLAND	51.133330	1.300000
			Dunfermline		Fife		SCOTLAND	56.071560	-3.4588...
			Edinburgh		City o...		SCOTLAND	55.952060	-3.1964...
			ENGLAND	51.550000	0.0500...

Details | Map

City: Boston
 Handle Characters Manually
 Postal Code:
 County: Suffolk
 State/Province: MASSACHUSETTS
 Country: USA
 Latitude: 42.358430
 Longitude: -71.059770

Note: Private Note
<http://www.cityofboston.gov/>

Boston
 Variants

Usage | Subdivisions | Statistics

Boston : 2 Place subdivisions

Subdivision	Latitude	Longitude	Nb. entries
Mass Gen	42.367859	-71.064938	1
Nursing Home	42.344706	-71.137318	1

By clicking on the pencil button, you can geolocate the selected subdivision.

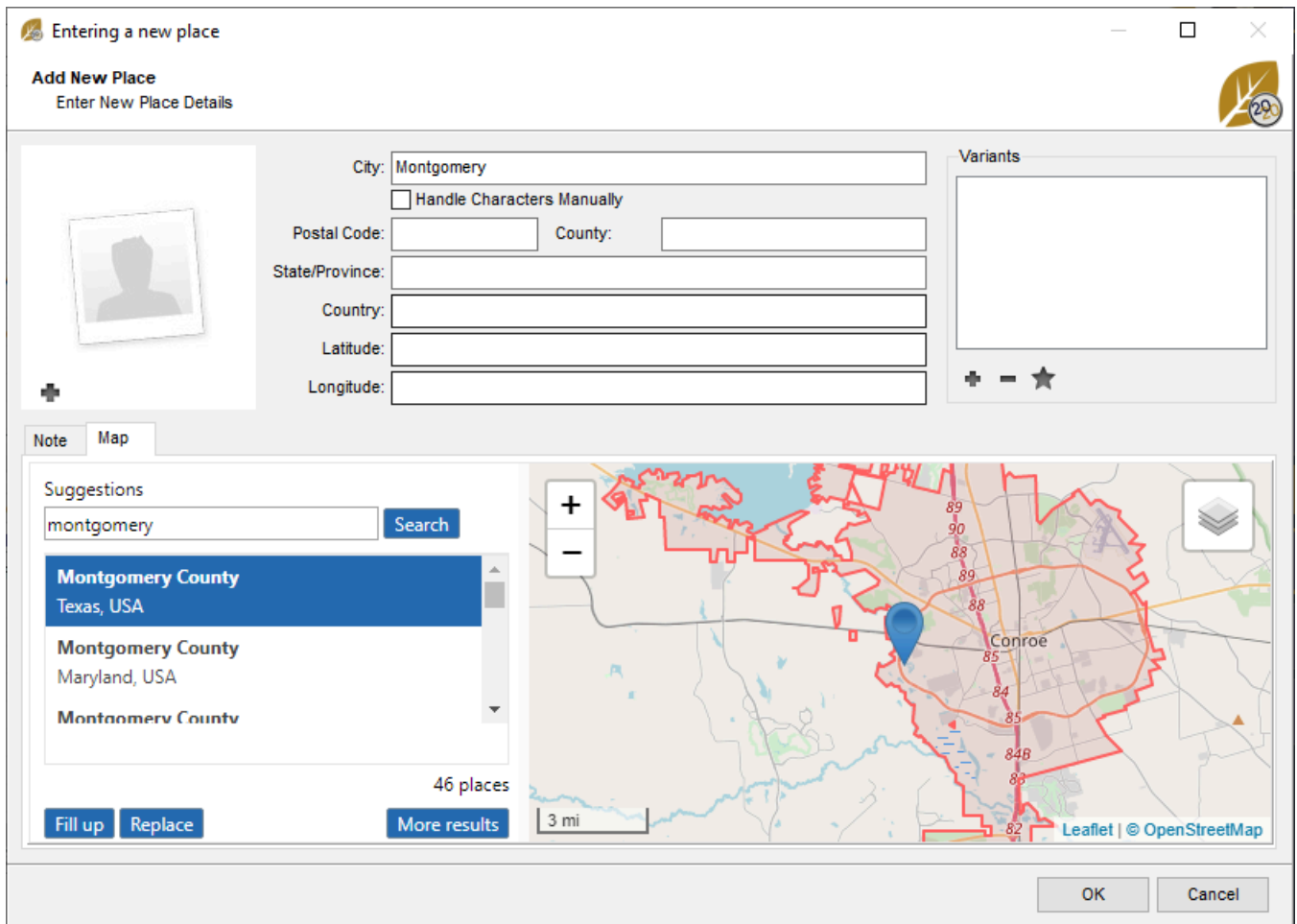
The button allows you to replace a subdivision by an other one, if for example, you entered « main street » and « Main Street ».

Also check Geolocating place subdivisions (voir page 294).

Geolocate a place

When the place is recognized by Heredis, it is geolocated. In this case, the latitude and longitude are inserted automatically and the map of the location may be displayed.

(Windows) *Entering a new place*



(Mac) Entering a new place

Places Index

Entering Place

City:

Handle Characters Manually

Postal Code:

County:

State/Province:

Country:

Latitude:

Longitude:

Suggestions


- Montgomery County**
Texas, USA
- Montgomery County
Maryland, USA
- Montgomery County
Virginia, USA
- Montgomery County
Iowa, USA
- Montgomery County

46 places

10 km

Leaflet | © OpenStreetMap

Info • View places not geolocated in the  **Places Index** by clicking on the **Latitude** or **Longitude** fields. If these fields are empty, you will have to create the geolocation manually.

1. Double-click the place in the **Places Index** or click the pencil  icon (Edit and modify the selected place) to open the enter/modify screen of the selected place.

2. Click the **Search** button in the geolocation field. Heredis will consult various databases of global importance to find the place you entered.

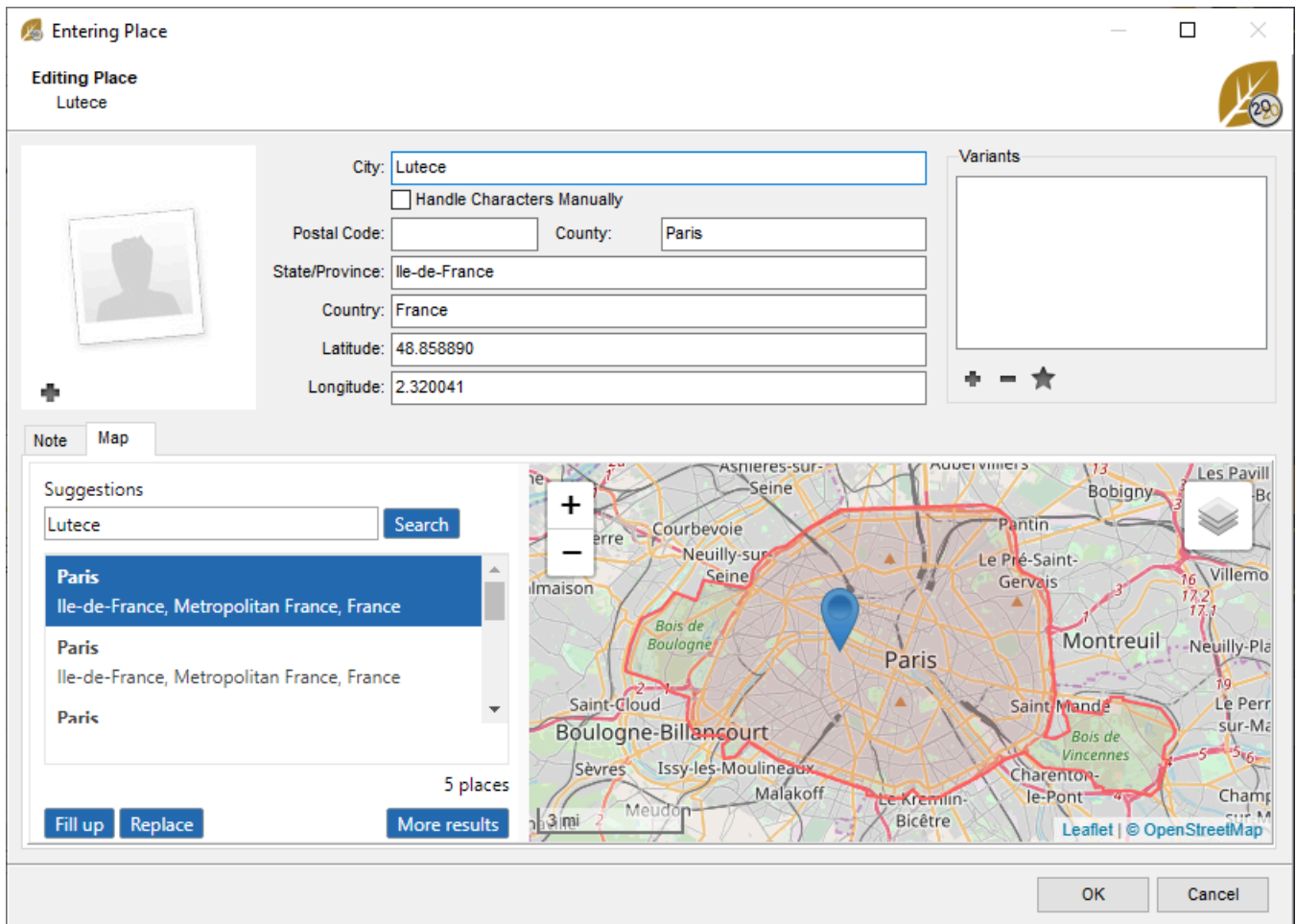
Info • This function is only available if you are connected to the Internet.

3. Click each of the proposals and observe the map that is displayed to clearly define which corresponds to the place you entered.

4. Edit your entry.

• Click **Fill up** to geolocate the place with the appropriate proposal while retaining the elements that you had already entered.

(Windows) Fill up Places index data



(Mac) Fill up Places index data

Places Index

Entering Place

City:

Handle Characters Manually

Postal Code:

County:

State/Province:

Country:

Latitude:

Longitude:

Suggestions

Paris
Ile-de-France, Metropolitan France, France

Paris
Ile-de-France, Metropolitan France, France

Paris
Ile-de-France, Metropolitan France, France

Lutece

17 places

Private Note

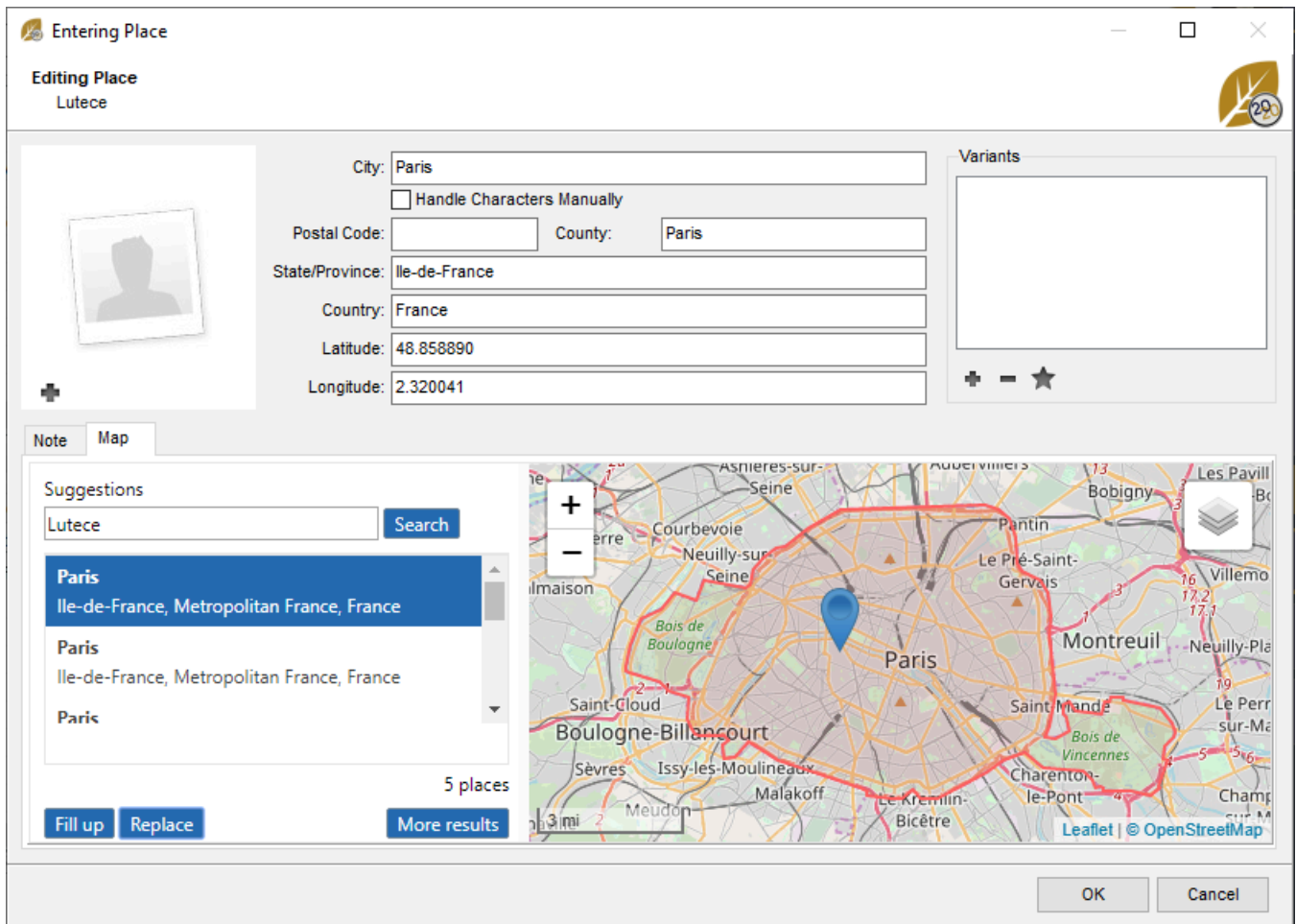
Cancel

Info • This will retain your original entry for the old name of a province or administrative division that has been changed.

• Click **Replace** should you have entered incorrect data for this place. Herdis replaces the contents of input fields with the information found online.

Validate the input/modify screen by clicking **OK** to complete the changes to the geolocation of the place.

(Windows) Replace Places index data



(Mac) Replace Places index data

Places Index

Entering Place

City: Paris
 Handle Characters Manually

Postal Code:

County: Paris

State/Province: Ile-de-France

Country: France

Latitude: 48.8588897

Longitude: 2.3200410274611

Suggestions

Paris Search

Paris
Ile-de-France, Metropolitan France, France

Paris
Ile-de-France, Metropolitan France, France

Paris
Ile-de-France, Metropolitan France, France

Lutece


17 places

Fill up Replace More results

Cancel OK




For further details see Geolocating Places (voir page 289).

Delete a place

- Select the place to delete
- Click on the  button

Heredis checks if the place is used, if so you won't be able to erase.

Variants

As for surname, given names and occupation, you can add variants to a place. Just double-click on the place you want to add a variant then use the  button in the variant area to choose a variant. Don't forget to choose the main variant by clicking on the  button. To delete a variant click on the  button.

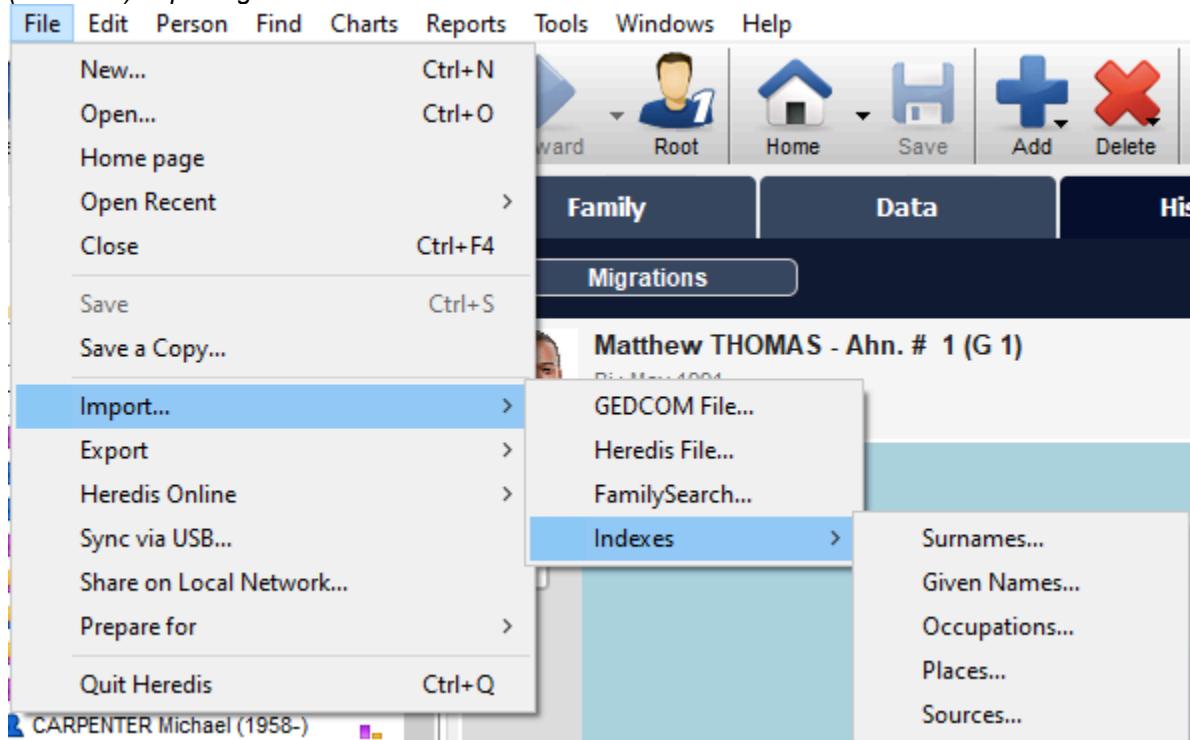
For further details see Indexes: generalities (voir page 241).

Import an index into a Heredis file

You have studied surnames, places or occupations. Heredis allows you to share your indexes with another file, so you don't have to re-enter everything in your wife's file, for example. Convenient when working with someone who has researched the origin of your family names or locations. You will be able to add to your own file one of the indexes in the Heredis file someone provided you.

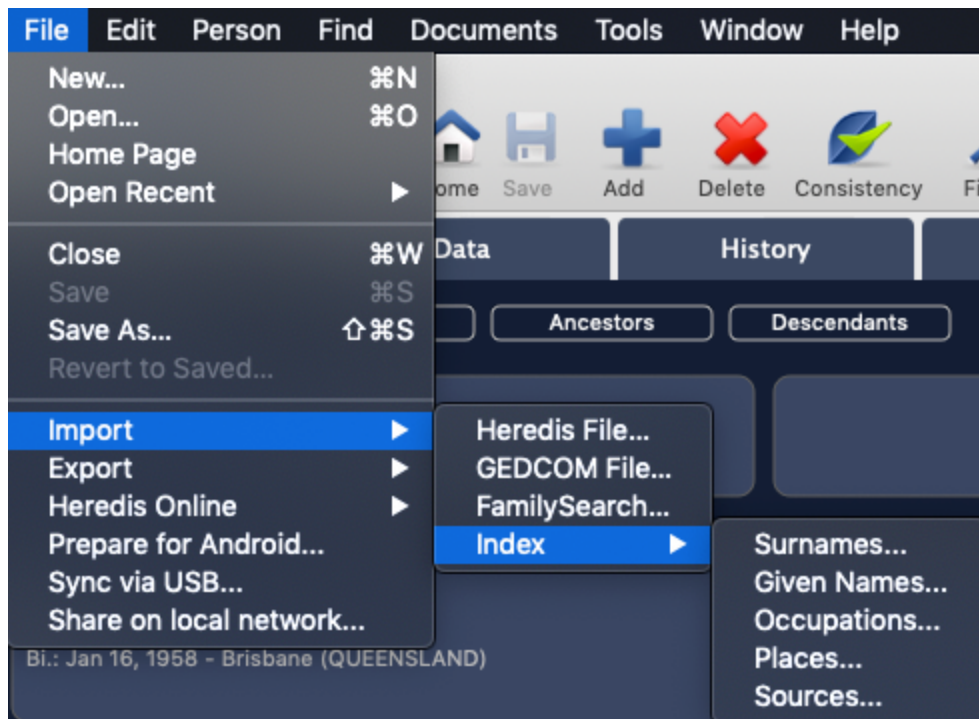
- Open the file in which you want to add the index.
- Click on the **File > Import > Indexes** menu and choose from the indexes suggested: **Surnames, Given Names, Occupations, Sources, Places.**

(Windows) Importing an index



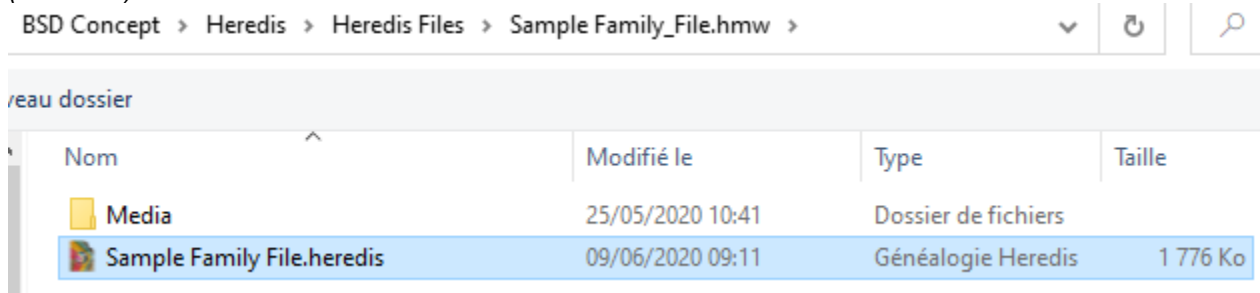
(Mac) Importing an index

Import an index into a Heredis file

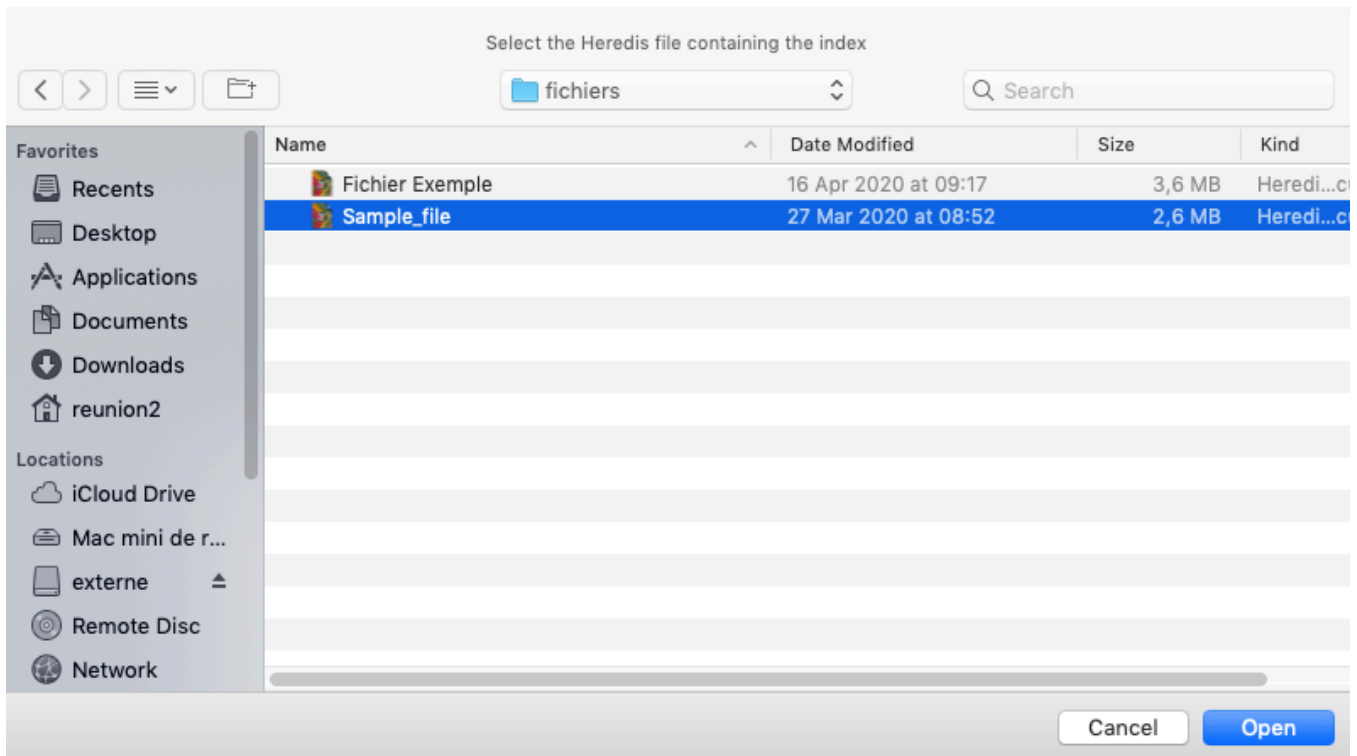


- **(Windows)** Choose the .heredis file that matches the one containing the index to be imported.
- **(Mac)** Choose the .hmw file that matches the one containing the index to be imported.

(Windows) Heredis file selection



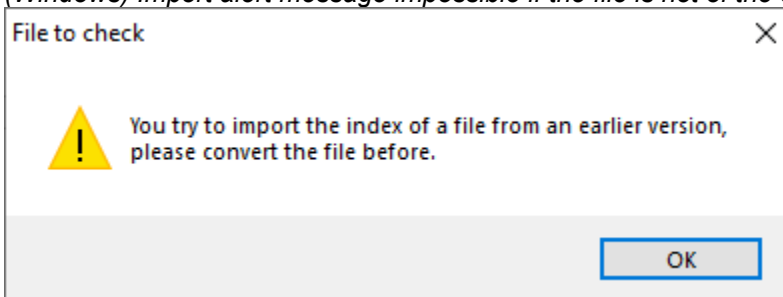
(Mac) Heredis file selection



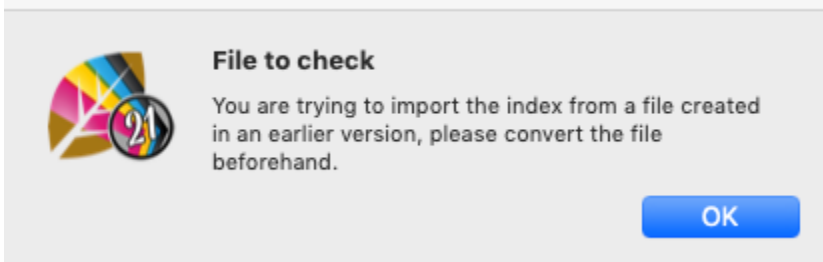
- Confirm by clicking on **Open**. You will be asked to open the corresponding index or not once the import is complete.

Important: The Heredis file must be in the same version as your file. Heredis 2021 will be able to import a Heredis 2021 file. If the file is not in the same version of Heredis format, a message will invite you to do the conversion. Click **OK** to validate the message. Then open the file with your version of Heredis, it will convert on its own and you can then return to your file in which you want to import that index.

(Windows) Import alert message impossible if the file is not of the same version



(Mac) Import alert message impossible if the file is not of the same version



Geolocating Places

Consulting Places maps

Heredis does everything for you to visualize the places where your ancestors lived. The **Places Index** will display an interactive map for the selected place. If Heredis has been unable to identify the place, you can yourself indicate where it is by using the geolocation tool.

Visualize the map

- Display the Map of selected place from the **Map** tab in each event or in the **Places index**.

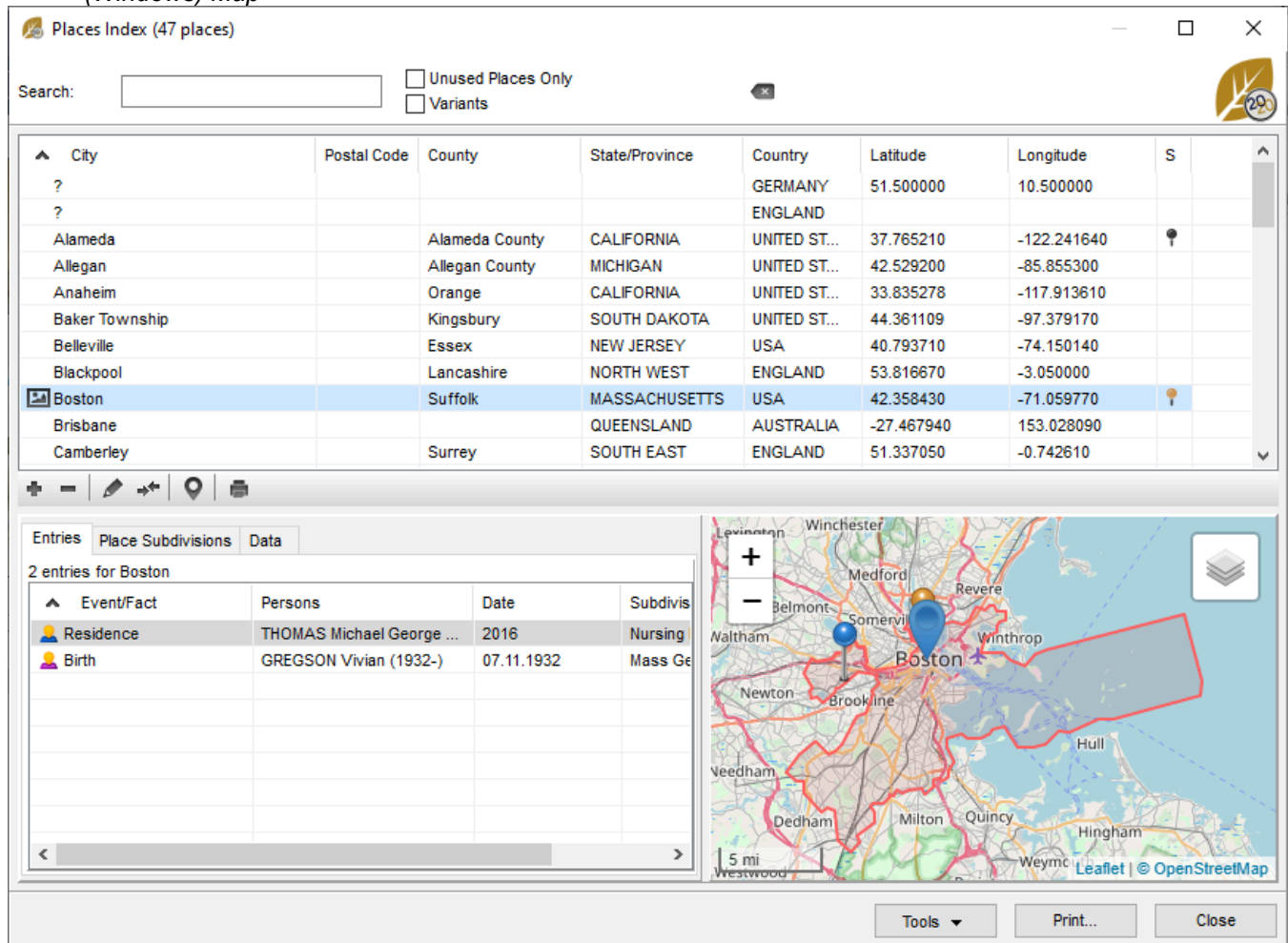
Open the  **Places index**.

(Windows) The map is displayed on the bottom right of the index when you have selected a place.

(Mac) Click on the **Map** tab on the right part of the screen when you have selected a place.


- Browse the map using the navigation tools. Zoom or reduce to get a better understanding of the geography of the place.

(Windows) Map





Places Index (47 places)

Search: Unused Places Only Variants

City	Postal Code	County	State/Province	Country	Latitude	Longitude	S
?				GERMANY	51.500000	10.500000	
?				ENGLAND			
Alameda		Alameda County	CALIFORNIA	UNITED ST...	37.765210	-122.241640	
Allegan		Allegan County	MICHIGAN	UNITED ST...	42.529200	-85.855300	
Anaheim		Orange	CALIFORNIA	UNITED ST...	33.835278	-117.913610	
Baker Township		Kingsbury	SOUTH DAKOTA	UNITED ST...	44.361109	-97.379170	
Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150140	
Blackpool		Lancashire	NORTH WEST	ENGLAND	53.816670	-3.050000	
 Boston		Suffolk	MASSACHUSETTS	USA	42.358430	-71.059770	
Brisbane			QUEENSLAND	AUSTRALIA	-27.467940	153.028090	
Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.742610	

Entries | Place Subdivisions | Data

2 entries for Boston

Event/Fact	Persons	Date	Subdivis
 Residence	THOMAS Michael George ...	2016	Nursing
 Birth	GREGSON Vivian (1932-)	07.11.1932	Mass Ge

Tools | Print... | Close

(Mac) Map

Sample Family File 2020 - Places Index

Search Unused Places

47/47


V	N	M	City	Post...	Cou...	State/Prov...	Country	Latitude	Longit...
			?				GERMANY	51.500...	10.50...
			?				ENGLAND		
			Alameda		Alam...	CALIFORNIA	UNITED S...	37.765...	-122.2...
			Allegan		Alleg...	MICHIGAN	UNITED S...	42.529...	-85.8...
			Anaheim		Oran...	CALIFORNIA	UNITED S...	33.835...	-117.9...
			Baker Township		King...	SOUTH D...	UNITED S...	44.361...	-97.37...
			Belleville		Essex	NEW JERS...	USA	40.793...	-74.15...
			Blackpool		Lanc...	NORTH W...	ENGLAND	53.816...	-3.05...
			Boston		Suff...	MASSACH...	USA	42.358...	-71.05...
			Brisbane			QUEENSL...	AUSTRALIA	-27.46...	153.0...
			Camberley		Surrey	SOUTH EA...	ENGLAND	51.337...	-0.74...
			Canterbury		Kent	SOUTH EA...	ENGLAND	51.279...	1.079...
			Dover		Kent	SOUTH EA...	ENGLAND	51.133...	1.300...
			Dunfermline		Fife		SCOTLAND	56.071...	-3.45...
			Edinburgh		City...		SCOTLAND	55.952...	-3.19...
				ENGLAND	51.550...	0.05...

Usage Subdivisions Statistics

0 entry for ? - GERMANY

Event/Fact	Persons	Date	Subdivision

Geolocate unrecognized places

Edit the place by double-clicking on it or by using the pencil  button after selecting the place to edit.

If no map appears on the **Map**, you must specify the coordinates of the place. If no latitude and longitude are available, Heredis will not be able to localize this place. For example, you can enter the old name of a city in the city field and search the **Suggestions** field with the current name. Heredis launches a search in OpenStreetMap and will geolocate the current location.

Click on **Fill up** to complete the missing data or click on **Replace** to modify the fields entered by the OpenStreetMap indications.

(Windows) Geolocate unrecognized places

Geolocating Places

Entering Place

Editing Place
Montgomery

City:

Handle Characters Manually

Postal Code: County:

State/Province:

Country:

Latitude:

Longitude:

Variants

Note Map

Suggestions

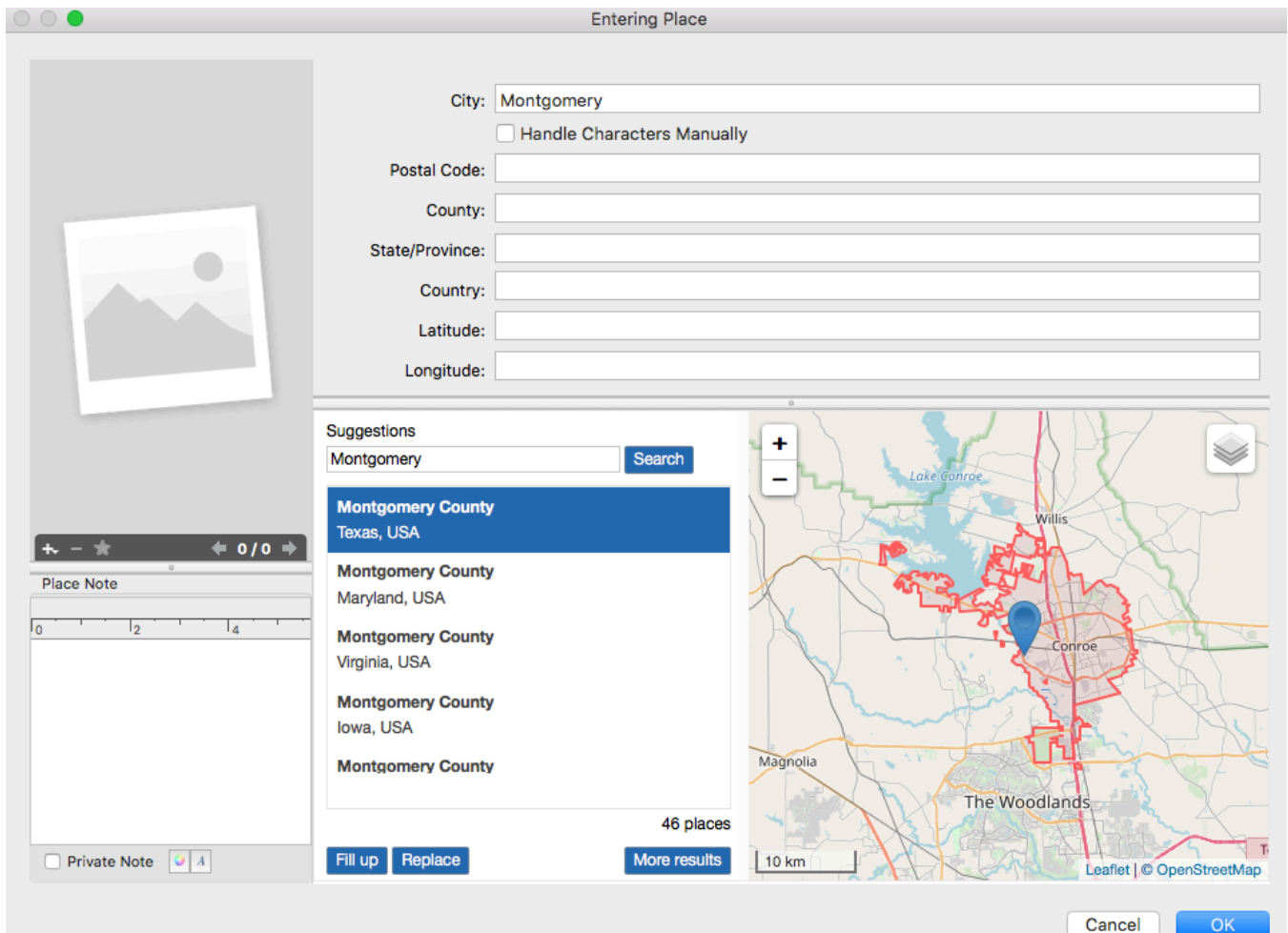
- Montgomery County
Texas, USA
- Montgomery County
Maryland, USA
- Montgomery County
Virginia, USA
- Montgomery County
Iowa, USA
- Montgomery County
Kansas, USA
- Montgomery County
Indiana, USA

46 places

5 km

Leaflet | © OpenStreetMap

(Mac) Geolocate unrecognized places



See also Places index (voir page 267) article.

Info • You may also access the map of the place in the **History > Migrations** tab, in the **Search > Search Wizard > Map** tab and in the **Data > Personal Data** tab. Click the **Map** tab for each event provided that a place has been entered.

Geolocating Places

The screenshot displays a family tree software interface with a navigation bar at the top containing 'Family', 'Data', 'History', and 'Search'. Below this is a 'Migrations' tab. The main area features a map of the world with several location pins. A blue line connects a pin in the United States to a pin in Germany. A sidebar on the right lists family members categorized by relationship: Grandparents, Parents, Primary Person, Spouses, Siblings, and Children. A small inset map shows the current view's location on a world map.

Family Tree Data:


- Primary Person:** THOMAS Michael George (1933-)
- Spouses:** GREGSON Vivian (1932-), LOWENSTEIN Paula (H 5701-)
- Siblings:** THOMAS Kate Elsie (1941-)
- Children:** THOMAS Peter (1956-), THOMAS Paul (1960-), THOMAS Judy (1962-)
- Parents:** THOMAS Christopher Edward (1910-), RUCASTLE Alice Jean (1908-1998)
- Grandparents:** THOMAS George (1877-1947), DAVIS Violet Elizabeth (1875-1966), RUCASTLE Gilbert (1870-1955), WALLACE Brenda (1873-1937)

See also Geolocating Places subdivisions (voir page 294), Zoom in on the World – Family Tree Mapping (voir page 306).

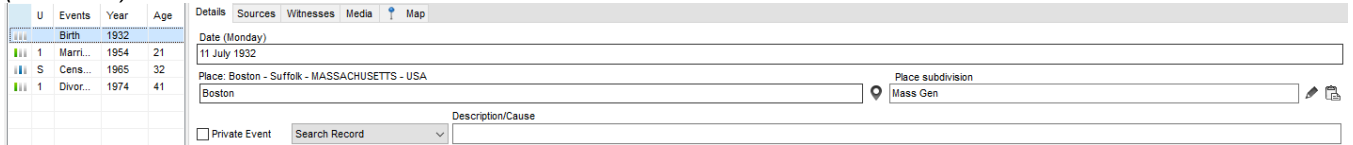
Geolocating Place subdivisions

Place subdivisions can now be geolocated. The **Place Subdivision** field is intended for specific details on a place, such as an exact address, a hamlet, or any other place name.

Edit

To access this feature, select an event under the **Personal Data** tab. Click on the **Details** tab then on the pencil  button displayed to the right of the **Place subdivision** field.

(Windows) Details tab for an Event



U	Events	Year	Age
	Birth	1932	
1	Marri...	1954	21
S	Cens...	1965	32
1	Divor...	1974	41

Details Sources Witnesses Media Map

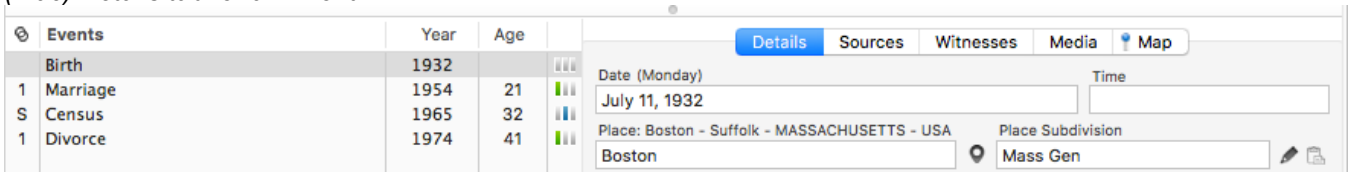
Date (Monday)
11 July 1932

Place: Boston - Suffolk - MASSACHUSETTS - USA

Place Subdivision
Boston

Search Record

(Mac) Details tab for an Event



Events	Year	Age
Birth	1932	
1 Marriage	1954	21
S Census	1965	32
1 Divorce	1974	41



Details Sources Witnesses Media Map

Date (Monday)
July 11, 1932

Place: Boston - Suffolk - MASSACHUSETTS - USA

Place Subdivision
Boston

You may also access it from **Places Index > Subdivision** then click on the pencil  button.

Since Heredis 2022, you can add a subdivision in the Place Index by clicking on  and delete it by clicking on  the on the Subdivision tab of a location.

(Windows) Places Index

Geolocating Place subdivisions

Dictionnaire des lieux (120 lieux)

Rechercher :

Afficher uniquement les lieux non utilisés
 Afficher les variantes

Com...	Code lieu	Département	Région	Pays	Latitude	Longitude	S
Lille	59000	Nord	Hauts-de-...	FRANCE	50.632970	3.058580	
★ Lyon	69000	Rhône	Auvergne-...	FRANCE	45.748460	4.846710	📍
Mâcon	71000	Saône-et-...	Bourgogn...	FRANCE	46.300000	4.833330	
Manas-...	32170	Gers	Occitanie	FRANCE	43.370860	0.361610	
Mandabe			Menabe	MADAGA...	-21.050751	44.935753	
Merval	02160	Aisne	Hauts-de-...	FRANCE	49.344460	3.697905	
Mont-d'...	02390	Aisne	Hauts-de-...	FRANCE	49.842125	3.499220	
Montch...	02860	Aisne	Hauts-de-...	FRANCE	49.513600	3.726460	
Montcor...	02340	Aisne	Hauts-de-...	FRANCE	49.696389	4.018056	
Montpell...	34000	Hérault	Occitanie	FRANCE	43.610920	3.877230	
Moscou			Moscou	RUSSIE	55.479205	37.327330	

Utilisations Subdivisions Informations

Lyon : 14 subdivisions

Subdivision	Latitude	Longitude	Nombre d'utilisations
3 rue Grolée			2
53 avenue de Saxe			2
à son domicile 34 avenue d...			2
à son domicile 53 avenue d...			4
Abbaye d'Ainay			2
abbaye d'ainay	45.753414	4.827327	2
Ainay	45.753903	4.828743	2

5 km Oullins 3 Leaflet | © OpenStreetMap

Outils Imprimer... Fermer

(Mac) Places Index

Fichier test 22 - Dictionnaire des lieux

Rechercher 35/35 non utilisés Options

V	N	M	Commune	Cod...	Dép...	Région	Pays	Latitude	Longit...	S
			Anancy-le-Vieux	74940	Haut...	Auvergne-R...	FRANCE	45.9197...	6.143930	
			Annonay	07100	Ardè...	Auvergne-R...	FRANCE	45.2397...	4.670750	
			Arlebosc	07410	Ardè...	Auvergne-R...	FRANCE	45.0363...	4.6506...	
			Arras	62000	Pas-...	Hauts-de-F...	FRANCE	50.2930...	2.781860	
			Bagnols-sur-Cèze	30200	Gard	Occitanie	FRANCE	44.1599...	4.617760	
			Brugge	8000	Flan...	Flandre	BELGIQUE	51.2089...	3.2242...	
			Caluire-et-Cuire	69300	Rhône	Auvergne-R...	FRANCE	45.7904...	4.841120	
			Condom	32100	Gers	Occitanie	FRANCE	43.9581...	0.371990	
			Cros-de-Géorand	07630	Ardè...	Auvergne-R...	FRANCE	44.7937...	4.125420	
			Genève	1200	Genè...	Région Lém...	SUISSE	46.2022...	6.1456...	
			Givors	69700	Rhône	Auvergne-R...	FRANCE	45.5841...	4.7725...	
			Grasse	06130	Alpe...	Provence-A...	FRANCE	43.6666...	6.916670	
			Grenoble	38000	Isère	Auvergne-R...	FRANCE	45.1666...	5.716670	
			Ivry-en-Montagne	21340	Côte...	Bourgogne-...	FRANCE	47.0286...	4.6367...	
			La Canourgue	48500	Lozère	Occitanie	FRANCE	44.4313...	3.215840	
			Lyon	69000	Rhône	Auvergne-R...	FRANCE	45.7484...	4.846710	


Utilisations Subdivisions Statistiques

Lyon : 12 subdivisions

Subdivision	Latitude	Longitude	Nb. utilisations
3 rue Grolée			1
53 avenue de Saxe			1
à son domicile 34 avenue de Saxe			1
à son domicile 53 avenue de Saxe			2
Abbaye d'Ainay			1
abbaye d'ainay	45.753414	4.827327	1
Ainay			1
au domicile familial			1
Clinique Jeanne d'Arc			1
Faculté de médecine			1
Hôpital Sainte-Croix			1
rue Godefroy	45.771789	4.841296	1

Commune : Lyon
 Gérer les majuscules
 Code lieu : 69000
 Département : Rhône
 Région : Auvergne-Rhône-Alpes
 Pays : FRANCE
 Latitude: 45.748460
 Longitude: 4.846710
 Note : Note privée

Lyon (69000)
 Variantes

You can enter the name and coordinates manually or paste a place's data (in its entirety or only the coordinates) by clicking on the  button. See the article entitled [Zoom in on a Place](#) for more details.

Search

If the subdivision name is precise enough, Heredis will perform an automated pre-search. Browse through the list of propositions.


If your subdivision cannot be located – for instance « at her grandma's house » – Heredis will not be able to offer any potential geolocation. You should therefore modify the field content under **Suggestions** then click on **Search** to launch the search again.

Note: Avoid using commas and unnecessary spaces at the end of the text in the Subdivision field to ensure that the automated search will be able to find the designated places.

Edit a non-geolocated subdivision

Geolocating Place subdivisions

Boston - Suffolk - MASSACHUSETTS - USA
Number of entries for this Place subdivision: 1

Place subdivision: 

Latitude:


Longitude:

Move the marker or right-click on the map to change the subdivision coordinates.

Suggestions

Name
Massachusetts General Hospital 55, Fruit Street, Downtown Crossing, Beacon Hill, Boston, Suffolk County, Massachusetts, 02114, USA
Massachusetts General Hospital 125, Nashua Street, Dock Square, West End, Boston, Suffolk County, Massachusetts, 02214, USA
Paul S. Russell, MD Museum of Medical History and Innovation 2, North Grove Street, Downtown Crossing, Beacon Hill, Boston, Suffolk County, Massachusetts, 02114- 3203, USA

3 toponyms



OK

In the same way you search for a place's geolocation (please refer to Geolocation), click on:

- **Fill up** to keep the subdivision name and add coordinates,
- **Replace** to replace all data previously entered for the subdivision.

Click **OK** to validate.


If you know where the person's grandmother used to live and prefer to leave « at her grandma's house », then drag and drop the marker or right-click on **Position the marker here**.

Coordinates (latitude and longitude) will then be displayed.

(Windows) Edit an unrecognized subdivision

Margate - Kent - SOUTH EAST - ENGLAND

Number of entries for this Place subdivision: 1

Place subdivision: 

Latitude:

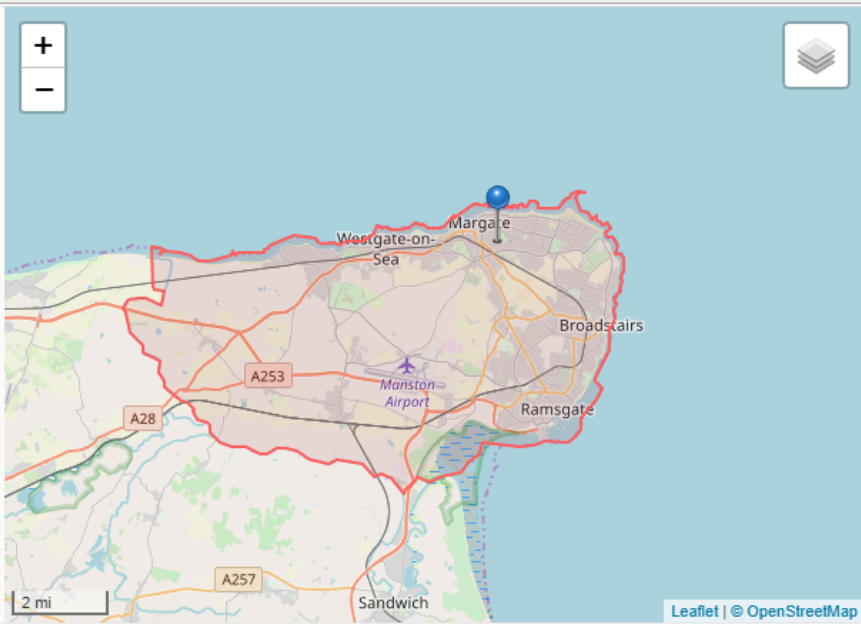
Longitude:

Move the marker or right-click on the map to change the subdivision coordinates.

Suggestions

Name
No available data. Check the latitude and longitude in the Places Index.

0 toponym



Display

From the Places Index

In the list of places, the S column will display markers to indicate whether there is one subdivision or more. When they are not geolocated, the marker is black . When at least one subdivision has been geolocated, the marker is yellow .

(Windows) Places Index – The S Column

Geolocating Place subdivisions

Places Index (47 places)

Search: Unused Places Only Variants

City	Post...	County	State/Province	Country	Latitude	Longitude	S
Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150140	
Blackpool		Lancashire	NORTH WEST	ENGLAND	53.816670	-3.050000	
Boston		Suffolk	MASSACHUSETTS	USA	42.358430	-71.059770	
Brisbane			QUEENSLAND	AUSTRALIA	-27.467940	153.028090	
Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.742610	
Canterbury		Kent	SOUTH EAST	ENGLAND	51.279040	1.079920	
Dover		Kent	SOUTH EAST	ENGLAND	51.133330	1.300000	
Dunfermline		Fife		SCOTLAND	56.071560	-3.458870	
Edinburgh		City Of Edinburgh		SCOTLAND	55.952060	-3.196480	
Hackney		Greater London		ENGLAND	51.550000	-0.050000	
Hudson		Columbia	NEW YORK	USA	42.252860	-73.790960	
Hull		East Riding Of Yo...	YORKSHIRE AND ...	ENGLAND	53.749929	-0.335250	
Kingsbury			SOUTH DAKOTA	UNITED ST...	44.366669	-97.483328	
Las Vegas		Clark	NEVADA	UNITED ST...	36.174999	-115.136390	
Leith		City Of Edinburgh		SCOTLAND	55.976380	-3.169706	

Map showing Boston area with a blue location pin. Labels include Somerville, Cambridge, Boston, Financial District, Back Bay, Fenway, South End, South Boston, and Logan International Airport.

Entries: Place Subdivisions Data

2 entries for Boston

Event/Fact	Persons	Date	Subdivis
Residence	THOMAS Michael George ...	2016	Nursing
Birth	GREGSON Vivian (1932-)	11.07.1932	Mass Ge

Tools Print... Close

(Mac) Places Index – The S Column

Sample Family File 2020 - Places Index

Search Unused Places 47/47

Options

V	N	M	City	Posta...	County	State/Provin...	Country	Latitude	Longitu...
			?				GERMANY	51.500000	10.5000...
			?				ENGLAND		
			Alameda		Alam...	CALIFORNIA	UNITED STA...	37.765210	-122.24...
			Allegan		Alleg...	MICHIGAN	UNITED STA...	42.529200	-85.855...
			Anaheim		Orange	CALIFORNIA	UNITED STA...	33.835278	-117.913...
			Baker Township		Kings...	SOUTH DAK...	UNITED STA...	44.361109	-97.379...
			Belleville		Essex	NEW JERSEY	USA	40.793710	-74.150...
			Blackpool		Lanca...	NORTH WEST	ENGLAND	53.816670	-3.0500...
			Boston		Suffolk	MASSACHU...	USA	42.358430	-71.059...
			Brisbane			QUEENSLAND	AUSTRALIA	-27.4679...	153.028...
			Camberley		Surrey	SOUTH EAST	ENGLAND	51.337050	-0.7426...
			Canterbury		Kent	SOUTH EAST	ENGLAND	51.279040	1.079920
			Dover		Kent	SOUTH EAST	ENGLAND	51.133330	1.300000
			Dunfermline		Fife		SCOTLAND	56.071560	-3.4588...
			Edinburgh		City o...		SCOTLAND	55.952060	-3.1964...
			ENGLAND	51.550000	0.0500...

Details Map

City: Boston
 Handle Characters Manually
 Postal Code:
 County: Suffolk
 State/Province: MASSACHUSETTS
 Country: USA
 Latitude: 42.358430
 Longitude: -71.059770

Note: Private Note
<http://www.cityofboston.gov/>

Boston
 Variants

Usage Subdivisions Statistics

Boston : 2 Place subdivisions


Subdivision	Latitude	Longitude	Nb. entries
Mass Gen	42.367859	-71.064938	1
Nursing Home	42.344706	-71.137318	1

From maps

Subdivisions are visible thanks to yellow markers on the **Events** maps, **Zoom in on a Place** maps, as well as on **Migrations** maps (under the **History** tab).





You can right-click on any of the Heredis maps and **Copy the coordinates**. You will then be able to click on the **Paste** button in the **Place subdivision** field under **Events**. However, to be able to do so, make sure a name has been entered in the subdivision field – otherwise the button will not be activated.

Zoom in on the World – Zoom in on a Place

Zoom in on the World  provides several tools that will assist you in locating your ancestors.


Heredis will help you get a better understanding of your ancestors' environment by offering an array of miscellaneous information related to places.

To access **Zoom in on a Place**, all you need to do is either click:

- on the  button, from **Data > Personal Data > Events > Details** tab,
- on the  button, from **Family Tree Mapping > Places** tab,
- from the **Tools** menu > **Zoom in on the World > Zoom in on a Place**,
- on the  **Zoom in on a Place** button in the toolbar,
- from the **Places Index** or the **Places** panel, on the  button.

In the upper part of the side panel, under Heredis Data, you will find the information for the location currently displayed in Heredis. You can tick or untick the box entitled Display place subdivisions to show or hide the subdivisions of your genealogy file that are linked to this place on the map.

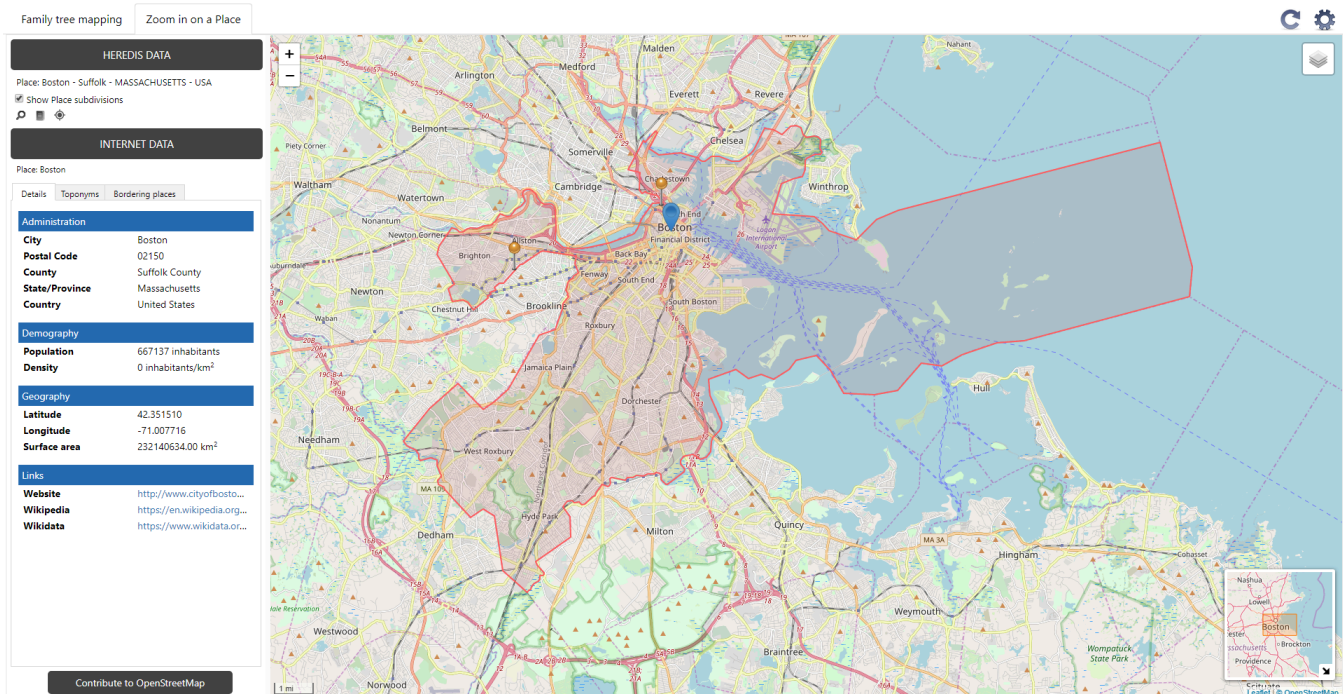
Change places by clicking on the magnifying glass . Open the **Places Index** by clicking on the button .

The button  allows you to zoom back on the place indicated under Heredis Data if you have been navigating on the map of a bordering place.

Please see the paragraph entitled **Bordering Places**.

Details tab

Under this tab, Heredis will display the information on this place found on the internet in OpenStreetMap's and Wikidata's databases, as well as a map zoomed in on this place. Administrative levels such as city, county, state/province, or country are clickable links that will allow you to modify the zoom level on the map.




The screenshot shows the Heredis interface with the 'Details' tab selected. The sidebar on the left contains the following information:

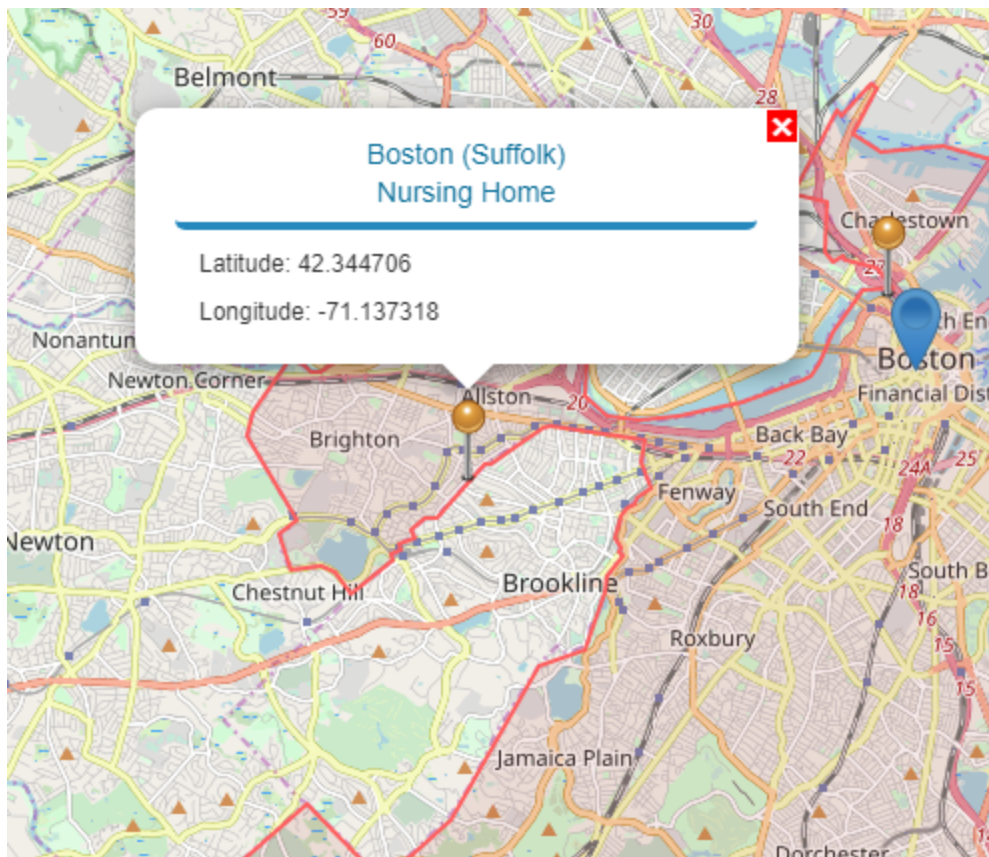
HEREDIS DATA	
Place:	Boston - Suffolk - MASSACHUSETTS - USA
<input checked="" type="checkbox"/>	Show Place subdivisions

INTERNET DATA	
Place: Boston	
Details Toponyms Bordering places	
Administration	
City	Boston
Postal Code	02150
County	Suffolk County
State/Province	Massachusetts
Country	United States
Demography	
Population	667137 inhabitants
Density	0 inhabitants/km ²
Geography	
Latitude	42.351510
Longitude	-71.007716
Surface area	232140634.00 km ²
Links	
Website	http://www.cityofbosto...
Wikipedia	https://en.wikipedia.org...
Wikidata	https://www.wikidata.or...

The main map area shows a detailed view of Boston, Massachusetts, with various administrative boundaries and yellow markers indicating geolocated subdivisions. A sidebar on the right contains navigation controls and a small inset map of the United States.



Heredis is also defaulted to display on this map every subdivision already geolocated in the current


genealogy and linked to this place. Yellow markers  indicate their position on the map. With just one click on a marker, the data related to this subdivision will be displayed.



You can untick the box entitled **Show place subdivisions** to hide the geolocated subdivisions markers.

Toponyms tab

Under this tab, you will find every toponym available in the OpenStreetMap database. The color of the marker, grey  or blue , indicates whether the toponym has been selected in the list of toponyms. Click on a toponym's marker to visualize its data and to copy it, if you wish to, by clicking on the **Copy** button. Such data will allow you, for instance, to precisely locate an event in your genealogy.

Click on a toponym to copy and paste its name and coordinates into **Personal Data > Events > Details**, by clicking on  next to the Place subdivision field (all data or coordinates only).

For more information on geolocating subdivisions, please consult the article entitled Family Tree Mapping subdivisions.

Zoom in on the World – Zoom in on a Place

Family tree mapping Zoom in on a Place

HEREDIS DATA

Place: Boston - Suffolk - MASSACHUSETTS - USA

Show Place subdivisions

INTERNET DATA

Place: Boston

Details Toponyms Bordering places

Name

Name	Type
Aberdeen	Hamlets
Aldridge Ledge	Misc.
Allston	Hamlets
Apple Island	Misc.
Ashmont	Hamlets
Audubon Square	Hamlets
Back Bay	Hamlets
Bald Knob	Orography
Beacon Hill	Hamlets
Beacon Hill	Orography
Bearberry Hill	Orography
Bellevue	Hamlets
Bellevue Hill	Orography
Black Rock	Misc.
Breeds Hill	Orography
Brewster Islands	Misc.
Brighton	Hamlets

137 toponyms

Contribute to OpenStreetMap

Note: yellow markers indicate subdivisions that have already been located in your current genealogy.

Bordering Places tab

Heredis will display the places bordering a city. You might be able to finally locate the impossible-to-find death certificate of your ancestor in one of these bordering places. Indeed, it is quite common to hit a wall when desperately looking for an event in the place where your ancestors' family resided while sometimes all it takes is to search in a neighboring village.

Click on **Bordering Places**. On the map, Heredis will display all registered cities that are on the same administrative level and directly surrounding your ancestors' place.

Family tree mapping Zoom in on a Place

HEREDIS DATA

Place: Boston - Suffolk - MASSACHUSETTS - USA

Show Place subdivisions

INTERNET DATA

Place: Boston

Details Toponyms Bordering places

Name

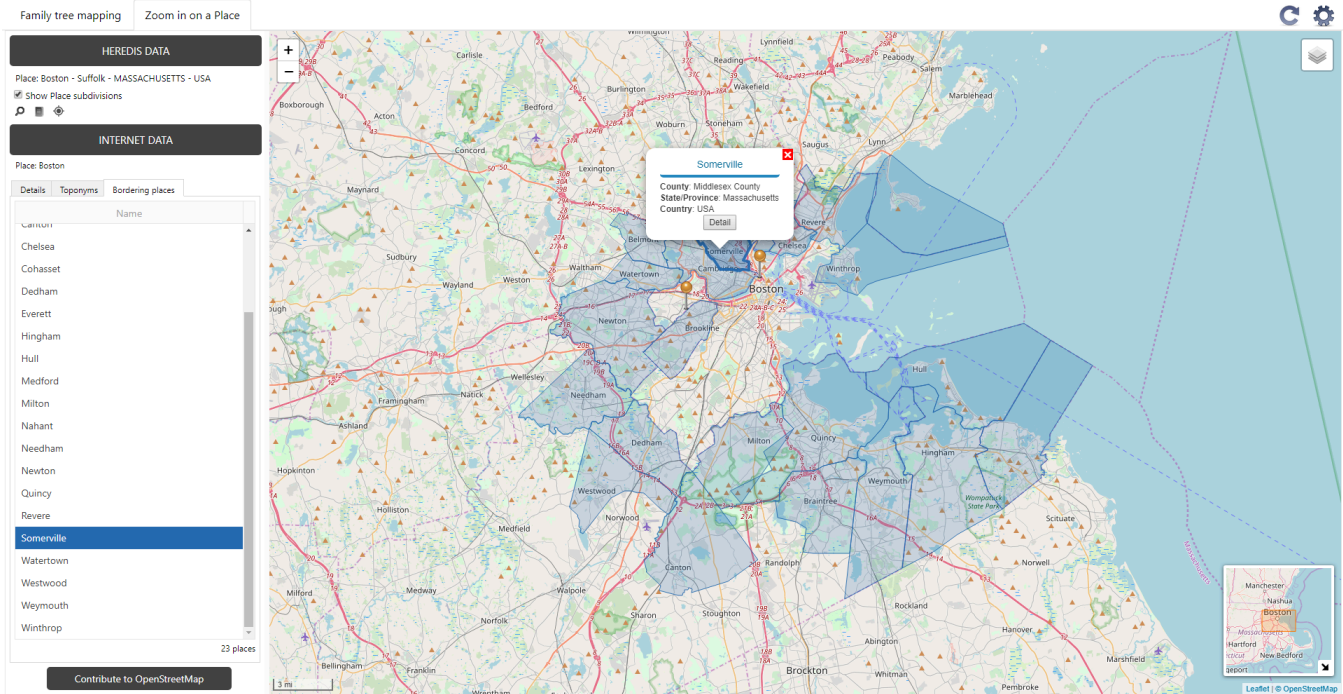
Chelsea
Cohasset
Dedham
Everett
Hingham
Hull
Medford
Milton
Nahant
Needham
Newton
Quincy
Revere
Somerville
Watertown
Westwood
Weymouth
Winthrop

23 places

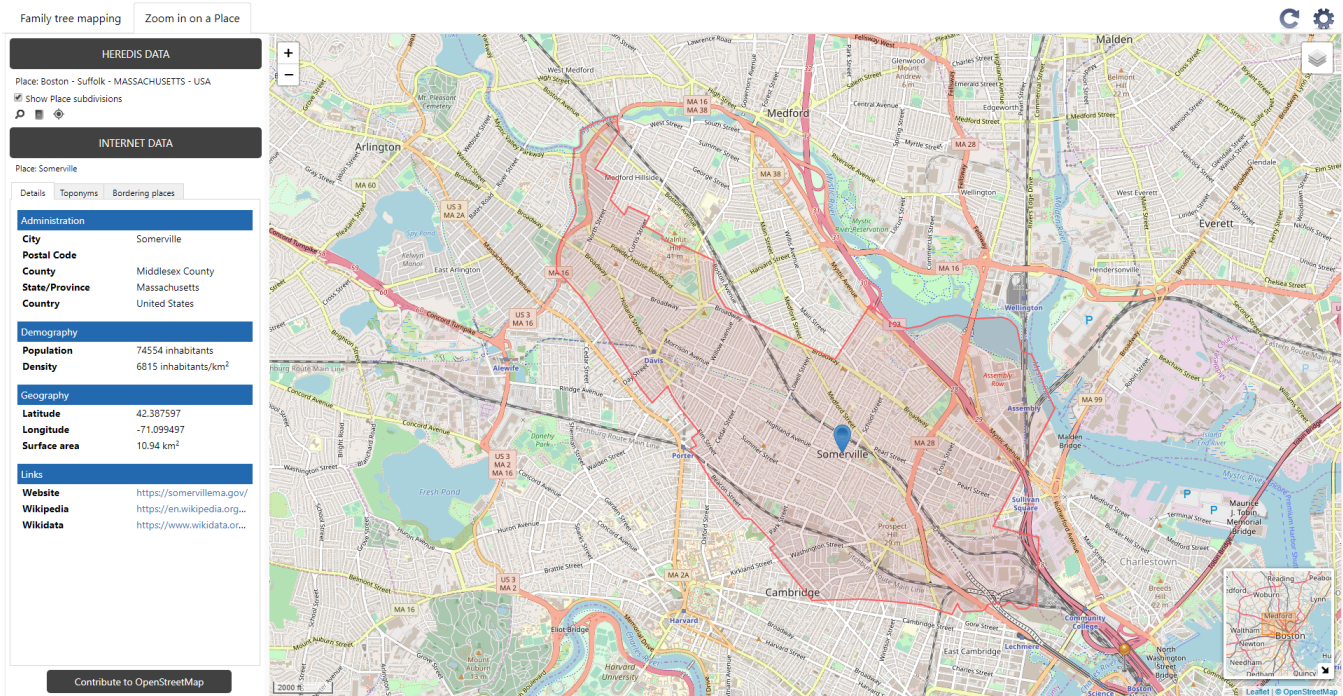
Contribute to OpenStreetMap

Note: Heredis can only display bordering places that are on the same administrative level as the place you have selected. Other bordering places may be on a different administrative level and therefore will not be highlighted.


When you select a city on the list, its city limits will be outlined. Click on the city displayed on the map and some concise data will pop up.



You can click on the **Detail** button to obtain more detailed information on this place. Heredis navigates on the Details tab in Zoom in on a Place and zooms in on this place on the map. You can access the various toponyms for this place under the **Toponyms** tab.




Click on the button  under Heredis Data to zoom back on the place you had selected in your Heredis file.


Right-clicking on the map of bordering places enables you to **Copy coordinates** and paste them in the **Place subdivisions** field of an event by clicking on  (all data or coordinates only).

For more information on geolocating subdivisions, please consult the article entitled Geolocating Place

subdivisions.

Updating your data and options available in Zoom in on the World

You can leave **Zoom in on the World** open and simultaneously work on your genealogy. For your latest data entries to be accounted for, click on the button .

The button  allows you to access various options and create a customized display:


- choose where you want the side bar and its various tabs to be located – you can either display it on the left- or right-hand side.
- decide whether you want to display boundaries at the various administrative levels (Borders), if such data is available in the OpenStreetMap database.


Contribute to OpenStreetMap

OpenStreetMap is a community database. Should you notice any missing data, e.g. some toponyms, feel free to add them yourself.

Click the **Contribute to OpenStreetMap** button and follow the instructions in the article entitled Contribute to OpenStreetMap. Heredis frequently updates its data from OpenStreetMap's. Data reported by worldwide users will then be integrated.

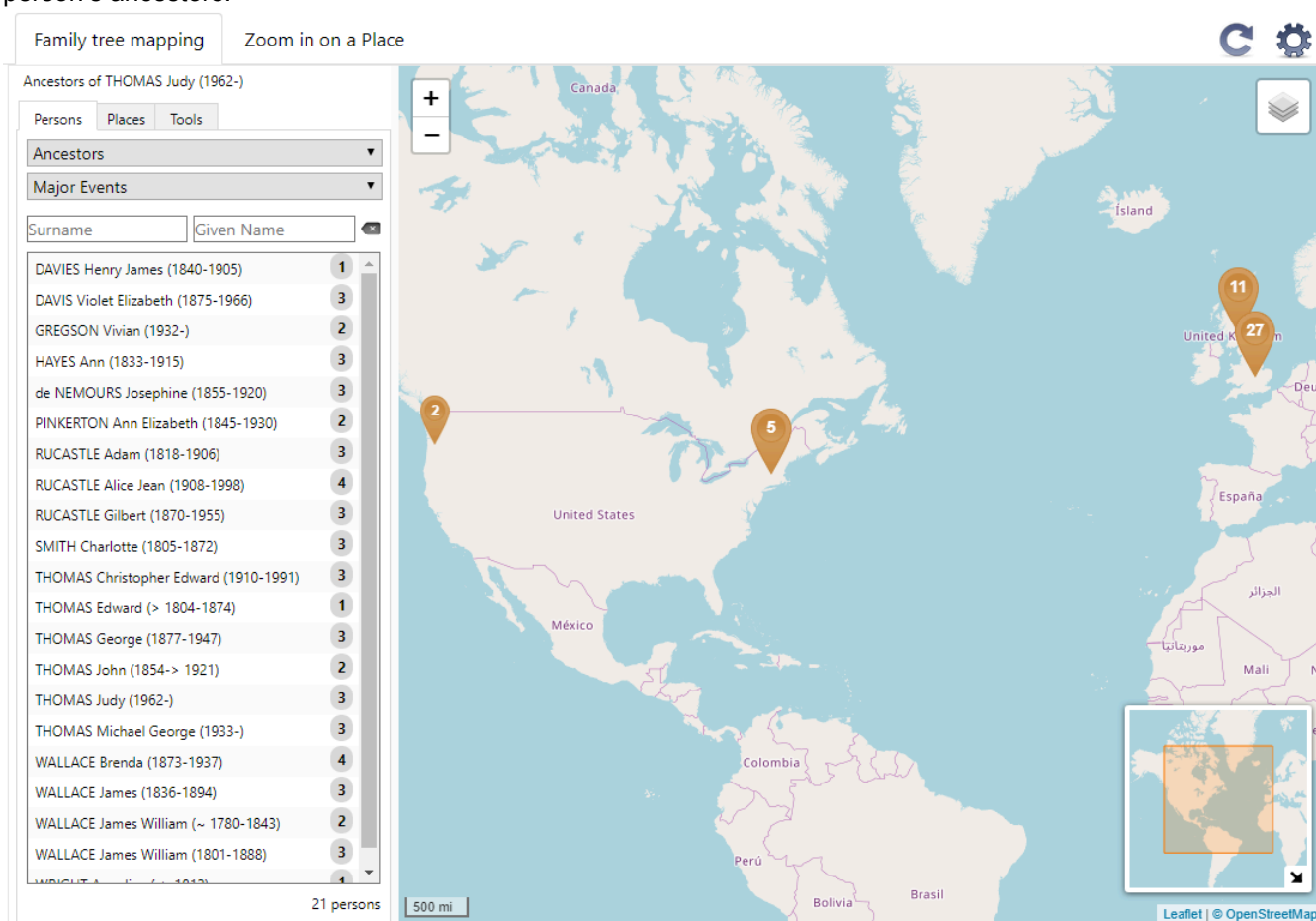
Zoom in on the World – Family Tree Mapping

Zoom in on the World  provides several tools that will assist you in locating your ancestors. Heredis will help you get a better understanding of your ancestors' lives, geographical implantations, and migrations.

Select the **Tools** menu > **Zoom in on the World** > **Family Tree Mapping** or click on the  button in the toolbar for the various events of the persons in your genealogy to be displayed on interactive maps.

You can zoom in and out on the maps and play them in a slideshow to view the geographic mobility of the persons in your genealogy through time and generations.

When you first open **Family Tree Mapping**, Heredis is defaulted to display the main events of the primary person's ancestors.



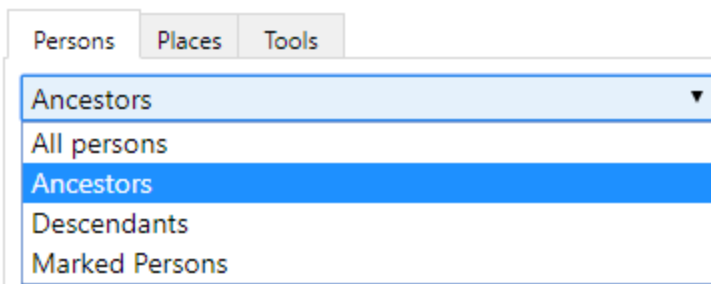
The screenshot displays the 'Family tree mapping' interface. On the left, there is a sidebar with tabs for 'Persons', 'Places', and 'Tools'. Under 'Persons', there are dropdown menus for 'Ancestors' and 'Major Events', and input fields for 'Surname' and 'Given Name'. A list of 21 persons is shown, each with a number in a circle to its right. The map on the right shows the United States and surrounding regions, with several orange location pins and a scale bar indicating 500 miles. The map is powered by Leaflet and OpenStreetMap.


You can simultaneously work on your file and leave this tool open.


Filters and display options

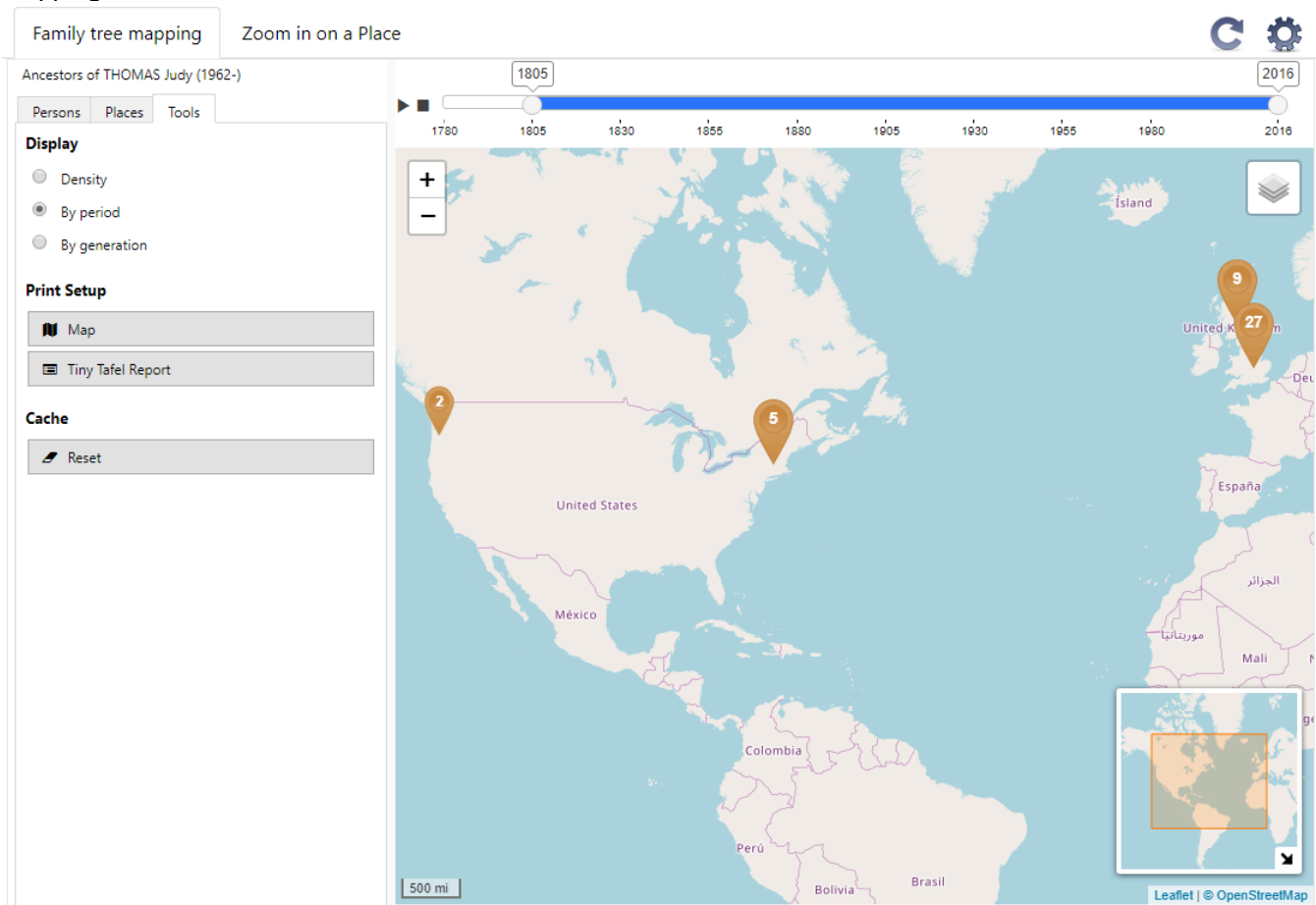
At any time, you are free to modify the filters in the window's side bar and choose to display every person in your file, or the primary person's ancestors or descendants only, or the persons you have marked beforehand in your genealogy.

Zoom in on the World – Family Tree Mapping



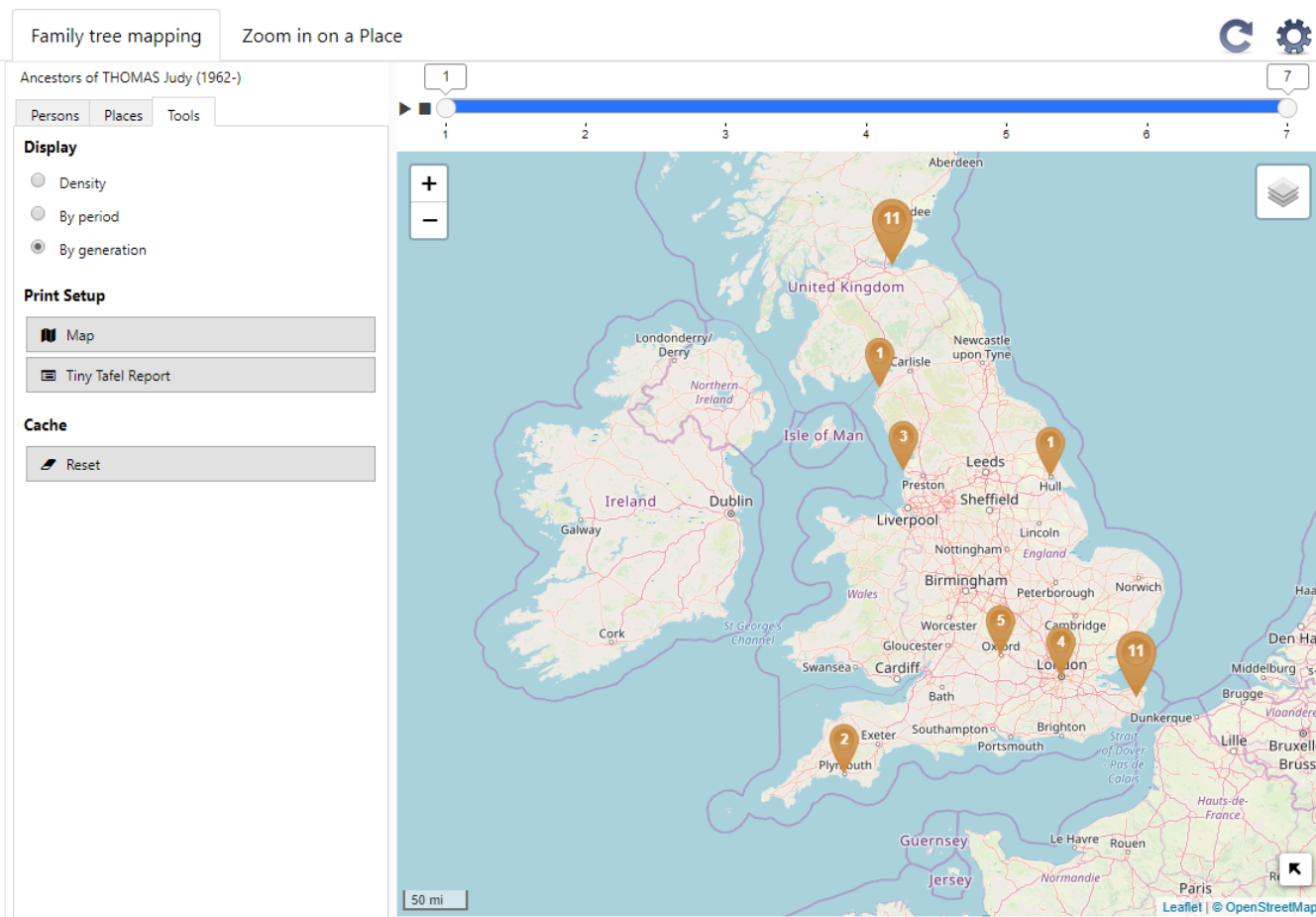
If you have just entered new events or new persons in your genealogy, click on the button  to retrieve this data in **Family Tree Mapping**.

Heredis is defaulted to preselect the **Density** representation mode when displaying your data. If you wish to get a preview of the mobility of the persons in your genealogy, select the **By period** representation mode under the **Tools** tab in **Family Tree Mapping**. A timeline will be displayed above the map, with intervals starting and ending at the most extreme dates in your file. Click on the **Play**  button and watch the events appear on the map through each time period. Before to press play, make sure to zoom out so you can see all the markers displayed on the map. Press the **Pause** button to be able to zoom in and zoom out as you please and study the mapping.




Note: the display and reading pace of the timeline are automatically calculated based on the most extreme dates in your file. If you prefer to study a specific time period, move the sliders at each end of the timeline to select the desired intervals. The map will then only display the events on the time period you have selected.

Heredis also offers a representation mode **By generation** which is operated the same way as the **By period** mode. You only need to select ancestors or descendants of the primary person in the **Persons** tab to use it. The dates intervals above the map are simply replaced by the number of generations.



Map display

Several types of maps are available for you to display your data. Select the theme that will best highlight your data on a map by clicking on .

To easily zoom in and out on the map, simply click on the + and – buttons or use the scroll wheel on your computer mouse. It will allow you to get a closeup on a specific geographical area or, on the contrary, to go back to a wider view of the map by zooming out.

To move around on the map, hold down the left mouse button (or the mouse wheel) and drag the mouse in the desired direction in order to center the map on another area.

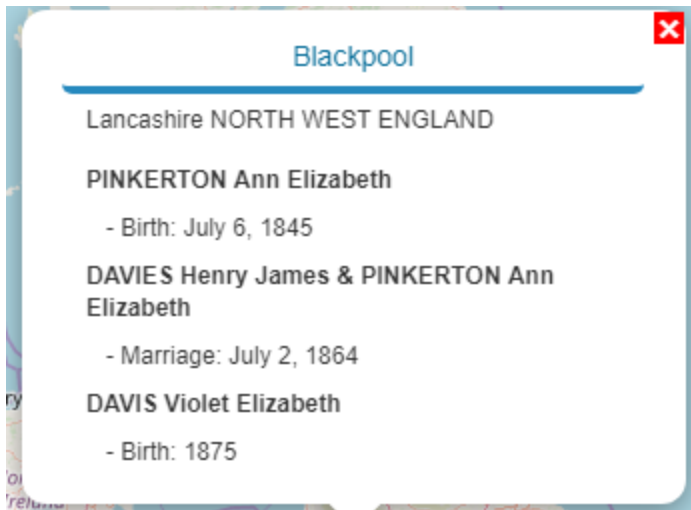
Right-clicking on the map will let you **Copy coordinates** so you can paste them into the **Place subdivision** of an event. Please refer to the article entitled Geolocating Place subdivisions for more information.

You may notice markers of various colors and sizes displayed on the map. The size of the marker is directly linked to the number of places it is indicating.



Smaller size markers or indicate events located in one single place. If you click on this type of markers, a popup window will open to show the exact place and the list of persons with events in this one place.

Zoom in on the World – Family Tree Mapping



Larger size markers or indicate events located in a grouping of places. If you click on this type of markers, Heredis will automatically zoom in to show you a more detailed map.

The number of events held in a place or in a grouping of places is indicated on each marker.

Search lists

Search lists displayed in the vertical side panel allow you to do searches on places or persons.

In these lists, to the right of the place's or person's name, Heredis specifies the number of events that were found.

The screenshot shows the Heredis interface with a search list on the left and a map of Edinburgh on the right. The search list is titled 'Ancestors of THOMAS Judy (1962-)' and includes the following entries:

Place	Number of Events
? (ENGLAND)	1
Blackpool (Lancashire)	3
Boston (Suffolk)	1
Canterbury (Kent)	1
Dover (Kent)	2
Dunfermline (Fife)	2
Edinburgh (City Of Edinburgh)	7
Hudson (Columbia)	3
Hull (East Riding Of Yorkshire)	1
Leith (City Of Edinburgh)	2
London (Greater London)	4
Margate (Kent)	8
Maryport (Cumbria)	1
Montgomery	1
Oxford (Oxfordshire)	5
Plymouth (Devon)	2
Portland (OREGON)	2
Troy (Rensselaer)	1

The map on the right shows Edinburgh, Scotland, with a detailed view of the city. A search list for 'Edinburgh' is displayed on the right side of the map, listing the following events:

- WALLACE James William**
 - Birth: about 1780
 - Christening: February 18, 1801 - St Stephen St.
- WALLACE James**
 - Christening: September 18, 1836
- WALLACE Brenda**
 - Birth: October 14, 1873
- WALLACE James**
 - Death: May 20, 1894
- RUCASTLE Gilbert & WALLACE Brenda**
 - Marriage: September 11, 1900
- de NEMOURS Josephine**
 - Death: August 31, 1920

Select the **Places** or **Persons** tab and enter a name in the search field to obtain a selective list of the matching places or persons. The list displayed below is automatically updated as you enter the name.

Navigating from the Persons or Places tabs

Places and persons displayed in the floating panel or in the popup windows are clickable links that will allow you to access directly, with just one click, the Places Index or a person's family tree, without closing **Family Tree Mapping**.

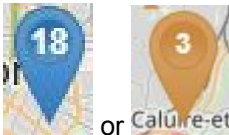
It will, for instance, enable you to correct or complete a person's data, modify or geolocate a place (for more details on how to geolocate a place, please consult the article entitled Geolocating Places and Geolocating Place subdivisions) and then to display this updated data in the **Family Tree Mapping** window by clicking on the

button .


Legend




Geolocated place





Grouping of geolocated places

Note: the color blue indicates that at least one place has been selected under the **Places** tab in **Family Tree Mapping** or in the floating panel of a person (by clicking on the button ). The number displayed on the marker indicates the number of events linked to a place or to a grouping of places.

Persons tab

Under this tab, if you click on one of the names on the list, Heredis will display a floating panel listing every event that has been geolocated for this person. Click on the button  in this floating panel to zoom in on the

location of the selected event on the map. The marker will turn from yellow  to blue .

Feel free to use the proposed filters to display every person in your file, or the primary person's ancestors or descendants only, or the persons you have marked beforehand in your genealogy.

Click on any person on the list to display markers for related places. A list of all places and events linked to this person will pop up.

Zoom in on the World – Family Tree Mapping

The screenshot shows the Heredis Family Tree Mapping interface. On the left, a sidebar titled "Ancestors of THOMAS Judy (1962-)" lists 21 persons with event counts. The "Places" tab is active, showing a map of the United States with orange markers indicating event locations. A popup window for "THOMAS Judy" is open, listing events such as birth, census, marriage, and other types of marriage.

Person	Event Count
DAVIES Henry James (1840-1905)	1
DAVIS Violet Elizabeth (1875-1966)	3
GREGSON Vivian (1932-)	3
HAYES Ann (1833-1915)	3
de NEMOURS Josephine (1855-1920)	3
PINKERTON Ann Elizabeth (1845-1930)	2
RUCASTLE Adam (1818-1906)	4
RUCASTLE Alice Jean (1908-1998)	7
RUCASTLE Gilbert (1870-1955)	4
SMITH Charlotte (1805-1872)	3
THOMAS Christopher Edward (1910-1991)	3
THOMAS Edward (> 1804-1874)	1
THOMAS George (1877-1947)	5
THOMAS John (1854-> 1921)	3
THOMAS Judy (1962-)	4
THOMAS Michael George (1933-)	5
WALLACE Brenda (1873-1937)	5
WALLACE James (1836-1894)	3
WALLACE James William (~ 1780-1843)	2
WALLACE James William (1801-1888)	3

The numbers displayed on the markers indicate the number of events from the persons' list that are located in this place.

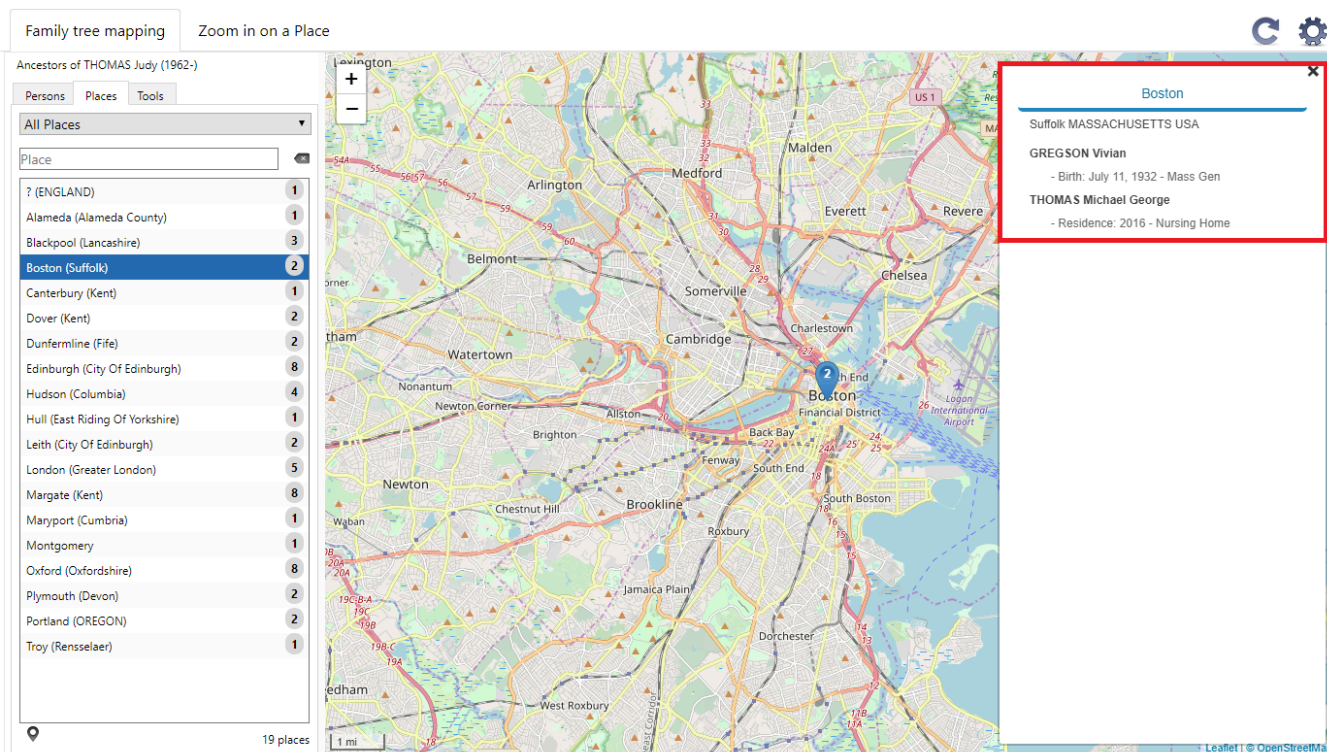
Clicking on the marker will open a popup window listing every event that took place in this location. Click on the name of a person or on one of the events listed in this popup window in order to navigate onto this person or event in Heredis.

The popup window for "Blackpool" lists the following events:

- PINKERTON Ann Elizabeth**
- Birth: July 6, 1845
- DAVIES Henry James & PINKERTON Ann Elizabeth**
- Marriage: July 2, 1864
- DAVIS Violet Elizabeth**
- Birth: 1875


Places tab

Under this tab, if you click on one of the names on the list, Heredis will zoom in on this place on the map; every event linked to this place will be listed in the floating panel anchored on the map.





Search filters are available. Heredis is defaulted to preselect the **All places** filter. You can switch to another filter by using the dropdown list at your disposal and choosing from:

- **Most represented places:** places are listed from the highest to the lowest number of events found for each place
- **Geolocated places**
- **Non-geolocated places:** places displayed on this list have no geolocation coordinates and therefore cannot be mapped. To complete the data for these places, click on the place name in the floating panel
- **Visible places:** this list only shows places that can be seen on the map currently displayed on the screen.

Note: If you double-click on a place under the **Places** tab or if you select it and click on the button at the bottom of the panel , the place will be displayed under the **Zoom in on a Place** (for more details on this feature, please consult the article entitled [Zoom in on a Place](#)).

Updating your data and options available in Zoom in on the World

You can leave **Zoom in on the World** open and simultaneously work on your genealogy. For your latest data entries to be accounted for, click on the button .

The button  allows you to access various options and create a customized display:

- choose where you want the side panel and its various tabs to be located – you can either display it on the left- or right-hand side.
- decide whether you want to display boundaries at the various administrative levels (**Borders**), if such data is available in the OpenStreetMap database.

Printing Map and create Tiny Tafel Report

You can edit and print the map you are seeing on your screen by clicking on the **Map** button in the **Tools** tabs.

Zoom in on the World – Family Tree Mapping

Family tree mapping Zoom in on a Place

Ancestors of THOMAS Judy (1962-)

Persons Places Tools

Display

- Density
- By period
- By generation

Print Setup

-
-

Cache

-

(Mac) Click on **PDF** button at the bottom of the printing windows or click on **Print** to launch your printer.

(Windows) Setup the parameters of the PDF export (size of the page, orientation) then click on **OK** button.

A PDF will open so you can print it.

Create a Tiny Tafel Report by clicking the button **Tiny Tafel Report**. Setup the Tiny Tafel parameters.

See (Windows) Create and Edit a Report (voir page 390) or (Mac) Create and Edit a Report for further details.

What to do in case of a slowdown or malfunction issue?

If your data is not displaying correctly, click on the **Tools** tab then on the **Reset** button.



Ancestors of THOMAS Judy (1962-)

Persons Places Tools

Display

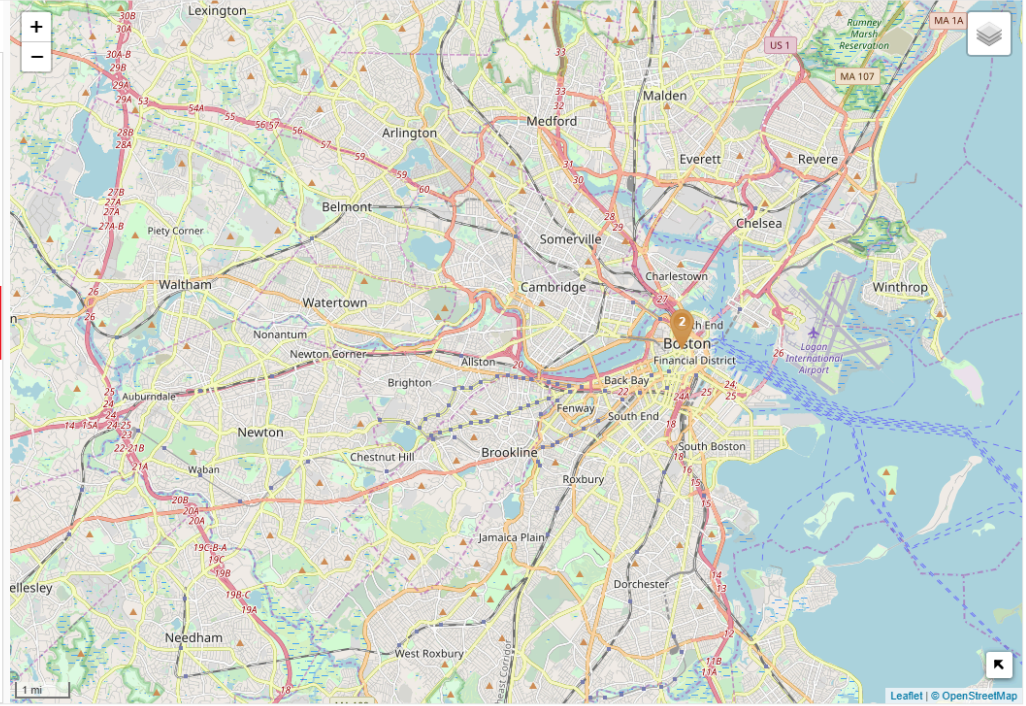
- Density
- By period
- By generation

Print Setup

- Map
- Tiny Tafel Report

Cache

- Reset




Migrations

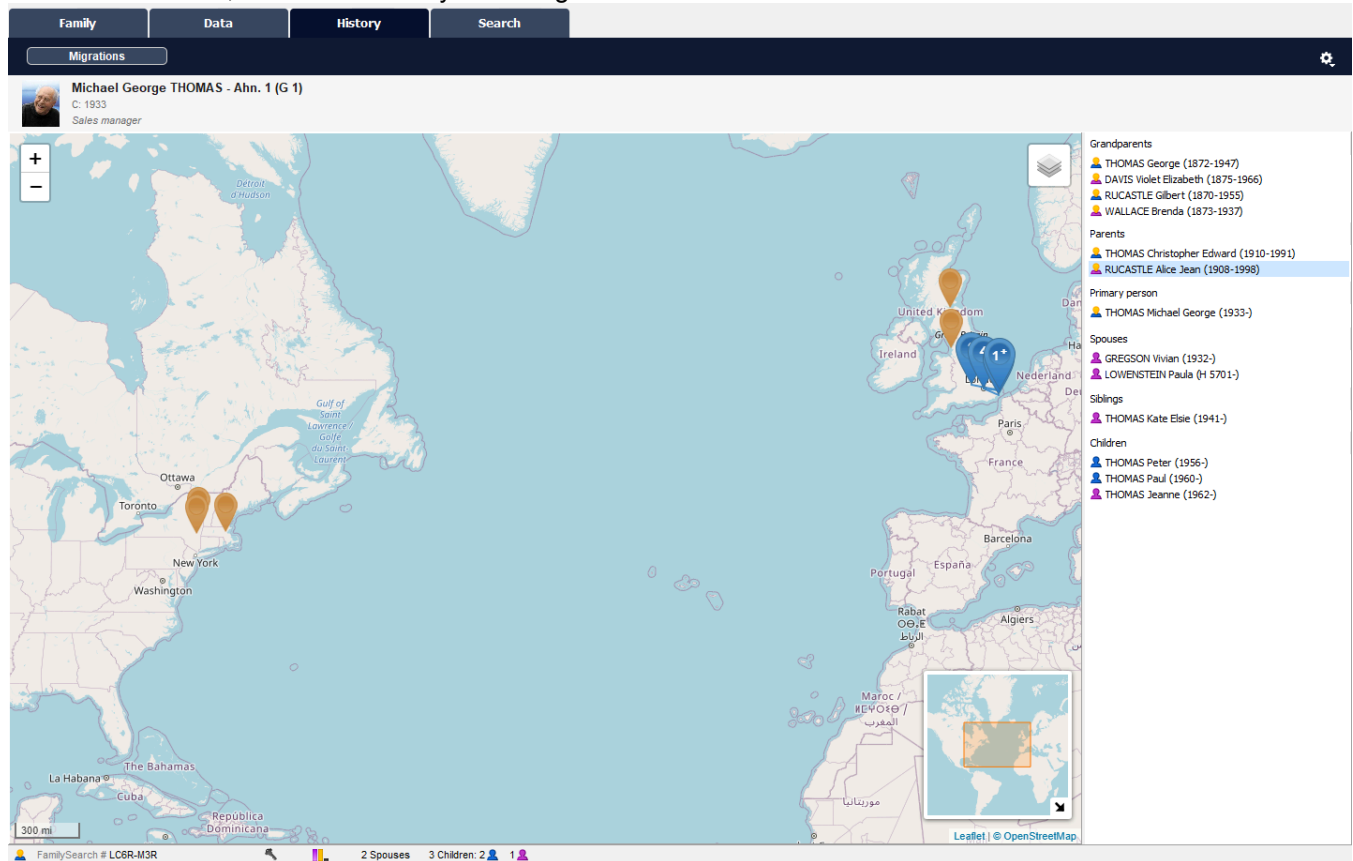
Migrations place the living places of the primary character or another family member on a map. The markers are numbered to know the chronology of movements. Each location marker shows the list of events listed in that location. You can see the movements of all members of the immediate family at the same time.

The number of events displayed is now dynamically managed.

The navigation thumbnail, displayed at the bottom right in the **Migrations** tab map and in the **Search Wizard** of the **Search** tab, allows you to easily move around.

Select the frame with the left click of the mouse, by moving it, you navigate through the viewed map.

Use the indented wheel  to choose whether or not to display the events of immediate family and/or, from Heredis 2020, the subdivisions you have geolocated.



The screenshot shows the 'Migrations' tab in a software interface. At the top, there are tabs for 'Family', 'Data', 'History', and 'Search'. Below these is a 'Migrations' sub-tab. The main area displays a map of Europe and North America. On the right side, there is a legend with the following categories and entries:

- Grandparents**
 - THOMAS George (1872-1947)
 - DAVIS Violet Elizabeth (1875-1966)
 - RUCASTLE Gilbert (1870-1955)
 - WALLACE Brenda (1873-1937)
- Parents**
 - THOMAS Christopher Edward (1910-1991)
 - RUCASTLE Alice Jean (1908-1998)
- Primary person**
 - THOMAS Michael George (1933-)
- Spouses**
 - GREGSON Vivian (1932-)
 - LOWENSTEIN Paula († 1971-)
- Siblings**
 - THOMAS Kate Elsie (1941-)
- Children**
 - THOMAS Peter (1956-)
 - THOMAS Paul (1960-)
 - THOMAS Jeanne (1962-)


The map shows several location markers. A blue marker with a star is located in the United Kingdom, corresponding to the primary person. Orange markers are located in Toronto and New York. A navigation thumbnail is visible in the bottom right corner of the map area.

Note:

Blue markers are those associated with the person selected from the list displayed to the right of the map
orange markers correspond to the events of other persons on this list
the star displayed next to a blue marker indicates that several events have been recorded at a location that concern the selected person.

My dashboard

The Heredis dashboard is a tool that allows you to control your family tree on a daily basis. The different available indicators, whether quantitative or qualitative, give you a global vision of your genealogical data and also inform you about the progress of your work.

The dashboard can be accessed from the **Tools > My Dashboard** menu. You can also add the  button to your toolbar if customized. (See Customize Heredis\Select the toolbar)
It consists of four tabs: **My Dashboard**, **File Info**, **Statistics** and **Search Tracking** in which Heredis displays indicators, also called widgets, presenting the current state of your family tree.

My Dashboard Tab

When you access the dashboard, it opens directly on the **My Dashboard** tab.

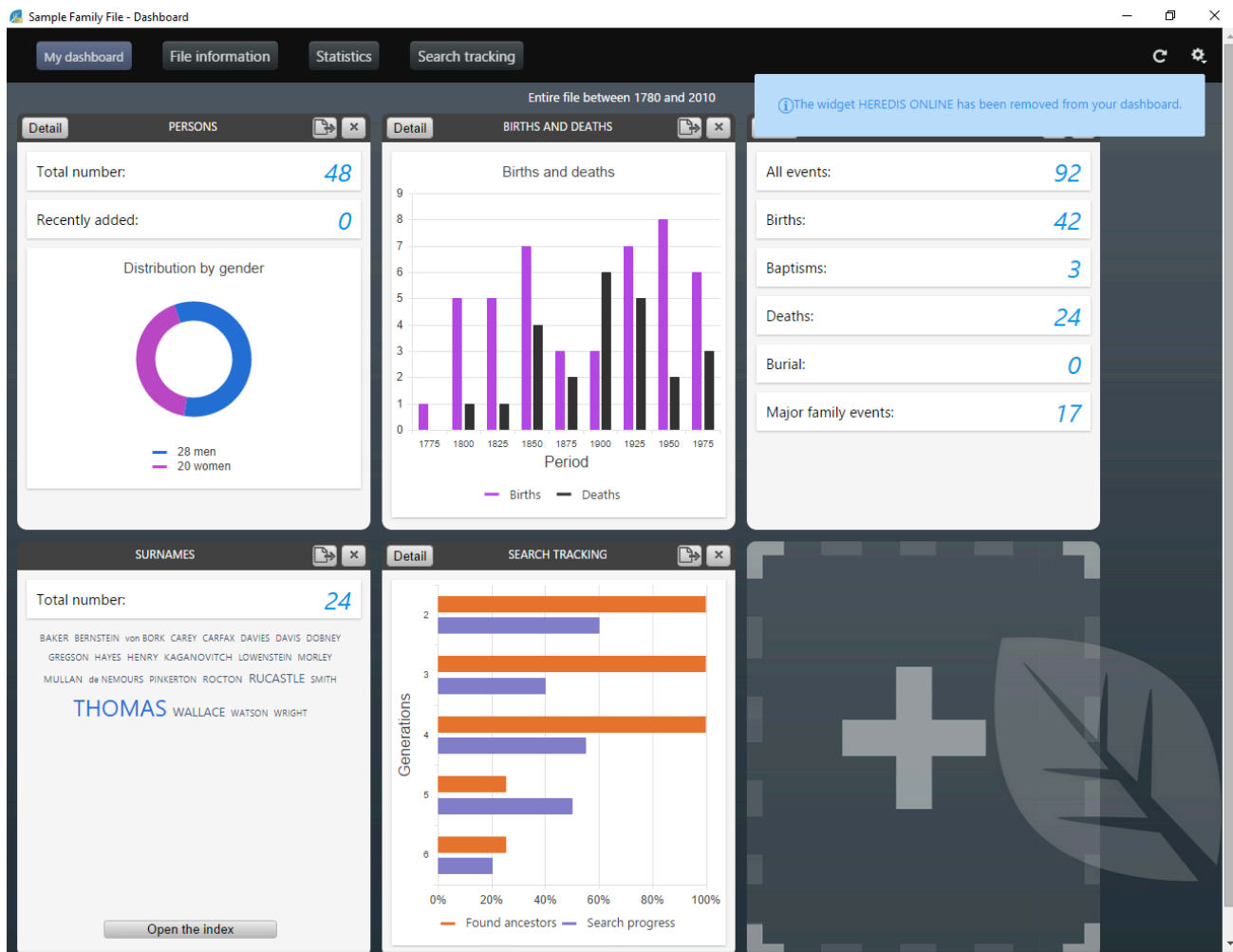
This tab is customizable, you can add widgets of your choice, delete those that do not interest you or reorganize them.

To add one or more widgets:



- Click the **+** button.
- Click on the widget you're interested in
- Click **add**



My dashboard

My dashboard



The widgets are added after those already on your **dashboard**.

To remove a widget, click the  button in the title of the widget. A notification informs you instantly that you have removed the widget from the tab. To see it again, just click the  button to display the widget.

Note: You can also add or remove a widget from the other tabs of the dashboard. You can choose your favorite widget. Click on the grey star  to add the widget. The star is now yellow , if you click again, it will be removed.

To rearrange the widgets to suit you, click on the widget banner and without releasing the mouse, drag it to the desired location and then release the mouse.

Heredis automatically reorganize your dashboard space even if you resize the window.

If you wish to, you can display all widgets in the **Dashboard** tab.

The information displayed in the dashboard is by default your entire file, such as the title at the top of the page, as well as the data added today (see example, in the PERSONS widget, the indication «Recently Added»).

To change these options, click the indented wheel button  at the top right of the page and select the filters that best fit your way of working:

- Filters showing recent additions: Today / Less than a week ago / There is less than one Month / Less than a year ago.
- Filters on persons: Entire file / Direct line ancestors/ Ancestry.

Then click on the **Validate** button, all widgets in the dashboard are updated based on the options you have chosen.

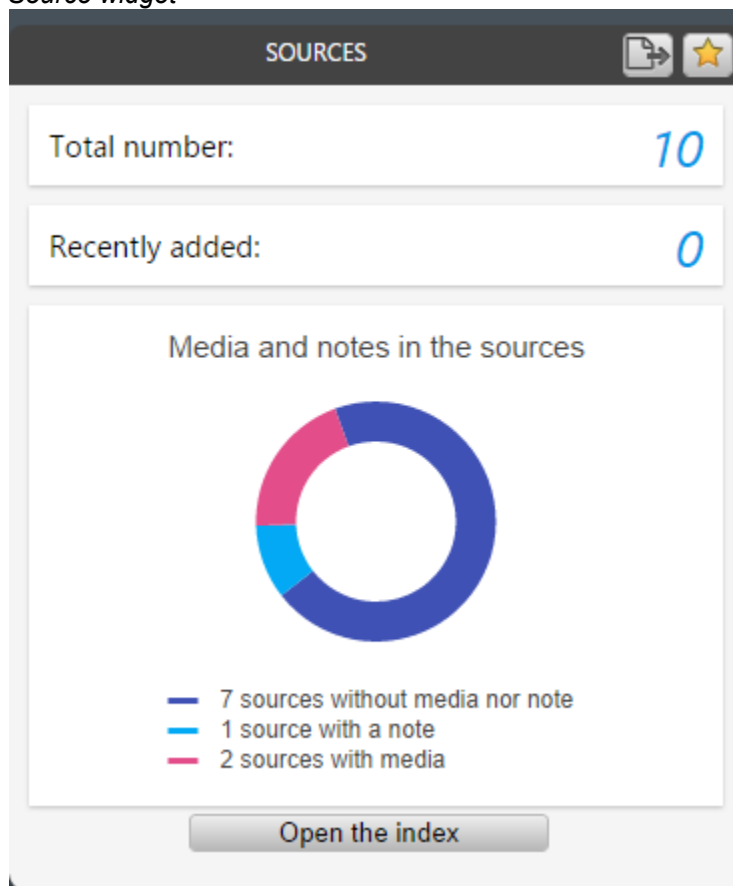
The widgets have a simple view and a detailed view. From the simple view, click the **Detail** button at the top left to display the detail view. From the detail view, to return to the simple mode, click the **Back** button on the top left.


Some widgets like NAMES or SOURCES do not have a detailed view. However, you can directly access their respective indexes by clicking the **Open the index** button. This allows you to easily find additional

information.

Simple widgets

Simple view of the Source widget

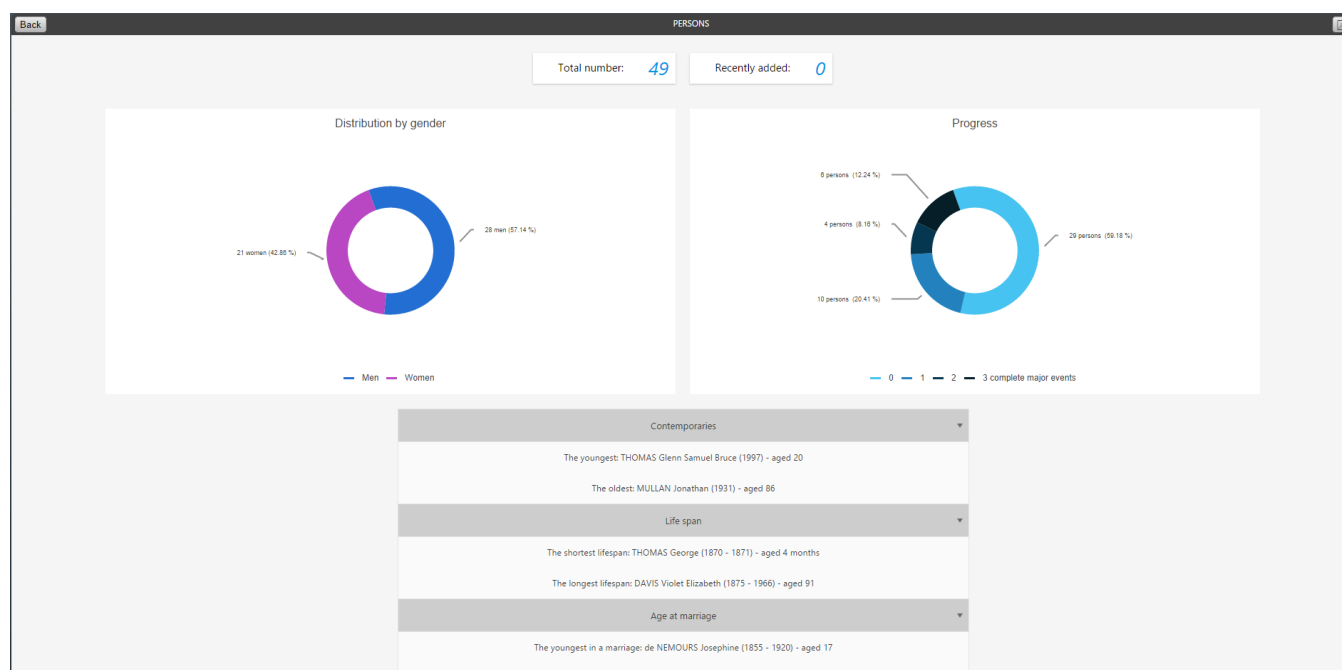


Widgets in simple view display a limited amount of information. Their size is variable based on what you display. They feature a button  to export the contents of the widget displayed in PDF or PNG format. **Info** • Note that as you hover over certain widgets, you have more accurate information. For the widget NAMES for example, when you pass the mouse over a surname, it immediately displays the number of times it has been used in your family tree.


Detailed widgets

Detailed view of the Person's widget


My dashboard



The detailed version of a widget displays additional information about the current status of your family tree.


Each detailed version widget can be exported to PDF through the PDF button . You can then print or transmit it very easily.

If you are working with a large screen or with two screens, you can keep the dashboard open constantly in order to control the progress of your family tree in real time.


When you add a data, click the refresh button  to update your dashboard and have the latest information entered in your file.

File Information Tab

From this tab, you have an overview of persons, events, sources, places, surnames, given names, occupations, media of your file as well as your Heredis Online data. This general view allows you to know how far you are in your work.

To access this page from the dashboard, click the **File Information** button or select the menu **Documents** > **File Information** or, if you personalized your toolbar, click directly on the **File Info** button .

HEREDIS ONLINE Widget

To view the content of this widget, you must be logged in to your account. If you already have an account, click on **Sign in**  button and enter your username and password otherwise, create one. (see the article « Heredis Online »)

Once connected to your account, this widget displays the date of the last publication of your file. You can access it directly by clicking the link "**Visit Website**".

You can see it has been a while since the last publication? You can publish at any time from the dashboard by clicking the **Publish** button.

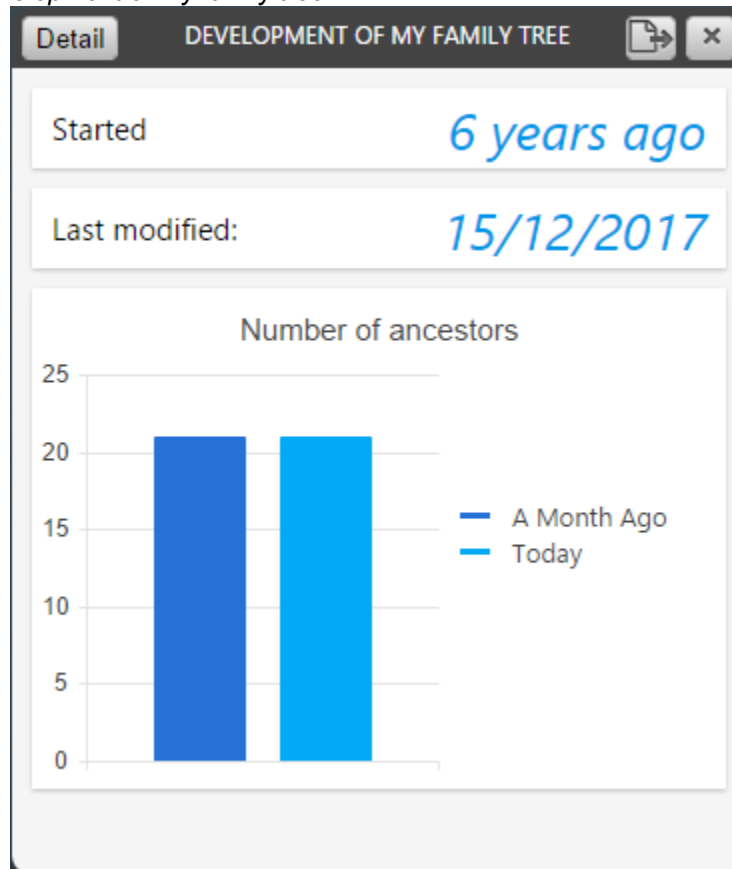
The detailed view shows you some new information. The first section shows you what you have recently be done on the open file: the last time you published it, the number of persons, of unions, of sources it contains.

All sections are foldable, just click on the title banner of the section to hide or display it.

For more details on Heredis Online, see Heredis Online (voir page 507) and Publish with Heredis Online (voir page 517).

DEVELOPMENT OF MY FAMILY TREE widget

Simple view of Development of my family tree



This widget shows you the evolution of your file in time:

- The date when you started your work, referring to the first person you created or imported in Heredis.
- The date of the last modification
- The number of ancestors (direct line) and persons found.

In the detailed view, a first chart shows the evolution of the number of ancestors and persons on a fixed time scale. The second chart shows the same data but on a variable time scale based on the date of the establishment of the persons in your file.

You can also check in this view 2 lists of persons, the list of the 10 last persons you added, and the one of the 10 last persons modified.

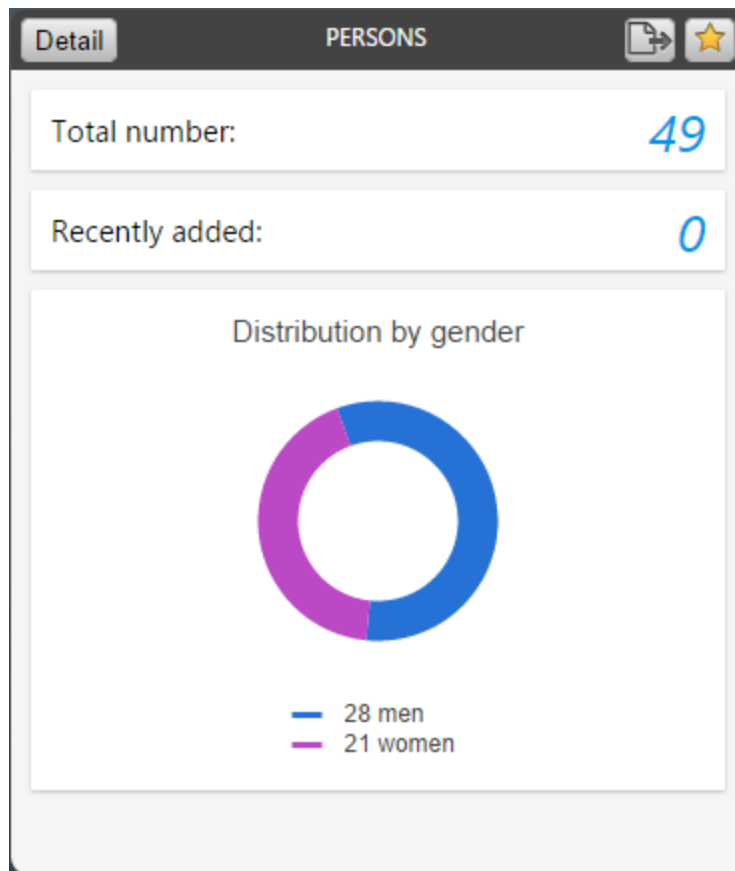
By clicking on these persons, you navigate on them in the Immediate Family.

PERSONS widget

This widget shows the total number of persons in your file and those added recently.

In the simple display, a graph shows the distribution of persons by gender.

Simple view of the Persons' widget



By entering the detailed mode, you can access:

- The «**Progress**» chart, which informs you about the quality of your family tree and in particular on the percentage of complete persons.
“3” is for the persons with the 3 main events completed, meaning you found the birth, marriage and death dates.
“2” is for persons with only 2 main events completed
“1” is for the persons for whom you completed 1 main event
“0” is for the person for whom you have not found any event

The notion of complete is directly related to Heredis’ preferences. From the menu **Heredis>Preferences>Appearance**, define what a complete event is for you. Heredis will then take these parameters into the «**Progress**» chart to determine if an event is complete or not.

- To the general information that will allow you to easily answer questions on your family history: who is the oldest person or the youngest among your contemporaries? Who had the longest or shortest life? Who was the youngest or the oldest when they got married? Which couple had the largest family...

Every section is foldable, just click on the title banner of the section to hide or display it.

EVENTS widget

Simple view of Event's



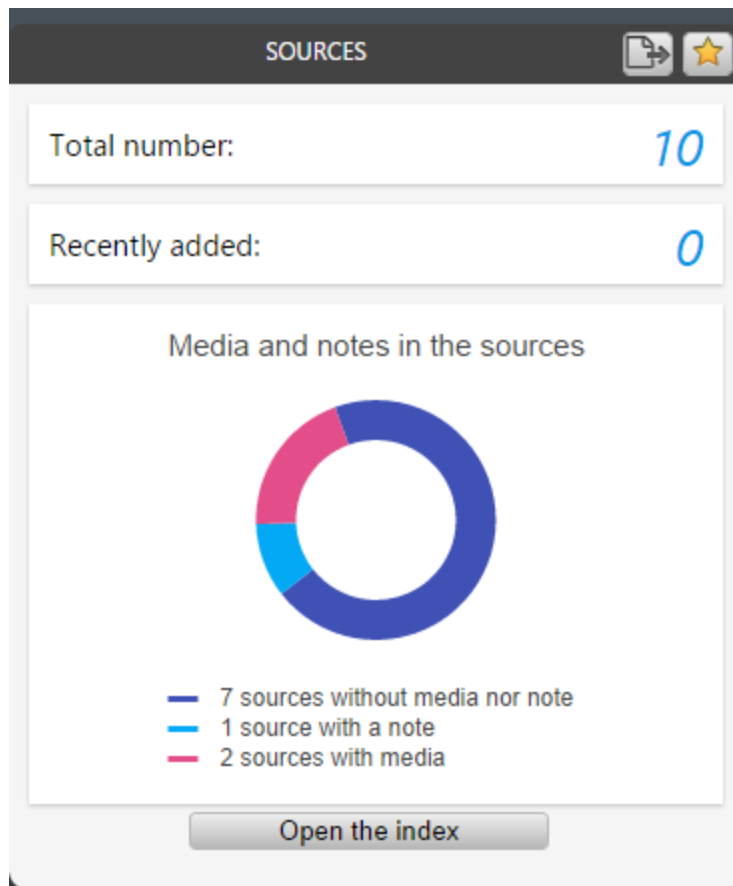
The simple version displays the total number of events, the total number of major events and the total number of family events.

The detailed version offers a zoom on the major events and displays in addition to the total number, the oldest event and the most recent event. For each event you can browse the person concerned with a single click.

SOURCES widget

The Simple Source Widget presents, in addition to the total number of sources and those recently added, a ring graph that allows you to analyze the quality of your sources.

Simple view of Sources' widget



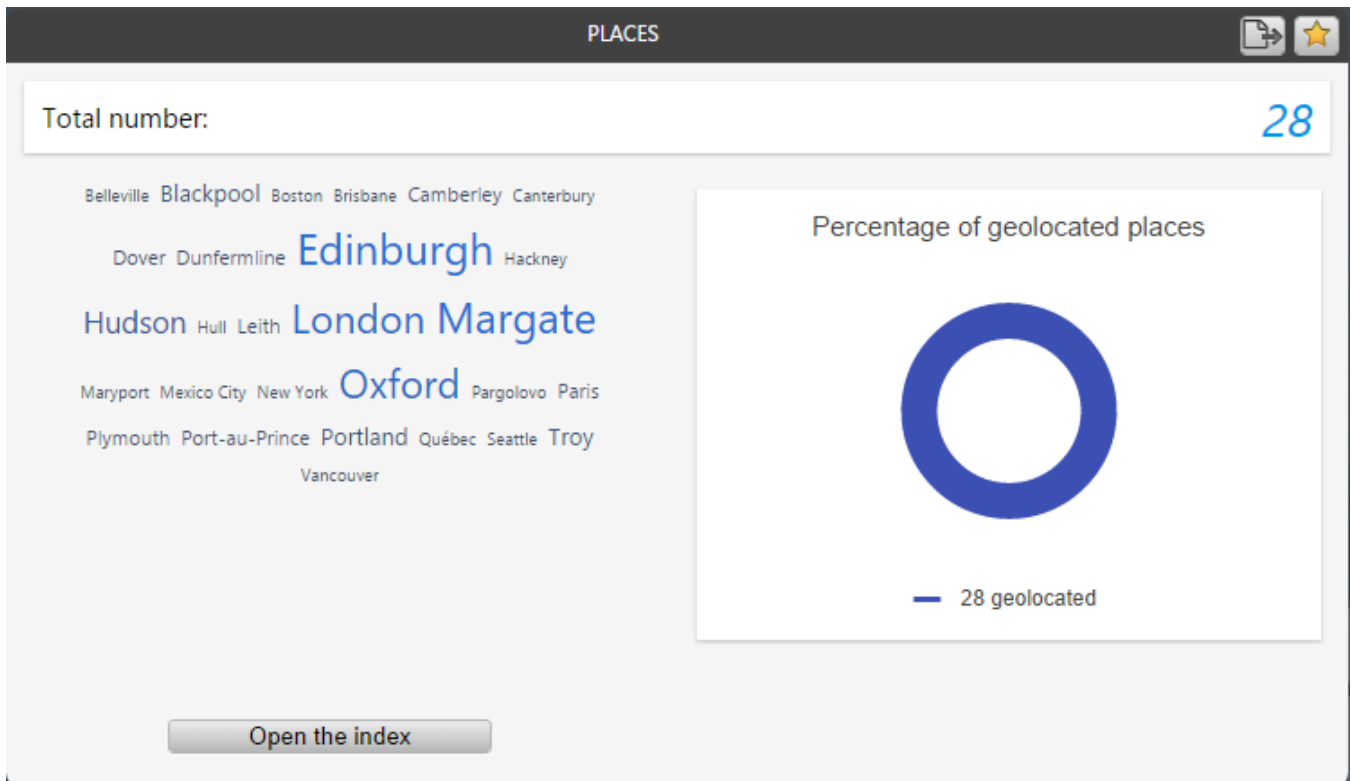
In this graph, we distinguish sources without media nor note, sources having only a note, sources with only media, and sources with a note and media.

To access the list of all your sources, click the button **Open the index**.

PLACES Widget

In this widgets, the frequency is shown by a word cloud. In this type of representation, the most commonly used places, for example, are displayed with a font size which varies according to the number of uses. When hovering with the mouse, an info bubble indicates the number of uses.

Places widget

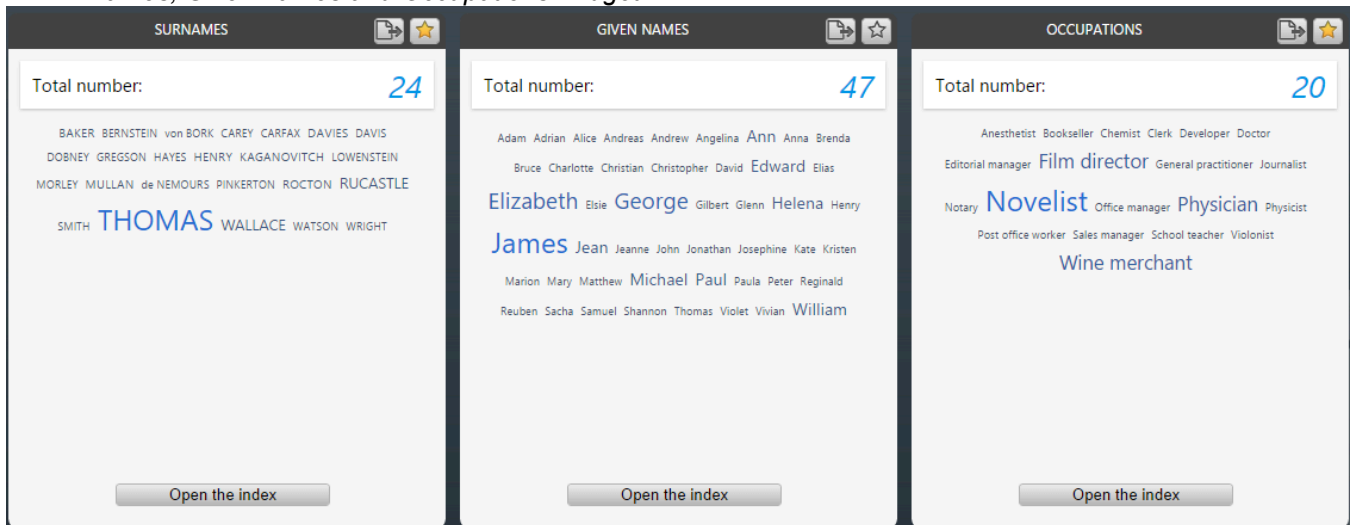


If you click on a place, Heredis opens the Index with this selected place and displays all information on it. The Place widget also indicates the total number of places in your file and the places that were not geolocated (places without latitude and longitude information). You can directly access the dictionaries by clicking on the button **Open the index**.

NAMES, GIVEN NAMES, OCCUPATIONS and MEDIA widgets

These widgets indicate the frequency of given names and occupations, as well as the number of uses in the genealogy file.

Names, Given names and Occupations' widget



For the Names, Given Names, and Occupations widget, the frequency is represented by a word cloud, just like for Places.

The Media widget is a ring-shaped chart indicating used and unused media. For all of these widgets, you can directly access the indexes by clicking on the **Open the index** button.

Statistics tab

In this tab, Heredis offers various genealogical and demographic analysis.
Statistics' tab




To access this function, from the dashboard, click the **Statistics** button or select the **Documents >**

Statistics menu or click on the statistics button  directly from the toolbar, if you personalized it.



The different analysis available are grouped into several widgets, **Births and Deaths, Surnames and Given names, Families and Generation count...**

In the simple version, these widgets present a simplified graph on births / deaths, the most common surnames, the average age at the first union and the ancestors count of the root person or the central person of your file.

You can easily export each chart displayed in PDF or PNG format by clicking on button  located in the title bar, to share it or document your genealogical work.

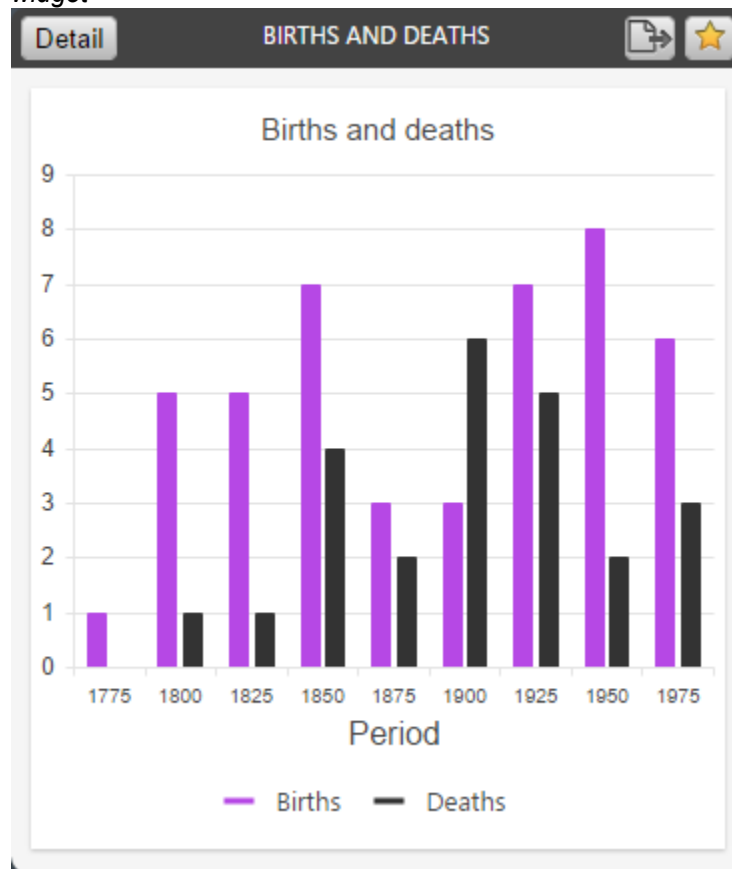
In the detailed version, each widget gathers different analyzes and displays the graphs and data tables associated with them.

In order to use this data outside Heredis you can:

- export all the charts and data tables of the widget by clicking on the button , located in the title bar of the widget. Heredis displays an overview of the widget you can save to PDF.
- export a specific data table by clicking Details then on the button  in the title bar of the data table. Heredis suggests that you save this data in Excel format on your computer. You can then analyze them using your spreadsheet.

BIRTHS and DEATHS widget

Births and Deaths' widget

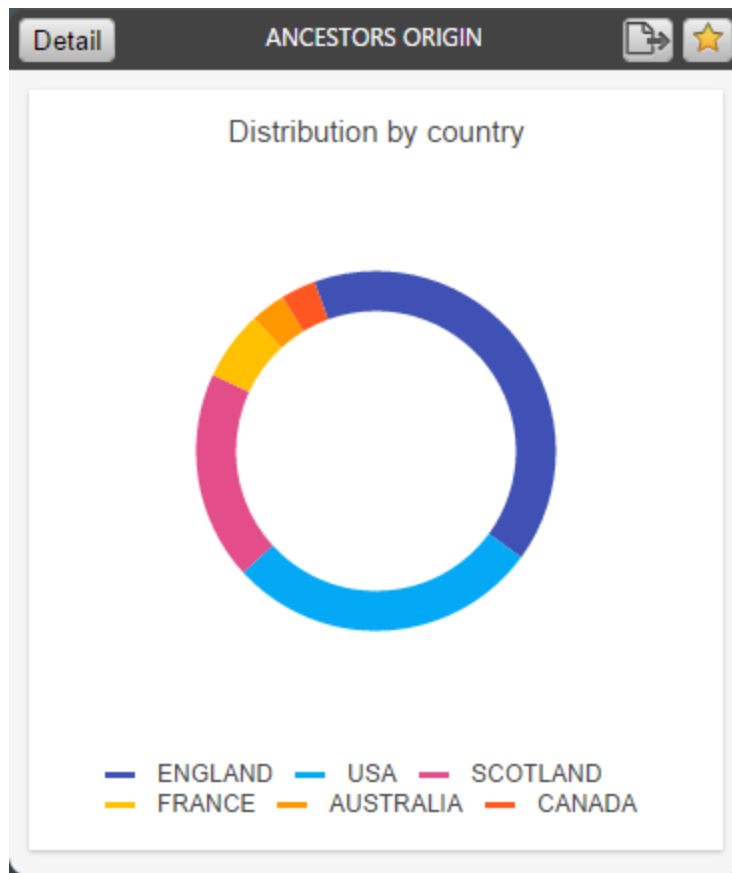


This widget contains the following analyses: distribution of births and deaths, life span and census. You can choose between one display per period with different possible intervals or one display by month according to what you want to highlight from your analysis.

In the Census widget, Heredis displays the number of persons who have lived in each period, based on their main events of birth and death on the one hand and the maximum age at death of the general preferences of Heredis on the other.

ANCESTORS ORIGIN widget

Ancestors Origin's widget



This widget allows you to visualize the distribution by country, state/province, and county of the persons in your genealogy.

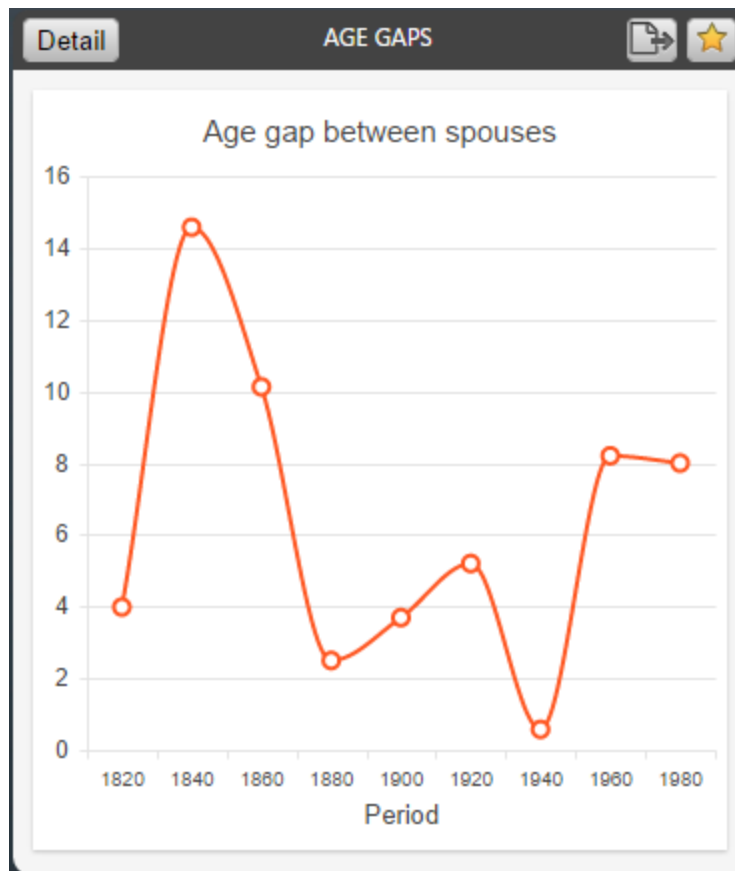
If you have selected **Entire File** as the Scope, the analysis will include every single person in your file. You can choose to narrow it down to the ancestors of the root person or of the primary person in your genealogy by setting the Scope to **Direct-line Ancestors** or **Ancestors**. To modify this option, click on the indented wheel in the upper right corner.

In the simple view widget, Heredis groups the persons according to their place of birth and displays a ring graph showing the most representative data by country, state/province or county.

If you click on the **Detail** button, Heredis will provide a full analysis by country, state/province and county along with a table indicating the number of persons found and the start/end years for the Period of appearance.

AGE GAPS widget

Age Gaps' widget



This statistical analysis focuses on the age difference between spouses and on the age gap between siblings in your genealogy. Just like in the previous widget, the scope of persons included in this analysis is set by you in the General Options of the dashboard.

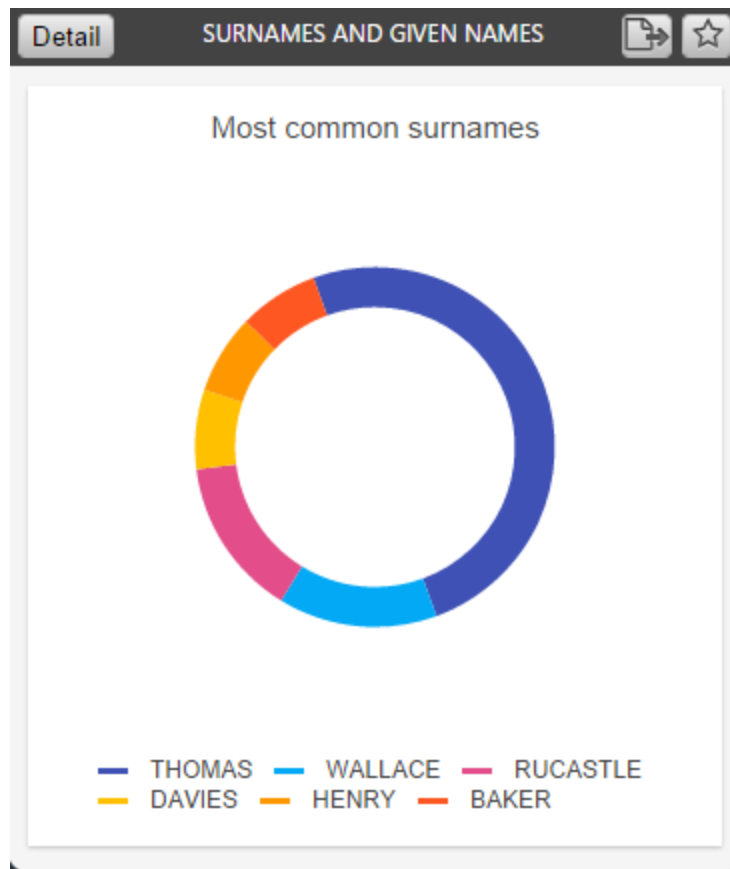
In Simple view, Heredis displays a line chart showing the average age difference between spouses. In Detail view, this same line chart is displayed along with a table filled with matching data and with another chart showing the average age gap between the first and last born among siblings.

Note: These charts only include couples with a minimum of one union entered with a date (Marriage, Religious Marriage, or other type of official marriage) and marital unions with at least two children properly entered with a date of Birth or Christening.

The default analysis interval is set to 50 years but you are free to modify this interval if you wish to adjust the data displayed in the charts and tables.

SURNAMES and GIVEN NAMES widget

Surnames and given names' widget

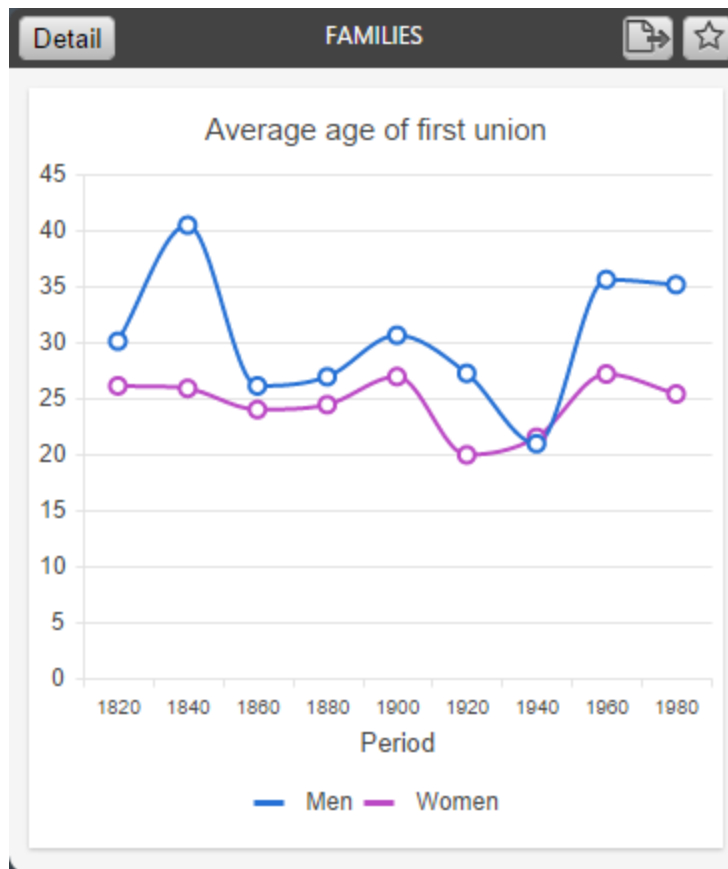


This widget provides you with a distribution of the most common surnames and given names of your genealogy that you can filter by gender.

On the graph, Heredis displays a selection of surnames, the most common given names and regroups all the others in the category «Other». For each surname / given name we specify on the graph, the number of holders and the percentage that it represents on the total names or given names of the file.

FAMILIES widget

Families' widget

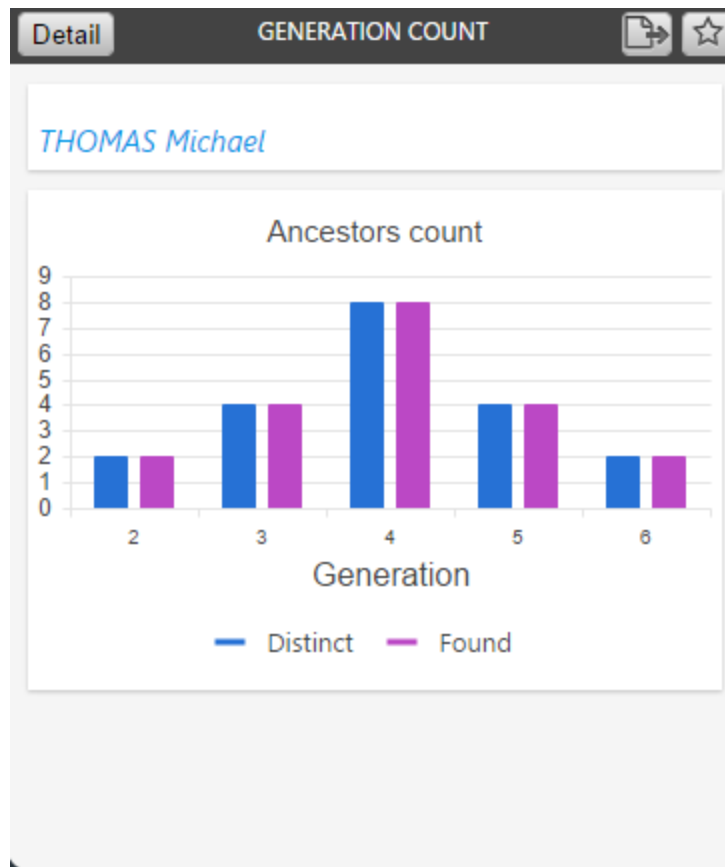


This widget contains the following analyses: average age at first union, number of children per family and the number of families.

You can choose between one display per period with different possible intervals or one display by month according to what you want to highlight from your analyses.

GENERATION COUNT widget

Generation Count widget



In this widget, Heredis offers to analyze the direct ancestors and descendants of root person of your file, if you selected «Entire File» or «Direct ancestor line» in the options of the dashboard, if not then the ascendants and descendants of the primary person if you selected «Ancestors».

The display, by generation, of the number of ancestors and descendants, found and distinct, makes it possible to highlight duplicate branches in your family tree.

What is a duplicate branch? Everyone, in their family tree, has a real number of ascendants that is lower than the theoretical number of ascendants because we descend several times from a same person because of marriages between more or less close cousins, we are then in the presence of a case of duplicate branches. Hence the importance of putting forward the distinct ancestors or descendants: when they are inferior to the found ancestors or descendants, it is because there is a duplicate branch.

Note: Changing the period and the analysis interval applies to all charts of the widget. All events with a calculated date are excluded from statistical analysis.

Search Tracking


For all details on **Search Tracking**, see Search Tracking tab (voir page 332) Article.

Search Tracking Tab

Search Tracking Tab

Heredis displays, by generation, indicators of progress concerning the persons found and the level of completion of their major events, birth, union and death.

To display the **Search Tracking**,

- from the dashboard, click on the **Search Tracking** page
- or select **Tools** menu > **Search Tracking**
- or from Heredis' toolbar click on the  button.

Search Tracking Tab

Entire file between 1737 and 2016

All Persons ▾ Ancestors of THOMAS Matthew (05.1991 -)

G2 Ancestors found: 1, findable: 1 Search progress 67% Found ancestors 100%

Ahn. #	Surname	Filiation	Birth			Family			Death			Note	Modified
			Date	Place	Source	Date	Place	Source	Date	Place	Source		
3	THOMAS Sophie		08.25.1965	Boston (Suffolk County)									07.30.2020

G3 Ancestors found: 2, findable: 2 Search progress 40% Found ancestors 100%

Ahn. #	Surname	Filiation	Birth			Family			Death			Note	Modified
			Date	Place	Source	Date	Place	Source	Date	Place	Source		
6	THOMAS Michael G.		02.03.1931	Boston (Suffolk County)		07.16.1955	Boston (Suffolk County)						07.30.2020
7	BERNSTEIN Marie E.		03.10.1935	London (London)		07.16.1955	Boston (Suffolk County)						07.30.2020


G4 Ancestors found: 2, findable: 2 Search progress 20% Found ancestors 100%

G5 Ancestors found: 4, findable: 4 Search progress 20% Found ancestors 100%

G6 Ancestors found: 4, findable: 8 Search progress 20% Found ancestors 50%

G7 Ancestors found: 2, findable: 6, Duplicate branches : 1 Search progress 33% Found ancestors 33%

G8 Ancestors found: 1, findable: 4 Search progress 0% Found ancestors 25%



Click on the indented wheel  on top right corner to change the scope of search tracking.

If you selected «**Entire file**» or «**Direct line ancestors**», in the general options of the Dashboard, Heredis lists the ancestry by generation of the root person of your file if not then the ancestry of the primary person if you selected «**Ancestors**».

Search Tracking Tab

The screenshot shows the 'Search tracking' tab in Heredis. At the top, it indicates the file covers the period from 1737 to 2016. The main area displays the search progress for generations G2 through G6. Each generation has a summary bar showing 'Ancestors found' and 'findable' counts, along with 'Search progress' (orange bar) and 'Found ancestors' (purple bar) percentages.

Altn. #	Surname	Filiation	Birth			Family			Death			Note	Modified
			Date	Place	Source	Date	Place	Source	Date	Place	Source		
12	THOMAS Christopher E.		04.26.1885	Boston (Suffolk County)		10.12.1925	Boston (Suffolk County)		03.26.1983	Boston (Suffolk County)			07.30.2020
13	DAVIS Katherine E.		09.08.1896	Harwich (Barnstable County)		10.12.1925	Boston (Suffolk County)		01.25.1988	Boston (Suffolk County)			07.30.2020
24	THOMAS Alexander J.		11.16.1849	London (London)		12.27.1886	Geneva (GENEVA)		03.03.1947	Boston (Suffolk County)			07.30.2020
25	PINKERTON Jane E.		10.29.1860	Geneva (GENEVA)		12.27.1886	Geneva (GENEVA)		04.17.1949	Boston (Suffolk County)			07.30.2020
26	DAVIS Louis		12.20.1863	Boston (Suffolk County)		1893	Newton (Middlesex County)		03.15.1955	Harwich (Barnstable County)			07.30.2020
27	WALLACE Brenda		03.13.1870	Newton (Middlesex County)		1893	Newton (Middlesex County)		01.24.1927	Harwich (Barnstable County)			07.30.2020


Each generation has a synthetic view and a more detailed one. You can switch from one to the other by clicking on the arrow on the left . The search tracking function can stay open while you continue to work in Heredis. Remember to refresh the information of this page by clicking the  button, so the changes you just made are included.

Synthetic view

The synthetic view shows a summary of search progress for generations G2 and G3. Each generation has a summary bar with 'Ancestors found' and 'findable' counts, and two progress bars: 'Search progress' (orange) and 'Found ancestors' (purple).

Generation	Ancestors found	findable	Search progress	Found ancestors
G2	2	2	80%	100%
G3	2	4	60%	50%

On each generation, the following information is displayed:

- the number of the generation, G2 for generation number 2 for example
- the number of ancestors you found
- the number of ancestors that can be found. You found only half of the findable ancestors in generation 4, ie 4 ancestors out of the theoretical 8; therefore, you will be able to find only the parents of these 4 ancestors: either 8 potentially findable ancestors instead of the 16 theoretical. If, during your research, you find additional ancestors at generation 4, Heredis will automatically update your calculation.
- from Heredis 2021 , untraceable parents are deduced from the findable ancestors and found ancestors.
- the duplicate branch (implex) of the generation, if there are any. Heredis shows here the number of persons appearing several times in the generation (shown with a ++ before the anhentafel number in the detailed view).
- the progression in the search for major events of persons. The orange progress bar, **Search progress**, allows you to see the progress of your research by making a report of the information you hold about the major events of found ancestors in all of the information you should collect on these found ancestors for them to be considered complete. Heredis takes into account your preferences. Set up what you think is important to consider a complete event in Heredis Preferences. (**Windows**) Tool menu > **Preferences** > **Hereditas Preferences** > **Appearance** ; (**Mac**) Hereditas menu > **Preferences** > **Appearance**.

Event Icons

The event is complete if there is:

- No missing, approximate or incomplete date
- The place is mentioned
- The source is mentioned
 - Citation evidence is "Direct"
- No 'Search Record' status


- the percentage of ancestors found. A purple progress bar **Found Ancestors** indicates the percentage of ancestors found in relation to findable ancestors.




Detailed view

At a given generation, if you notice that the number of found ancestors is less than the number of findable ancestors, unfold the previous generation and locate the gray filiations icons. They tell you about individuals with no parents, who are therefore not found and which will not figure in the next generation.

When you click on a generation to display its **detailed view**, Heredis lists all ancestors ordered by Ahnentafel number. If you selected «Ancestors» as the scope in the dashboard options, this number may not be entered.

Other information displayed in detailed mode are:


- The surname and given name of the person. In the case of a duplicate branch, they are displayed in red.
- The filiation icon  indicating the presence or not of the parents of the person. Blue indicate the presence of the father, violet of the mother.

The absence of colour indicates the absence of the parents. Since Heredis 2021 , when a parent is declared untraceable, the icon has a blue cross for  untraceable father or  pink for untraceable mother. See also the article Untraceable Parents (voir page 84).

- Dates, places and sources for major birth, union and death events.
- The note icon which indicates the presence or absence of a search note. By clicking on this icon you can view, edit or add a search note.
- The date of the last modification of the person. Click on the header of this column for it to be sorted in descending order, you will thereby know on which individual you worked recently.

Search Tracking Tab


Ancestors of THOMAS Judy (15.08.1962 -)															
G2		Ancestors found: 2, findable: 2										Search progress 80%		Found ancestors 100%	
G3		Ancestors found: 2, findable: 4										Search progress 60%		Found ancestors 50%	
Ahn. #	Surname	Filiation	Birth			Family			Death			Note	Modified		
			Date	Place	Source	Date	Place	Source	Date	Place	Source				
4	THOMAS Christopher E.		13.05.1910	Oxford (Oxfordshire)		22.11.1935	London (Greater London)		31.05.1991	Dover (Kent)			12.08.2020		
5	RUCASTLE Alice J.		02.12.1908	Margate (Kent)		22.11.1935	London (Greater London)		31.07.1998	Dover (Kent)			12.08.2020		
G4		Ancestors found: 4, findable: 4										Search progress 60%		Found ancestors 100%	
Ahn. #	Surname	Filiation	Birth			Family			Death			Note	Modified		
			Date	Place	Source	Date	Place	Source	Date	Place	Source				
8	THOMAS George		04.07.1877	Oxford (Oxfordshire)		27.05.1899	Oxford (Oxfordshire)		01.08.1947	Oxford (Oxfordshire)			11.12.2019		
9	DAVIS Violet E.		1875	Blackpool (Lancashire)		27.05.1899	Oxford (Oxfordshire)		1966	Oxford (Oxfordshire)			22.01.2019		
10	RUCASTLE Gilbert		03.02.1870	Margate (Kent)		11.09.1900	Edinburgh (City Of Edinburgh)		02.06.1955	Margate (Kent)			20.11.2018		
11	WALLACE Brenda		14.10.1873	Edinburgh (City Of Edinburgh)		11.09.1900	Edinburgh (City Of Edinburgh)		08.09.1937	Margate (Kent)			15.11.2018		
G5		Ancestors found: 7, findable: 8										Search progress 50%		Found ancestors 86%	
G6		Ancestors found: 4, findable: 14										Search progress 50%		Found ancestors 29%	
G7		Ancestors found: 2, findable: 8										Search progress 20%		Found ancestors 25%	

Note: Remember to refresh the information of this page by clicking the  button, so the changes you just made are included.

Heredis helps you to visualize distinctly and quickly the events considered as complete from those incomplete, based on the preferences you defined on the software. Heredis colors automatically the events boxes so called complete.

Note: You know you will never find the information you need on a person and you declared it complete

(**Search Tab > Search Help > Button**  or since Heredis 2021  from **Data > Personal Data** tab), it will

appear visually as complete in the search tracking with this button  displayed in front of the name of the person to report that you have forced his status to complete. This person will also be counted in the percentage of completion.

A Common-Law Union is considered by Heredis as a complete union event.

The last column indicates the last time you updated that person. This information is useful to know what was the latest ancestor you worked on. You can sort out the column by decreasing date to have the latest date first.

Heredis proposes by default in the preferences a maximum age at death fixed at 90 years for men and 100 years for women. If one of your male ancestors is still alive after 90 years, it will not be considered complete. Your **Search Tracking** will indicate that it is missing the date of death. Simply change this in «**Preferences – Consistency**» to increase maximum age at death for your entire file.

Filter

Since Heredis 2021, it is possible to filter

- By Treetops, to display only individuals on top of a branch and know where you need to search
- By Dead Ends, to identify the branches where you will have to search in specific archives or completely stop searching.

Click on the desired filter in the upper left corner. Heredis unfolds the first generation affected by this filter and colors in blue the other generations where you will find Treetops or Dead Ends.

Entire file between 1737 and 2016



Ancestors of *THOMAS Matthew (05.1991 -)*

Dead Ends
All Parsons
Trestops
Dead Ends

G2		Ancestors found: 1, findable: 1										Search progress		Found ancestors	
												<div style="width: 67%;"></div> 67%		<div style="width: 100%;"></div> 100%	
G3		Ancestors found: 2, findable: 2										Search progress		Found ancestors	
												<div style="width: 40%;"></div> 40%		<div style="width: 100%;"></div> 100%	
Ahn. #	Surname	Filiation	Birth			Family			Death			Note	Modified		
7	BERNSTEIN Marie E.		Date	Place	Source	Date	Place	Source	Date	Place	Source		07.30.2020		
			03.10.1935	London (London)		07.16.1955	Boston (Suffolk County)								
G4		Ancestors found: 2, findable: 2										Search progress		Found ancestors	
												<div style="width: 20%;"></div> 20%		<div style="width: 100%;"></div> 100%	
G5		Ancestors found: 4, findable: 4										Search progress		Found ancestors	
												<div style="width: 20%;"></div> 20%		<div style="width: 100%;"></div> 100%	
G6		Ancestors found: 4, findable: 8										Search progress		Found ancestors	
												<div style="width: 20%;"></div> 20%		<div style="width: 50%;"></div> 50%	
G7		Ancestors found: 2, findable: 6, Duplicate branches : 1										Search progress		Found ancestors	
												<div style="width: 33%;"></div> 33%		<div style="width: 33%;"></div> 33%	
G8		Ancestors found: 1, findable: 4										Search progress		Found ancestors	
												<div style="width: 0%;"></div> 0%		<div style="width: 25%;"></div> 25%	

Export Search Tracking

The table «**Search Tracking**» can be exported

- in Excel format: click on the button .
- in PDF format: click on the button .

Of course, the data in this Excel table or PDF will not automatically update.


This function has a simplified view in the **My Dashboard** page, where you can display a progress graph of search progress and ancestors found limited to the first 15 generations. Click the  button to export this chart to PDF or PNG.

Photo Tool

Heredis offers an ideal tool for enriching your Genealogy. Very simple to use, it allows for example, for all genealogists to identify persons in a group photo or in an act and capture faces or signatures.

If the pictures or captures of acts are not perfect, you may correct them with the photo editing tool.

The photo tool is available in your software from the **Immediate Family**, **XXL Family**, **Personal Data** and **Family Group Data** tabs but also from the **Media research** panel and from the various indexes.


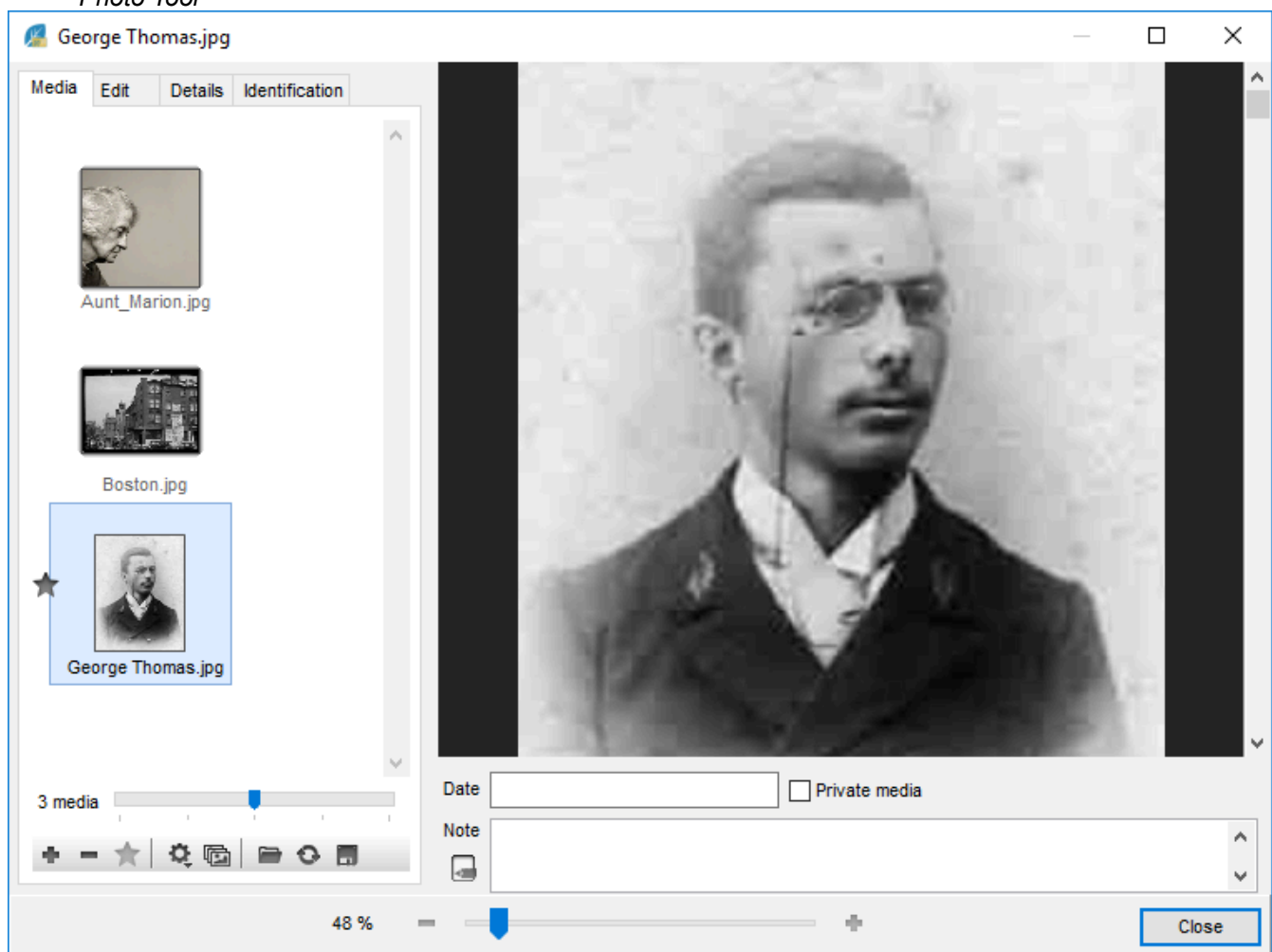
- Select for example the **Immediate Family** in the **Family** tab and double-click on the media of the primary person
- or click the button  if it is in your toolbar
- or click on the **Tools Menu > Photo Tool**

Photo Tool



This tool consists of four tabs, **Media**, **Edit**, **Details** and **Identification**, a display area for the image and input fields to complete media information.

You have information concerning a photo: enter in the input fields the date and notes to clarify the context and thus complement your genealogical data.

If necessary, indicate that this is a private media. Thus, you can avoid transmitting it when exporting or publishing your file: tick the **Private Media** box.

The Media tab



A list of media appears in this tab in the form of photo thumbnails. This list will depend on the context of launching of the photo tool.



For example, if you run the tool from the thumbnail of the Primary Person in the **Immediate Family**, the media displayed will be those of the Primary Person.



If you run the tool from a picture of the union in the **Personal Data** tab, Heredis will only list the media for that union.

A zoom slider at the bottom of the tab to the right of media counter allows you to adjust the size of the thumbnail displayed.





You have a series of buttons to act on the media displayed:

- Button : You can add a media from the hard disk, the index or the clipboard.
- Button : press this button to detach the media of the Primary Person without removing it from the Media index.

Info •  and  buttons are not displayed if you launch the photo tool from the Media index.

- Button : the star symbol identifies the photo you have selected as a favorite. It is this photo which will illustrate the person in question in all documents. Select a thumbnail from the list and click this button to place it as the favorite.
- **Show all media linked to primary person**  button: this button will display all the media concerning the person and you will see the wedding picture or pictures of the Primary Person, as well as those associated with his or her name...


Info • the Star and All Media buttons only appear when you display the media of the Primary Person.

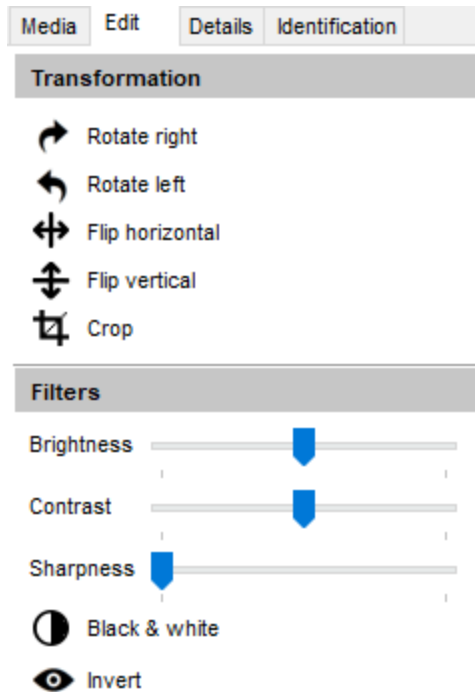
-  button: to find a media more easily in the displayed miniatures, you can sort them by name or date.
-  button: if you have made a mistake in adding a media, click this button to replace it with another media on your computer.
-  button: you have made changes to a photo which do not suit you and you want to go back to the original version of this photo: click the Reload button. Heredis will automatically reload the original picture saved on the computer.
-  button: You can save a copy of the displayed picture to the **Photo tool** on your computer.





The Edit tab

Editing is possible for images media: .jpg, .jpeg, .png... It is not possible to touch up a PDF or a .docx. It is therefore preferable to put image-type media even for your deeds rather than PDFs.



If your photo is not perfect, you can easily modify it.

For example, crop the image to remove unwanted parts with the **Crop**  button. When you click the button, a selection box appears on your capture. Adjust the dimension with your mouse cursor by stretching or narrowing one of the 4 corners of the selection area. The cursor changes shape when you position it on the dotted lines of the selection area: hold down the left click and drag the window to move it. When the selection area is adjusted, click **Crop**. Your image is now well framed.



If you want to orientate your photo in any other way, rotate the image in the right direction by using the orientation buttons **Rotate Left**  Button, **Rotate Right**  button. You may flip the image horizontally with the **Horizontal Flip**  button but also vertically with the **Vertical Flip**  button.

With Heredis, you do not need any other software to embellish your photos. You can adjust **brightness**, **contrast**, or **definition to sharpen** an image to its true value.

You can also change a color photo to black and white by clicking the button  but also reverse the colors of the photo by clicking on the button .

Do not hesitate to try different changes, because you can always return to the original photo with the **Cancel** button.

Once your image is satisfactory, you may confirm the changes by clicking the **Apply** button.

The Details tab

With this tab, Heredis informs you of the different uses of the image displayed and shows you where the original is located on your computer. If you click on the displayed path, **(Windows)** Windows Explorer / **(Mac)** Finder will open.

See also Media Index (voir page 249) and Media (voir page 105) articles.

The Identification tab

From this tab, you can identify persons in a group photo or persons named in an act by cutting out their photos or signatures. If you then navigate through your software, you will see that the cut portraits or signatures illustrate persons with whom they are associated.

Using your mouse, enclose the people on the picture in the display area.

Position the mouse cursor over a person, hold down the left mouse button and draw a cut-out frame around the person. When you release the left click, Heredis instantly offers to search the index of persons of your genealogy for the person in question.

If you know this person, type in the given name or surname or both. Immediately Heredis displays the list of persons with this name and forename or variations in your file. Select the person from the list and click **(Windows) Choose; (Mac) OK**. Check the summary of existing persons to make sure you choose the right person.

(Mac) The summary appears in the always accessible summary tab.

(Windows) The summary appears after selecting an person.

Identification



If you know this person, but he is not present in your genealogy, click the **Create Person** button to create the person directly from this screen.

If you do not recognize this person, click the **Unknown Person** button to indicate that this person is an unknown person.

A frame appears around the person. You can always adjust this frame at any moment.

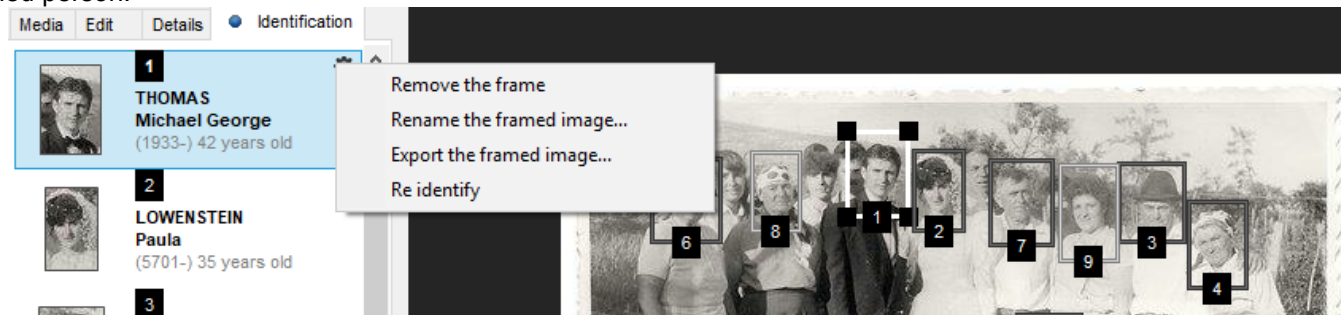
When you place the mouse pointer on the contours of the frame, it changes its appearance. By holding down your mouse, you can move the frame. By touching the corners of the frame, you can enlarge it or reduce its size to make it fit perfectly.

To the left of the photo, the list of numbered frames appears progressively as you identify the different persons in the photo.

An indented wheel appears when you move your mouse over the media in the list. If you click this button, you have access to the following functions:

- **Remove the Frame:** you have made a mistake, select this menu to simply remove it. Note that all the frames are automatically renumbered.
- **Rename the framed picture :** Heredis automatically assigns a name to the media which you have just created and if the name does not suit you, you can change it.
- **Re-Identify:** if you have identified a person as unknown or you have made a mistake concerning the person, you can always assign to this frame the right person in your genealogy file.
- **Export the framed image:** You can save the newly created image managed by Heredis to your computer.

All images are stored directly in the Media Index. They are also assigned automatically to the media of the identified person.



Click the **Show all picture frames** button at the bottom of this tab to display only the frames numbers in the display area of the image.

You can print the picture as displayed in the image display area by clicking the **Print** button. Specify the print options and click **OK**. The document opens in your usual word processor.

Take this printed document along with you during visits to your family: the people around you will enjoy your work and perhaps identify unknown persons in the group photo.

Info • When you browse and launch the photo tool for a person with whom you have associated a signature for example, Heredis indicates above the display area of the image that the media selected has been cut from another picture. If you click the **Display the Original** link, it will be displayed in the image display area. If

Photo Tool

you want to hide it, click the **Hide Original** link.

You cannot recut a picture that has already been cut out.

Some editing functions are not available for a group photo if you have already identified persons in this picture.

If you close your genealogy file without saving, all edits, cut-out photos and signatures... will be lost.

Identification can only be performed on files in photo format: .jpg, .jpeg, .png ... A PDF is not a photo format.

There will therefore be no identification on a PDF media.

Slideshow

With Heredis, the slideshow scrolls through the life of your ancestors in images. This tool presents your photos in a family album, composed of different chapters resuming life of the primary person and his/her immediate family.


In this function, Heredis displays the media of the primary person and his family and more specifically the media:

- of the primary person
- of his/her spouses
- of his/her children
- of his/her brothers and sisters
- of his/her parents
- of his/her grandparents



For all, Heredis shows the person's media, union media, individual events, union and shared events, media of names, first names, occupations, places. If they have already been displayed for the primary person, they won't appear again.

Launch Slideshow

To launch it, place the wanted person as the primary person:

- click the **Slideshow**  button under the screen of the primary person from the immediate family tab, or the person's data entry tab.
- click on **Reports** menu > **Slideshow**

Let the pages of the photo album scroll through and enjoy your work.

- Click the **Pause**  button on the top right of the screen to stop on a picture and read the comments on the photo, for example.
- Click the **Chapters** menu to display all the chapters of your album. By clicking on one of the chapters, you navigate directly to the selected chapter and you can then restart the slideshow by clicking the **Play**  button at the top right.

Slideshow


Slideshow



Change Slideshow Theme


By default, the slideshow appears with the **Retro** theme but you can change it according to your tastes. Click the **Themes** menu and choose another theme from the selection.

Each theme has an associated music. It is not editable.

At the bottom of the screen, you have an audio player for playing music. As you watch this family slideshow, the photos parade with the music. Click the **Sound**  icon to cut the sound.

Filter the images of the slideshow

By default, all media of the primary person and his/her close family are displayed.

Click on the indented wheel  and choose the images you want to see for the primary person, his/her children, his/her spouse and unions, the other persons (brothers, sisters...) etc.

Filter images of Slideshow

Slideshow photos

	All	Preferred	None
Primary Person	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children/Spouses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other persons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other photos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Exclude private photos


Cancel

OK

Note: other photos are those attached to places, surnames, given names, occupations, sources, and linked to the primary person.

A box to tick allows you to exclude from this slideshow all private images of your genealogy.

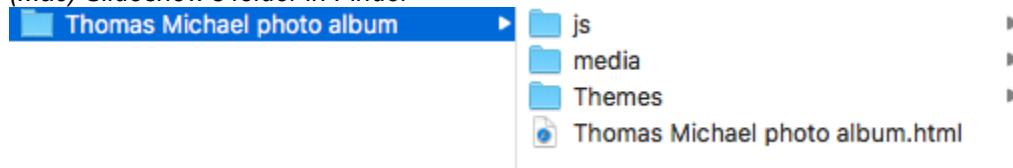
Export the slideshow

Now you wish to share this slideshow, click on the **Export**  button. Heredis creates, in the location of your choice, a folder with the photo album of the primary person, the way you set it. Share this folder with your relatives: they can play it by simply clicking the HTML page created in **The photo album of [...].html** and even if they do not have the Heredis software.

You can also copy the folder to a USB key or an external hard-drive and plug it to your TV, computer or any other USB outlet... to visualize the slideshow with your family.

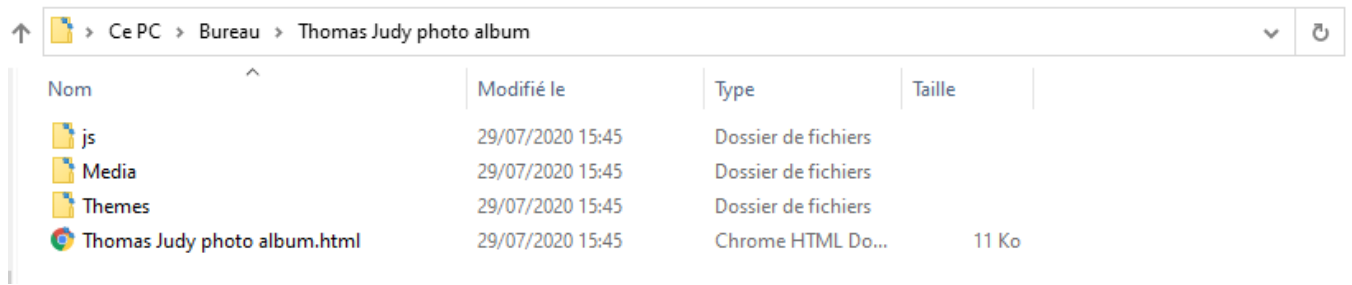
Important: You need to copy the entire folder if you want the Slideshow to work.

(Mac) Slideshow's folder in Finder




(Windows) Slideshow's folder in Windows Explorer

Slideshow



The screenshot shows a Windows File Explorer window with the address bar displaying the path: Ce PC > Bureau > Thomas Judy photo album. The window contains a table of files and folders.

Nom	Modifié le	Type	Taille
js	29/07/2020 15:45	Dossier de fichiers	
Media	29/07/2020 15:45	Dossier de fichiers	
Themes	29/07/2020 15:45	Dossier de fichiers	
Thomas Judy photo album.html	29/07/2020 15:45	Chrome HTML Do...	11 Ko

To exit the slideshow, simply click the **Exit**  button at the top right.

(Windows) Permanent control for duplicates

Permanent control for duplicates

When adding a new person to your genealogy, you may risk creating a duplicate, that is to say, create two distinct persons for the same ancestor. Heredis provides a tool, available in all entry fields for individuals, to avoid creating a person already saved in your file. Heredis will control for duplicates at all times during the entry of data. If the person already exists, select him/her in the matching persons list and click on **Choose** to link the person instead of creating a new one.


The screenshot shows the 'Entering New Person' dialog box. The 'Personal Data' section has 'Surname' as 'THOMAS' and 'Given Names' as 'george'. A dropdown menu for 'Given Names' is open, showing 'George' selected and other options like 'Gilbert', 'Glenn', and variants starting with 'Gab'. The 'Matching Persons' section lists four existing individuals: 'THOMAS George (1870-1871)', 'THOMAS George (1872-1947)', 'THOMAS Glenn Samuel Bruce (1997-)', and 'THOMAS Michael George (1933-)'. Below this, a detailed view for 'THOMAS George' is shown, including birth (06.12.1870) and death (11.04.1871) dates, a 'Preferred Picture' field, and sections for 'Parents' (THOMAS Reuben Paul and von BORK Helena), 'No Spouse', 'No Child', 'Other Person Events', 'Other Family Events', 'Shared Events', and 'Facts'. At the bottom are 'Add', 'Choose', and 'Cancel' buttons.

Info • For even more pertinence, Heredis includes in the list of potential duplicates, those persons already entered bearing a variant of the name you typed.

In the Add or Choose... screen

With the first letters typed in the **Surname** or **Given Names** fields, you see, in the **Matching Persons** column, the list of individuals already entered who may match the person. Step by step, as you enter new letters, the list of duplicates is updated.

In the Family Group Data tab

When you type in one of the fields of this screen, the full name of a person already entered, the **Enter New Data** icon (gray arrow) turns red . Click this icon to see a list of individuals who may correspond to the person.
Family Group Data

Parents (2)		Families (3)			
#	Surname	Given Names	M	Marriage Date	Marriage Place
1	GREGSON	Vivian	M	07/01/1954	Hudson
2	LOWENSTEIN	Paula	M	03/03/1976	Troy
3	DAVES				

Check if a proposed person is in fact a duplicate

Select the person from the Matching Persons list or check in the Summary panel. Here you have more information for more effective comparison.



If it appears that the person you wish to create already exists, select him/her from the Matching Persons list and click the **Choose** button. This will cancel the creation of a new person, and thus avoids a duplicate in your genealogy.

If you do not find a duplicate, continue.

Search for duplicates in the file

Heredis controls while imputting but the importing of data from other genealogists, or a moment of inattention may create duplicates. This powerful tool is essential for maintaining an impeccable genealogy file. Research and verification is carried out in one click. The results are clearly displayed and indicate the probability of duplication.

The search for duplicate identifies persons entered several times in the genealogy file. The permanent control indicates possible duplicates as you tip but duplicates can be made because of an import file or an unguarded moment.

Choose **Find > Find Duplicates...** or click  in the  button in the toolbar.

Setup parameters

Search for duplicates

Search Options Results

Search Method for Given Names

At least one of the Given Names is identical

One Given Name of One Parent is Identical

Search Method for Events

Dates Strictly Identical

Margin of Error in Years 20

Search Method for Surnames

Limit to a surname and its variants

Select a Surname

Start Search

Close

Select your search criteria for comparing the given name:

- **Ignore:** the search will consider only surnames,
- **At least one of the Given Names is identical:** a person whose given names are all included in the given names of another individual with the same surname will be considered as a potential duplicate,
- The **First Given Name is identical:** an individual with the same surname and the same given name as another individual will be considered as a potential duplicate,
- Tick the box **One Given Name of One parent is identical:** a person whose given names are all included in the given names of another individual with the same surname will be considered as a potential duplicate.

(Windows) Permanent control for duplicates

Search for duplicates

Search Options Results

Search Method for Given Names

Ignore

Ignore

At least one of the Given Names is identical

The first Given Name is identical

Dates Strictly Identical

Margin of Error in Years 20

Search Method for Surnames

Limit to a surname and its variants

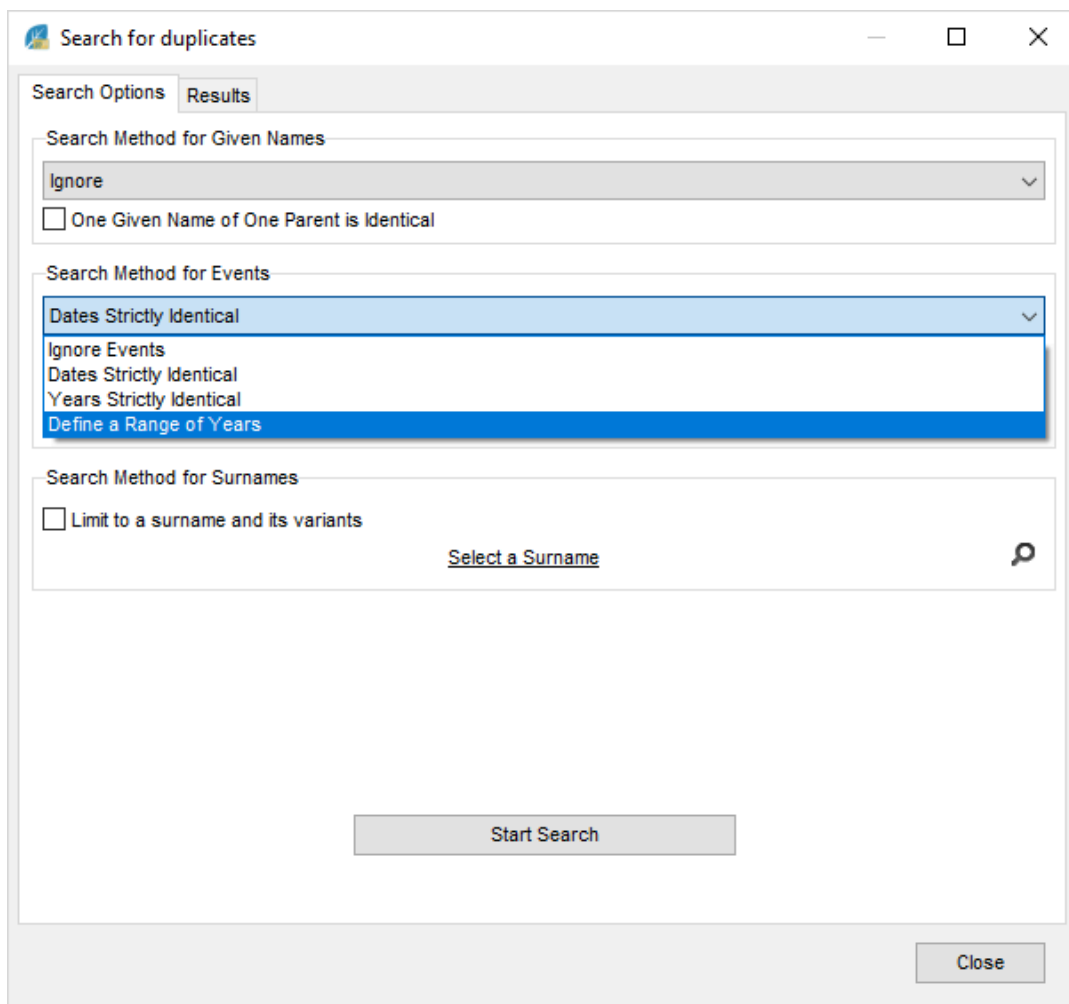
Select a Surname

Start Search

Close

Select your search criteria for comparing events:

- **Ignore Events:** the search will consider only given names and surnames,
- **Dates Strictly identical:** when an event has been detected and assumed to be an identical date, it must be displayed exactly in the same way in both files (Birth about 1801 and 01/1801 may not be considered as two identical events),
- **Years Strictly identical:** when an event has been detected and assumed to be an identical year for the event, it must be identical in both files,
- **Define a Range of Years:** if you do not require exactly the same dates as the criterion for comparison, indicate how many years from a date to be tolerated for considering two events as identical. If you specify range as «10», events that took place 10 years before or after another event may be considered as potential duplicates.



You can limit the search for comparing surnames:

- Tick the box **Limit to a surname and its variants** to limit the search integrating this criterion.
- Click then on the magnifying glass to select the required surname.

Click **Start Search**

Results

The list of all potential duplicates identified in your genealogy is displayed in the **Results** tab. A person may appear several times in the list if there are several possible duplicates.

(Windows) Permanent control for duplicates

Search Options Results

Search completed: 2 potential duplicates found

Merge: With:

BERNSTEIN Grace E (1916-)
BERNSTEIN Arlo E (1922-)

BERNSTEIN Arlo E (1922-)

Delete

BERNSTEIN Grace E
FamilySearch # L2R3-XQM
1916 - Oldham
Parents (2)
P BERNSTEIN Fritz (1886-)
M BECKER Helena S (1900-)
Spouse (1)
HARMS Hiram Willie (1914-)
x 23 09 1933 - Mccook

BERNSTEIN Arlo E
FamilySearch # L2R3-NH9
1922 - Oldham
Parents (2)
P BERNSTEIN Fritz (1886-)
M BECKER Helena S (1900-)
No Known Spouse
No Known Child

Mark Duplicates Edit Duplicates Report Prepare Merger...

By clicking an individual, you display in the lower part of the column a summary of information concerning this person and in the right column his/her potential duplicates. By clicking on one of them, you display opposing summaries of the two selected persons.

You can use the following options for dealing with duplicates:

- **Delete** a person: it removes the selected individual in the left column of the screen if you consider that the duplicate is adequate and you do not need to merge them to obtain additional information.
- **Mark Duplicates**: all the supposed duplicates matching your criteria for comparison are marked. Then just check and delete the marked individuals if you wish.
- **Edit Duplicates Report**: all the supposed duplicates matching your criteria for comparison are printed in the form of an alphabetical list. Just check this list to delete all required individuals.

You may check it out in the summary about the persons concerned to check the data.

After selecting a person and his/her duplicate, you can click on **Prepare merger** of the two.

If there is indeed a duplicate, merge the two persons by selecting the most appropriate information on the **Find Duplicates** screen.

See Merging Two Persons (voir page 352) to know how to merge.

Merging Two Persons

While entering data in Heredis, you realize you have created a person who may already exist in your genealogy. Or you have imported your cousin's genealogical data into yours and now find yourself with a bunch of duplicates...

Starting with Heredis 2022 🌱, a brand-new merge module is now at your disposal! It will assist you from A to Z during this usually tricky process.

To locate a duplicate, you may:

- Start a search for duplicates – read the article on (Windows) Search for duplicates in the file or (Mac) Search for duplicates in the file. Select two potential duplicates then click on **Prepare merger**.
- Try to find potential duplicates in the persons' panel. Once you have spotted a pair, choose one of them as the primary person and click on the drop-down menu **Person > Merge with another person**. Select the second person by clicking on the magnifying glass button (you will then access the list of existing persons to choose from).

Take a look at the summaries and comparison trees to make sure they are indeed duplicates. Should the person's parents be duplicates, start merging them first.

Once you have reviewed the summaries and comparison trees, click on **(Mac) Compare the 2 persons**, **(Windows) Prepare Merger** to prepare the merger.

(Mac) Merging Persons popup window from the Person menu

Merging persons may modify your file considerably! Always save your file before undertaking this operation.

Choose First Person: DAVIS Katherine "Emily" (1896-1988)

Choose second person: DAVIS Katherine "Emily" (1896-1988)

DAVIS Katherine "Emily"
 Ahn. # 5 (G 3)
 None
 Bi. 09.08.1896 - Harwich
 D 01.25.1988 - Boston - Mass General Hospital

Parents
 F DAVIS Louis (1863-1955)
 M WALLACE Brenda (1870-1927)

Spouse (1)
 • SMITH Christopher Edward (1881-1973)
 M 12.10.1925 - Boston

Spouses
 SMITH Christopher... (1881-1973)
 December 10, 19...

Children
 SMITH Michael Ge... (1931-)
 SMITH Vivian (1945-)

DAVIS Katherine "Emily"
 Bi.: September 8, 1896 - Harwich - Barnstable County - M...
 D: January 25, 1988 - Boston - Suffolk County - MA - UNL...

DAVIS Katherine "Emily"
 Bi.: September 8, 1896 - Harwich - Barnstable County - MA...
 D: January 25, 1988 - Boston - Suffolk County - MA - UNIT...

Parents
 F DAVIS Louis (1863-1955)
 M WALLACE Brenda (1870-1927)

Spouse (1)
 • SMITH Christopher Edward (1881-1973)
 M 12.10.1925 - Boston

No Known Child

Cancel Compare the 2 persons...

(Windows) Merging Persons popup window from the Person menu

Merging Two Persons

Heredis will open a window to prepare your merger. This window contains several columns, colored bullets, arrow buttons, and switches. Let's take a closer look at how to use them.

Note: a duplicate merger is irreversible; once you have validated and saved the changes to your file, you can no longer cancel it. Remember to back up your file before merging persons.

Columns and lines

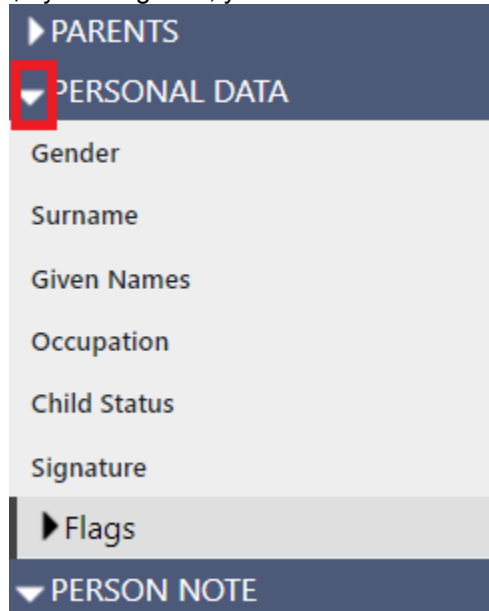
The first column shows the names of the data categories and fields.

The “person” column on the left-hand side shows the first duplicate; the person’s name, and his/her potential Ahnentafel number can be found in the column heading.

The “person” column in the middle shows the data of the person who will result from the merger; this column is entitled « Merged person ».

The “person” column on the right-hand side shows the second duplicate; the person’s name, and his/her potential Ahnentafel number can be found in the column heading.

To save some screen space, data is organized into categories (or “sections”). These categories are folded; by clicking on the arrow preceding the category title, you can unfold it and view all the information available. The arrow will then point downwards; by clicking on it, you will be able to fold the section again.



Colors

Heredis has prepped up the work for. The data with a green background (in the middle column) has been pre-selected by Heredis. If there is no doubt that the data is identical for both duplicates, then Heredis will show the result in the middle column, colored in green.

However, we advise you take the time to doublecheck this data, just in case.



If there is any conflict, Heredis displays the line in the middle column in pink. It’s up to you to choose which data to keep and to resolve all conflicts before you validate the merger.





If the line is grayed out, it means that the data has been ignored. Heredis will not ignore data systematically, it is up to you to click on the switch to ignore a set of data. We will go back to this later.


Merging Two Persons



Bullets

A system of colored bullets, located at the end of the line for each item, shows you which items have conflicts and which do not, i.e., data that might be questionable for the merger.

The pink  bullet indicates that there is at least one conflict. The green  bullet means that Heredis has not encountered any potential issue.

A gray  bullet shows that the dataset has been ignored.

At the bottom of the screen, you can visualize the progress of the conflict resolution. When it reaches 100%, the merger can be validated.

Uncomplete progress bar





Complete progress bar

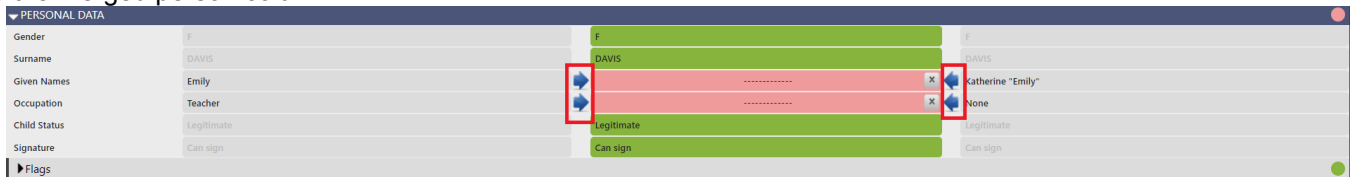


To resolve conflicts more rapidly, we have created a « **Next Conflict** » button (lower-right corner of the window) that allows you to move from one conflict to the next without checking the data already in green. Click on it to move from one conflict to the next if you don't want to check the remaining data.

The list of information to be checked may be shorter or longer depending on the amount of data entered. Everything is detailed, nothing has been put aside. Therefore, you should take your time.

Arrows and crosses

To select the data you wish to save from one of the two duplicates, click on the  or  arrow located next to the Merged person column.




Some fields could be concatenated. Hence, if you want to retain data from both duplicates for Occupation, Given Names, Notes, etc., you can do so by clicking on the left arrow and then on the right one (or from right to left, it works too).

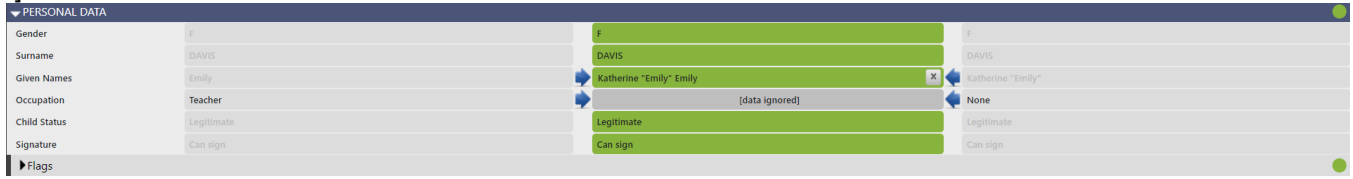
On the other hand, some fields do not allow you to cumulate data from both sides. For example, you need to be either a Natural or a Legitimate child, you can sign or you cannot. Such fields cannot be combined.

Similarly, the same rule applies to Flags: Confidential, Marked, Secondary...



If you made a mistake when selecting the 2 pieces of information, click on the cross  to remove the information. Both will be removed, then you will only need to click on one of the 2 arrows to select the data you

wish to keep. You can also choose not to keep any data at all. In this case, the central rectangle will read [data ignored].



Switches

Switches allow you to ignore an entire set of data versus individual pieces of data, as described above (using the cross). For example, if the merger allows me to gather all the information I need on a person, my Person Notes will no longer be of any use to me. By clicking the switch in the Person Note section, I intend to ignore my research notes and therefore will no longer have this information available in the merged person.

Switch icon is "on" so as to retain all data from this section

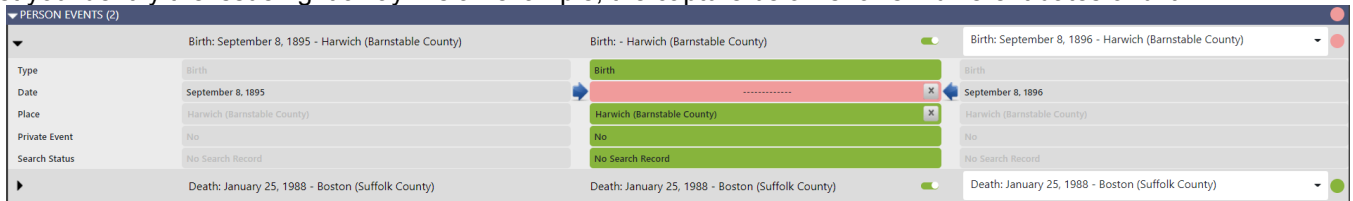


Switch icon is "off" so as to ignore all data from this section

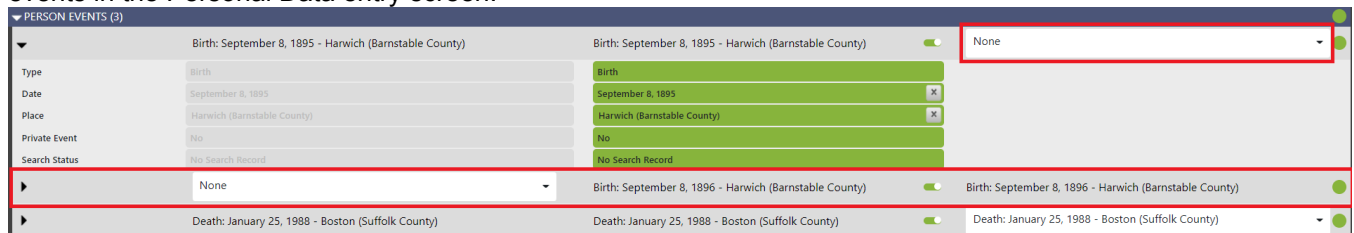


Events

Heredis places events of the same type side by side for the 2 persons to be merged. For example, both persons have a Birth event. Heredis puts on each side the 2 Birth events, even if they differ. It's then up to you to solve the conflict. To do so, scroll down to the Person Events section, then to the Birth event line. Colored in pink, it will let you identify the issue right away. As an example, the capture below shows 2 different dates of birth.



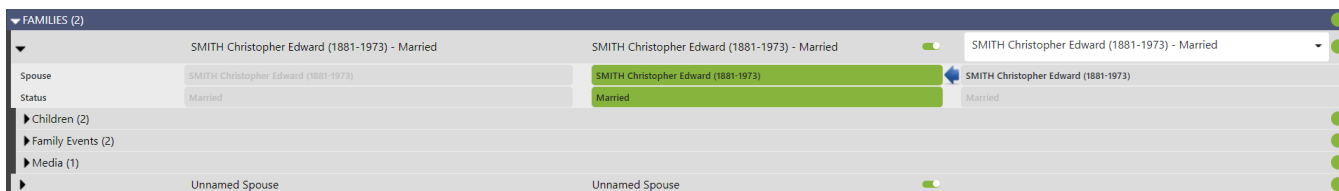
You may only choose 1 of the 2 dates as it is not possible to cumulate both of them. If you need to investigate some more before validating the date for good, you still have the option to save the 2 events. Click on the white rectangle, i.e. Birth: September 8, 1896 – Harwich (Barnstable County), and choose None. A second Birth event line appears so the 2 events are no longer on the same line. After validation of the merger, the merged person will own 2 birth events. You will later need to manually remove the incorrect birth event from the list of events in the Personal Data entry screen.



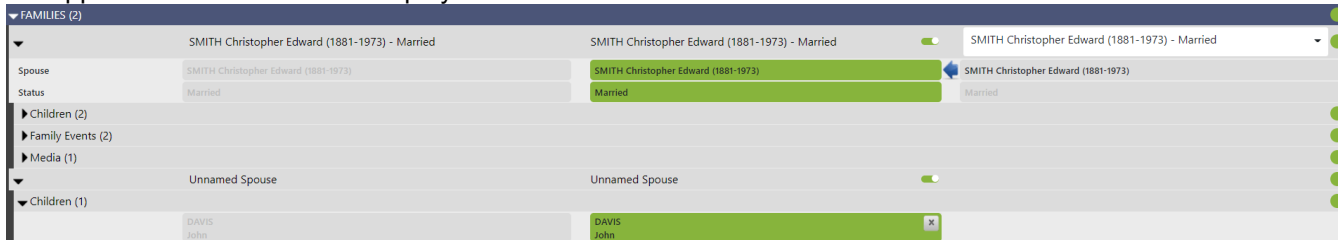
Despite the various suggestions made by Heredis, you remain in full control and can choose what you wish to keep or not.

As for Families (spouses), Parents, and Children, the same principle applies. You can choose to keep one or the other or simply both by selecting **None**. Remember to unfold each section to doublecheck the data.

Merging Two Persons



If the person has a child but no spouse (e.g. a child with an unknown father), an “**Unnamed Spouse**” line will appear so the child can be displayed.



In short:

- **Colored bullets** indicate whether conflicts are present or not. Green means everything seems consistent, pink means you must doublecheck your data, grey means the data has been ignored.
- **Switches** allow you to ignore a set of data, a section, or an entire event (date, place, status...). The section's bullet point is grey if you chose to ignore this data.
- **Dropdown lists** under Person Events allow you to select the event you wish to compare between both persons.
- The **cross** allows you to ignore one single piece of information.
- The **Next Conflict** button lets you move forward at a faster pace when resolving conflicts, without dwelling on what was predefined by Heredis.

When everything is set up properly and the progress bar shows 100%, the **MERGE** button becomes clickable at the bottom right of the screen. You can then click on it to validate the merger.

Create and Edit a Book

Your family tree has grown and you wish to share your findings with your family. The Ancestors or Descendants books are perfect for getting the interest of cousins or other relatives, even if they know nothing about genealogy.

You can edit written books to tell your genealogy. From the information you have gathered in your file, Heredis generates a complete book in written form and automatically adapts the vocabulary to the data type. This book includes cover page, dedication, acknowledgments, preface and introduction.

The written books offered in Heredis are elaborated according to the recommendations of the author of the Filiatus software. The presentation and the writing are particularly careful. Written in the style of the genealogy dictionaries of olden times (Father Anselme or Dictionary of the nobility), their presentation is nevertheless friendly and comprehensible by all, even neophytes on the subject.

The ancestors of each character are analyzed in all seams, to detect possible cousinings and to create the branches and sub-branches corresponding to the family structure studied.

Heredis puts two types of book at your disposal, books written from the primary person and books of the type «dictionary» based on all your genealogy.

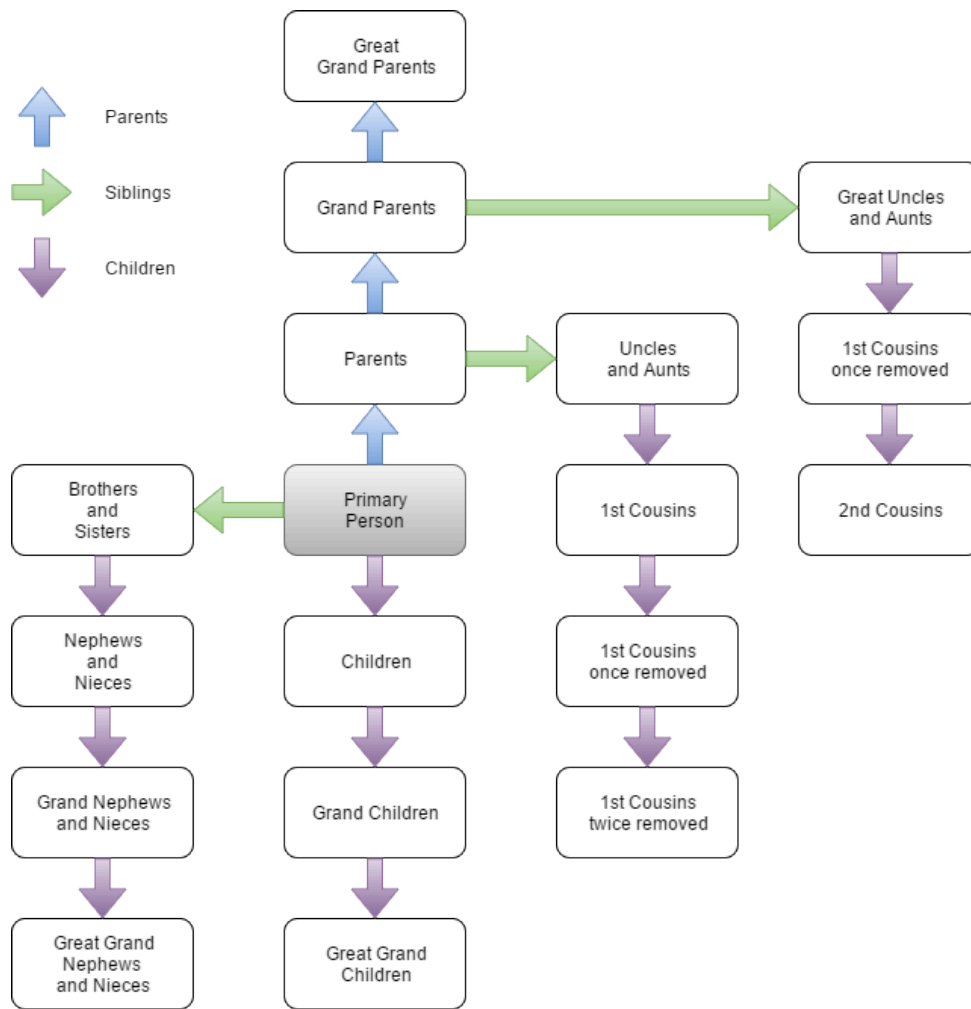
With Heredis 2022, the book Families from my village has appeared. See the article Families from my village (voir page 365) for more details.

The books written from the primary person

- **Ancestors** by generation
- **Descendants** by branch
- **Clan**: in this document, Heredis builds up the close family around the primary person: spouses, parents, uncles and aunts, grandparents, brothers and sisters, cousins, children, grandchildren ...

Diagram of the individuals included in the Clan

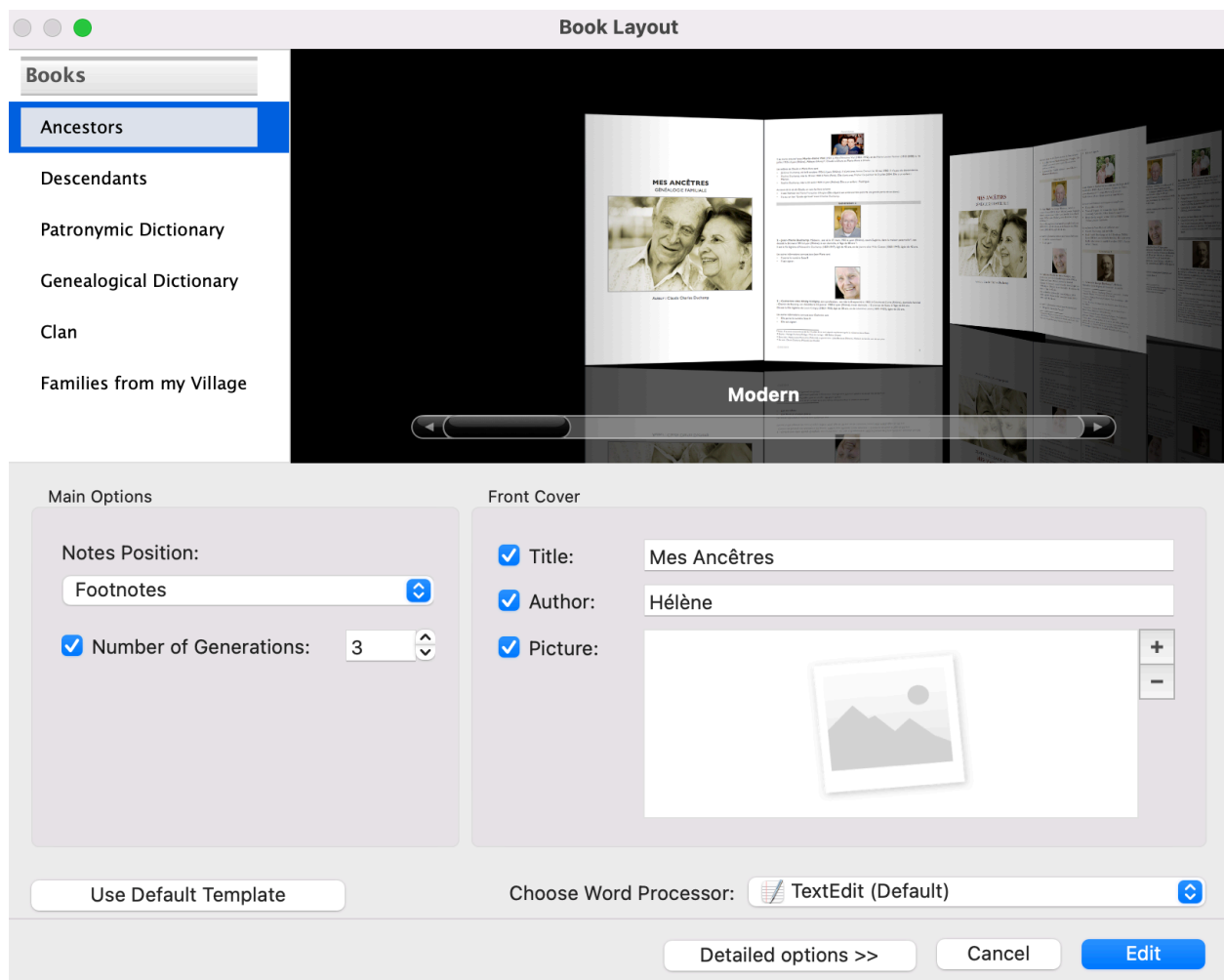
Create and Edit a Book



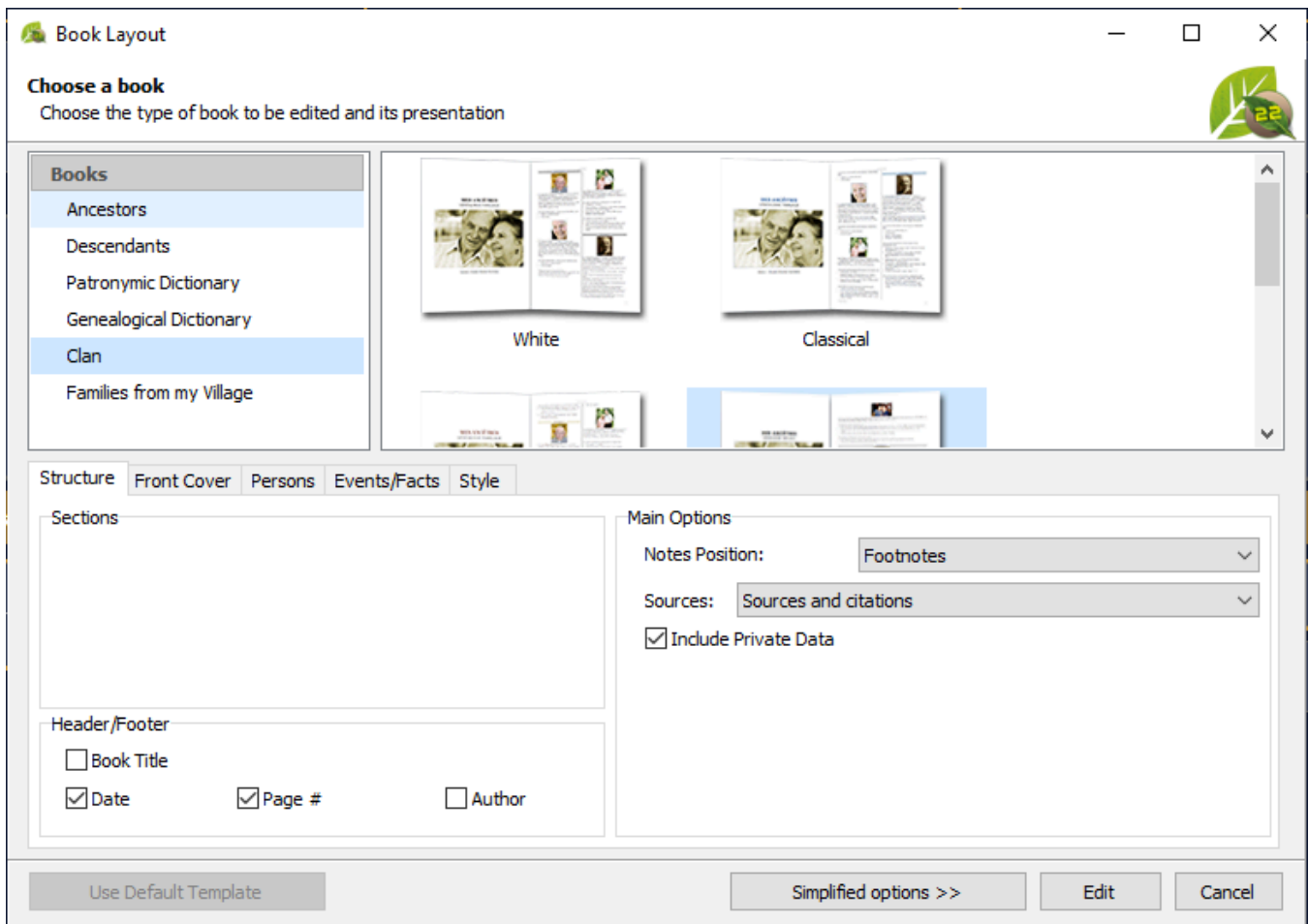
The “dictionary” type books

- **Patronymic dictionary:** Heredis searches all men at the beginning of branches, classifies them by surname and generates their patronymic descent (this dictionary is inspired by René Jetté’s «Genealogical Dictionary of Families»).
- **Genealogical dictionary:** Heredis takes all individuals from your genealogy file, sorted alphabetically. You can attach to these books, genealogical tables and a complete index of individuals, professions and places mentioned.


(Mac) Books choices



(Windows) Books choices



Creating a Book

1. Choose (Windows) **Reports** menu > **Books**; (Mac) **Documents** menu > **Books**; or click the **Books**  button in the toolbar.
2. Select the document type from the list on the left.
3. Select the appropriate graphic theme in the viewer.
4. Click on **Detailed options** button and view the different tabs to choose the appropriate construction parameters for your document.

The tabs and options are the same on Mac and Windows. The only difference is the color of the selections because the Mac system highlights in blue color what Windows puts in gray.

Detailed options

The presentation and content options can be selected from the various tabs. Changes made to a theme are memorized for future use of the same theme. By default, the book construction screen opens in simplified mode. Only the most common options are displayed. To view all available options, click the **Detailed Options** button at the bottom of this screen.

Note: In detailed mode, the label of this button changes to **Simplified Options**, allowing you to return to simple mode at any time.

- Click the **Structure** tab.
 - Check the information to be included: photo album, header and footer data, private data.
 - Choose where to place notes, at the bottom of the page, at the end of the section or in the text.
 - Limit your document. Indicate the number of generations desired, limit to a surname, place, edit

your document in several volumes.

- Choose how to present sources: Quoting sources, Complete sources, or No Sources

Note: Depending on the type of document selected, some of the options mentioned above do not appear.

Structure Front Cover Persons Events/Facts Style

Sections

- Photo Album
- Genealogical tables

Header/Footer

- Book Title
- Date
- Page #
- Author

Main Options

Notes Position: Footnotes

Sources: Quoting sources

- Include Private Data
- Number of Generations: 3

- Click the **Front Cover** tab.
 - Check the boxes for the information to be included on the cover.
 - Modify the title, add a subtitle, indicate who is the author.
 - Insert a picture to customize the cover, click on + button at the bottom right to add a picture.

Structure Front Cover Persons Events/Facts Style

Title: My Clan

Subtitle:

Author: Helene

Picture:

+ -

- Click the **Persons** tab.
 - Choose the surname and given name formats.
 - Check the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered these fields.
 - Check the boxes to include the following information: **pictures**, **child status**, **signature**, **notes**, **sundry links**, calculated data (ahnentafel number, duration of marriage, Stepfamilies, Consanguinity degree precise the maximum wanted degree).
 - Tick the corresponding boxes to include in the document the **spouses** of each child and whether or not they have **descendants**.

Create and Edit a Book

The screenshot shows the 'Style' tab of a software interface. It contains several sections:

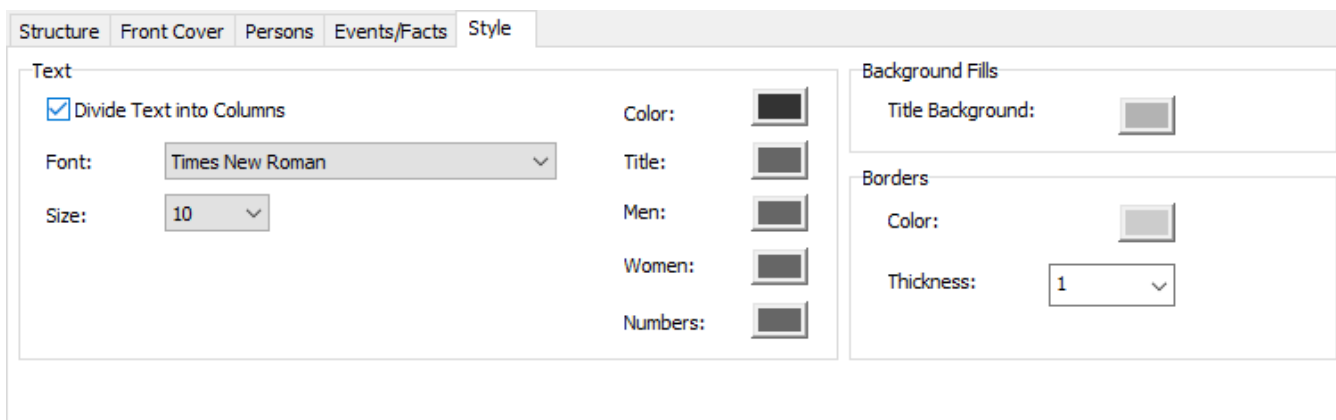
- Surname Styles:** A dropdown menu set to 'William of HATFIELD', with checkboxes for 'Include Suffix' (checked) and 'Include Prefix' (unchecked).
- Given Names Styles:** A dropdown menu set to 'All Given Names', with a checked 'Include Nickname' checkbox.
- Primary Person Options:** Checkboxes for 'Preferred Pictures' (checked), 'Child Status' (unchecked), 'Signature' (unchecked), 'Notes' (checked), and 'Sundry Links' (unchecked).
- Calculated Data:** Checkboxes for 'Ahn. Number' (checked), 'Duration of Marriage' (checked), and 'Stepfamilies' (checked). A 'Degree of Consanguinity' field is set to '4'.
- Children Options:** Checkboxes for 'Spouses' (checked) and 'Descendants' (checked).

- Click the **Events/Facts** tab
 - Choose the date format. Check the **Use Gregorian Dates** box to display all dates in this calendar, regardless of the calendar in which they were entered.
 - Choose the place style from the drop-down menu. Select which elements of the places you want to display in the document from the ones you have entered. Check the box **Include subdivision** to give more precision to the place.
 - Select which events to include: **minor events** (other than birth, death and marriage event), **facts**.
 - For each event, tick the corresponding boxes to specify witnesses, age at the event and notes.
 - Check the option **Show Missing Data** to have it completed by your family.

The screenshot shows the 'Events/Facts' tab of a software interface. It contains several sections:

- Date Styles:** A dropdown menu set to '30 September 1984', with an unchecked 'Use Gregorian Dates' checkbox.
- Place Styles:** A dropdown menu set to 'City (County)', with a checked 'Include Subdivision' checkbox.
- Event Options:** Checkboxes for 'Minor Events' (unchecked), 'Show Missing Data' (unchecked), 'Quoting age at Events' (checked), 'Witnesses' (checked), 'Quoting Notes' (checked), and 'Facts' (unchecked).

- Click the **Style** tab
 - Tick the box to **Divide text into Columns** by page for your book.
 - Choose the formatting of the book: **font**, **text size**
 - Click on the colored button to choose colors for general data (**Color**), **title**, specific colors for **men**, **women** and **numbers**
 - Click on the colored button to choose the color of **title background**, **color** and **thickness** of borders of the document.



(Mac) Select the word processor with which you want to edit the document. Heredis offers you all programs that enable editing and installed on your computer.

(Windows) Heredis will launch the software by default for .docx files. Make sure you have a word processor by default otherwise the document won't open. It will be saved in Documents > BSD Concept > Heredis > Heredis Genealogical Reports but won't open. You'll be able to open it once you'll have a word processor.

- Click **Edit** to start the word processor.

Important: Once your book is created it becomes an independant document from Heredis. You can modify it in your word processor. If you encounter {XE} tags in your book, it is not due to Heredis, see {XE "xxxxxxxxx Names"} tags in your documents, what to do? article.

Info • Indexes are not directly integrated with books because each word processor handles them in a specific way. However, index entries are marked so that you can generate an index after the document is created and opened in your word processor. Put the cursor where you want and generate the index:

- in Word, menu **Insert > Tables and Index or References > Insert Index**
- in LibreOffice, menu **Insert > Indexes and Tables**

Mac Note: The text editor Page doesn't manage index.

Print or Export Books

Once the book is created, you can print it from your word processor. Generally, then click on the **File** menu > **Print**.

From your word processor, you can save in a format other than . docx, for example in .pdf. Click the **File** menu > **Save As**, change the format (the operation differs from one word processor to another), choose the save location and click **Save** or **OK** depending on the software.


For more details, refer to the user manual of your word processor or printer for printing configuration.

Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

“Families from my Village” Books

Starting with Heredis 2022, a new category of books has become available: **Families from my Village**. In a Families from my Village book, you will find all the persons who had a major life event in the village you selected. This book follows the same logic as one-place studies, such as the Ortsfamilienbuch used by German genealogists.

Create a « Families from my Village » book

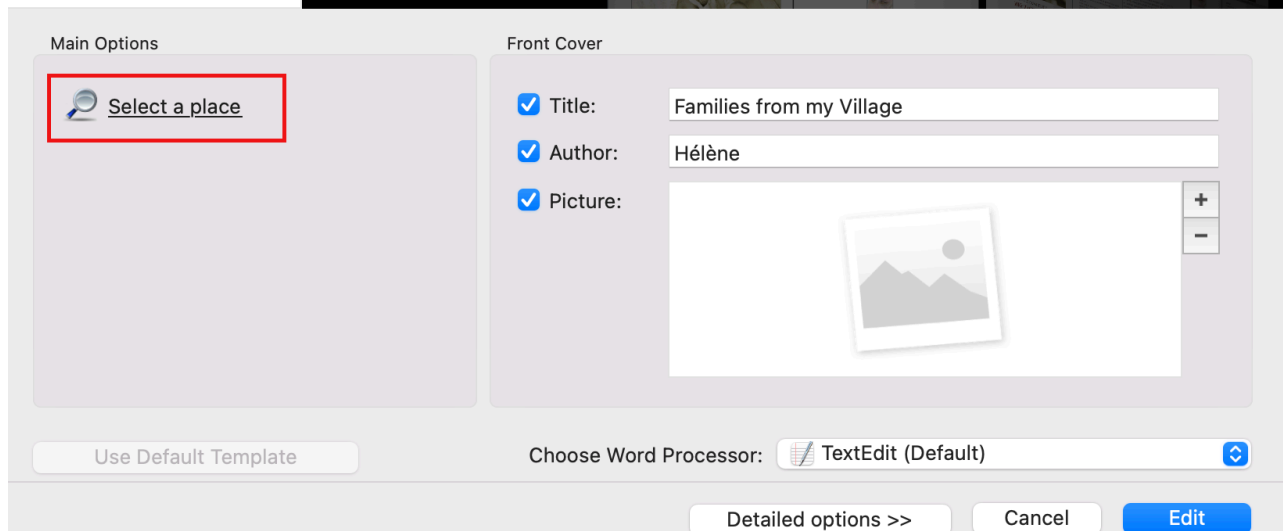
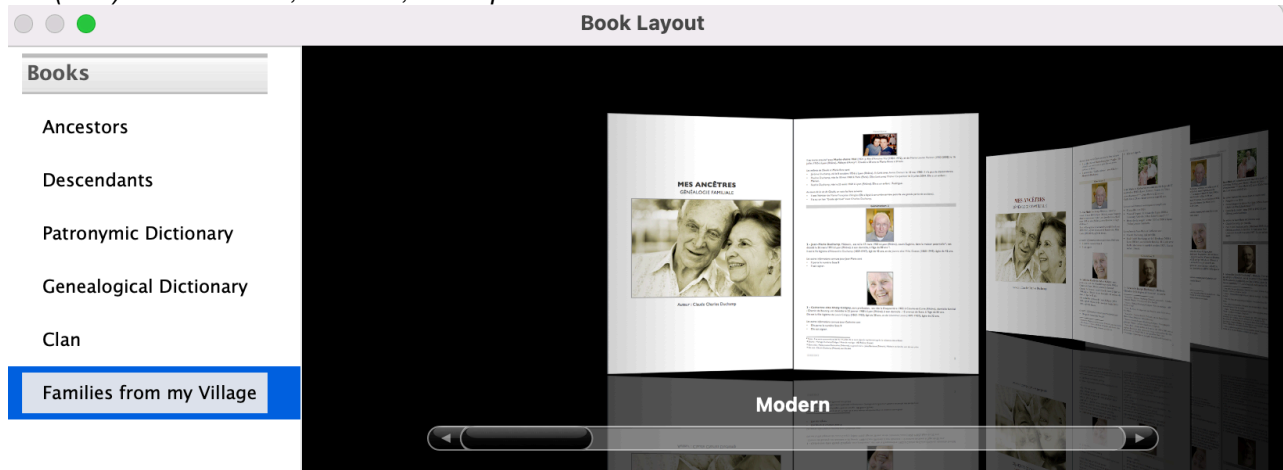
To start creating a Families from my Village book, click the  **Books** button on the toolbar or use the pull-down menu: **Documents > Books**.

Select **Families from my Village**. Choose a theme just as you would do it for any other type of Heredis book.

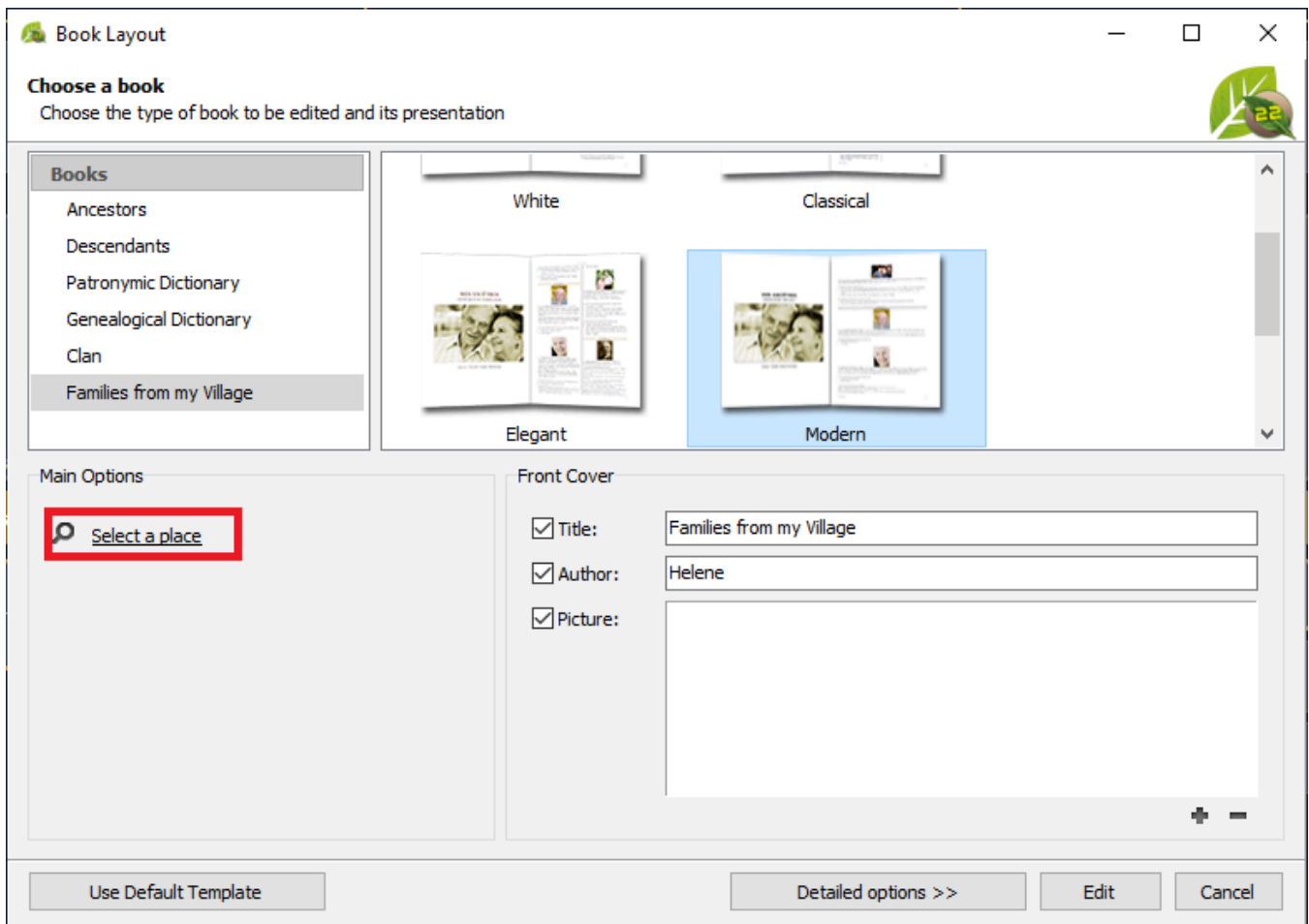
In the lower part of the Book Layout window, choose the desired options. Remember to choose them before creating the book, as it will not be possible to change them after the book is created. You would otherwise need to restart the entire creation process to add data.

Click on **Select a place** to choose among pre-existing places in your genealogy. Indicate a title, an author, and choose a photo as an illustration.

(Mac) Select a book, a theme, and a place



(Windows) Select a book, a theme, and a place

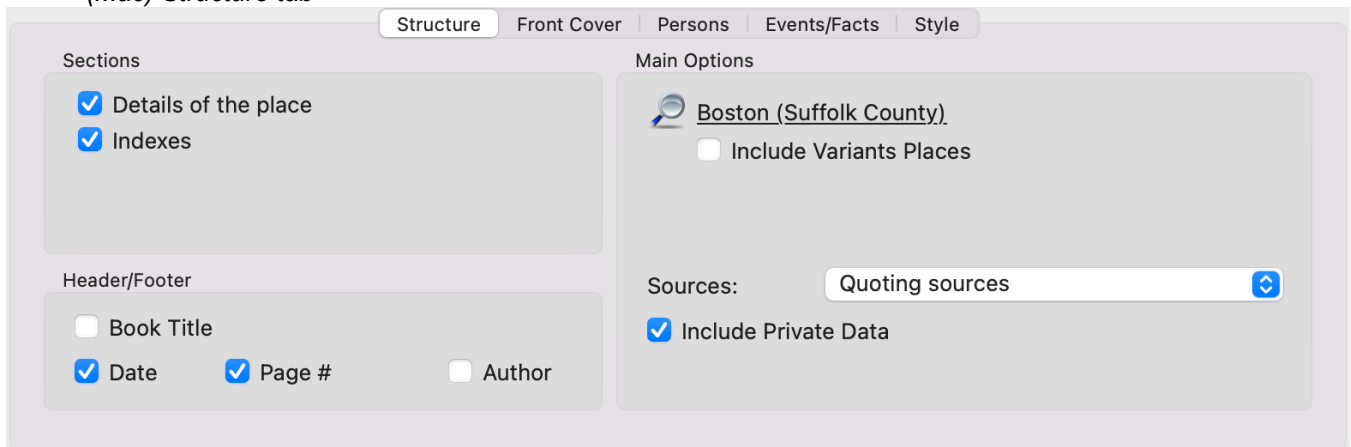


(Mac) Choose the type of word processor you wish to use.

For additional options, click on **Detailed options >>**. Various tabs will allow you to further customize your book.

Structure tab

(Mac) Structure tab



(Windows) Structure tab

“Families from my Village” Books

Structure Front Cover Persons Events/Facts Style

Sections

- Details of the place
- Indexes

Header/Footer

- Book Title
- Date
- Page #
- Author

Main Options

Boston (Suffolk County)

Include Variants Places

Sources: Sources and citations

Include Private Data

Check each of the boxes you are interested in. You are given the option to:

- Add **Details** of the place. The book will include data from the Places Index: full name, notes, places subdivisions, name variants, and media available for the place.
- Add (= generate) **Indexes** for persons and places. A useful feature when the list of persons or places used is a long one; it will let you locate where in the document (book) the person or place you are looking for is mentioned.
- Include a **Book Title**, a **Date**, **Page** numbers, and the name of the **Author**.
- **Select a place** and also add every person entered in the place variant(s) if there is any. In which case you can check the box **Include Variants Places**.
- Choose **Quoting sources** – or not.
- **Include Private Data** – or not. Uncheck the box to not include the data.

Front Cover tab

(Mac) Front Cover tab

Structure Front Cover Persons Events/Facts Style

Title:
Families from my Village

Subtitle:
Boston

Author:
Hélène

Picture:

+ -

(Windows) Front Cover tab

It will let you choose a **Title**, **Subtitle**, **Author** and a cover **Picture**. Uncheck boxes to ignore the fields you do not wish to include on the book cover.

Click on **+** to add a picture, or on **-** to remove it.

Persons tab

(Mac) Persons tab

(Windows) Persons tab

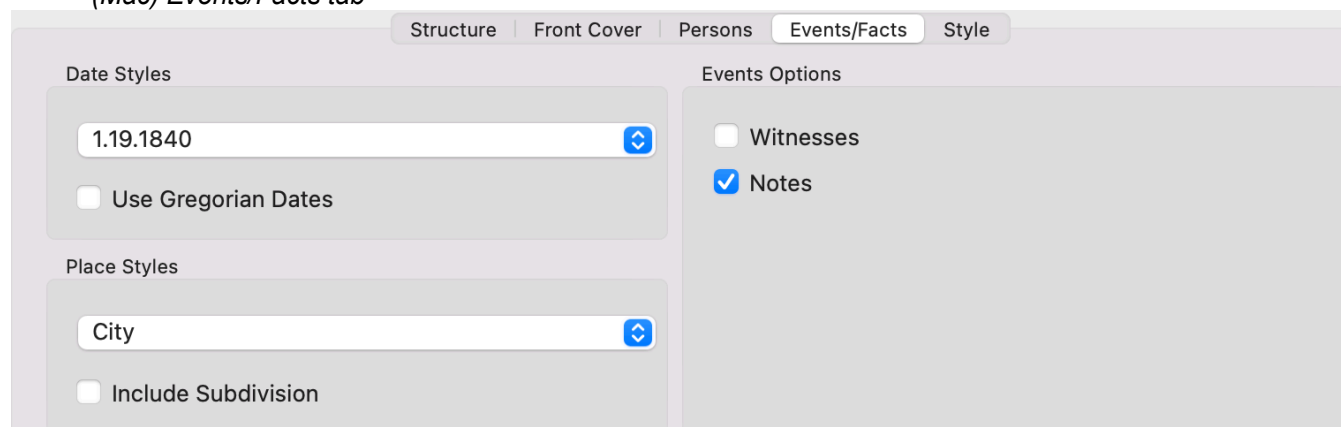
Surname Styles: you can set up your preferred format for a person’s full name, with the option to include his/her Prefix or Suffix – if you have provided such information in the person’s data.

Specify which given names should be mentioned: **All Given Names**, **Only First Given Name**, **Only Usual Given Name**, or even **First Given Name and Initial of Others**. Check the box entitled “**Include Nickname**” to include your ancestors’ nicknames in the book.

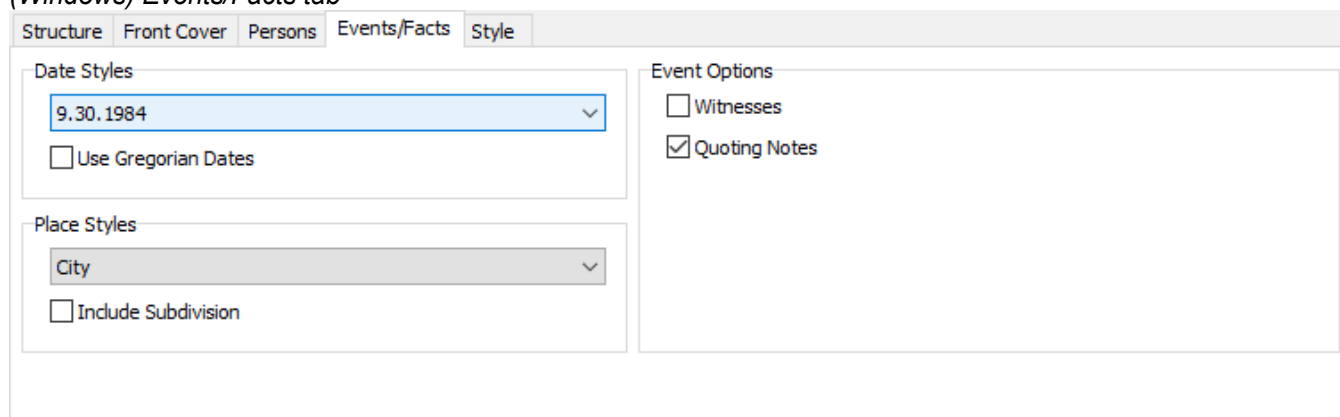
Check additional boxes available under this tab to include additional personal data such as **Child Status** – legitimate, adopted, etc. – **Notes**, **Ahnentafel Number** and **children’s Spouses**.

Events/Facts tab

(Mac) Events/Facts tab



(Windows) Events/Facts tab



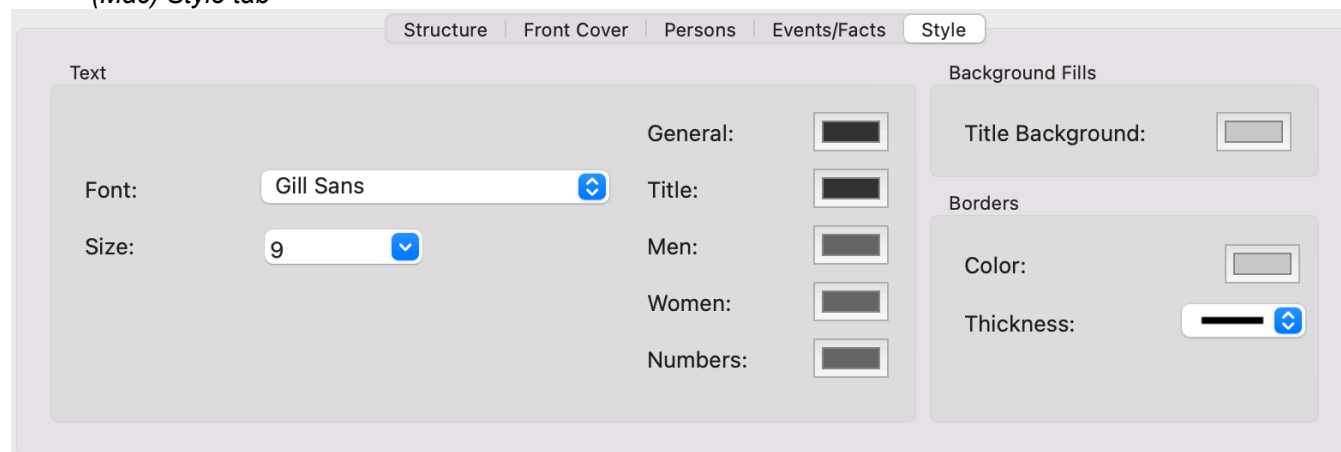
Choose among the **Dates Styles** offered which should be used. If some dates have been entered using specific calendars, e.g. the French Republican Calendar, check the box entitled “**Use Gregorian Dates**” and Heredis will convert the dates for you automatically.

Choose among the Places Styles offered which should be used. Check the box to Include Subdivision – providing you have entered one.

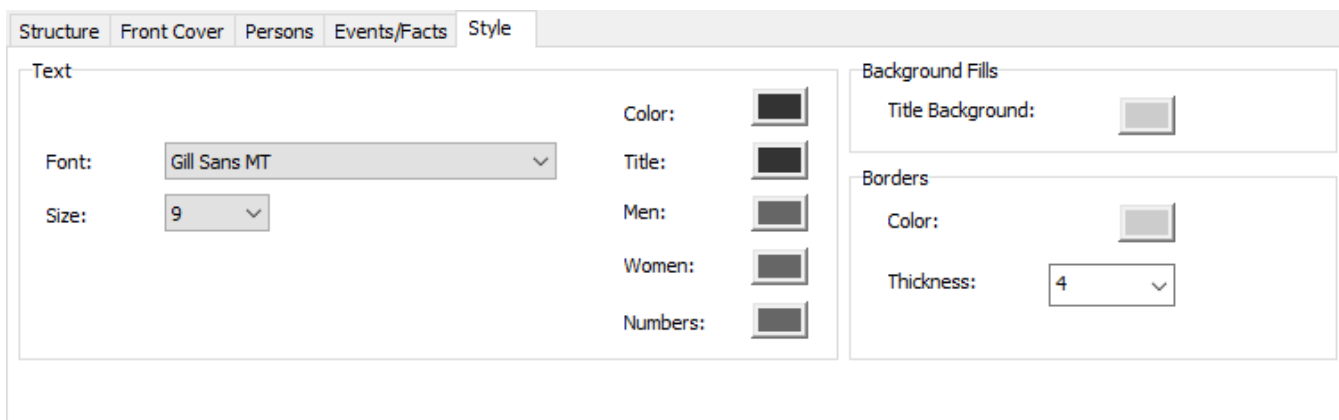
Check the Witnesses and/or Notes boxes if you want them to be mentioned in the book.

Style tab

(Mac) Style tab



(Windows) Style tab



Under this tab, you may choose among various fonts and font sizes and/or set colors according to the types of data available. Click on the color squares to modify the default color for each type of data. Click on the **Font** and **Size** drop-down list to modify them.

Once your book layout is completely set up, click on **Edit** to generate your book in a .docx format. This document will no longer be linked to your Heredis software and will be automatically opened in your default or selected word processor.

Note on Windows: make sure your default word processor can handle .docx files.

Consult the generated book

By default, on **Windows**, Heredis saves the document under Documents > BSD Concept > Heredis > Heredis Genealogy Reports.

On **Mac**, you need to specify where to save the document after clicking on **Edit**.

As soon as it is created, the document will open up on your computer screen. You will be able to enter additional information: acknowledgments, a dedication, an introduction. Use your word processor's features as usual. Changes made to the document will not affect your Heredis data since the document is independent from your genealogy software.

Pictures can be resized or even removed if – for instance – they turn out to be low-quality photos. All you need to do is select the picture and hit the backspace or delete button on your keyboard.

This document is defaulted to list family members under the name of the male spouse (usually the head of household), immediately followed by his parents' info. For this reason, female spouses and children – in general – are not listed at the “first level” as primary persons prefixed by a cross-reference number. They are “attached” to their spouse or parents.

Content of the edited book

The main persons presented in this document are:

- All persons who are “heads” of a family who have lived in the place.
- All persons «isolated» with only one major individual event in the place.

These main persons appear at the first level in the book, sorted alphabetically, with a number in front of their name.

Data displayed

Primary Person

Person's number

Ahnentafel number

Surname Given Name

If a person's surname is a variant, the main surname will be displayed and the variant will be between parenthesis. Example : SMITS (SMITH)

“Families from my Village” Books

Child Status, Religion, Occupation, Title

Date and Place of Birth-Baptism / Date and Place of Death-Burial

Parents' Surname, Given Name

Cross-reference number

Child Status, Religion, Occupation, Title

Parents' date and place of Birth-Baptism / date and place of Death-Burial

Family/Spouse(s)

Spouses are listed chronologically in the document and include the following information:

Spouse's Surname, Given Name

Cross-reference number

Child Status, Religion, Occupation, Title

Spouse's date and place of Birth-Baptism / date and place of Death-Burial

Spouse's Parents' Surname, Given Name

Child Status, Religion, Occupation, Title

Spouse's Parents' date and place of Birth-Baptism / date and place of Death-Burial

Children (from each family/spouse)

A numbered list of the children born from each family

Surname Given Name

Cross-reference number

Child Status, Religion, Occupation, Title

Children's Date and Place of Birth / Date and Place of Death

For each child's family

To be displayed in chronological order:

Spouse's Surname Given Name

Cross-reference number

Child Status, Religion, Occupation, Title

Children' spouse's Date and Place of Birth / Date and Place of Death

Marriage Date and Place

Cross-reference numbers

Each main person in the place (village) has a cross-reference number.

If a person is described in a family group then they have a cross-reference number to quickly access all their information.

The cross-reference number is clickable in the document by holding the CTRL key on Windows or

Command key  on Mac.

(cross-reference number) = will send you to the same person

{ cross-reference number } = will send you to the family under which the person is listed (which is usually the case for women and children)

Notes and sources

If you have checked the “**Notes**” box in the Events/Personal Topics tab, all the notes of the persons, unions and events mentioned are grouped under the main person block.

If you chose “Sources and Citation” in the Structure tab, the person and event sources are also displayed under the main person block.

Indexes

Under the persons list, if you checked the option before editing, it is possible to display indexes.

- Names and Variants Index

SMITH..... p 8, 15

SMITS (SMITH)

- Other Places Index

This index lists other places mentioned, sorted in alphabetical order, with the name of the person and

cross-reference number.

Abbreviations

Bi = Birth

M = Marriage

rM = Religious Marriage

Mc = Marriage Contract

O = Other Type of Marriage

D = Death


B = Burial

F = Father M = Mother

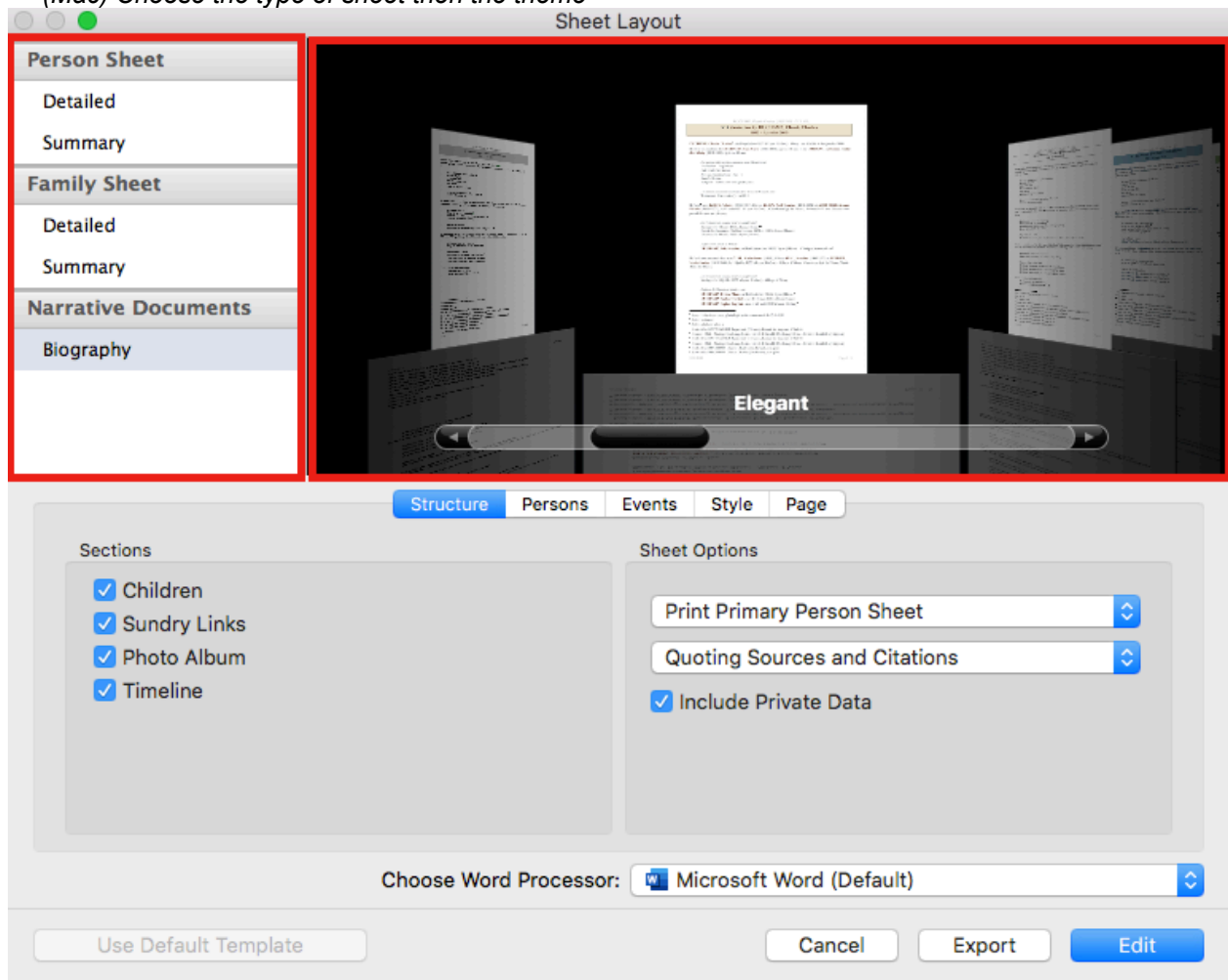
Create and Edit Sheets

You can edit individual or couple sheets.

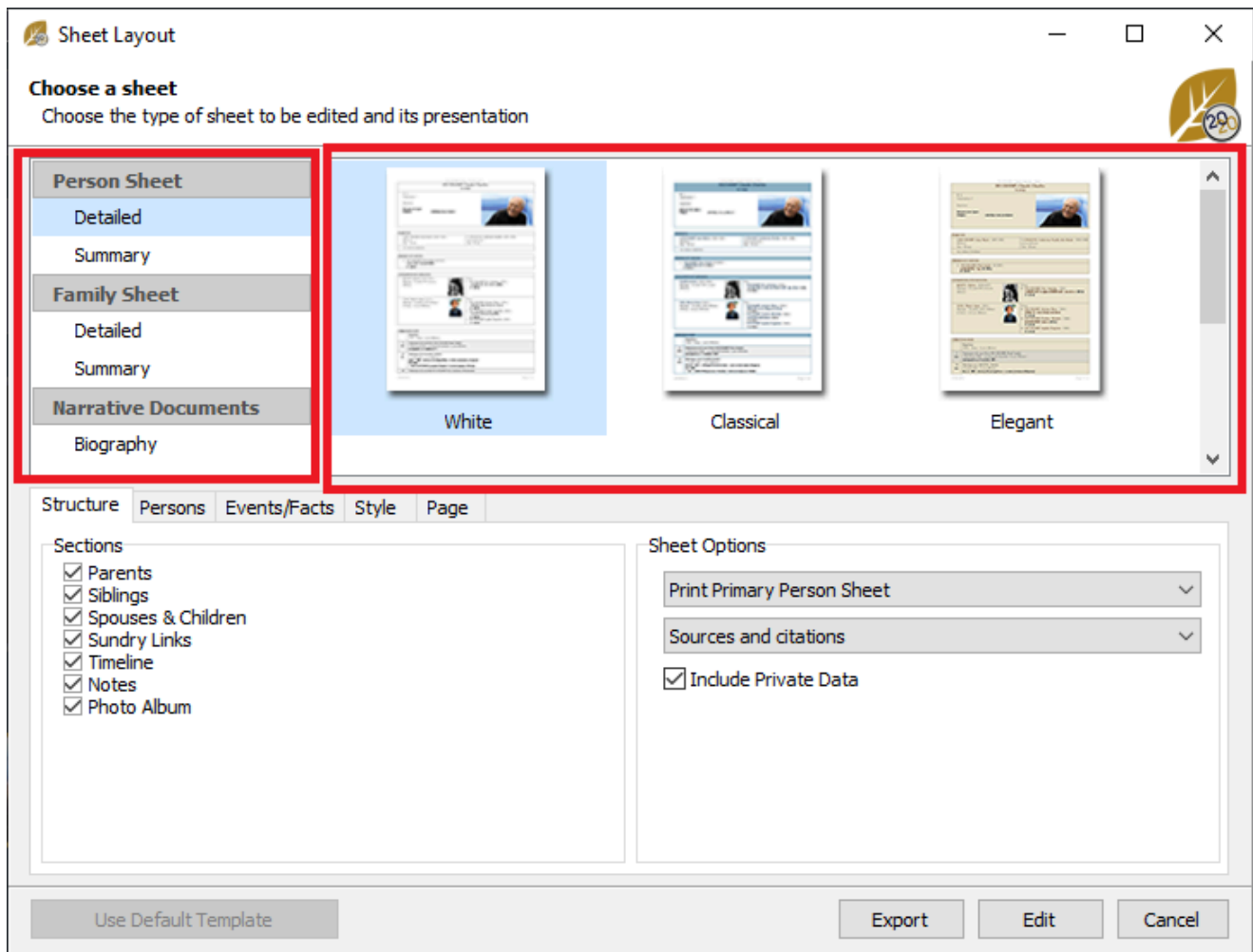
Creating sheets

- Choose **(Windows) Reports / (Mac) Documents > Sheets** or click the **Sheets**  button in the toolbar.
- Select the document type from the list on the left.
- Select the appropriate graphic theme in the viewer

(Mac) Choose the type of sheet then the theme



(Windows) Choose the type of sheet then the theme

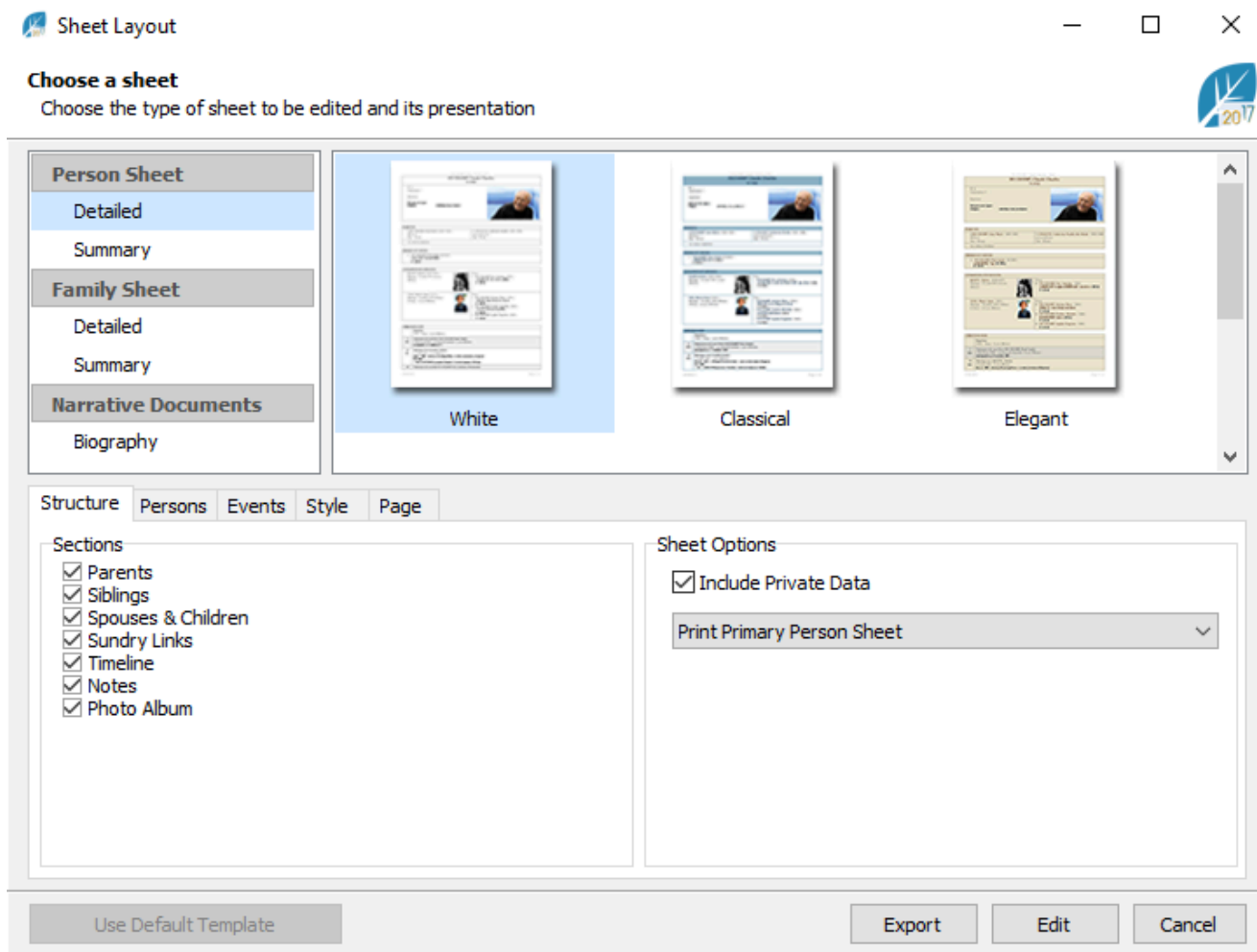


- Click on the different tabs to choose the appropriate construction parameters for your document. See paragraph below.

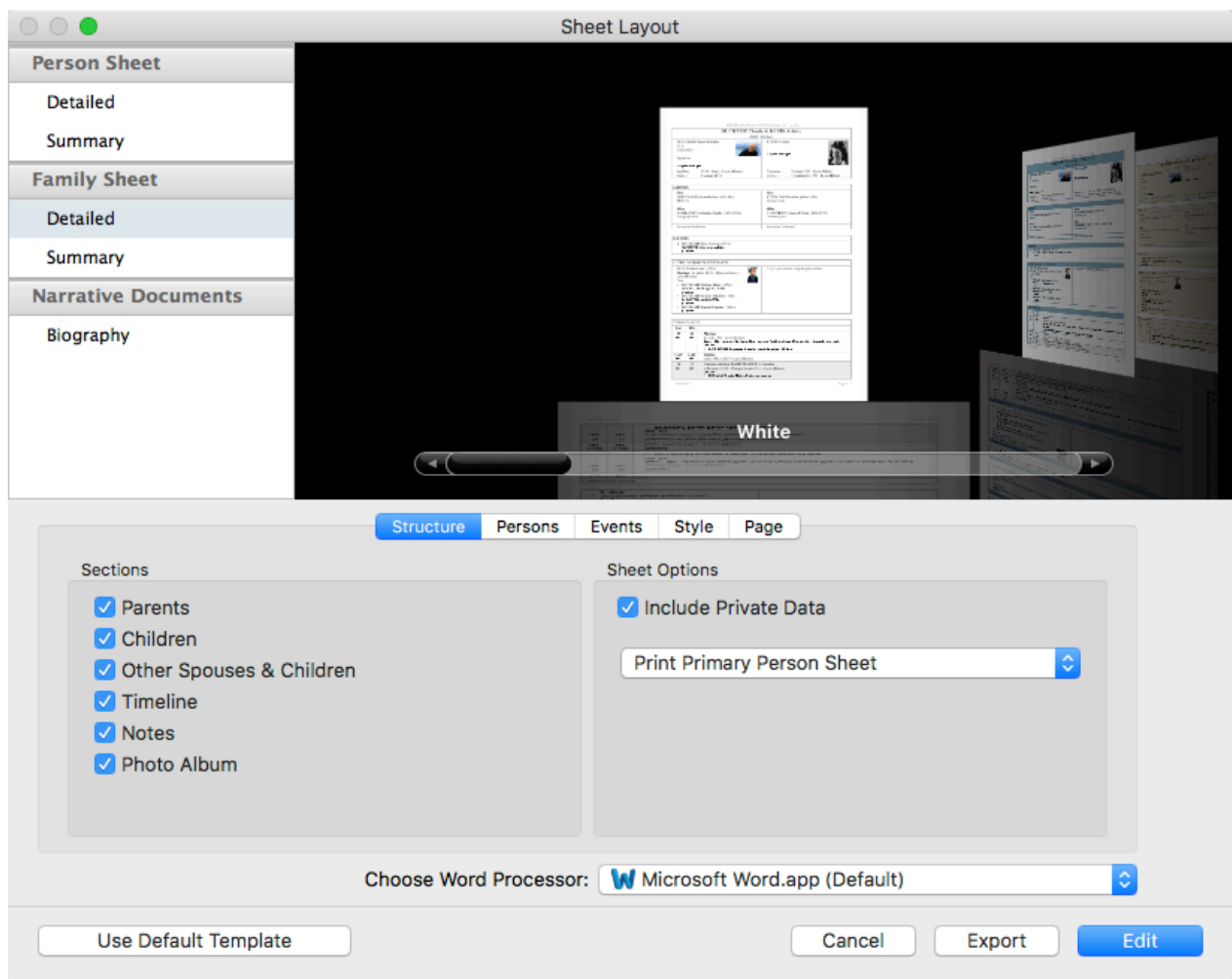
Composing a sheet

(Windows) Sheet's Layout


Create and Edit Sheets

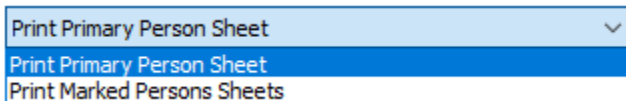


(Mac) Sheet's layout



The presentation and content options can be selected from the various tabs. Changes made to a theme are memorized for future use of the same theme.

- Click on the **Structure** tab
 - check the information to be included in the form: different family members, photo album, notes, private data, etc.
 - choose how to manage sources.
 - choose the person(s) to be treated.
 - **Note:** If you want to edit the sheets of several persons in your file at the same time, you must first mark these persons using the flag  of **Personal Data** screen. You can mass mark according to one or more search criteria through smart search. For example, you can search for all persons with the Thomas name and then click the **Marked >Declare marked** button in the processing area. See the Smart Search (voir page 208) article for more details. Then select **Print Marked Persons Sheets**. You will get all the relevant sheets at the same time.



Be careful!, the more persons you put, the longer the edition will be. Avoid putting too many people at the same time not to block Heredis for many hours if your file is consequent.

(Windows) Structure tab

Create and Edit Sheets

Structure | Persons | Events/Facts | Style | Page

Sections

- Parents
- Siblings
- Spouses & Children
- Sundry Links
- Timeline
- Notes
- Photo Album

Sheet Options

Print Primary Person Sheet

Sources and citations

Include Private Data

Use Default Template | Export | Edit | Cancel

(Mac) Structure tab

Structure | Persons | Events | Style | Page

Sections

- Parents
- Siblings
- Spouses & Children
- Sundry Links
- Timeline
- Notes
- Photo Album

Sheet Options

Print Primary Person Sheet

Quoting Sources and Citations

Include Private Data

Choose Word Processor: Microsoft Word (Default)

Use Default Template | Cancel | Export | Edit

- Click the **Persons** tab.
 - Choose the surname and given name formats.
 - Check the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered these fields.
 - Check the boxes to include the information in the sheet: preferred picture, number, occupation, title, child status, signature, flags (confidential, childless ...), notes.
 - Check the corresponding boxes to include in the document the spouses of each child and whether or not they have descendants.
 - **(Mac)** Check here the box to add Facts.

(Windows) Person tab

(Mac) Person tab

- Click the **Events** tab to select which events to include:
 - **minor events** (other than birth, death and marriage event), **cross-events** (events in which the person participated as a witness, for example).
 - Choose the format of date of events.
 - Check the **Dates in Gregorian calendar** box to display all dates in this calendar, regardless of the calendar in which they were entered.
 - Choose the place style from the drop-down menu. Select which elements of the places you want to display in the document from the ones you have entered.
 - Check the box **Include subdivision** to give more precision to the place.
 - For each event, specify if you wish to mention witnesses and notes.
 - **(Windows)** Choose to add the **Facts** of the person.
 - If you selected the **Biography** document, check **Show Missing Data** to have your family complete it.

(Windows) Events/Facts tab

Create and Edit Sheets

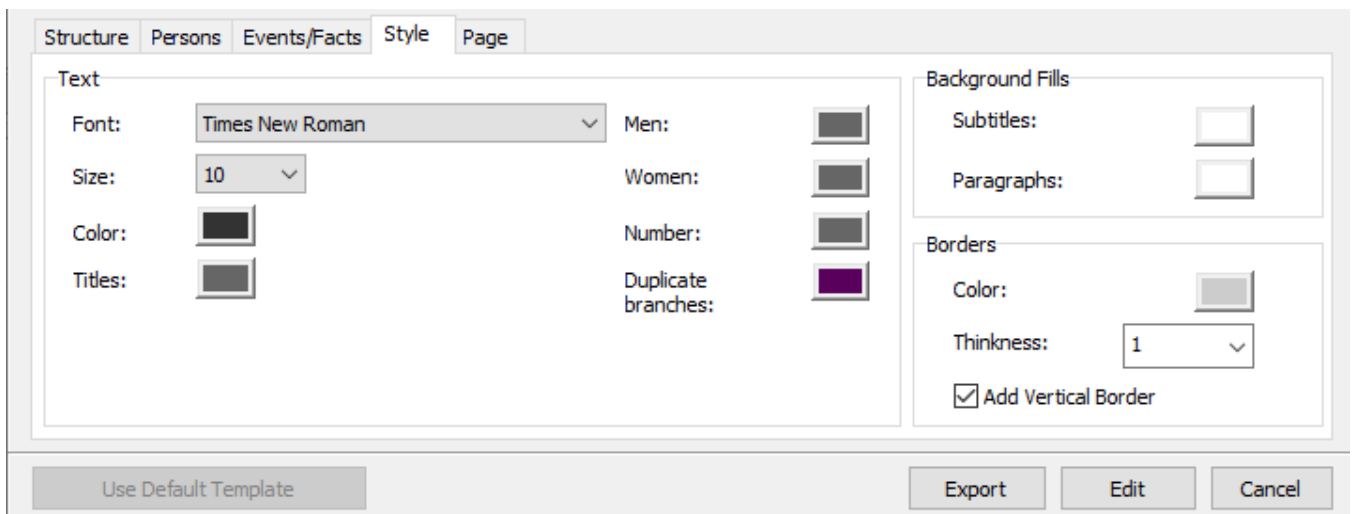
The screenshot shows a software interface with five tabs: Structure, Persons, Events/Facts, Style, and Page. The 'Events/Facts' tab is active. It contains two main sections: 'Date Style' and 'Place Styles'. The 'Date Style' section has a dropdown menu showing '30 September 1984' and a checkbox for 'Use Gregorian Dates'. The 'Place Styles' section has a dropdown menu showing 'City (County)' and a checked checkbox for 'Include Subdivision'. To the right, the 'Event Options' section contains five checked checkboxes: 'Witnesses', 'Notes', 'Minor Events', 'Cross Events', and 'Facts'. At the bottom, there are three buttons: 'Use Default Template', 'Export', 'Edit', and 'Cancel'.

(Mac) *Events* tab

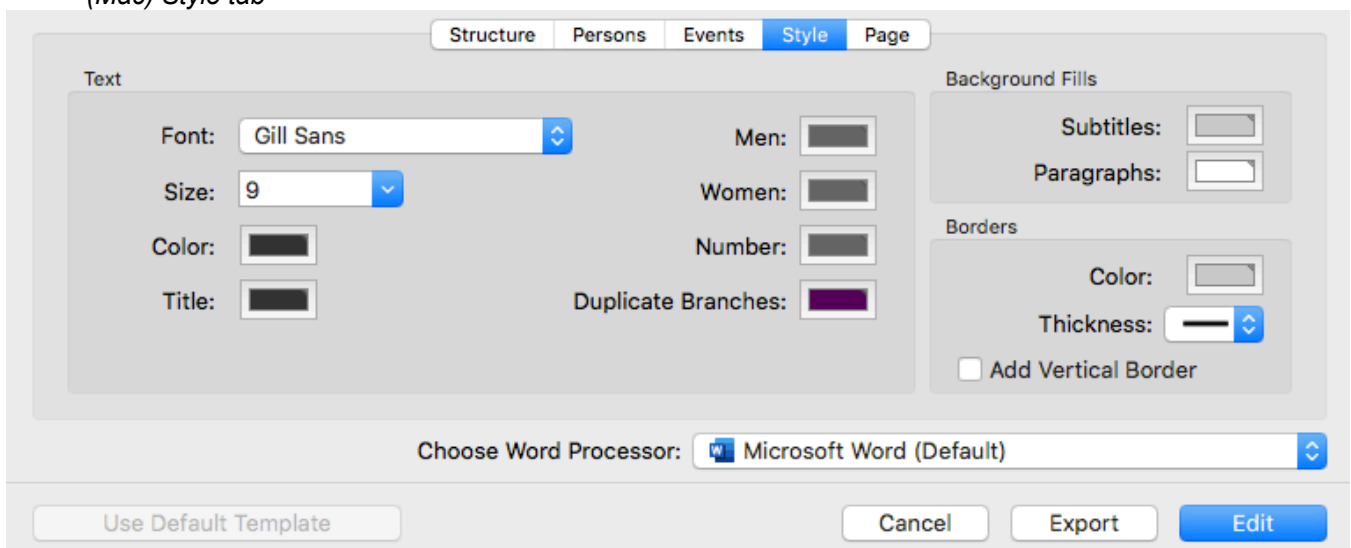
The screenshot shows a software interface with five tabs: Structure, Persons, Events, Style, and Page. The 'Events' tab is active. It contains two main sections: 'Date Styles' and 'Place Styles'. The 'Date Styles' section has a dropdown menu showing 'Jan 19, 1840' and a checkbox for 'Use Gregorian Dates'. The 'Place Styles' section has a dropdown menu showing 'City (County)' and a checked checkbox for 'Include Subdivision'. To the right, the 'Events Options' section contains four checked checkboxes: 'Witnesses', 'Notes', 'Minor Events', and 'Cross Events'. At the bottom, there is a 'Choose Word Processor:' dropdown menu showing 'Microsoft Word (Default)'. Below this are four buttons: 'Use Default Template', 'Cancel', 'Export', and 'Edit'.

- Click the **Style** tab and choose the formatting of the form:
 - type of font,
 - text size and color,
 - specific colors for men, women and numbers,
 - colors of the titles
 - colors of background fills
 - color and thickness of the borders of the document.

(Windows) *Style* tab



(Mac) Style tab



- Click the **Page** tab and set your print options:
 - indicate the text to include in headers and footers,
 - paper size and orientation,
 - setup the document margins.

(Windows) Page tab

Create and Edit Sheets

Structure Persons Events/Facts Style **Page**

Header

Title: THOMAS Michael George (1933-) - # 1 (G1)

Footer

Date Page #

Author: Helene

Setup

Page Setup

A4 - 21.0 x 29.7 cm (Portrait)

Margins (cm)

Top: 1,50 cm Bottom: 1,50 cm

Left: 1,50 cm Right: 1,50 cm

Use Default Template Export Edit Cancel

(Mac) Page tab

Structure Persons Events Style **Page**

Header

Title: THOMAS Judy (1962-) (G1)

Footer

Date Page #

Author: Helene

Setup

Page Setup

A4 - 21.0 x 29.7 cm (Portrait)

Margins (cm)

Top: 1,5 Bottom: 1,5

Left: 1,5 Right: 1,5

Choose Word Processor: Microsoft Word (Default)

Use Default Template Cancel Export Edit

- **(Mac)** Select the word processor with which you want to edit the document. Heredis shows you all programs that enable editing and are installed on your computer.
- **(Windows)** The sheet will open in your default word processor for .docx file formats that is installed on your computer. If you do not have a default word processor for this type of file, Heredis will not be able to open the file. Remember to check in Windows system, if you have a default application for .docx.
- Click **Edit** to start the word processor.
- Click **Export** if you want to use it differently and create a .txt document to be open in raw text format.

Important: Once your sheet is created it becomes an independent document from Heredis. You can modify it in your word processor. If you encounter {XE} tags in your sheet, it is not due to Heredis, see {XE "xxxxxxxx Names" } tags in your documents, what to do? article.

Save a Sheet

A sheet edited in your word processor becomes an independent document from the Heredis software. This document can be saved for later reprinting or modifying. To keep the document displayed in your word processor, use the saving feature of your software. It is generally found in the **File** menu.

To change the name proposed by Heredis for the document, or the location of the file, choose **File > Save As**. These commands are generally the same in all word processors.

Print Sheets

You will start printing from your word processor, having made changes if required.


Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

Usually, you can find the Print options in File menu > Print but it depends on your word processor software. Refer to its user guide to know exactly how.

Custom Reports

Starting with Heredis 2019, this feature offers various reports models that can be fully customized according to your needs.

Click on the menu **(Windows) Reports > Custom Reports; (Mac) Documents > Custom Reports** and select the type of report you are interested in among the default models included in the application: Ancestors,

Descendants, Persons, Events, Places, Sources. You can also use the  shortcut in the toolbar.

The selected report opens up in a new Heredis window, which allows you to consult the data in your file while continuing to work on your genealogy.

Note: you can also open several custom reports at the same time if you wish to.

Ancestors Custom Report

Ahn. #	Surname	Given Names	Bi.: C-Date	B/C-Place	Spouse-Surname	Marr-Date-Place	D/Bu-Date	D/Bu-Place	D/Bu-Calc. Age
Generation : 1									
1	THOMAS	Michael George	Bi.: 2/6/1933	Margate	<ul style="list-style-type: none"> GREGSON Vivian LOWENSTEIN Paula 	<ul style="list-style-type: none"> M: 1/7/1954 Hudson M: 3/3/1976 Troy 			
Generation : 2									
2	THOMAS	Christopher Edward	Bi.: 5/13/1910	Oxford	RUCASTLE Alice Jean	M: 11/22/1935 London	D: 5/31/1991	Dover	81 years
3	RUCASTLE	Alice Jean	Bi.: 12/2/1908	Margate	<ul style="list-style-type: none"> MORLEY Andrew THOMAS Christopher Edward 	<ul style="list-style-type: none"> M: 11/3/1928 Margate M: 11/22/1935 London 	D: 7/31/1998	Dover	89 years
Generation : 3									
4	THOMAS	George	Bi.: 7/4/1877	Oxford	DAVIS Violet Elizabeth	M: 5/27/1899 Oxford	D: 8/1/1947	Oxford	70 years
5	DAVIS	Violet Elizabeth	Bi.: 1875	Blackpool	THOMAS George	M: 5/27/1899 Oxford	D: 1966	Oxford	91 years
6	RUCASTLE	Gilbert	Bi.: 2/3/1870	Margate	WALLACE Brenda	M: 9/11/1900 Edinburgh	D: 6/2/1955	Margate	85 years
7	WALLACE	Brenda	Bi.: 10/14/1873	Edinburgh	<ul style="list-style-type: none"> RUCASTLE Gilbert THOMAS Paul 	<ul style="list-style-type: none"> M: 9/11/1900 Edinburgh M: 1902 Montgomery 	D: 9/8/1937	Margate	63 years
Generation : 4									
8	THOMAS	John	Bi.: 5/1854	?	von BORK Jeanne	M: 4/4/1882 Portland	D: > 1921		66 years at least
10	DAVIES	Henry James	Bi.: 1840		PINKERTON Ann Elizabeth	M: 7/2/1864 Blackpool	D: 1905		65 years
11	PINKERTON	Ann Elizabeth	Bi.: 7/6/1845	Blackpool	DAVIES Henry James	M: 7/2/1864 Blackpool	D: 3/11/1930		84 years
12	RUCASTLE	Adam	Bi.: 6/7/1818	Canterbury	HAYES Ann	M: 11/11/1858 Plymouth	D: 11/8/1906	Margate	88 years
13	HAYES	Ann	Bi.: 1833	Plymouth	RUCASTLE Adam	M: 11/11/1858 Plymouth	D: 1915	Margate	82 years
14	WALLACE	James	C: 9/18/1836	Edinburgh	de NEMOURS Josephine	M: 3/10/1872 Dunfermline	D: 5/20/1894	Edinburgh	57 years
15	de NEMOURS	Josephine	Bi.: 1/24/1855	Dunfermline	WALLACE James	M: 3/10/1872 Dunfermline	D: 8/31/1920	Edinburgh	65 years

The data thus displayed depends on the type of default report selected:

- **Persons Reports** allow you to display all the persons in your genealogy
- **Ancestors Reports** display the primary person and his/her ancestors, grouped by generation
- **Descendants Reports** display the primary person and his/her descendants, grouped by generation
- **Events Reports** allow you to display all the events saved in your genealogy

And, starting with Heredis 2020:

- **Places Reports** display all the places saved in your genealogy
- **Sources Reports** allow you to view each and every source in your genealogy.

Each report includes the following elements:

- a toolbar
- a data table
- a status bar

Starting with Heredis 2020, in each report, you can click on a person's name and navigate onto this person in Heredis.

The Toolbar

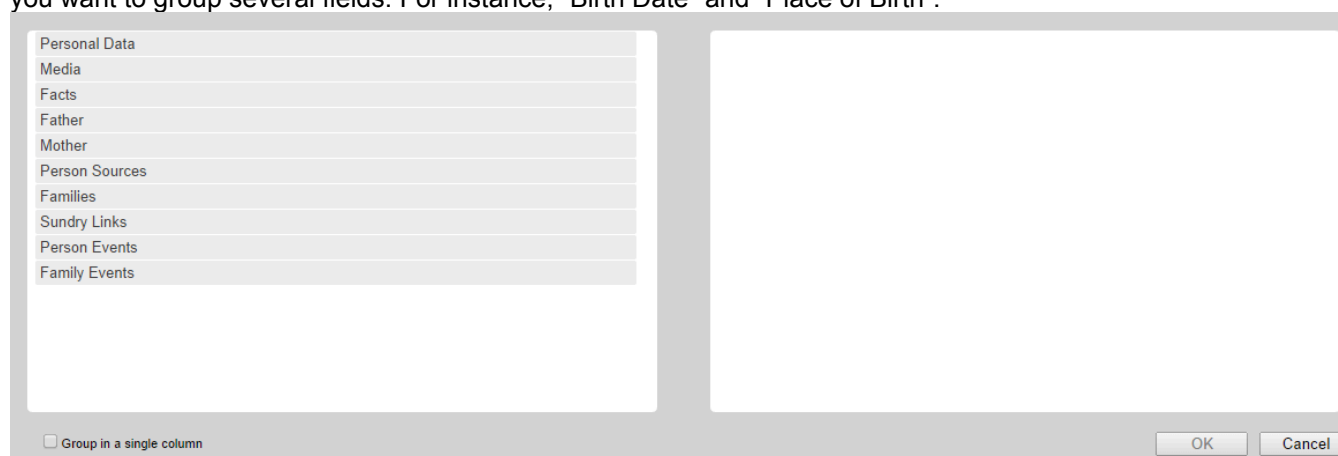


Add Button

Select the information you want to add to your report by clicking on the different sections available (Personal Data, Media, ...)

You can select one or more fields among those suggested. If you click the **OK** button, additional columns are automatically added to your report to let you view the data you deem relevant and important.

Note: You can also group multiple fields into a single column. Select the desired fields and check the **“Group in a single column”** box. Validate your selection and do the same thing again for each column in which you want to group several fields. For instance, “Birth Date” and “Place of Birth”.



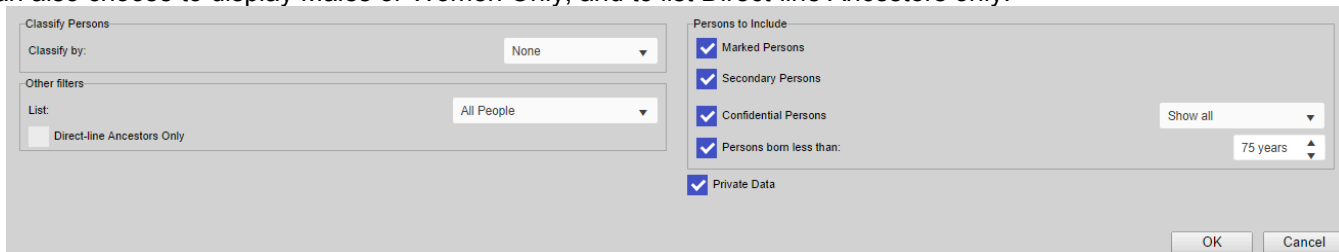
Options Button

Based on the type of report, you are given several options, grouping, and filters to refine the displayed report.

– Persons Report:

This report is built based on all the persons saved in your genealogy. If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes. Heredis is defaulted not to apply any grouping of persons in this report but you can set up your own display of data: classify by Name or Birth.

You can also choose to display Males or Women Only, and to list Direct-line Ancestors only.



– Ancestors Report:

This report is built based on the primary person displayed on the navigation screen.

If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or

Custom Reports

uncheck the corresponding boxes.

Heredis is defaulted to supply a complete list of your ancestors over 10 generations in this report but you can modify these options to display a report by Male Ancestors (agnatic) or Female Ancestors (cognatic). You can also increase or decrease the Number of Generations to be displayed.

The screenshot shows the 'Custom Reports' dialog box for 'Ancestors'. The 'Scope' section has 'List of Ancestors' set to 'All Genders' and 'Number of Generations' set to 10. The 'Persons to Include' section has checkboxes for 'Marked Persons', 'Secondary Persons', 'Confidential Persons', 'Persons born less than:' (set to 75 years), and 'Private Data', all of which are checked. There are 'Show all' and '75 years' dropdown menus next to the 'Confidential Persons' and 'Persons born less than:' options respectively. 'OK' and 'Cancel' buttons are at the bottom right.

– Descendants Report:

This report is built based on the primary person displayed on the navigation screen.

If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.

Heredis is defaulted to supply a complete list of your descendants over 10 generations in this report but you can modify these options to display a report showing Name Holders Only. You can also increase or decrease the Number of Generations to be displayed and choose the type of Numbering Method to display in your custom report (d'Aboville or Lettered).

The screenshot shows the 'Custom Reports' dialog box for 'Descendants'. The 'Scope' section has 'Descendants Report' set to 'All Descendants' and 'Number of Generations' set to 10. The 'Numbering Method' is set to 'd'Aboville'. The 'Persons to Include' section has checkboxes for 'Marked Persons', 'Secondary Persons', 'Confidential Persons', 'Persons born less than:' (set to 75 years), and 'Private Data', all of which are checked. There are 'Show all' and '75 years' dropdown menus next to the 'Confidential Persons' and 'Persons born less than:' options respectively. 'OK' and 'Cancel' buttons are at the bottom right.

– Events Report:

This report is built based on all the events saved in your genealogy.

If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.

Heredis is defaulted not to apply any grouping of events in this report but you can create your own way of displaying data: classify by Dates, Persons, Type of events, or Places.

The screenshot shows the 'Custom Reports' dialog box for 'Events'. The 'Classify Events' section has 'Classify by' set to 'None'. The 'Date Limits' section has 'Known Dates Only' and 'Limit by Date' checked, with 'Start Year' set to 1900 and 'End Year' set to 2000. The 'Place Limits' section has 'Known Places Only' and 'Limit by Place' checked, with 'City' set to a dropdown and 'Begins With' set to a text field. The 'Persons to Include' section has checkboxes for 'Marked Persons', 'Secondary Persons', 'Confidential Persons', 'Persons born less than:' (set to 75 years), and 'Private Data', all of which are checked. The 'Verified Events' section has checkboxes for 'Families', 'Other Events', 'Births/Christenings', and 'Death/Burial', all of which are checked. The 'Limitation on surnames' section has 'Limit to a surname and its variants' checked, with an 'Enter Name' text field. 'OK' and 'Cancel' buttons are at the bottom right.

– Places Report:

This report is built based on all the places saved in your genealogy.

You can choose to limit to a city, a state...

– Sources Report:

This report is built based on all the sources saved in your genealogy. You can change options to display private sources only, used only...



Layout Button

You are given layout options for the following:

- Surnames, Given Names, Dates
- Font size displayed in the report
- Colors for males, females, direct-line ancestors, and implexes – since Heredis 2020. (Colors are displayed on the screen but cannot be exported to .xlsx and .csv formats.)
- Major events



Save Button

Click the **Save** button and name your report so it is saved with your custom options and preferences.

Find it again later in the menu **(Windows) Reports > Custom Reports; (Mac) Documents > Custom Reports**, right underneath the default model supplied by Heredis.

Starting with Heredis 2020, you can manage your custom reports models. Please refer to the paragraph below for more details.



Delete Button

From the menu: **(Windows) Reports > Custom Reports; (Mac) Documents > Custom Reports**, open the model you do not wish to keep, click the **Delete** button, and confirm you want to delete the model. You can also delete from the model management tool. Please refer to the paragraph below for more details.



Refresh Button

Custom reports open in an independent Heredis window so you can continue working on your file while leaving a custom report open. If you make modifications or additions to your genealogy, all you need to do is click the Refresh button to update the content of the report displayed.



CSV / XLSX Buttons

Custom Reports

You can export the data from your report to a **CSV** or **Excel** format so you can use them later outside of the Heredis environment. The file will become independent from Heredis and you will be able to work on the data from your usual spreadsheet software.

Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

Data Table

The various reports provide data presented in a multiple-column table ; content varies according to the type of model you choose.

You can sort data by clicking on a column header. An arrow displayed next to the header title indicates the type of sorting that has been applied: ascending, descending, or no sorting if no arrow is displayed.

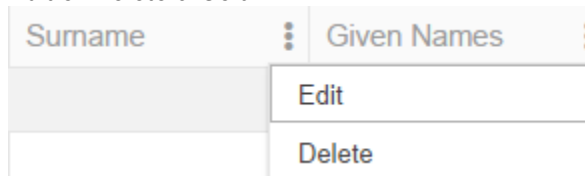
Date of Event ↑

Note: some columns cannot be sorted; this is the case, for instance, of columns in which several types of data have been aggregated. A message in red will inform you that the column cannot be sorted.

You can also

- Reorganize the way data is displayed by moving columns, for example: click the header of a column and hold the click down while moving the column to the desired location, then release the mouse click.
- Delete a column: click on the 3 dots displayed on the column header and select the **Delete** option.
- Modify the content of a column: click on the 3 dots displayed on the column header and select the **Edit** option. An Edit Column window opens up, it allows you to:
 - modify the column title
 - add/modify/delete fields in this column
 - add and customize column data separators to display between 2 column fields

Edit or Delete a Column

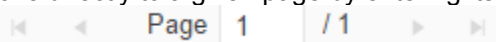


Organize data



Status Bar

In the status bar, Heredis shows the total number of pages for the report being displayed, as well as the range in which the current page is located (the indicator is displayed in the bottom right). Easily navigate through the different pages of a report by clicking on the **First / Last Page**, **Previous Page / Next Page** arrows. You can also move directly to a given page by entering its number.

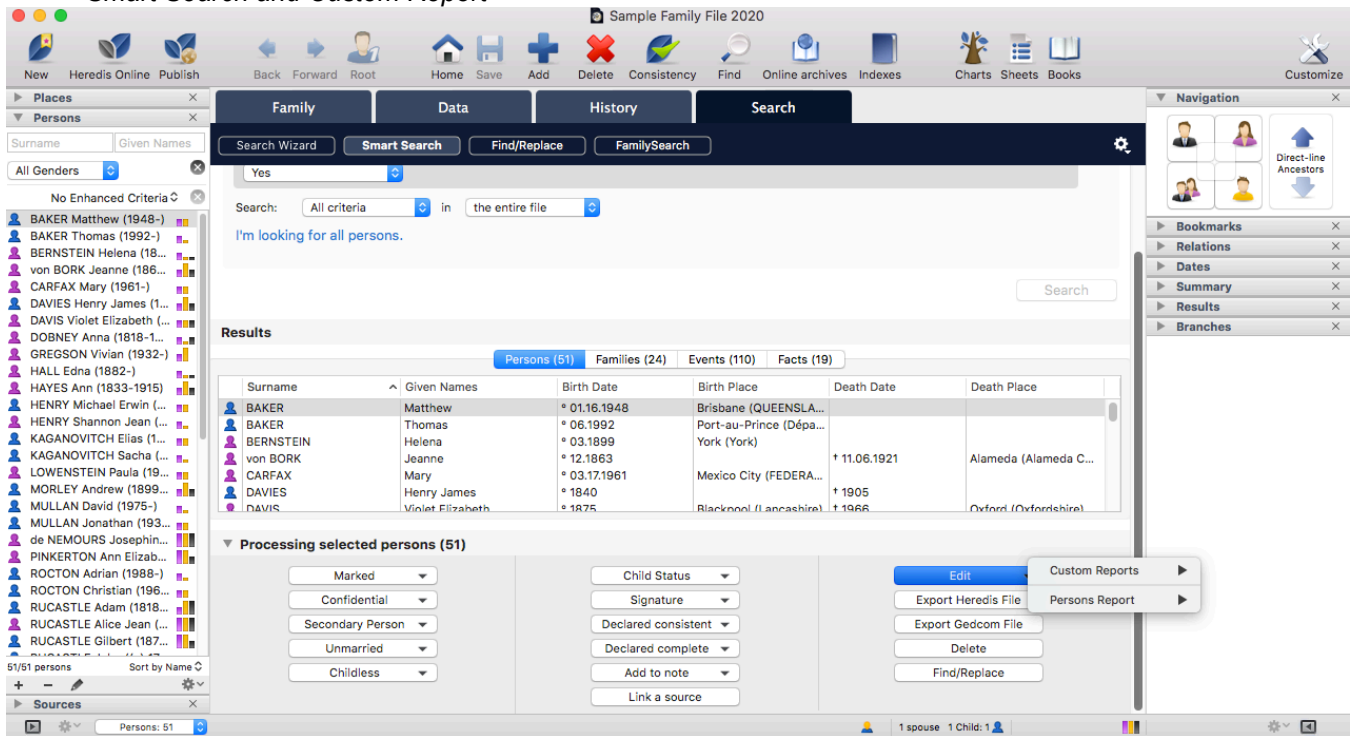


Custom Reports and Smart Search

Custom reports are also accessible directly from **Smart Search**.

- From the **Search** tab > **Smart Search**, launch a search.
- In the **Results** area, select the **Persons** or **Events** tab you are interested in.
- In the **Processing** area, click the **Edit** button > **(Mac) Custom Report / (Windows) Customizable Reports** and select the report model you want to use to display the results from your search.

Smart Search and Custom Report



Manage your models

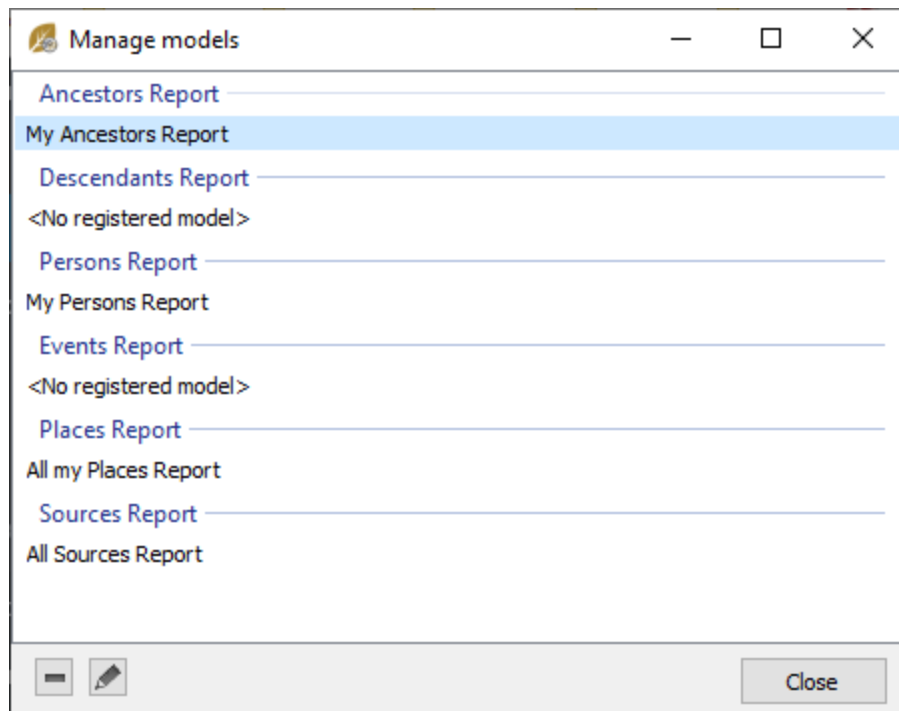
Starting with Heredis 2020, you can manage your custom reports models.

(Windows) Click on the **Reports** menu > **Custom Reports** > **Manage my models...** to open the model manager.

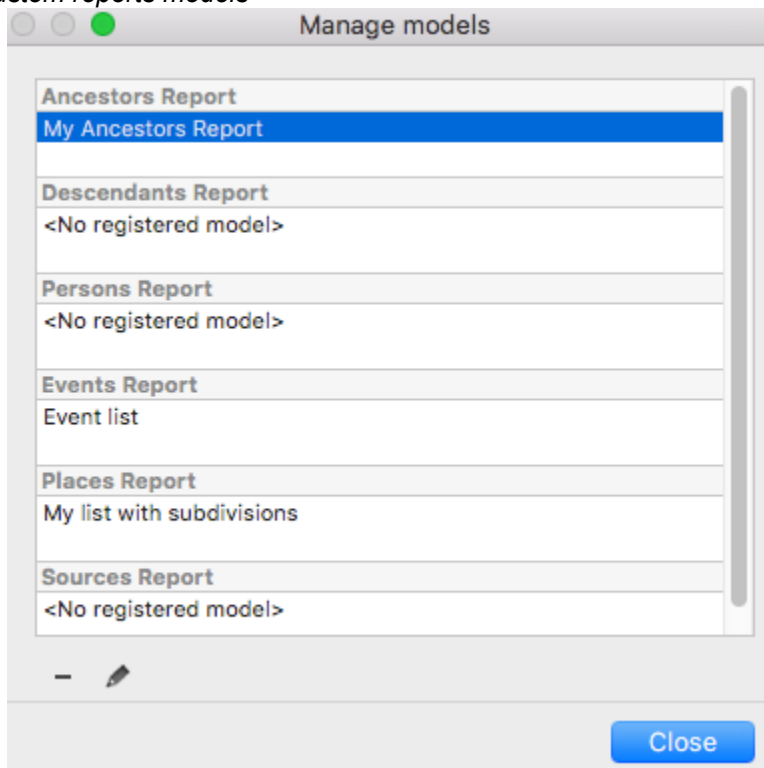
(Mac) Click on the **Documents** menu > **Custom Reports** > **Manage my models...** to open the model manager.



(Windows) Manage custom reports models

Custom Reports



(Mac) Manage custom reports models



Select the report model you wish to modify and click the  button to rename this report model or the  button to delete the model.

(Windows) Pre-established reports

All documents you view and print with Heredis will open in your word processing. This way of operating puts you in a familiar environment, facilitates the manipulations you want to perform, allows you to completely reshape the presentation of the data and to record, if you wish, the documents displayed as independent files. If no word processing is up and running on your computer, you can download free word processing, such as LibreOffice. Make sure your system has an application by default for .rtf, .xlsx, and .docx files.

Use the **Reports** menu to access the various editions offered by Heredis, with the exception of indexes entries that can only be accessed in indexes.

For more details on old Ascentors, Descendants and Persons Custom report, see (Windows) Customize your reports (voir page 399). For Custom Reports included since Heredis 2019, see Custom Reports (voir page 383).

The different types of pre-established reports

Ancestors reports

They are built from the primary person displayed on the navigation screen.

- The Default Ancestors report
- The By Men Ancestors report (agnatic line)
- The By Women Ancestors report (cognatic line)

Descendants reports

They are built from the primary person displayed on the navigation screen.

- The Default Descendants report
- The By Name Descendants report

Persons reports

It displays and prints all persons registered in the file regardless of their kinship or role, ranked in order of surname and then given name.

Families report

It displays and prints all the unions recorded in the file regardless of the type (marriage, civil or religious, cohabitation, extramarital relationship...).

Tiny Tafel report

This report is a review of genealogical researches. It lists all the surnames recorded in the file based on where the surnames were found and the period during which they appeared.

For each surname and place, it counts the type of acts found: Birth – Baptism – Marriage – Death.

The Tiny Tafel report is the preferred mode of exchange within genealogical societies.

It allows you to immediately see if bearers of the surnames you are interested in have already been identified by other genealogists, where and when they have been spotted.

Events report

It displays and prints all events, individual or family, recorded in the file, ranked chronologically, with the date and location of the event.



Facts report

It displays and prints all the facts recorded in the file, arranged in alphabetical order. For each fact, its description, the person to which it is attached and the place when this information is provided are displayed.

Research Status report

It review of your researches and prints all the persons for whom you are looking for an original certificate in order to confirm your data. The list can be edited for the entire file or place by place, or for an entire County or State.



To get this report, you need to activate the landmark button  (Research Status) in the **Data > Personal Data** screen, or in the event entry area of the **Add a Person** window or in the **Search Wizard**, by clicking on the magnifying glass. To activate it, change the display mode with the indented wheel  of the **Personal Data**.

Anniversaries Report

It displays and prints events, individual or family, based on a « historical » selection: events that took place on a particular day of the month, or in the following week or month.

Indexes lists

They allow the full content of each of the indexes generated by Heredis to be published.

The **Surname List**, the **Given Name List**, the **Occupations List** and the **Places List** show the list with the variants and the number of uses.

The **Source List displays** and prints all the sources cited in the events, specifying the persons related to them and the events involved.

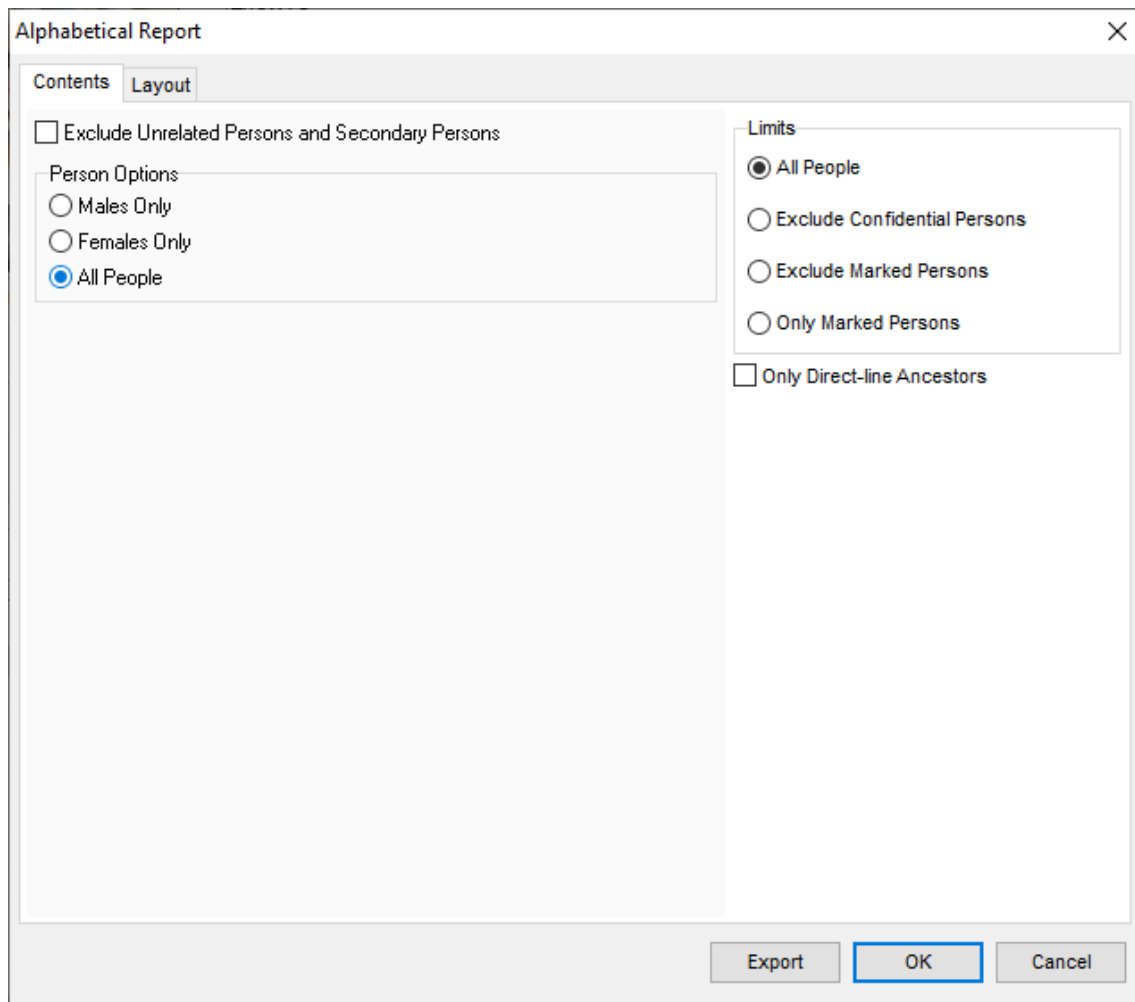
These lists can be obtained directly from the corresponding indexes. In the index, click on the **Print** button.

The choice of data to display

- Click on the **Contents** tab. According to the chosen report, you may not have always the same options.
- Check the options for selecting the persons to be displayed in the report (men, women, witnesses, etc.) based on their genealogical role.
- Specify the limits to be made to the list (confidential, Direct-line Ancestors, Period, Places...).

Options vary depending on the type of report requested.

Persons Report (By Name or Alphabetical) – Contents



The layout of the reports

- Click on the **Layout** tab.
- Determine the layout of each report using the different settings proposed for the header, font, format, field styles, and colors.

Persons Report (By name or Alphabetical) – Layout

Font

For each edited state, select a font and character size.

Header

Each page of each state reproduces a header where you post:

- A personal text entered in the header area
- The total number of items on the report
- The date of the report edition
- The name of the genealogical file
- The number on the page.

Margins and Page

You can change several elements of the page format:

- The margins of the document.
- The printing of the grid. Check **Print grid** to frame the areas assigned to the different types of information in the cards or separate each of the persons listed.
- The layout. Click the **Print Setup** button to select a printer, choose the orientation of the paper (portrait

or landscape), choose the size of the paper. The paper sizes suggested depend on the type of printer you have selected.

Field Styles

You can choose for each person displayed in the requested document, different layout options. Click on the drop-down menus and find out all the statement possibilities that are available to you for:

Given names

- All Given names
- Only the first given name
- Only the usual given name (in the absence of a common declared given name, Heredis will take the first given name)
- The first given name followed by the initials of others.

Check the option **include nickname** if necessary.

The name order

Different possibilities are proposed to place the surname, particle and given names. Check the option **include suffix** and **include prefix** if necessary.

Dates

- Digit separated by a point (with or without the display of 0)
- Digit separated by a slash (with or without the display of 0)
- Month in letters (in full or abbreviated)
- Month in letters and the day of the week (whole or abbreviated)
- Only the year.

(Windows) Pre-established reports

The screenshot displays a software interface for configuring pre-established reports. It is divided into several sections:

- Styles des rubriques:** Includes dropdown menus for 'Prénoms' (set to 'Tous les prénoms'), 'Nom et prénoms' (set to 'Arnaud de ROUVILLE'), and 'Dates' (set to '3.9.1984'). There are checkboxes for 'Avec le surnom', 'Avec le suffixe', and 'Avec la qualité'. A list of date formats is shown below the 'Dates' dropdown, including '3/9/1984', '03.09.1984', '03/09/1984', 'lundi 3 septembre 1984', '3 septembre 1984', 'lun. 3 sept. 1984', '3 sept. 1984', and '1984'. There is also a 'Lieux' field.
- Couleurs:** Includes color selection boxes for 'Hommes' (dark blue), 'Femmes' (red), 'N° Sosa/réf.' (green), and 'N° en implexe' (magenta).
- Police:** Includes a font dropdown (set to 'Arial') and a size dropdown (set to '9').
- Page:** Includes a checkbox for 'Imprimer le quadrillage' (checked) and a 'Format d'impression' button showing 'A4 - 21.0 x 29.7 cm (Portrait)'. There is also a 'Marges' section with input fields for 'Haut', 'Bas', 'Gauche', and 'Droite', all set to '1,50 cm'.
- En-tête:** Includes a 'Titre' field (set to 'Liste d'ascendance') and checkboxes for 'Nombre d'éléments', 'Date d'impression', 'Nom du fichier', and 'N° de page' (all checked).

In each of these cases you can check the Dates option **in the Gregorian calendar** to view and print the dates in Gregorian format regardless of the calendar in which they were entered.

The **Show Headings** option precedes each date by the symbol corresponding to the type of event: ° for Birth, b for Baptism, x for Marriage, xR for Religious Marriage, xP for Other Union, mc for Marriage Contract, † for Death, (†) for Burial.

The places

- Name of the city only
- Name of the city and postal code
- Name of the city, postal code and subdivision of the place if there is one
- Full place name.

Styles des rubriques

Prénoms : Tous les prénoms ▼
 Avec le surnom

Nom et prénoms : Arnaud de ROUVILLE ▼
 Avec le suffixe
 Avec la qualité

Dates : 3.9.1984 ▼
 Dates en calendrier grégorien
 Afficher les symboles généalogiques

Lieux : Commune ▼
Commune
Commune (code lieu abrégé)
Commune (code lieu complet)
Commune (code lieu) - Subdivision
Lieu complet

Couleurs

Hommes : ▼

Femmes : ▼

N° Sosa/réf. : ▼

N° en implexe : ▼

Police

Arial ▼ Taille : 9 ▼

Page

Imprimer le quadrillage

Format d'impression A4 - 21.0 x 29.7 cm (Portrait)

En-tête

Titre : Liste d'ascendance

Nombre d'éléments Date d'impression
 Nom du fichier N° de page

Marges

Haut : 1,50 cm ▼ Bas : 1,50 cm ▼

Gauche : 1,50 cm ▼ Droite : 1,50 cm ▼

Sources (for some documents such as Biography)

- either they are ignored,
- or Heredis indicates the names of each of the associated sources,
- or Heredis details the description of each of the associated sources,
- or Heredis takes up the entirety of each of the associated sources, including the text of the deeds.

Private data

If you exclude private data, notes, events, sources, media for which the **Private** box was checked at the time of entry will not be printed in the requested document.

Colors

Differentiate each of the important elements of the edited state by assigning it a color. Select it from the drop-down menu. Items differ depending on the type of report requested.

(Windows) Pre-established reports

The screenshot displays a configuration window for pre-established reports, organized into several sections:

- Field Styles:** Includes dropdowns for 'Given Names' (set to 'All Given Names'), 'Name Order' (set to 'HATFIELD, William of'), and 'Dates' (set to '30.9.1984'). It also features checkboxes for 'Include Nickname', 'Include Suffix', 'Include Prefix', 'Use Gregorian Dates', and 'Show Headings' (checked).
- Colors:** A vertical list of color swatches for 'Males', 'Females', 'Ahn. #', and 'Duplicate Line #'. The 'Males' color is currently set to dark blue.
- Font:** Shows 'Arial' as the selected font and '9' as the font size.
- Page:** Includes a 'Print Grid' checkbox (checked) and a 'Print Setup' button. The page size is 'A4 - 21.0 x 29.7 cm (Portrait)'. A 'Print Setup' button is also present.
- Header:** The title is 'Alphabetical Report'. Checkboxes for 'Number of Items', 'Date', 'File Name', and 'Page #' are all checked.
- Margins:** All four margins (Top, Bottom, Left, Right) are set to '1,50 cm'.

Click **OK** to validate the creation of the document in .rtf format.

Note: This format opens with any word-processing software. Make sure you have a default software for files with the .rtf extension. Check out the Windows user manual or online tutorials to learn more.

Create a report of persons or events from Smart Search.

It is also possible to edit the result of a selection obtained with **Smart Search** as a report.

Search for one or more criteria from the **Search > Smart Search** Tab. Check out Smart Search (voir page 208) article for more details.

- Click the **Edit** button in the processing selected persons area.
- Select the type of report of **Persons** or **Events** based on the tab selected in the search results.

Family Data History Search

Search Wizard Smart Search Find/Replace Family Search

Criteria

< Choose a search model >

Persons Surname

Is Exactly thomas

Search All criteria in the entire file

I'm looking for persons whose surname is exactly "thomas".

Results

Persons (15) Families (11) Events (38) Facts (4)

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
THOMAS	Christopher Edward	* 13.05.1910	Oxford (Oxfordshire)	† 31.05.1991	Dover (Kent)
THOMAS	Edward	* > 1804		† 1874	Hull (East Riding Of Yorkshire)
THOMAS	Elizabeth (Tic)	* 1882			
THOMAS	George	* 04.07.1877	Oxford (Oxfordshire)	† 01.08.1947	Oxford (Oxfordshire)
THOMAS	George	* 06.12.1890		† 11.04.1891	
THOMAS	Glenn Samuel Bruce	* 11.07.1997	Paris (Paris)		
THOMAS	John	* 05.1854	? (ENGLAND)	† > 1921	
THOMAS	John	* 15.09.1994	Belleville (Essex)		
THOMAS	Judy	* 15.08.1962	Hudson (Columbia)		
THOMAS	Kate Elsie	* 24.08.1941	Margate (Kent)		
THOMAS	Marion	* 1900		† 1985	
THOMAS	Michael George	* 06.02.1933	Margate (Kent)		
THOMAS	Paul	* 1883			
THOMAS	Paul	* 10.10.1960	Hudson (Columbia)		
THOMAS	Peter	* 03.12.1956	Hudson (Columbia)		

Processing selected persons (15)

Marked Confidential Secondary Person Unmarried Childless

Child Status Signature Declared consistent Declared complete Add to note Link a source

Edit Persons Report

Export Heredis File Custom Persons Report

Export GEDCOM Customizable Reports

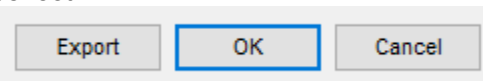
Delete

Find/Replace

Ahn. # 1 Generation 1 1 Spouse 2 Children: 1 1

Exporting documents

The various documents, reports or sheets, are exportable in text format (.txt). Click the **Export** button to create a .txt document or click on OK to create a .rtf document. Give the new document a name and specify its location before registering it. Then open this document in adapted software: word processing, spreadsheet...



Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

(Windows) Customize your Reports

This function existed prior to Custom Reports included since Heredis 2019. See also the new custom reports (voir page 383) article.

All documents you view and print with Heredis are open in your word processing. This way of operating puts you in a familiar environment, facilitates the manipulations you want to perform, allows you to completely reshape the presentation of the data and to record, if you wish, the documents displayed as independent files. If no word processing is up and running on your computer, you can download free word processing, such as LibreOffice.

Create a custom report

You can compose several types of custom reports: **Persons**, **Ancestors** or **Descendants**.

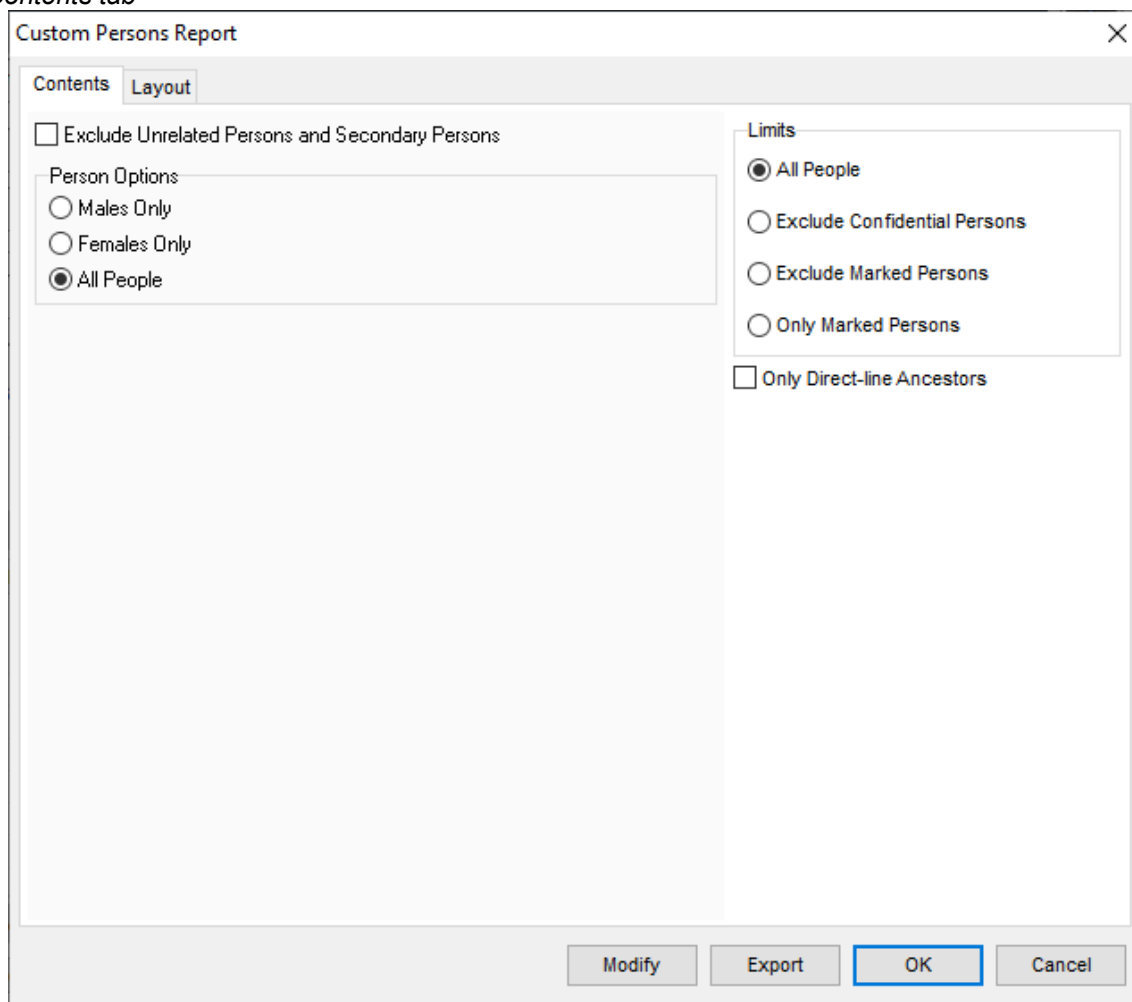
Click on the **Reports** menu to access the various editions offered by Heredis. Choose the type of list (**Ancestors**, **Descendants**, **Persons**) and then click **Custom Report...**

All selected settings will be memorized and offered by default when you'll next open the same type of report.

All **Ancestors** or **Descendants** custom reports will be built from the primary person displayed.

- Choose list settings for **Contents** and **Layout** in tabs of the same name.

Contents tab



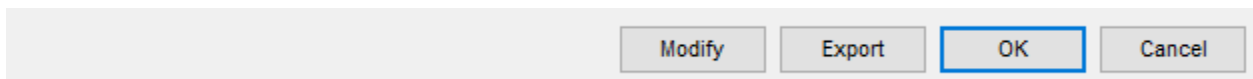
The screenshot shows the 'Custom Persons Report' dialog box with the 'Contents' tab selected. The dialog has a title bar with a close button (X) and two tabs: 'Contents' and 'Layout'. Below the tabs, there are several options:

- Exclude Unrelated Persons and Secondary Persons
- Person Options:
 - Males Only
 - Females Only
 - All People
- Limits:
 - All People
 - Exclude Confidential Persons
 - Exclude Marked Persons
 - Only Marked Persons
 - Only Direct-line Ancestors

At the bottom of the dialog, there are four buttons: 'Modify', 'Export', 'OK', and 'Cancel'. The 'OK' button is highlighted with a blue border.

Layout tab

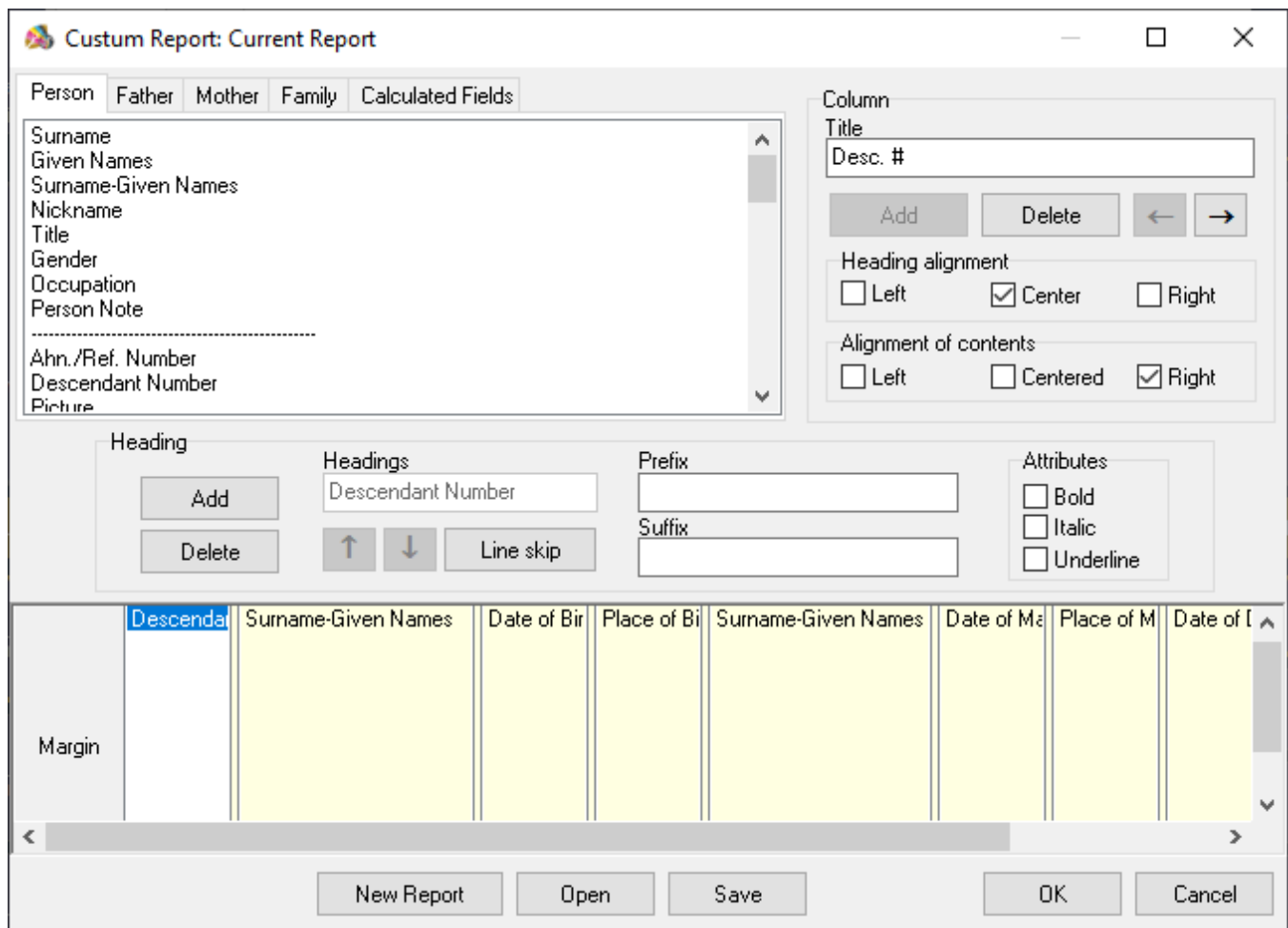
- Click the **Modify** button to change the default report or create your own report.



To build a custom report, you have the following:

- **Columns:** You can build your report with as many columns as you like, assign them a width, a title, and include the fields you want in each column. It is possible to insert or remove columns.
- **Fields:** Most of the fields in the **Data> Personal Data** screen are usable, as well as certain calculated fields (age at death, number of children, etc.).
- **The layout of the columns:** Each of the fields you put on the report can be shaped (attributes, alignment, etc.).
You can also assign a **suffix** and a **prefix** to each selected field.

(Windows) Customize your Reports



When you first open a custom report, Heredis displays a default report that you can use as is or change.

Custom reports as you have drawn them can be saved and recalled for future use. For example, you can create several themes for each type of reports (persons, ancestors, descendants). The custom report offered by clicking on the **New Report** button is fully composed by you.

Columns

Add columns

The lower area of the window allows the columns to be displayed. It represents the useful width of the page. The columns are divided between the two margins in the same proportions as on the screen regardless of the print format chosen (portrait or landscape).

You can create up to 32 columns within the space available for printing.

- Click the **Add** button in the **Column** area to create the number of columns you need for the report to build.

Column

Title

Add Delete ← →

Heading alignment

Left Center Right

Alignment of contents

Left Centered Right

Swap columns

- Click in the column to move.
- Click the **Left arrow** or **Right arrow** button until the column has reached the desired location.

Column

Title

Add Delete ← →

Heading alignment

Left Center Right

Alignment of contents

Left Centered Right

Column

Title

Add Delete ← →

Heading alignment

Left Center Right

Alignment of contents

Left Centered Right

Delete a column


- Click in the column to select it.
- Click the **Delete** button in the **Column** area.

Give a column a title

- Click in the column to select it.
- Type in the title chosen for the selected column in the **Title** input area.
- Include the alignment chosen for the column title by checking the **Left**, **Centered** or **Right** boxes.
- Also indicate the alignment chosen for the contents that will be contained in this column.

Change the width of the columns

Position the mouse on the right edge of the column you want to enlarge or reduce.

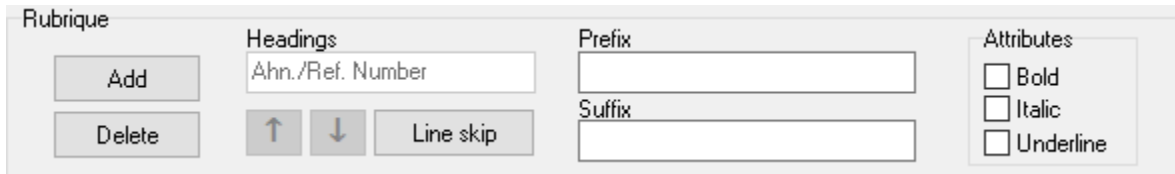
- The cursor then turns into a double  arrow.
- Hold the left button on the mouse.
- Move the right edge of the column to reach the desired width.

Fields

Position the fields in the columns

Depending on the type of information to be placed in the column, click on one of the tabs containing the data for the person, his/her father, his/her mother, his/her unions, or the calculated data.

- Choose on the list of fields on the one you want to set up and click on it.
- Click the **Add** button in the **Field** area to fit into the selected column.
or Double-click on the name of the field in the list to fit into the selected column.
- Include for the added field any formatting attributes to apply to it by checking the **Bold**, **Italic** or **Underline** boxes.



The fields will be presented side by side in the edited document unless you have inserted a line break. To spread the fields across different lines in the same column:

- Select the field.
- Click the **Line Skip** button.

The total number of fields and line breaks is limited to 32 per column. For delete and move options, line breaks should be treated as fields.

To switch the order of fields on the same line or within a column:

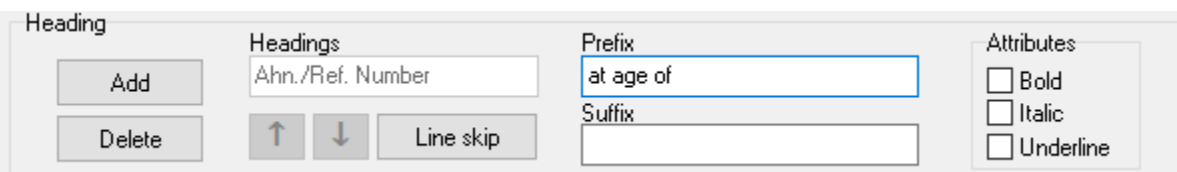
- Select the field to move.
- Click the **Up** or **Down** Arrow button until the field has reached its new location.

Delete a field in a column

- Select the field to remove.
- Click the **Delete** button in the **Field** area.

Add a suffix or prefix to a field

- Select the field to edit in the column.
- Click in the **Prefix** area and then type in the prefix to be applied to this field.
- Position yourself in the **Suffix** area and then type the suffix to apply to this field.



For example, to indicate the age at death of a person:

- Select **Ageat Death** in the column.
- Click in the **Prefix** box, type « at the age of ».
- Click in the **Suffix** box, type the word « years. »

You will thus get the mention: at the age of < age at the death > years.

Create a Custom Persons Report from Smart Search.

It is also possible to edit the result of a selection obtained with **Smart Search** as a personalized list.

Search for one or more criteria from the **Search > Smart Search** Tab. Check out Smart Search article for more details.

- Click the **Edit** button in the results processing area.
- Select **Custom Persons Report**.

The screenshot shows the Heredis software interface. The top navigation bar includes 'Family', 'Data', 'History', and 'Search'. The 'Search' tab is active, showing the 'Smart Search' sub-tab. The 'Criteria' section is set to 'Persons' with the search criteria 'Surname' and 'Begins With' set to 'Thomas'. The search results are displayed in a table with columns for Surname, Given Names, Birth Date, Birth Place, Death Date, and Death Place. The 'Processing selected persons (15)' area is visible, showing various options for the selected persons, including 'Edit', 'Export Heredis File', 'Export GEDCOM', and 'Delete'. The 'Edit' button is highlighted with a red box, and the 'Custom Persons Report' option in the dropdown menu is also highlighted with a red box. The right sidebar shows the 'Navigation' panel with a tree view of family relationships and a 'Preferred Picture' section.

Person	Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
THOMAS	THOMAS	Christopher Ed...	* 13.05.1910	Oxford (Oxford...	† 31.05.1991	Dover (Kent)
THOMAS	THOMAS	Edward	* > 1804		† 1874	Hull (East Riding...
THOMAS	THOMAS	Elizabeth (Tic)	* 1882			
THOMAS	THOMAS	George	* 04.07.1877	Oxford (Oxford...	† 01.08.1947	Oxford (Oxford...
THOMAS	THOMAS	George	* 06.12.1890		† 11.04.1891	
THOMAS	THOMAS	Glenn Samuel B...	* 11.07.1997	Paris (Paris)		
THOMAS	THOMAS	John	* 05.1854	? (ENGLAND)	† > 1921	
THOMAS	THOMAS	John	* 15.09.1994	Belleville (Essex)		

Save a Custom Report layout

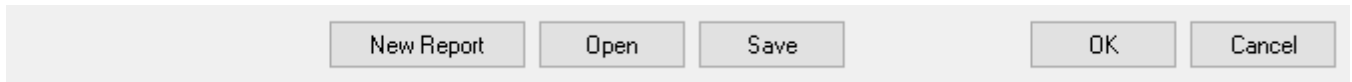
Change an existing report

Each time the same custom report (persons, ancestors or descendants) changes to the construction of the reports, it is memorized.

To create a custom report theme with the layout you've set:

- Click the **Save** button.
- Name the custom list theme you're creating. He'll wear a .hp18 extension.
- Heredis records this theme in the *Documents* folder – *BSD Concept – Heredis – Heredis Custom Reports*.

This theme can then be called and used in any type of custom report.



Create a new custom report

To create a new blank list theme:

- Click the **New Report** button to access a new blank list, to be completed with the desired fields and columns. The number of columns proposed by default is 4.

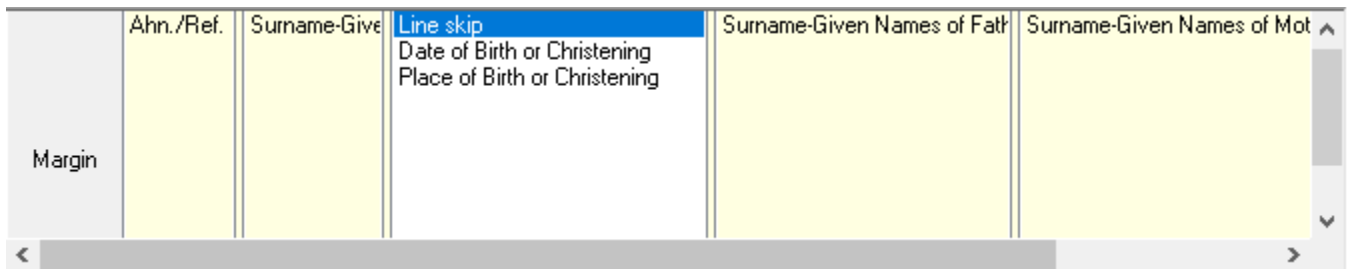
Open a custom report theme already registered

To recall all the custom report themes you've created:

- Click the **Open** button.
- Select the existing theme to reuse. Custom report themes have a .hp18 extension.

This theme will appear on the screen for use or modification and will be the list theme that will open by default when the next request of the same type of list is set.

Launch the edition of the custom report



- Click the **OK** button to validate the layout of the built list.
- Click the **Cancel** button to return to the setting screen without changing the custom report theme used.
- Click the **OK** button on the setting screen to launch the text processor that will display the custom report.

Ahn. #	Birth Date	Name	Father	Mother
4	THOMAS, Christopher Edward	13.5.1910 Oxford	THOMAS, George	DAVIS, Violet Elizabeth
32	THOMAS, Edward	> 1804		
	THOMAS, Elizabeth (Tic)	1882	THOMAS, John	BORK, Jeanne von
8	THOMAS, George	4.7.1877 Oxford	THOMAS, John	
	THOMAS, George	6.12.1890	THOMAS, John	BORK, Jeanne von
	THOMAS, Glenn Samuel Bruce	11.7.1997 Paris	THOMAS, Paul	CARFAX, Mary
16	THOMAS, John	5.1854 ?	THOMAS, Edward	DOBNEY, Anna
	THOMAS, John	15.9.1994 Belleville	THOMAS, Peter	WATSON, Kristen
1	THOMAS, Judy	15.8.1962 Hudson	THOMAS, Michael George	GREGSON, Vivian
	THOMAS, Kate Elsie	24.6.1941 Margate	THOMAS, Christopher Edward	RUCASTLE, Alice Jean
	THOMAS, Marion	1900	THOMAS, George	DAVIS, Violet Elizabeth
2	THOMAS, Michael George	6.2.1933 Margate	THOMAS, Christopher Edward	RUCASTLE, Alice Jean
	THOMAS, Paul	1883	THOMAS, John	BORK, Jeanne von
	THOMAS, Paul	10.10.1960 Hudson	THOMAS, Michael George	GREGSON, Vivian
	THOMAS, Peter	3.12.1956 Hudson	THOMAS, Michael George	GREGSON, Vivian

Export the contents of a custom report

- Click the **Export** button in the setting screen to export the data in the custom report to Plain Text Files (.txt).

This data can then be used in a database, spreadsheet or word processor.

Exporting documents

The various documents, lists or sheets, are exportable in text format (.txt).

Click the **Export** button to create a .txt document or click on **OK** to create a .rtf document. Give the new document a name and specify its location before registering it.

Then open this document in any type of adapted software: word processing, spreadsheet...

Exporter

OK

Annuler


Then once open with your word processing software or text reader software you can save, modify ... the document becomes independant of Heredis.

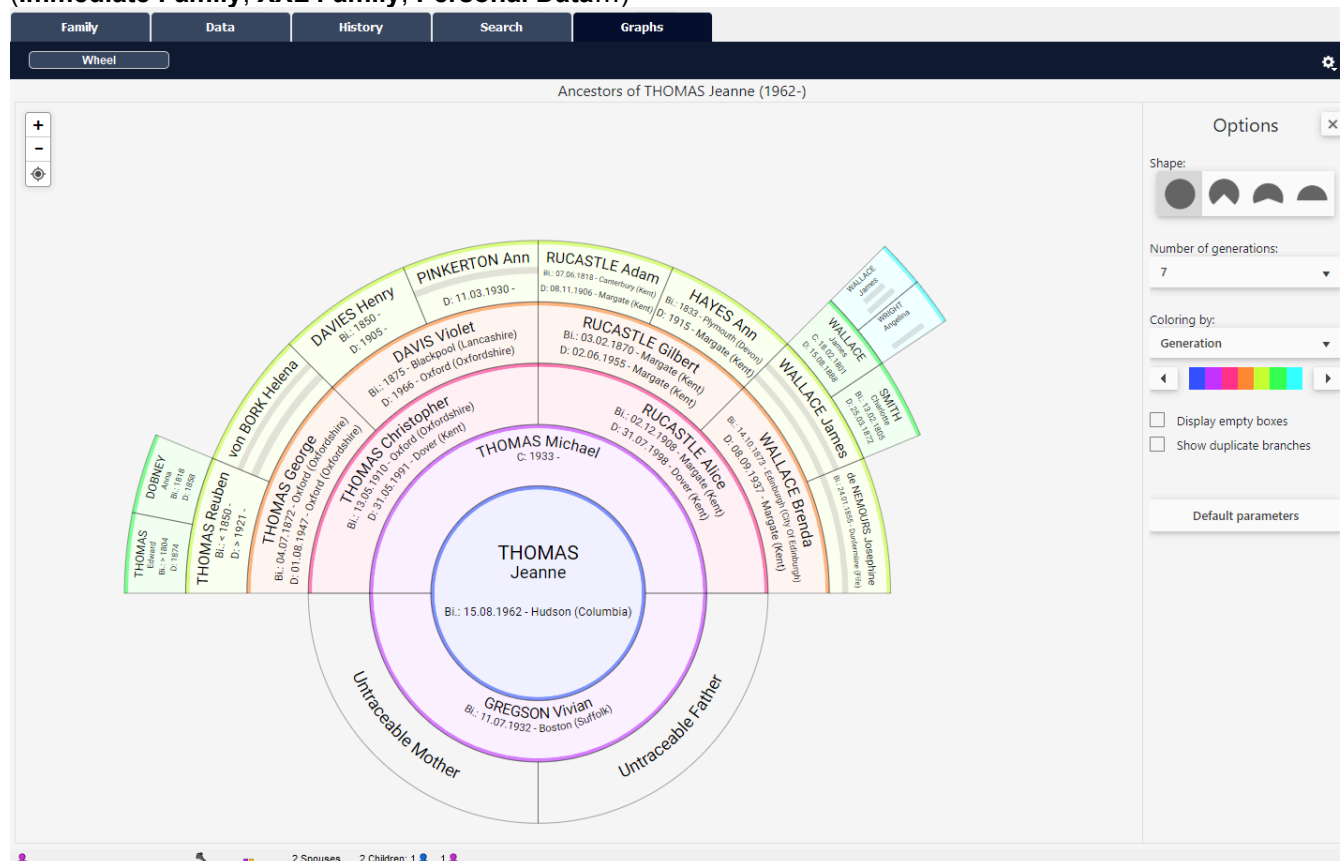
Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

The Dynamic Ancestors Wheel

Starting with Heredis 2021, a new tab is now available: the **Graphs** tab. There, you will find a wheel-shaped graph.

Click on the **Graphs > Ancestors Wheel** tab or, if you have already added it to your toolbar, click on the

icon . The wheel is built around the primary person currently displayed on your other Heredis screens (**Immediate Family, XXL Family, Personal Data...**)




Depending on the generation, the information displayed as well as its format will vary so it can fit in the box.

Navigate

You can navigate the wheel by changing the primary person. Right click on the person you want to place in the center of the wheel and choose **Move to Primary Person**.

The wheel automatically recalculates the ancestors of the new primary person, who will also be displayed under the other tabs (**Family, Data, Search**).

Double-click on a person's box to go directly to this person's **Personal Data** screen.

Left click and hold your mouse button to move the wheel around on your screen. Click on the  button to re-center the wheel on your screen.

Right-clicking also allows you to view a person's relatives. Clicking on one of the relatives' name modifies the wheel by placing this relative as the primary person.

To zoom in or out, you can use :

- the scroll-wheel on your mouse,
- the + and – buttons in the top left-hand corner of the wheel screen.

Set the wheel's display format

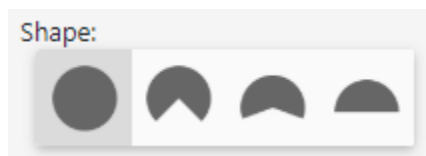
A foldable **Options** panel is at your disposal in the top right-hand corner to set up the wheel's parameters.

To give yourself more space when viewing the wheel, click on the cross ✕ in the **Options** panel.

To re-open the **Options** panel, click on the hamburger ≡ button.

The **Options** panels allows you to choose:

- the **Shape** of the wheel. You may prefer to view the wheel at a different angle than the default one of 360 degrees. Click on the graph icon that suits you best.

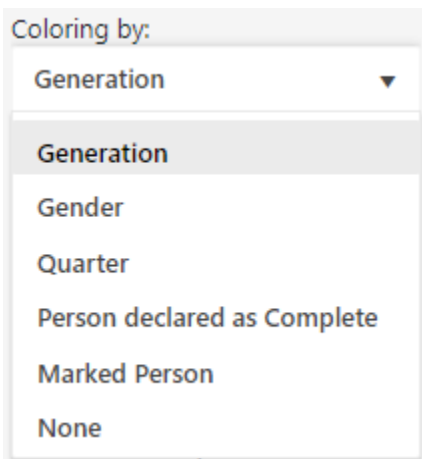


- the **Number of generations** to be displayed. You may choose from 4 to 12 generations. The more generations you have selected, the longer it will take for Heredis to display the wheel.

Tip: The speed at which the wheel is displayed also depends on the power of your computer and the current use of your computer's memory. Avoid using other programs simultaneously if you want the wheel to be displayed at a faster rate.

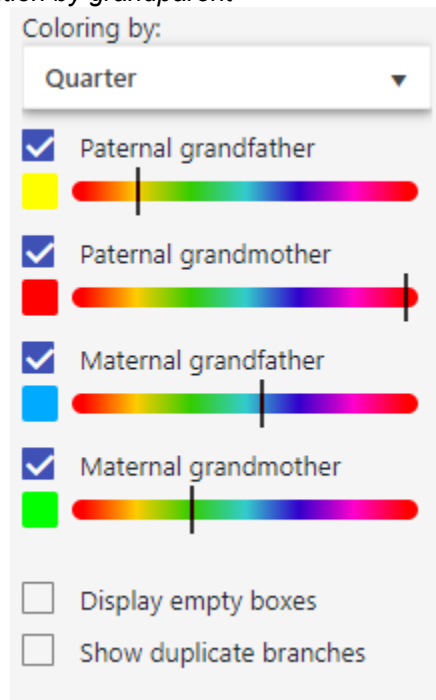
The Dynamic Ancestors Wheel

- **Coloring.** You may choose to color the wheel by:
 - **Generation.** Each generation will have its own color.
 - **Gender.** Men and women will be highlighted in two different colors.
 - **Quarter.** Quarters start from the grandparents' generation. The paternal grandfather's and grandmother's, the maternal grandfather's and grandmother's quarters can each be highlighted in a different color.
 - **Ahn. Number.** Since Heredis 2022, display clearly which persons of the wheel belong to the Ahnentafel line.
 - **Person declared as Complete.** This coloring option gives you an opportunity to visualize the persons whose conditions of completeness for major life events are met. See Heredis' Preferences > Completeness of data (voir page 65).
 - **Marked Person.** If you have marked persons based on one or more criteria, they can be assigned a different color than those unmarked. E.g., if you want to identify all persons born in the same city. See The different data fields > Flags (voir page 50) and their use, and Smart Search (voir page 208) for information on how to tag or "mark" persons.
 - **None.** No wheel coloring at all.



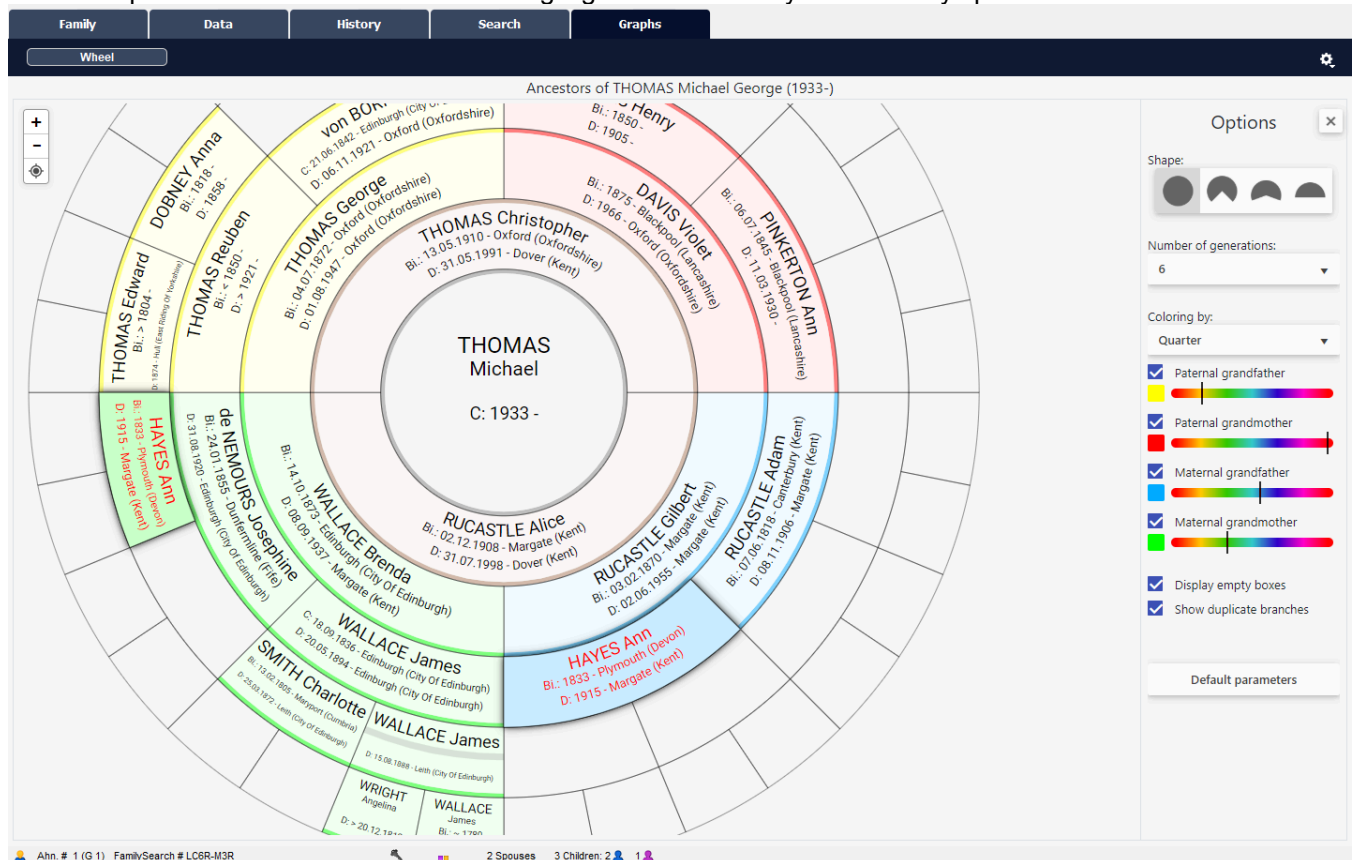
Depending on the selected color format, one or more sliders will appear so you can choose the color to be applied. Left-click on the black slider and move it over the color bar to apply the desired color. Once you have chosen which color to apply, release the left click. The color will then be applied to the wheel.

Coloring by quarter, color selection by grandparent



You can choose whether to display empty boxes. To view a full wheel or simply to visualize the work left to do, check **Display empty boxes**.

In genealogy, it is not uncommon to come across consanguineous marriages. These marriages involve the repetition of branches, which is called an implex. You can view implexes by checking **Show duplicate branches**. The text inside the boxes of the persons who appear more than once in the wheel is then switched to red. You can then right-click on one of the implex boxes and choose **Show all Occurrences** to visualize all the boxes for this same person in the wheel. Heredis will highlight the boxes so you can easily spot them.



To stop highlighting occurrences, right-click again on one of the boxes and select **Do not show all occurrences**.

Since Heredis 2022, you have new options.

- **Show Untraceable Parents** allows you to display the boxes of missing parents of an individual.
- **Use Gregorian Dates**. This option makes it possible to transform the dates entered into an unusual calendar into a Gregorian date for a better understanding, for your family members, for example.

To go back to default settings (6 generations, coloring by generation, 360° wheel shape, hide empty boxes and implexes), click on the **Default parameters** button.

Highlight a branch

Do you wish to highlight a branch so you can show your maternal family the section of the wheel that will be of interest to them?

Right-click on the box of the person at the base of the branch you wish to view. Select Highlight the branch.

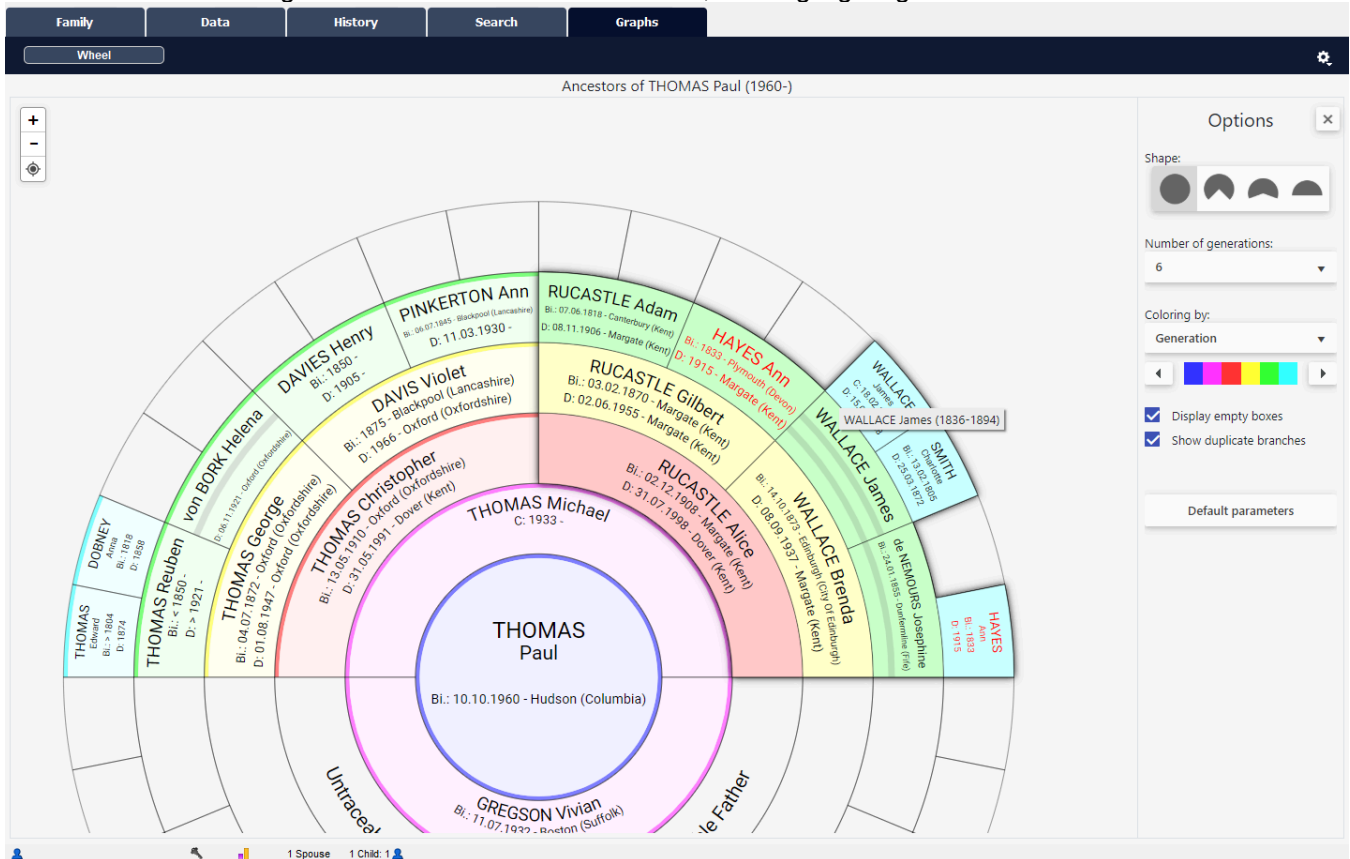
The Dynamic Ancestors Wheel

RUCASTLE Alice Jean (1908-1998)
 Move to Primary Person
 Print Person Sheet...
 Define As Root Person...
 Add to the Bookmarks
Highlight the branch
 Show all occurrences

Relatives

- Grandparents ▶
- Parents ▶
- Parents-in-Law ▶
- Spouses ▶
- Uncles and Aunts ▶
- Siblings ▶
- Children ▶
- Nephews and nieces ▶
- Cousins ▶
- Grandchildren ▶

Colors will be brighter and the branch will be shaded, thus highlighting it on the screen.



Export for printing

The **Dynamic Ancestors Wheel** was designed as a printable document.

Click on the indented wheel  then click on **Export to PDF format for printing**.

A setup windows opens. In it, the wheel is previewed as it was set up in the **Graphs** tab.



The wheel's title is automatically generated using the primary person's information.

Before exporting to PDF, set up your print format. The preview will show you the number of pages needed for printing based on the chosen format.

Click on **Hide Page Breaks** to no longer see them.

Click on the **Page Setup** drop-down list to select your settings. If none of the suggested paper sizes suits your needs, select **Customized**. Then enter the desired width and height in cm.

Note: The PDF format allows you to create a document with a maximum size of 5 by 5 meters. If your wheel is larger and your printer has a paper roll larger than 5x5 m, remember to "delete assembling link-up zone". This way, when printing, the document won't show any breaks.


Change orientation from **Landscape** to **Portrait** if necessary.


The number of pages depends on the paper size you selected. Modifying the number of pages will decrease or increase the print factor. If you decrease it too much, the data entered in your wheel may not be legible.

Tip: Before printing, make sure that your data is legible by opening the PDF file and setting the zoom to 100%. If you can't read what is inside the boxes located the furthest from the center of the wheel, do not start printing.



Once your parameters are set, click on the **Export PDF** button. Choose where to save the file on your computer and name it. The file is now independent from Heredis and can be opened by anyone with a PDF reader software (Adobe reader...).


Descendants Wheel

The **Graphs** tab allows you to display the Ancestors Wheel as well as, starting with Heredis 2022 , the **Descendants Wheel**. Its process is similar to the Ancestors Wheel. Any change made in a person's data entry form will automatically be reflected in the wheel.

Access the wheel by clicking on the **Graphs** tab > **Descendants Wheel** or from the button  you can add to the toolbar.

Navigate the Wheel



The same way you do it in the XXL Family window, you can zoom in and out by scrolling with your mouse wheel or using the  and  buttons in the upper left corner. Hold down the left click of your mouse to move the wheel around in the window.

Click on the target  button to re-center the wheel on the screen.

Right-clicking with your mouse on a person's box allows you to:

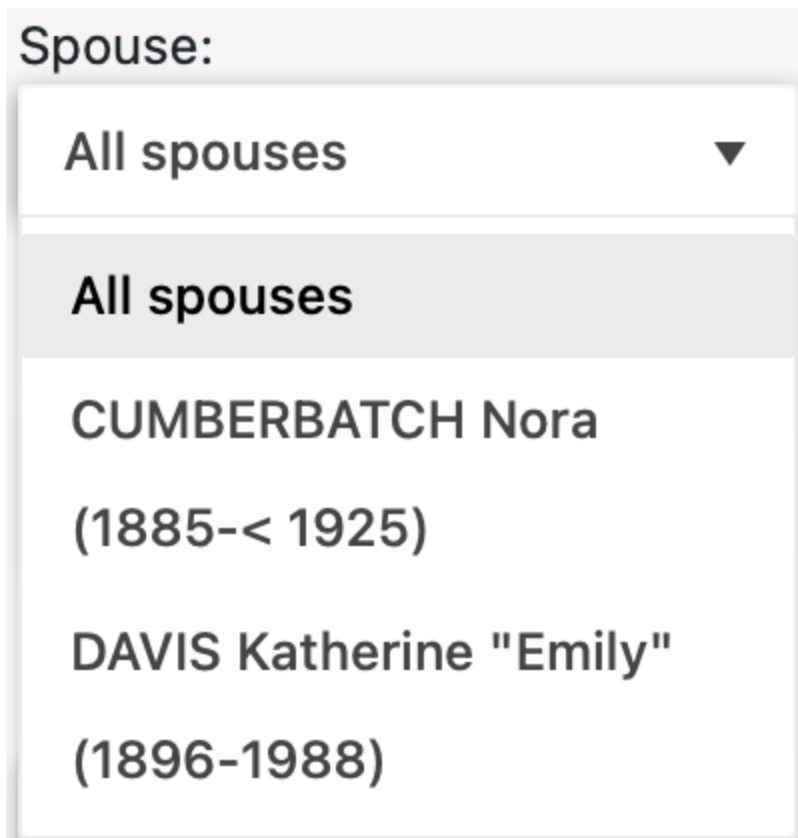
- View the person's Relations
- Define him/her as the Primary Person
- Print the Person Sheet
- Define him/her as the Root Person
- Add the person to the Bookmarks
- Highlight the branch from this person
- Show all occurrences in case of an implex ("duplicate branches").

SMITH Christopher Edward (1881-1973)	
Define as Primary Person Print Person Sheet... Define As Root Person... Add to the Bookmarks Highlight the branch Show all occurrences	
Relations	
Grandparents	▶
Parents	▶
Parents-in-Law	▶
Spouses	▶
Uncles and Aunts	▶
Siblings	▶
Children	▶
Nephews and nieces	▶
Cousins	▶
Grandchildren	▶

To free up your screen, fold the Options palette by clicking the  button; unfold it using the burger  button.

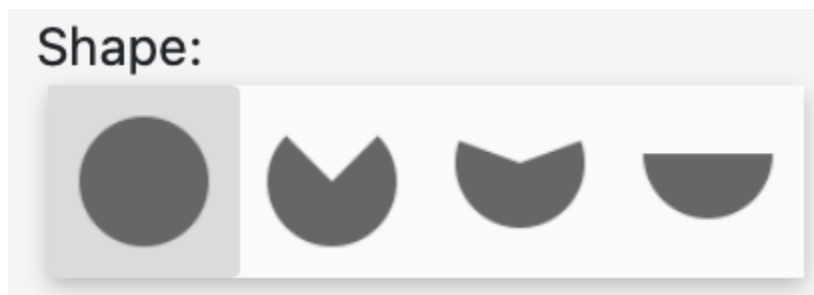
Options

Spouses



If the person had several spouses, select one of the spouses to display the descendants from that spouse. If you select All spouses, then all descendants from the main person will be visible. If the person has children from none of his/her spouses, a question mark will show the descendants born from an unknown parent.

Shape



You can choose from a variety of shapes for your wheel. A full wheel or a fan wheel with various angles. Click on the shape that suits you best.

Number of Generations

Number of generations:

12 ▼

4

5

6

7

8

9

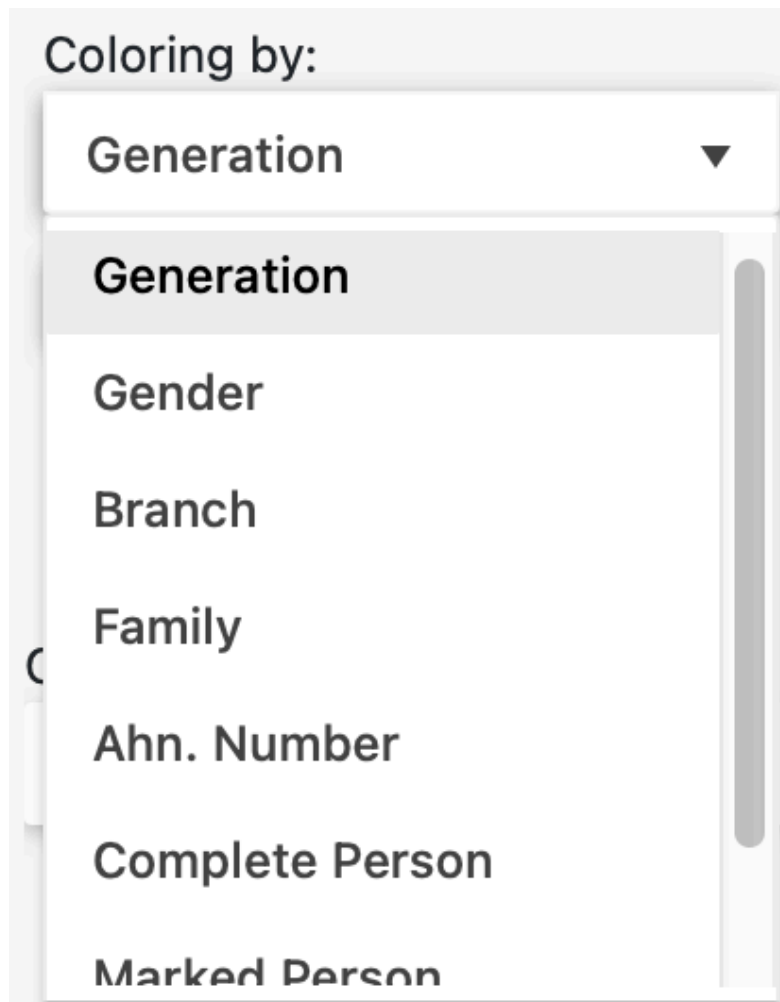
10

11

Use the scroll-down menu to specify the number of generations to generate. Between 4 and 12 generations from the Primary Person.

Filters

Depending on the filter selected, the wheel will display different colors.



The various filters offer coloring by:

- Generation,
- Gender,
- Branch,
- Family (if the primary person was married more than once – you can switch from one spouse to another using the Spouses scroll-down list),
- Ahnentafel number to see the persons in direct line of the root person of the file,
- Complete Person, which lets you see which persons are not complete and therefore require additional research work,
- Marked Person,
- or simply select None (for no coloring).

You can change the color gradient by clicking on the arrows and holding the left mouse click on the color strip and dragging it; or by holding the slider with the left mouse click and dragging it. Depending on the filter you choose, you will be offered several color sliders.

Once you have reached the chosen color, you can release the mouse click. The wheel will change colors, applying your selection.

Coloring by Generation filter with arrows

Coloring by:

Generation



Coloring by Gender filter with arrows

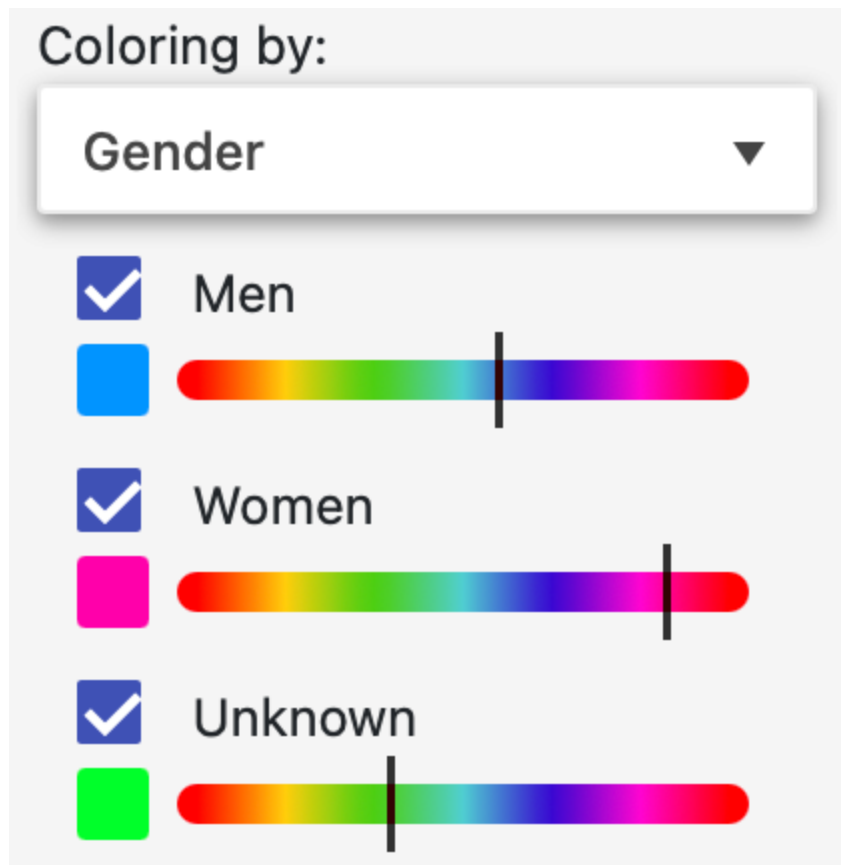
Coloring by:

Gender ▼

Men

Women

Unknown



Other Options

Show duplicate branches

Use Gregorian Dates

Given Names:

Usual Given Name ▼

Display empty boxes

It allows you to show the empty boxes in order to see the remaining work.

Duplicate branches (aka “Implexes”)

It was not uncommon for cousins to marry each other. The wheel helps you identify duplicate branches created by such marriages.

Check the **Show duplicate branches** box.

Words inside these boxes are then displayed in red.

Right-click on a person in the duplicate branch and choose to display all occurrences in order to locate them among the various branches in the wheel. You will see the boxes for this person stand out and thus better locate its multiple appearances in the wheel.

Dates in Gregorian format

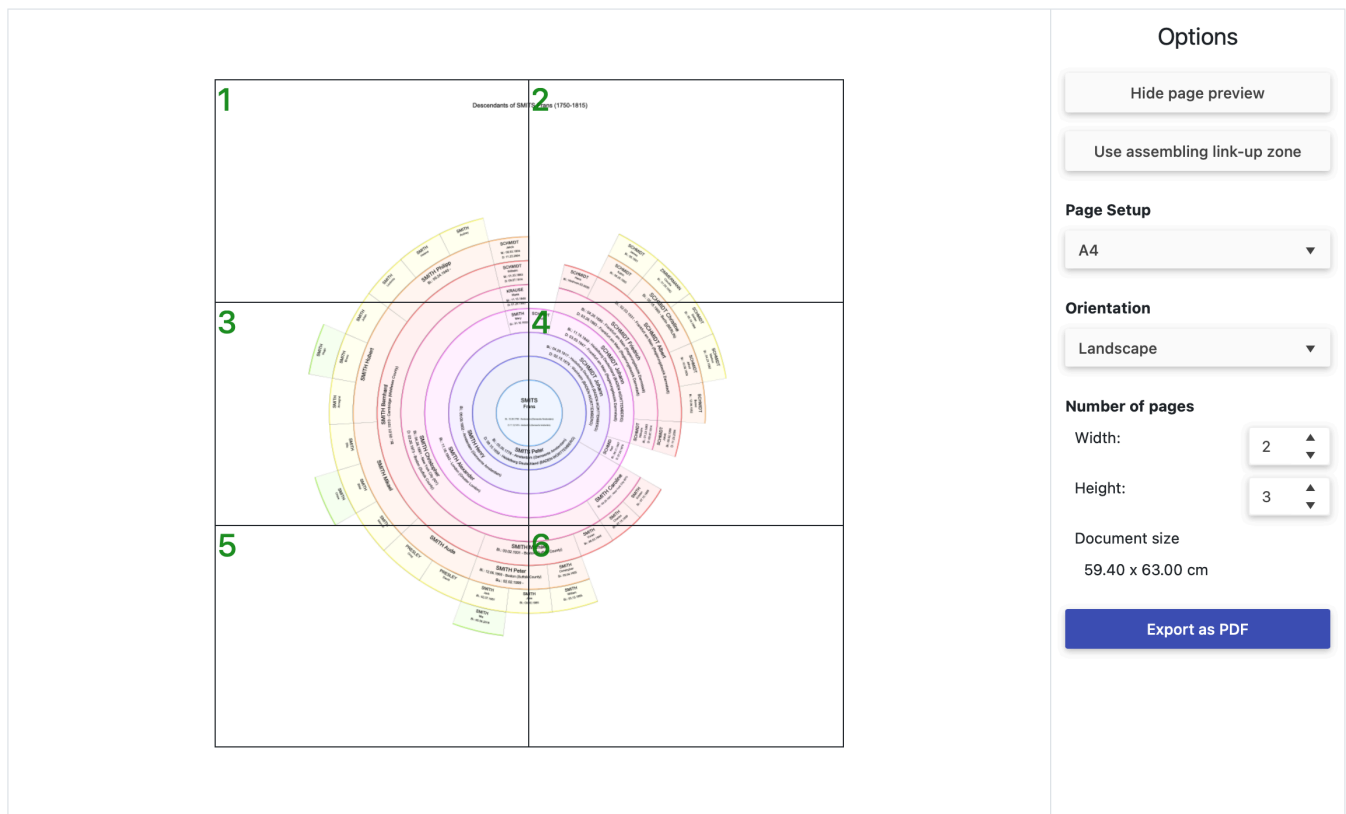
We currently use the Gregorian calendar. Yet you may have already entered dates in another calendar format, such as the Republican calendar. Check the **Use Gregorian Dates** box to convert Republican dates to Gregorian format so your family gets a better understanding of the graph.

Given Names

Choose the Given Names format you like best by clicking on the drop-down menu.

- All Given Names,
- First Given Name,
- Usual Given Name
- First Given Name and Initials.

Export to PDF before printing



The screenshot shows a circular genealogical wheel divided into six numbered sections (1-6) by a vertical and a horizontal line. The wheel contains names and dates, with some text highlighted in red. To the right of the wheel is an 'Options' panel with the following controls:

- Buttons: 'Hide page preview', 'Use assembling link-up zone'
- Page Setup: A4 (dropdown)
- Orientation: Landscape (dropdown)
- Number of pages: Width: 2 (up/down arrows), Height: 3 (up/down arrows)
- Document size: 59.40 x 63.00 cm
- Export as PDF (blue button)

Are you happy with the result and wish to have this wheel printed so you can show it to your family?

Zoom in till you reach the level of details that suits your needs.

Click on the indented wheel and **Export to PDF format for printing.**

The window that opens up will allow you to set up the PDF export.

Select your export options before printing.

Options

Hide page preview

Use assembling link-up zone

Page Setup

A4 ▼

Orientation

Landscape ▼

Number of pages

Width: 2 ▲▼

Height: 3 ▲▼

Document size

59.40 x 63.00 cm

Export as PDF

Make sure you select the optimal format for printing this wheel. Click on the **Page Setup** drop-down list to select your print settings. Standard paper sizes are already preset.

If your wheel is very large, choose to customize the size, then change the height and width sizes. Ask your professional printer for additional information if necessary. You'll be able to select the number of pages desired (for the height and width), as well as the orientation of the page (landscape or portrait), and then to modify its size if needed. Specify the size in centimeters for the width and height. If you are using the services of a professional printer, ask him/her for the maximum paper size he/she can supply.

Note: The PDF format allows you to create a document with a maximum size of 500 by 500 cm. If your wheel is larger than this, remember to "delete assembling link-up zone".

The assembling link-up zone is a white strip on each end of your sheet of paper that lets you assemble the sheets together without overlapping on any part of the graph. If your professional printer has a large enough roll of paper, click on the "**delete assembling link-up zone**" button to remove these strips so the wheel can be printed without showing any breaks even if its size exceeds 500 cm.

Click on **Hide Page Breaks** to no longer see them on your screen.

When you are done with your settings, click on **Export as PDF** and generate the file you'll provide to your printer.

Modify the file name if the one generated does not suit you and choose the location where you want to save it. Validate by clicking on **Save**.

All you have left to do is open the PDF file and print it on your personal printer or send the PDF file to your professional printer.

XXL Family

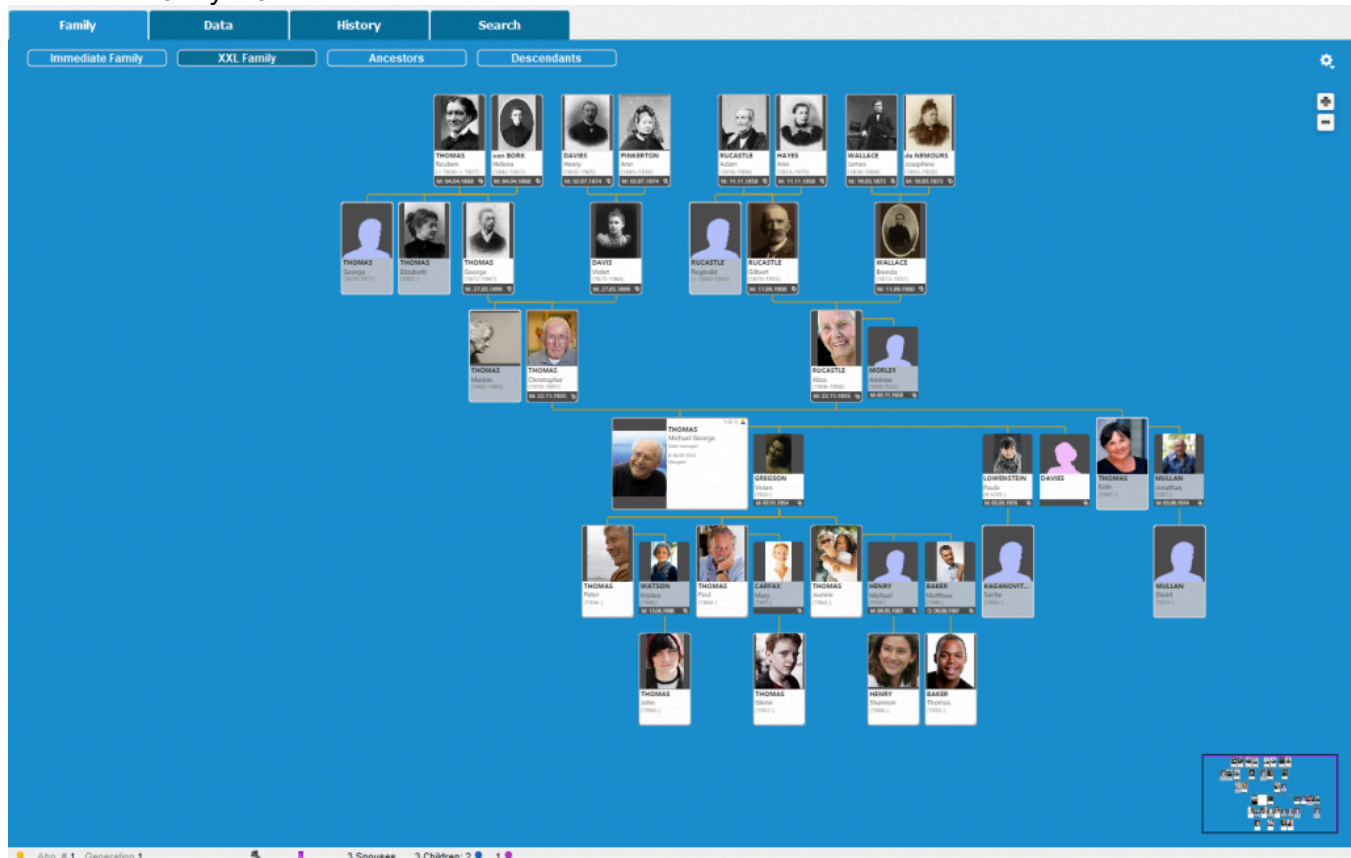
Not only can you visualize the primary person's family – parents, grandparents, great-grandparents, spouses, children – but also all the relatives that might have been around him/her: you'll get to display a true XXL view!

Persons displayed

Access the XXL Family by clicking on **Family** tab then **XXL Family**.

All persons are always displayed clearly distinguishing their affiliation or not to the main line. The primary person has a bigger box, centered on your screen. Background colors of the boxes change according to the affiliation or not of the person to the main line of the primary person. The other ones are usually grayed.

XXL Family View



Around the primary person, you will see, generation by generation:


- In ascendance:
 - His/her great-grandparents,
 - His/her grandparents, their brothers and sisters (great-uncles and aunts of the primary person), their other spouses,
 - His/her parents, their brothers and sisters (uncles and aunts of the primary person), their other spouses (father-in-law, mother-in-law of the primary person).

Note: sometimes the siblings will not be displayed chronologically, unlike in other parts of the tree, because a parent's sibling(s) cannot be inserted between the two parents – otherwise the tree chart would not be legible.

- In descendance:

XXL Family

- His/her children, children from another union, his/her nephews and nieces,
- His/her grandchildren, those of his/her brothers and sisters, half-brothers and half-sisters and cousins

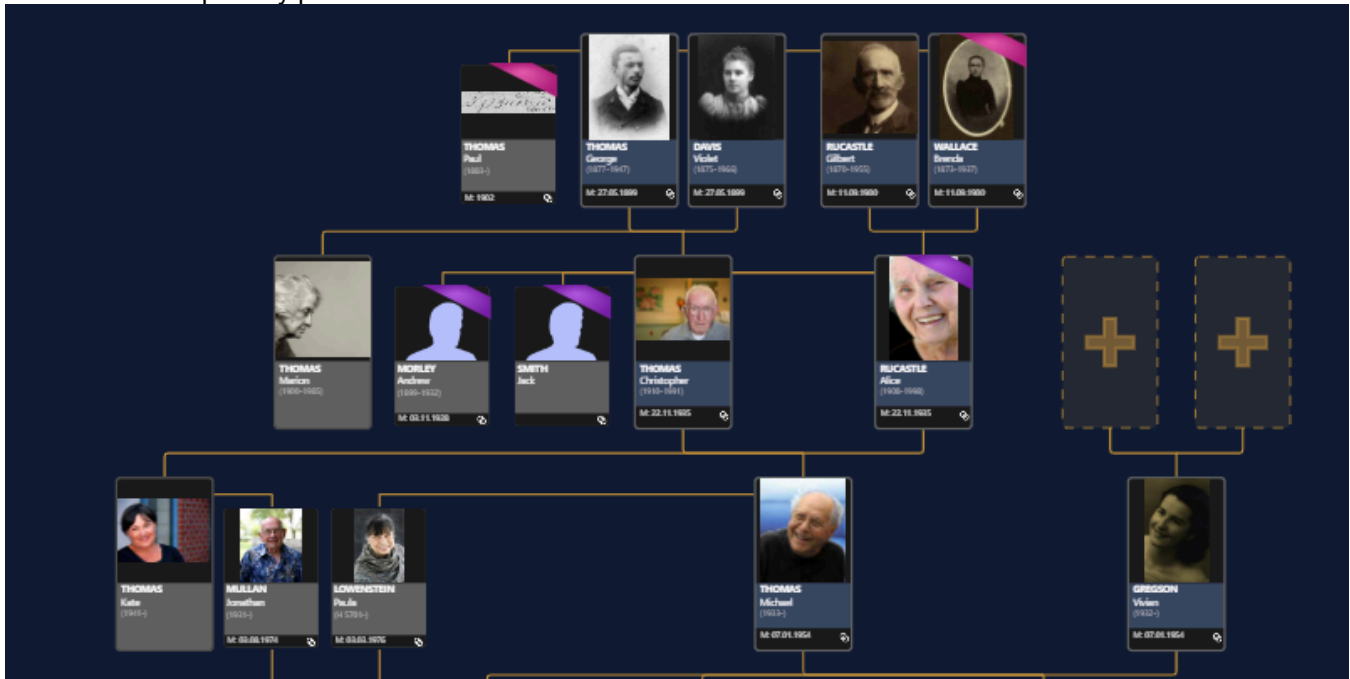
Since the  2019 version, his/her great grand children.


Note: You can also display the descendants of other spouses, grandparents and great-grandparents.

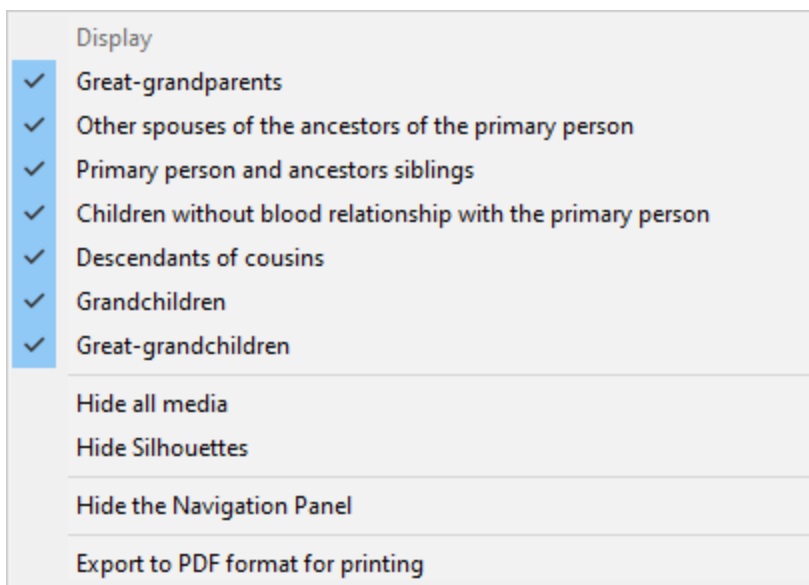
- Concerning generation of the primary person:
 - His/her spouses, brothers and sisters, half-brothers and half-sisters, stepbrothers and stepsisters, and cousins,

You can fold the left or right panels to gain more space and reveal the XXL Family.

If one of the ancestors of the primary person (from the generation of grand-parents) has had several spouses his/her box and that of his/her spouses are marked by a colored band, except the one in direct-line of the primary person. For a question of clarity of the tree, the other spouses are staggered. So you quickly see the direct ancestors of the primary person.



The revealed tree includes persons you do not want to display? Click on the indented wheel  button to hide some persons: the great-grandparents, relatives, children unrelated to the primary person's bloodline, the descendants of cousins or grandchildren.



Available information

« Focus » or « unfocus » in this dynamic tree for more or less details for each displayed person. In order to do that, use the mouse wheel, press the + or – button on your keyboard or click on the + and – buttons in the upper right corner of the window.

According to the focus level, Heredis display every person:

- his/her main media,
- his/her surnames and given names,
- his/her occupation,
- his/her birthdate, birthplace, deathdate and deathplace and age at the death,
- the icon indicating if the person is part of the Ahnentafel line.

If the displayed person is an additional spouse that you found, the information on the main union event will be displayed in the banner at the bottom of the box.

Note: Heredis memorizes all your settings to allow you to display the XXL Family format that satisfies you the most.

Navigation

From **XXL Family**, a simple click on a displayed person allows you to put this person as the primary person or to navigate to his/her relatives.

As everywhere in the software, you can also navigate from a person to another thanks to the **Navigation** panel or from the **Person's** index by double-clicking on one of them.


If all family members are not shown on the screen, you can navigate in the tree by pressing and holding down the left mouse button and by moving the cursor to the right or the left, up or down, then let go of the mouse button.

You can also move in that tree thanks to the preview displayed at the right bottom of the navigation thumbnail. Select the pink frame with the left mouse button, by moving it, you navigate in the tree.



Since 2019 version : Hide or display media and silhouettes

The XXL Family displays the main media for each person in the tree. You can decide to hide the media by

clicking on the indented wheel button , then **Hide** all media. If some persons are without a media, Heredis is defaulted to display a silhouette instead. You can choose to hide them or to display them again at any time from the indented wheel by clicking on **Display/Hide Silhouettes**.

Display

- Great-grandparents
- Other spouses of the ancestors of the primary person
- Primary person and ancestors siblings
- Children without blood relationship with the primary person
- Descendants of cousins
- Grandchildren
- Great-grandchildren

Hide all media

Hide Silhouettes

Hide the Navigation Panel

Export to PDF format for printing

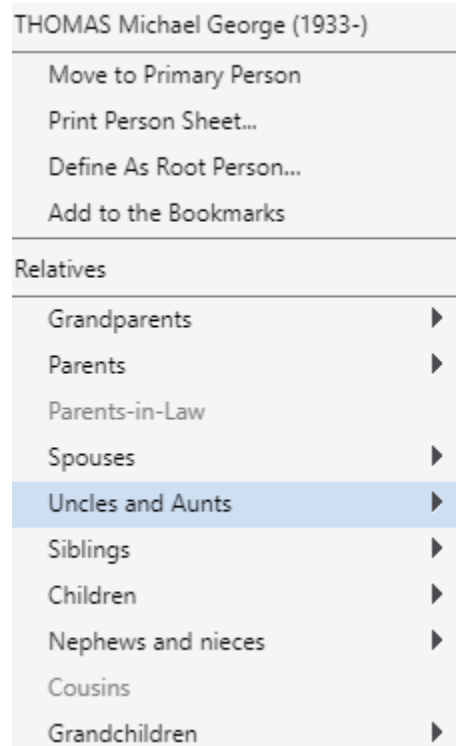
Since 2019 version : Adding spouses and children to the primary person

Heredis allows you to add spouses and children to the primary person directly from the XXL Family view. To do so, click on the + sign located below the primary person's box.

The other actions in the contextual menu

When you click the right button on a person, you can also:


- move to primary person
- print his/her individual sheet.
- define him/her as the Root person.
- add him/her as a favorite in the bookmarks.
- see his/her relatives



To add membership at this family, click on the add button from the toolbar or directly in the tree, or click on the **+** button displayed in this view, to complete the direct ascendance.

Export XXL Family

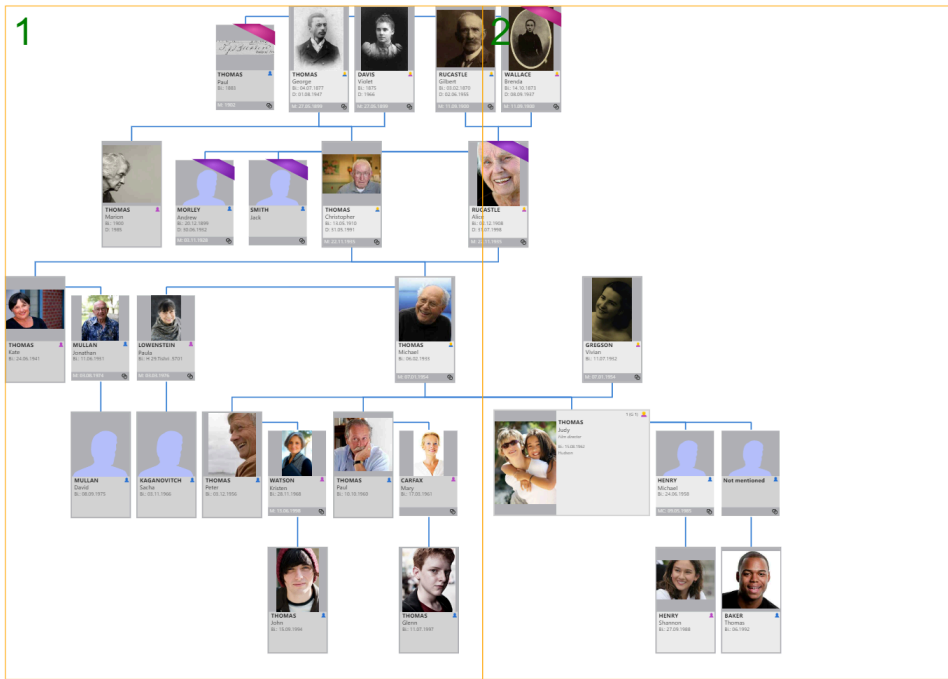
Your tree is ready. You hid the persons that you do not wish to show. You applied the focus level that convinces you in order to display the information you believe are essential, export this tree so you can print it.

- Click the indented wheel 
- Choose to **Hide the Navigation Panel**
- Click **Export to PDF format for printing**

A new window opens to preview your tree. You can access to the regular printing settings such as the pages' display or the recovery, the choosing printing format, orientation of pages or the possibility to change the height and width of the pages.

- Choose the Page Setup and orientation of the paper
- Activate or not the assembling link-up zone. The assembling link-up zone allows you to make the assembly by leaving a white area on the beginning and end of the page.

XXL Family



Hide Page Breaks

Use assembling link-up zone

Page Setup:

A4

Orientation:

Portrait Landscape

Width:

21.00 cm

Height:

29.70 cm

PDF File

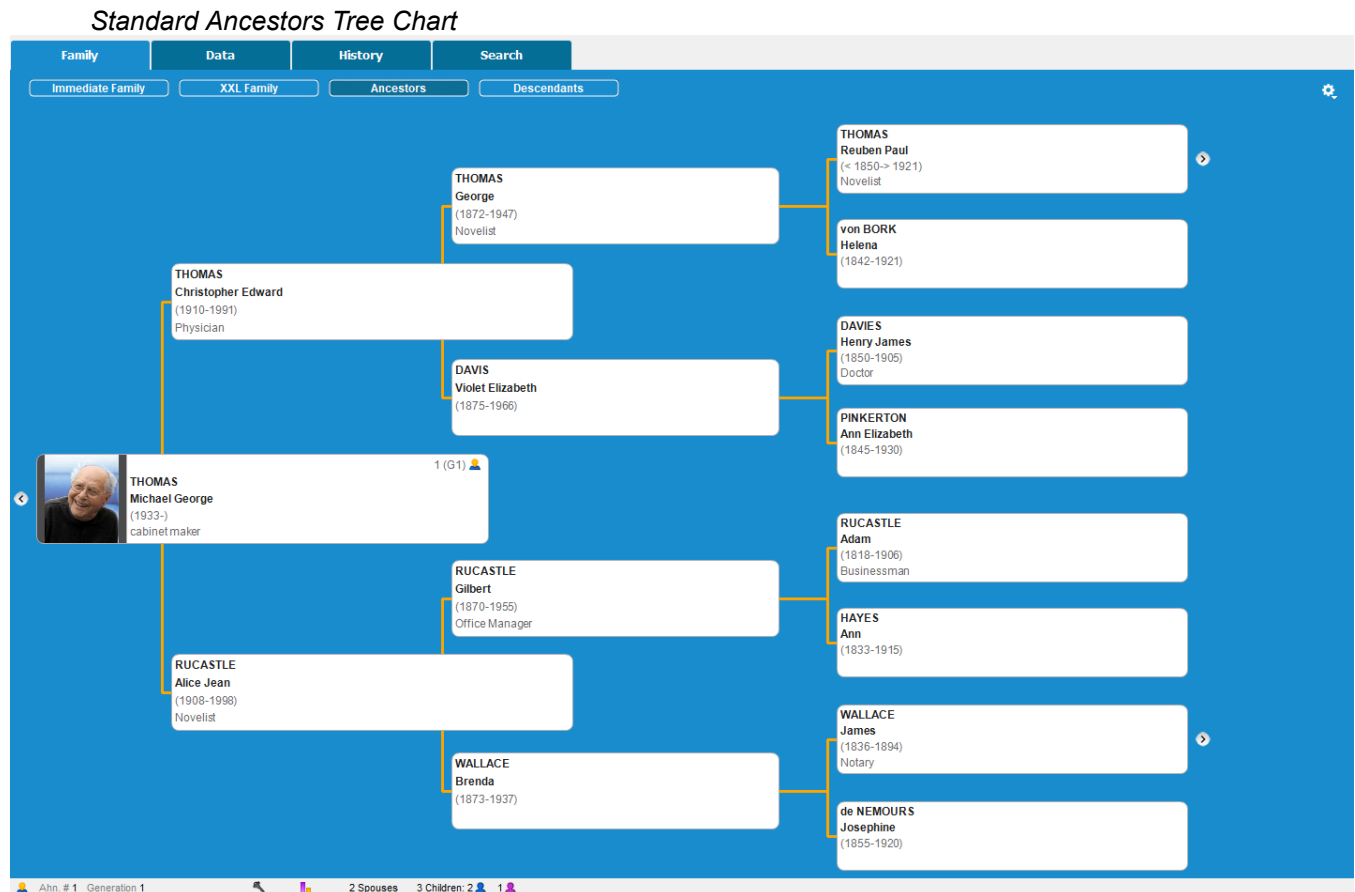
Finally, click on the **PDF file** button, and you can save the file at PDF format to print it from home or with a professional's.



Important: Note that you can generate customized size, but be carefull, PDF format allows only 200" x 200". If your XXL Family is bigger and your printer can print on a paper roll, then click on the assembling button to delete assembling link-up zone. (it is desable when you see Use assembling link-up zone)

Location Tree

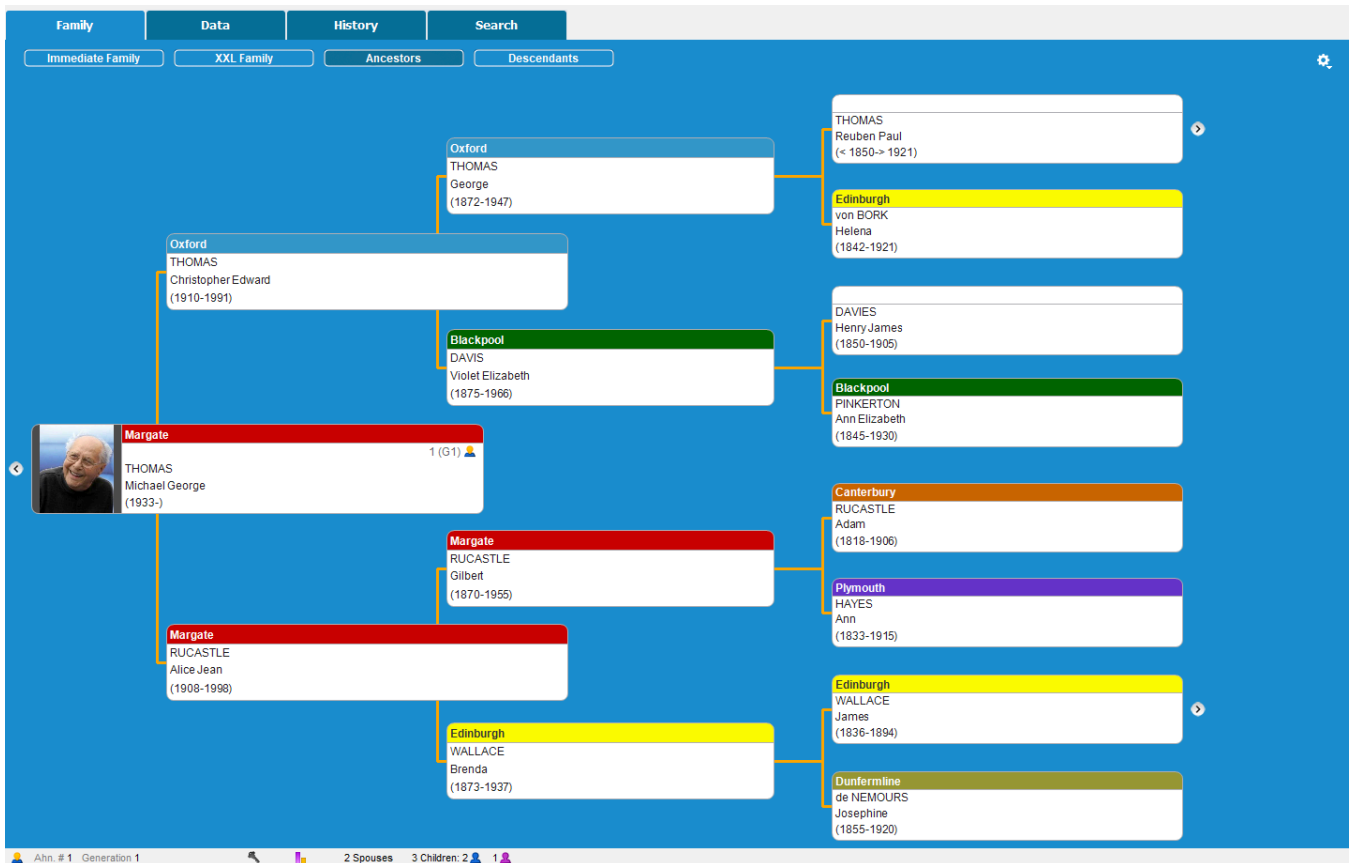
Under the **Ancestors** dynamic view, Heredis will automatically color code the banner of each box in the family tree, based on the place of birth of the persons displayed. Heredis will also let you see the criteria on which the color coding is based, that is either the persons' City, County, State/Region, or Country of birth.

How to display the Location Tree




- Click on the **Family** tab > **Ancestors**, then on the indented wheel .
- You can now select **Location Tree**. Heredis is defaulted to color code each person's City of birth but you can, if you wish to, switch to another option such as **County**, **State/Region**, or **Country** of birth by clicking on the indented wheel  in the upper right corner of the screen and selecting > Location Tree.
The New Location Tree


Location Tree



Note: When no data has been entered for the person's place of birth, his/her banner is displayed on a white background.

You can choose to increase or decrease the number of generations displayed in this Location Tree by clicking on the wheel  and selecting the desired option.

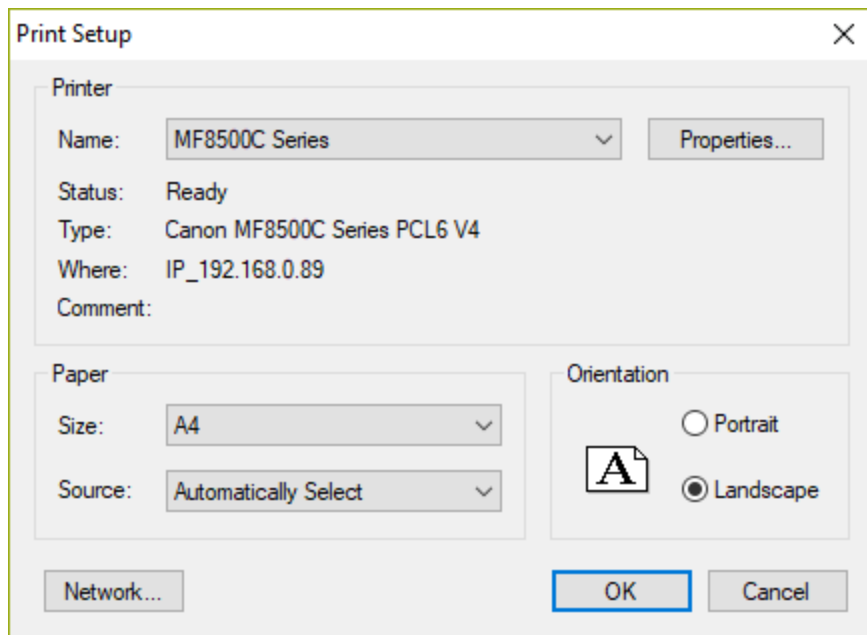
Printing the Location Tree

You can also choose to print the Location Tree by clicking again on the indented wheel  and then on Print.

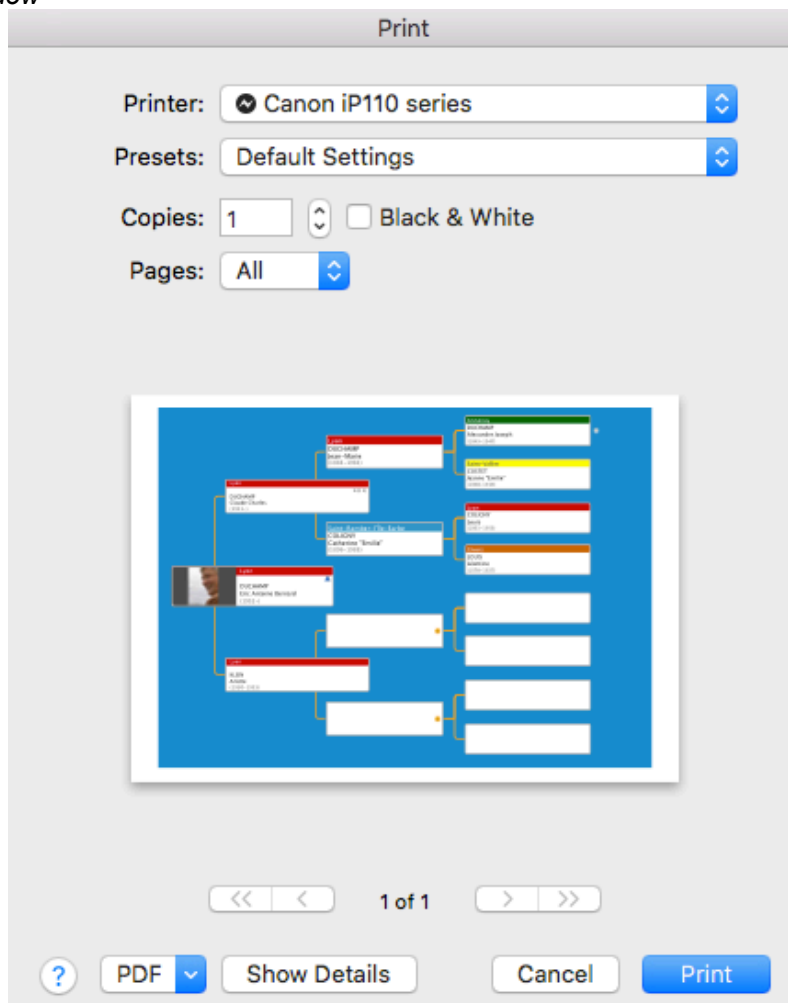
(Mac only) The printing format will depend on the size of your screen.

The Print window of your operating system pops up.

(Windows) Print window



(Mac) Print window



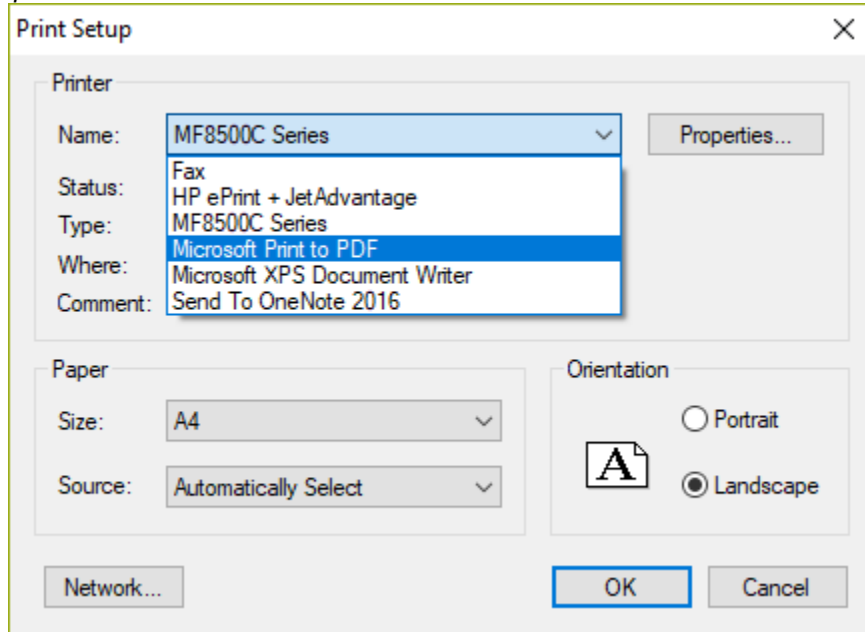
Export to PDF

(Windows) If you wish to export to PDF, instead of choosing your printer, select Print-to-PDF or any other

Location Tree

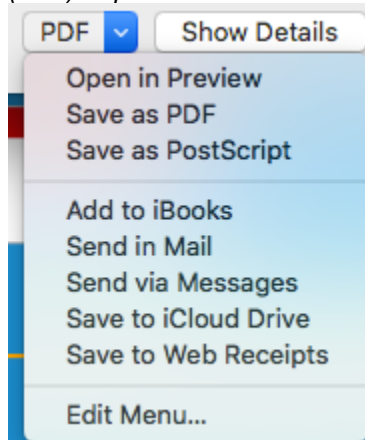
PDF add-on installed on your computer.

(Windows) Export to PDF



(Mac) Click the **PDF** button in the lower left corner of the Print window then select **Save as PDF**.

(Mac) Export to PDF



(Windows) Building single-page pedigree tree charts

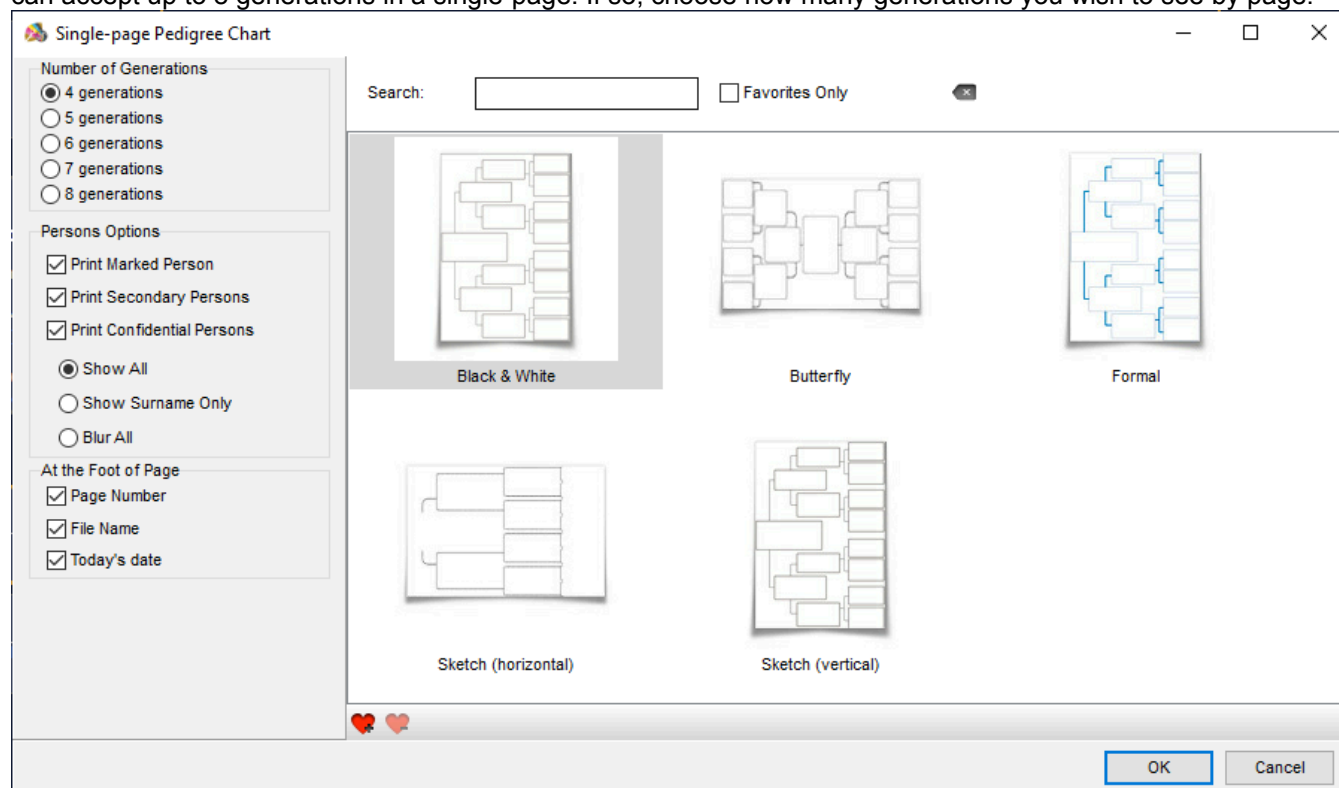
Single-page pedigree trees are ancestors trees of predefined size whose presentation always conforms to the same scheme. They are designed to be printed on a single page.


Choose the presentation of the chart

Select the **Charts menu – Ancestors Tree Charts – Single-page...**, or click the button  and click the thumbnail representing a single-page.

Graphic thumbnails show the different themes of single-page pedigree charts.

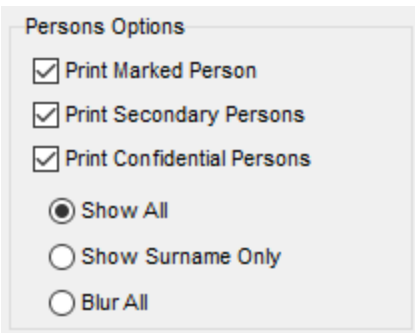
For each theme selected, Heredis indicates the format for which the document has been optimized. Some themes can accept up to 8 generations in a single-page. If so, choose how many generations you wish to see by page.



- Type the name of the theme that you want in the search bar.
- Display only your favorite themes (to set them, click the  button).

The left-hand column allows you to specify who will be automatically included or not in the tree. Check or uncheck the boxes to print marked persons, secondary persons, persons declared confidential. If you choose to print persons declared confidential, you will need to specify how they will be displayed (in full or blur or partially). See the article *The different data fields* (voir page 50) to find out what the marked, confidential and secondary tags are.

(Windows) Building single-page pedigree tree charts



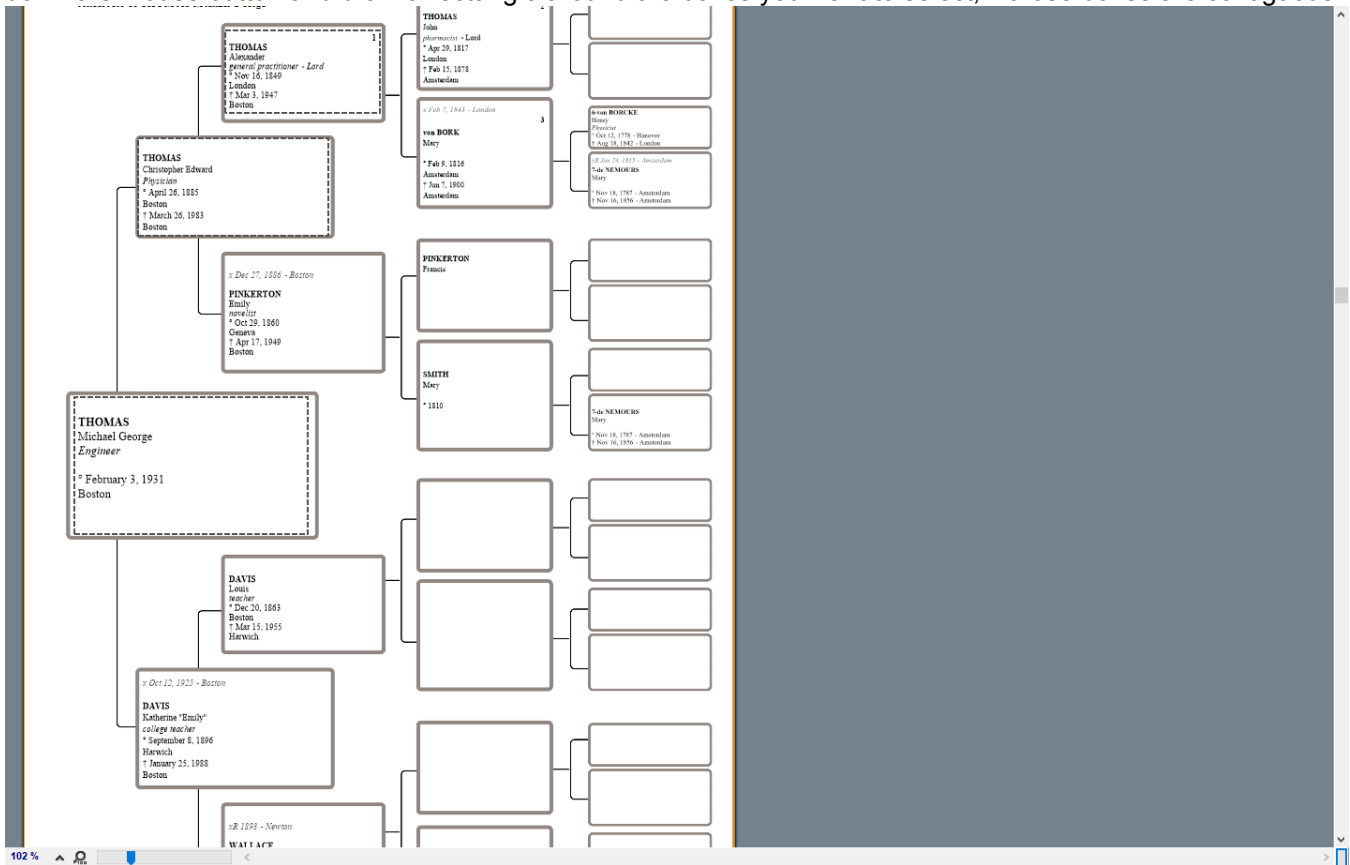
Choose to add the File name, page number and/or Today's date.
Click the **OK** button to start creating the single-page pedigree tree.

Change the chart layout

It is possible to make changes to the entire tree chart or to a selection of boxes.

Select boxes

Click a box in the tree chart to select it. To extend the selection to other boxes, maintain **Ctrl** key and **click** or **Shift** key and **click** the other boxes you need to select and make a personal multi-selection. You can also hold down the mouse button and draw a rectangle around the boxes you want to select, if those boxes are contiguous.



Use the **Search** panel and double-click one of the people in the tree to select their box.

Type **Ctrl A** to select the entire tree or use the **Select** menu – **Select All**.

Use the right click to make a multi-genealogical selection. Click on the first box to select and then right click of the mouse to choose from the following options: **Select Person** and **All Ancestors** – **Select Person** and **All descendants** – **Select the generation** – **Select All** (the entire tree chart) – **Select Males Only** – **Select Females Only**.

To unselect a box, maintain **Ctrl** key and **click** or **Shift** key and **click** the box.

See the article (Windows Pro) Apply a selection to a tree chart (voir page 453) for more details on box selection.

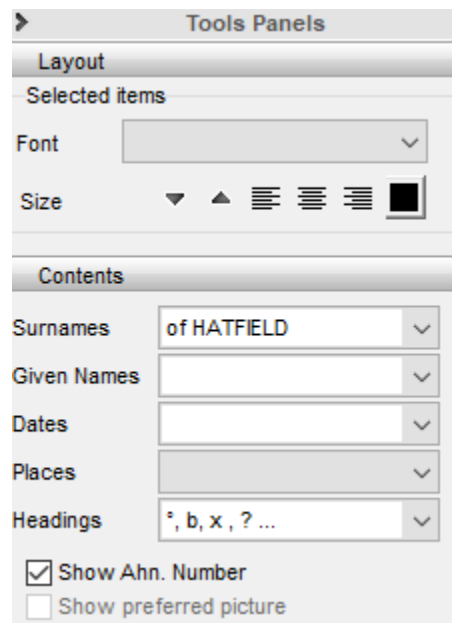
Change the presentation of the boxes

It is very simple to change the formatting of a selection of boxes using the options provided in the **Tools Panels**:

- Apply a different font
- Increase or decrease the overall font size
- Change the alignment of content
- Change the color of the text in all the selected boxes.

The changes can also relate to the content of the selected boxes:

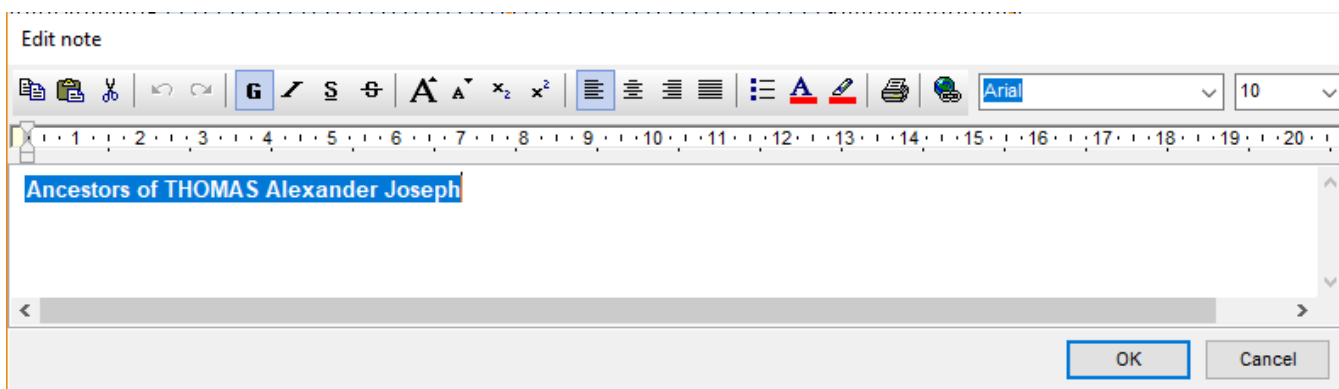
- Change the format of the surnames
- Change the format of given names
- Change the format of dates
- Change the format of places
- Apply other headings as genealogical symbols
- Show or not the Ahnentafel number
- Show or not the picture in tree charts themes allowing pictures.



Change the title of the tree chart

The title of the tree chart is an editable text box. Heredis offers a title containing the name of the primary person. Double-click the title to open the text editor and make your content or text formatting changes. When the processing window has been closed, if necessary, use the mouse to change the size of the title area by clicking on the border and then dragging with the mouse in the desired direction.

(Windows) Building single-page pedigree tree charts



See (Windows) Print or export as PDF the tree chart (voir page 462) for layout and printing functions.


(Windows) Building Fan charts

Trees of ancestors can be printed in the shape of a fan, with the primary character as the origin.

The number of generations represented on a fan chart can be up to 12 of ancestors (including the character at the base of the tree).

These charts can be printed according to their dimensions on a single page or on several pages to be assembled. If they are printed on multiple pages, an assembling link-up zone between the pages makes editing easier.



Click the button  and then click the thumbnail representing the Fan chart.
or Select the **Charts** menu – **Ancestors Tree Charts** – **Fan Charts**.


The screenshot shows the 'Fan Chart' dialog box with the following settings:

- Field styles:** Surname: of HATFIELD; Given Names: All Given Names; Dates: 9.30.1984; Use Gregorian Dates: unchecked; Places: City; Text format: 4 lines; Show Ahn./User Number: checked.
- Font and color:** Font: AR CENA; Size: 7; Males/Females/Other text lines: color swatches.
- Line Width:** Thin, Regular, Bold.
- Persons Options:** Print Marked Person, Print Secondary Persons, Print Confidential Persons: checked; Show All, Show Surname Only, Blur All: radio buttons.
- Templates:** Exploration.
- Background Fills:** Males/Females, By Generations, By Quarters: radio buttons; Gradient Fill: checked.
- Chart Format:** Generations: 8; Angle: 210.
- Preview:** A fan chart showing 255 persons.

Choose the presentation of the chart

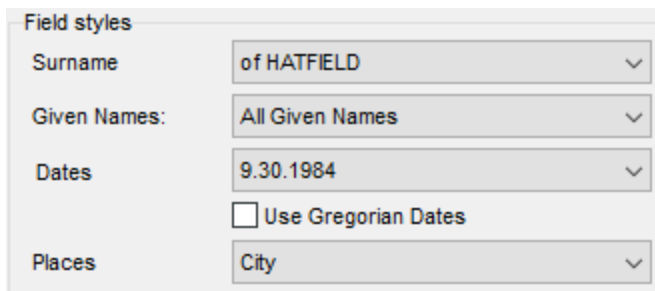
Formatting the contents of the boxes

The content of the boxes is defined in the left part of the setup screen.

It can then be modified by clicking on  once the fan chart is created.

- Choose the styles of the fields for the tree chart (should one or more given names be included, should the dates specify the day of the week...).

(Windows) Building Fan charts



Field styles

Surname: of HATFIELD

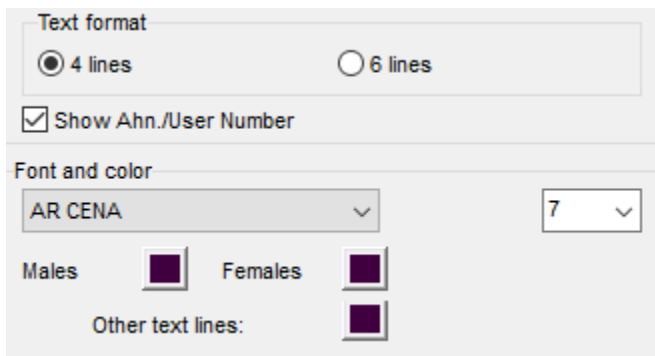
Given Names: All Given Names

Dates: 9.30.1984

Use Gregorian Dates

Places: City

- Specify the formatting of the text: font, size, colors.



Text format

4 lines 6 lines

Show Ahn./User Number

Font and color

AR CENA 7

Males Females

Other text lines:

- Apply the limitations on the persons to be displayed (marked, confidential...). See the article The different data fields (voir page 50) to learn all about this marking.



Persons Options

Print Marked Person

Print Secondary Persons

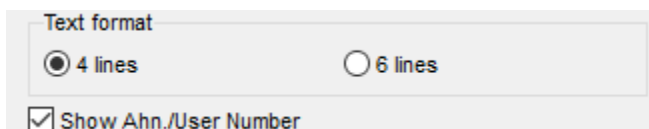
Print Confidential Persons

Show All

Show Surname Only

Blur All

- Specify whether you want, in each box of the tree chart, succinct or more detailed information by clicking on the **buttons 4 lines** or **6 lines**. Heredis manages, depending on the generation, the maximum amount of information that can be edited.



Text format

4 lines 6 lines

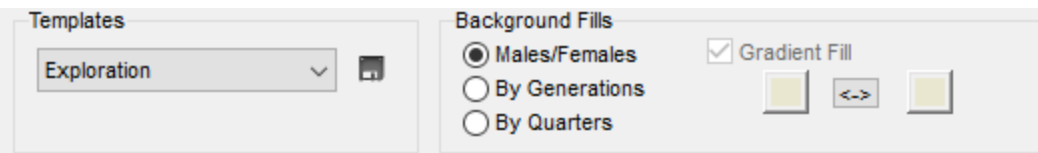
Show Ahn./User Number

- Set the width of the printed line and specify whether you want to display the Ahnentafel number of persons.

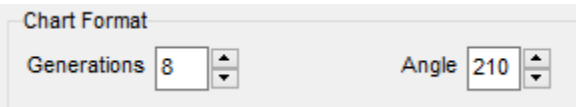
Graphic formatting

The right part of the setup screen includes the different tools to use to give the desired shape to the fan tree chart.

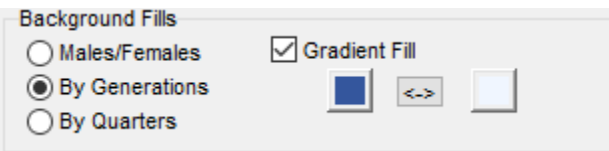
- Select a tree theme from the **Templates** drop-down menu and observe in the preview window the change made by each new layout you choose (number of generations, angle, colors...).



- Indicate the number of generations to be treated (up to 12), Heredis specifies the number of persons contained in the tree chart according to the number of generations chosen.
- Choose the angle of the fan (between 180° and 300°).
Choose the shape of the fan (up to 300°).



- Move the slider to specify the number of different quarters to color if you chose the **By quarters**. The number of quarters can range from 4 to 16.
- Choose the color settings. Select the options:
 - **Males / Females** to color the different boxes according to the sex of the person,
 - **By generations** to apply a different color to each,
 - **By quarters** to materialize the 4, 8 or 16 chosen quarters.
- Select the **Gradient Fill** check box to choose the two extreme colors for generations or quarters coloring.
or Click in each of the preview areas (generation, quarter...) to specify a fill color.




Click **OK** to draw the tree according to the choices you specified.

Save your modified theme

When you have made personal changes to a template, your formatting is preserved until the next personal edit you make in the tree chart.

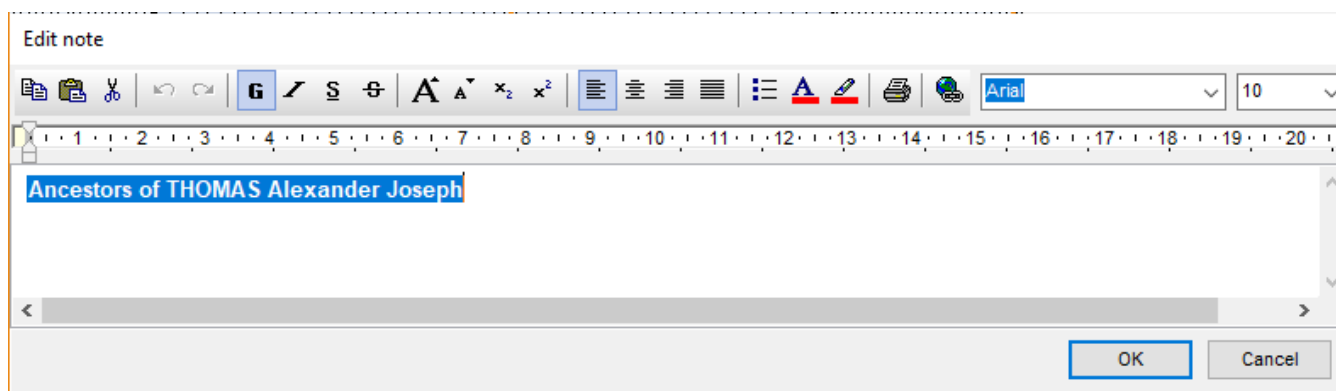
You will be able to try the different themes but also return to **Lastest layout** in the **Templates** drop-down menu.

Save the created template by clicking  next to the template choice and give your template a name.

Change the tree chart layout

Change the title of the tree chart

The title of the tree chart is an editable text box. Heredis offers a title containing the name of the main person. Double-click the title to open the word processor and make your content or text formatting changes.



Change the formatting in the tree chart

In tree charts of fan ancestors, it is possible to make modifications, either to the whole tree or to a selection of boxes.

Select boxes

Click a box to select it. To extend the selection to other boxes, maintain **Ctrl** key and **click**, or **Shift** key and **click**, on the other boxes you select for a personal multiselection.

Type **Ctrl A** to select the entire tree.

Use the right click to do a genealogical multiselection. Click on the first selected box and choose from **Select** menu the following options: **Select Ancestors – Select Descendants – Select Generation – Select All** (the entire tree) – **Select Females Only – Select Males Only**.

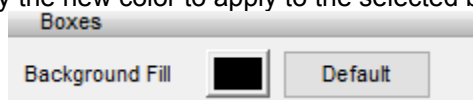
Use the **Search** list and double-click one of the people in the tree chart to select their box.

To unselect one of the boxes, maintain **Ctrl** key and **click** or **Shift** key and **click** the box.


See the article (Windows) Apply a selection to a tree (voir page 453) for more details.

Apply a change

It is possible to change the color of the selected box(es). Click the color pad in the **Boxes** panel and specify the new color to apply to the selected boxes.



Restore the fan tree chart according to the colors of the template by clicking on the **Default** button: each of the selected boxes will take the color defined by the template.


To return to the general settings of the tree chart, click the button  or select the **Display** menu – **Graphical preferences** and change the number of generations, the template used, or any content or coloring options. The new settings will apply as soon as you click **OK** to rebuild the fan tree chart.

See Finding your way around a tree (voir page 455) for display and move functions in the tree chart.

See (Windows) Print or export as PDF the tree chart (voir page 462) for layout and printing features.

(Windows) Unlimited size tree chart : ancestors, descendant and hourglass

You can create as many graphical representations of your genealogy as you wish. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

Choose from the different types of tree charts proposed in the **Charts** menu or click **Charts**  on the toolbar to visually select the tree charts proposed by Heredis.

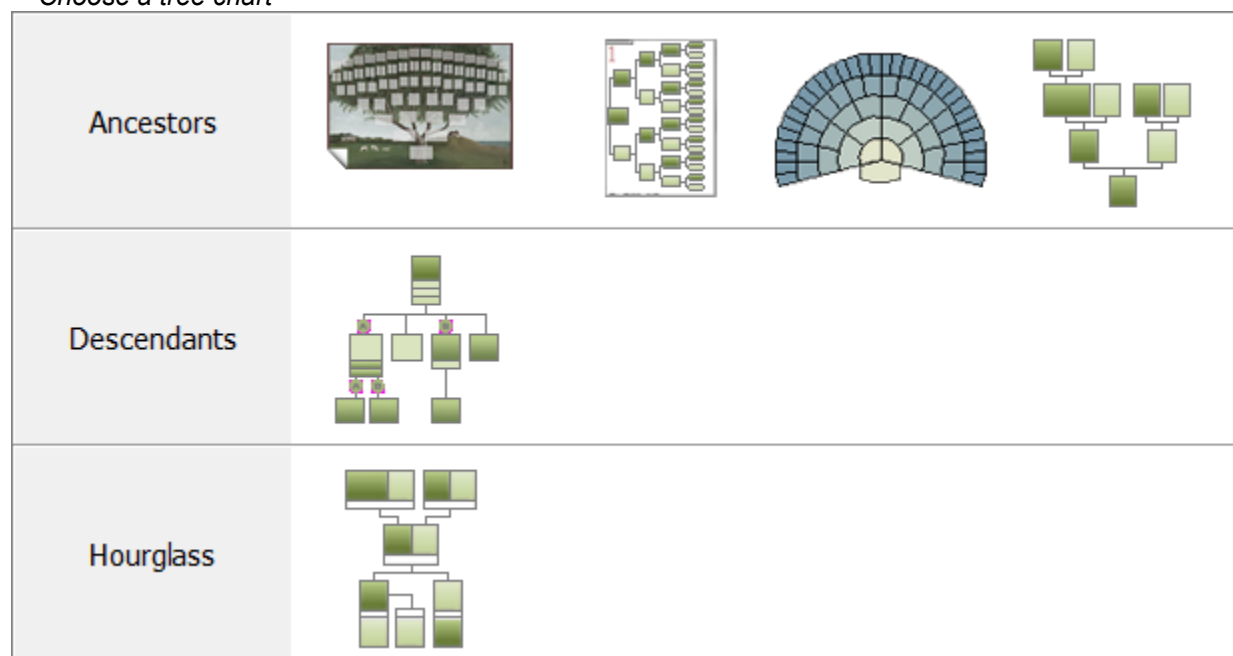
Edit a tree chart

The printing of a tree chart takes as its starting point the primary person displayed and will display his/her ancestors, descendants or both as an hourglass tree chart.

Choice of tree chart

In the **Charts** menu or in the displayed selection screen, choose the type of tree to build from the list to the right.

Choose a tree chart



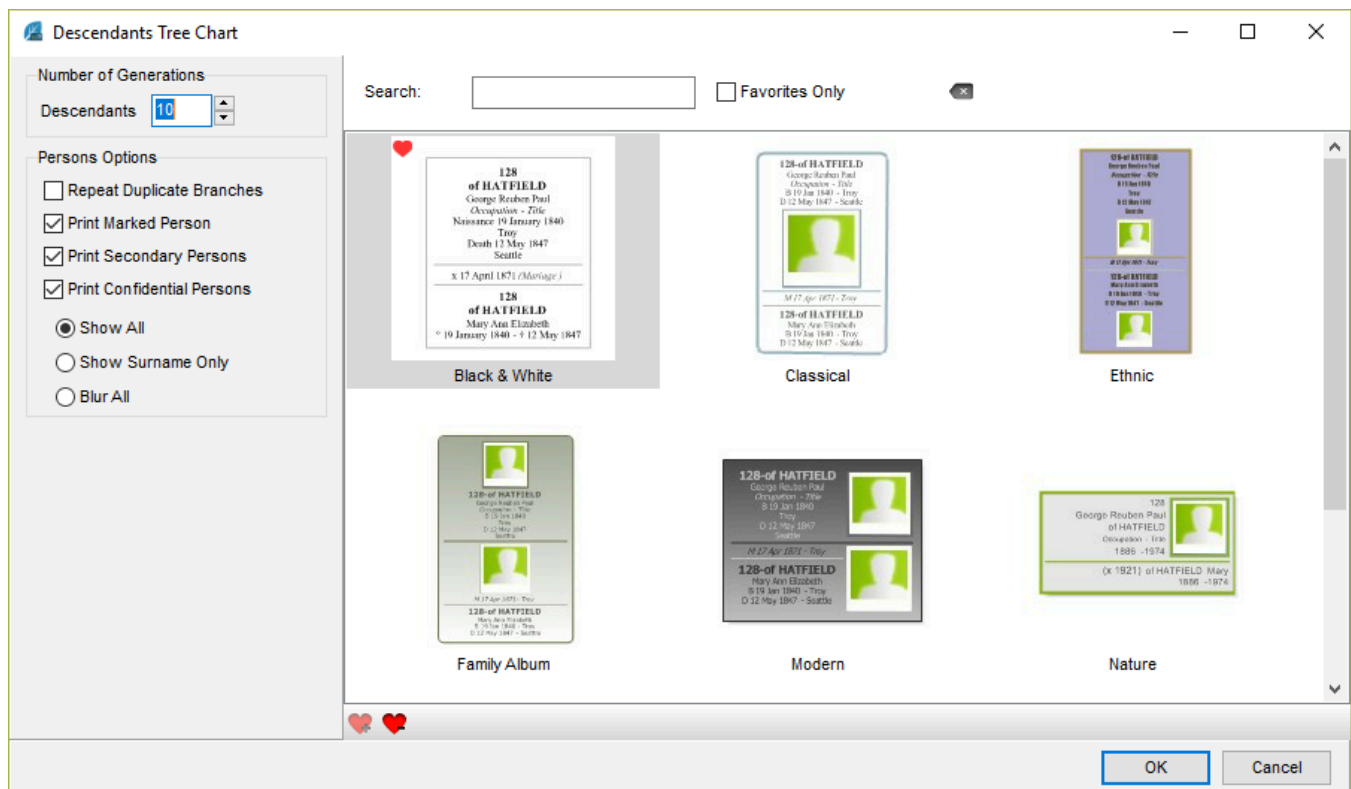
Heredis proposes various types of tree charts of unlimited size. Whatever the type of tree chart selected, you can print it or have it printed over several pages or a single long strip of paper.


When a tree exceeds the size of your printer, each page is printed with an overlap to facilitate mounting of the chart.

Choice of theme

Choose a theme

(Windows) Unlimited size tree chart : ancestors, descendant and hourglass



Click a theme in the viewer. To facilitate your choice, Heredis displays an overall preview of the tree to be edited with this theme or a preview of a box. Scroll through the different themes by pressing the arrow keys or with the mouse. The last used themes are preset for each type of tree chart. After testing the different themes of tree charts, you may define your favorite themes. Click the **Add to Favorite**  button and the theme is marked with a heart icon that allows it to be recognized.

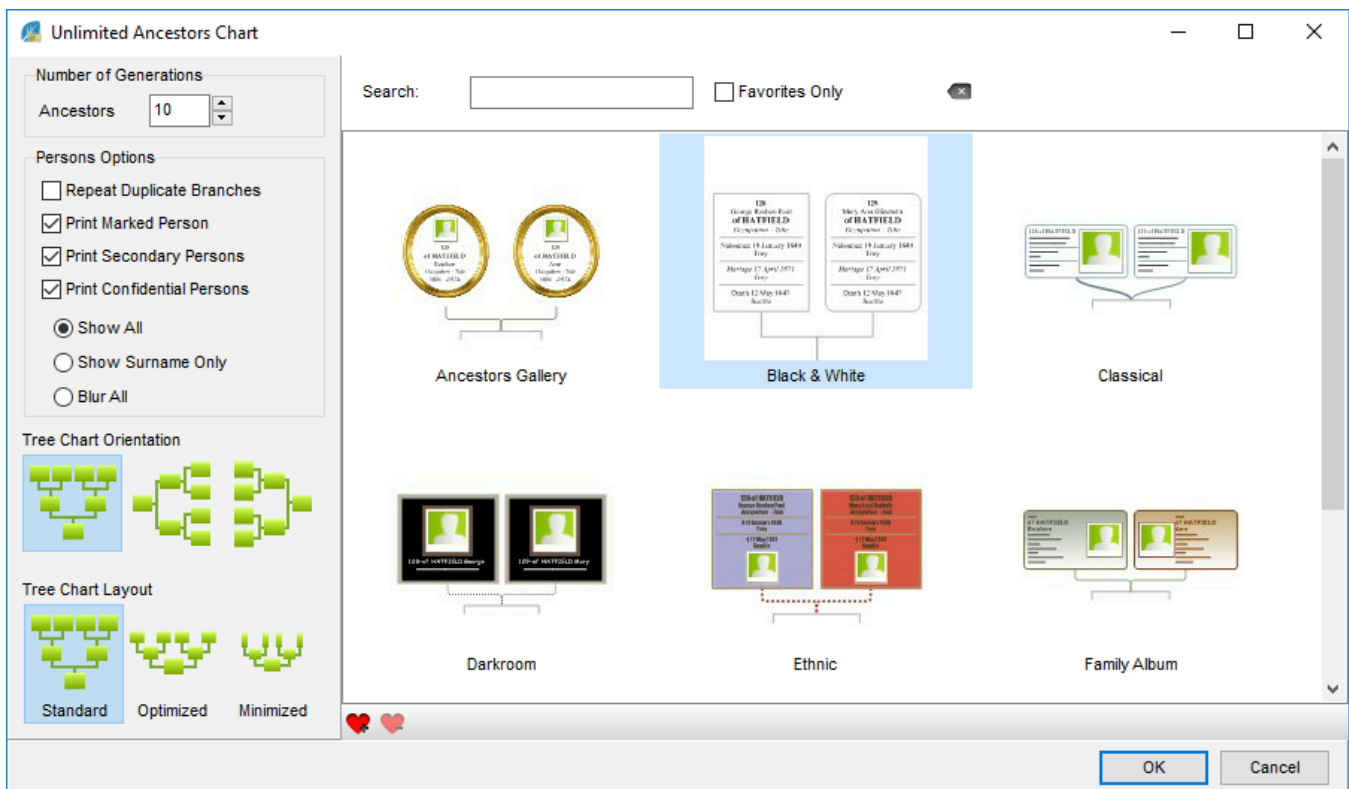
Info • You have a search filter for favorite themes. Thus, you can display only the themes that you commonly use.

Chart Settings

Specify the construction parameters that suit you for the selected theme: number of generations, people to be displayed or not on the tree chart.

1. Indicate the number of generations. It is unlimited for ancestors as well as descendants.

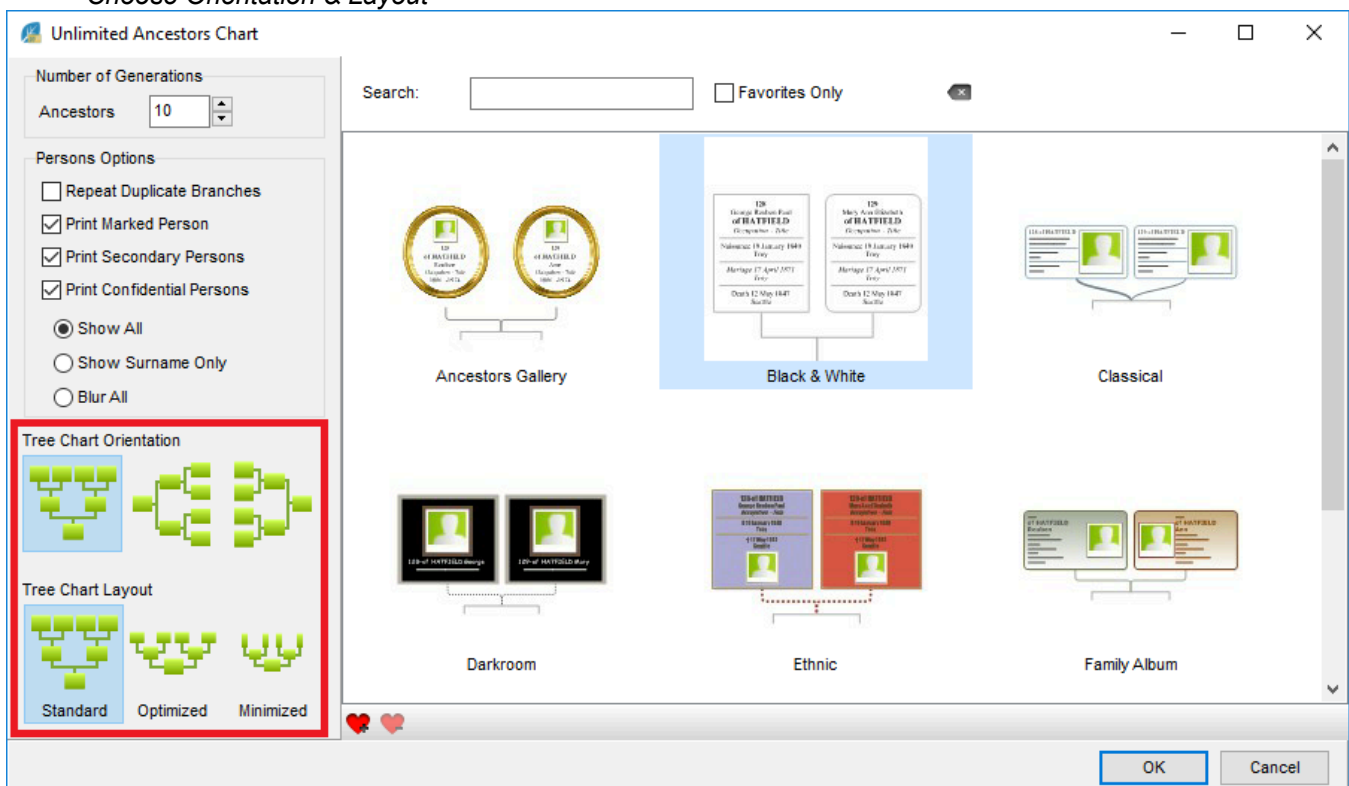
Unlimited Chart



If this option is available, specify who will be automatically included or not in the tree. Check or uncheck the box to print marked persons. Check or uncheck the box to print confidential persons. If you choose to print them, you will need to specify how they will be displayed (in full or blur). See the article [The different data fields \(voir page 50\)](#) to know everything about this marking.

2. Choose the orientation of the tree chart, building from bottom to top, from left to right or from right to left.

Choose Orientation & Layout



3. Choose a method for automatic construction according to the space you want to allocate to the tree chart.

- The **Default** tree chart is built with all boxes of the same size, that is to say that the box of the central character has the same size as that of persons shown in the third generation or 10th generation. In this tree chart, generations will be located one above the other without overlapping.

- In the **Optimized** tree chart, boxes gradually decrease in size with the higher generations and they slightly overlap.

- In the **Minimized** tree chart, the boxes will diminish in size and content and their position can be rotated at the end of the branch to save even more room.

4. Select the persons for inclusion on the tree chart. By default all persons appearing in the ancestry or descent of the primary person are displayed on the tree chart. You may untick secondary persons, or marked and confidential persons, for them not to be displayed on the tree chart. You may also hide all the data you have declared to be private (events, pictures, etc.).

Click **OK** to start the construction of the tree chart according to the theme selected and with the chosen parameters.

Tree Chart Screen

Heredis displays a tree chart representing the lineage of the primary person and which is printable immediately. If you want to make changes to the tree chart, you have tools in the specific Tools panels of the various tree charts.

Toolbars and menus

When the tree chart is displayed, the menus and buttons are different from those for data management.

You may use the buttons for normal actions:  **Save**,  **Pages**,  **Add**,  **Layout**,  **Print**. Display only the buttons you use most often by choosing **Windows > Customize Toolbar**.



Use the tree chart menus to manage also the layout of the screen or the selection of people on the tree chart.

Info • You can open another previously saved tree chart while the tree chart is already open on the screen choose **File > Open**.

Persons displayed in the tree chart

The **Search** panel of the tree chart contains a list of all persons included in the chart. Clicking a person in the list previews that person's box in the tree chart. A double click navigates through the tree, if its size exceeds that of the screen, to display the box for a selected person.

To quickly find a person in the list of individuals on the tree chart, enter the surname or given name. Refine the search by selecting from the drop-down menu, the gender of the person sought if the name is multiple.

When there are marriages between blood relations (implex) on your tree chart, certain ancestors may be included more than once. By default, Heredis will only display one complete branch and duplicate branches are cut off. If you want to repeat the implex branches, tick the option in the settings screen of the tree chart prior to construction.

Click the name of the ancestor in the **Search** panel and Heredis displays the various positions of the person in the tree chart. Click on the first position to see the entire branch displayed. The different boxes for the ancestor have identical lettering.

Info • In **Search** panel of the tree chart, click the name of a person in the list, his/her summary appears in the **Summary** panel.

Preview of the selected box

The **Tools** panels displays the selected box. At the opening of the tree chart, Heredis displays a complete view of the document, whatever its size. The preview is very useful in large tree charts, when the content of the boxes is not readable on the screen. This visualization immediately displays any changes that you apply to the box.

For more details, see the article (Windows Pro) Apply a selection to a tree chart

Tree chart formatting


You may modify the unlimited tree charts to give them a more personal graphical appearance. In the fixed size tree charts, the changes apply only to the content of the boxes. The overall environment is not editable.

The different **Tools** panels allow either changes to be applied to the whole tree chart or changes to a given selection (one or more boxes).

Display screen

The central area of the screen shows all the boxes of the tree chart, the title of the tree and any images that you have added.

To help you check and estimate the size of your tree chart, materialize the pages on the screen.

In the toolbar, click **Pages > Show/Hide Page Breaks**  or in the menu choose **Display > Show/Hide Page Breaks**.

The number of pages depends on the chosen page format for your printer. To change the format and page orientation in your printer, click the Page Setup button in the **Print** panel.

To move around the tree chart, use the horizontal and vertical bars, or change the zoom factor or double-click the name of a person from the Persons panel to display his/her box directly.

Zoom

You can increase (zoom in) or reduce (zoom out) the display of the tree chart. It is often necessary to reduce the display of a tree chart to visualize all required generations. Choose **Display > Zoom > Increase Magnification** or **Decrease Magnification**. To return to the actual size of the tree, choose **Display > Zoom > 100 %**.

You may also select different levels of zoom on the bottom bar of the tree chart screen.

- Click the arrow and select a value from the drop-down menu or use the slider to change the zoom level. Heredis indicates the factor used to reduce or enlarge to the left of the bar.

- Click the **100%** button to return to the real size of the tree.

- Hold down the **Alt** key. With a left click, the tree chart grows, with a right click, the tree chart is reduced.

You may also use the mouse wheel up or down to enlarge or reduce.

Info • Remember to fold back the **Search** and/or **Tools** panels to have the maximum available space for display of the tree chart.

Selection

Before making changes to a tree chart, first select the boxes to which they will apply. Depending on the type of change to be made, make individual selections or selections of a genealogical order.

- To select all boxes of the tree chart, choose **Select > Select All**. From anywhere in the tree chart, you can right-click the mouse and choose **Select All**.

- To select one or more boxes of the tree chart, drag the mouse cursor over the boxes to be selected.

- To select more boxes that are not contiguous, select the first box, and then, holding down the **Shift** key, the additional box or boxes To make genealogical selections from any box in the tree, right-click the mouse and choose **Select Men Only** (or **Women Only**, or **Person and All Ancestors**, or **Person and All Descendants or Generation**).

Info • Persons corresponding to the selected boxes are also selected in the **Search** panels.

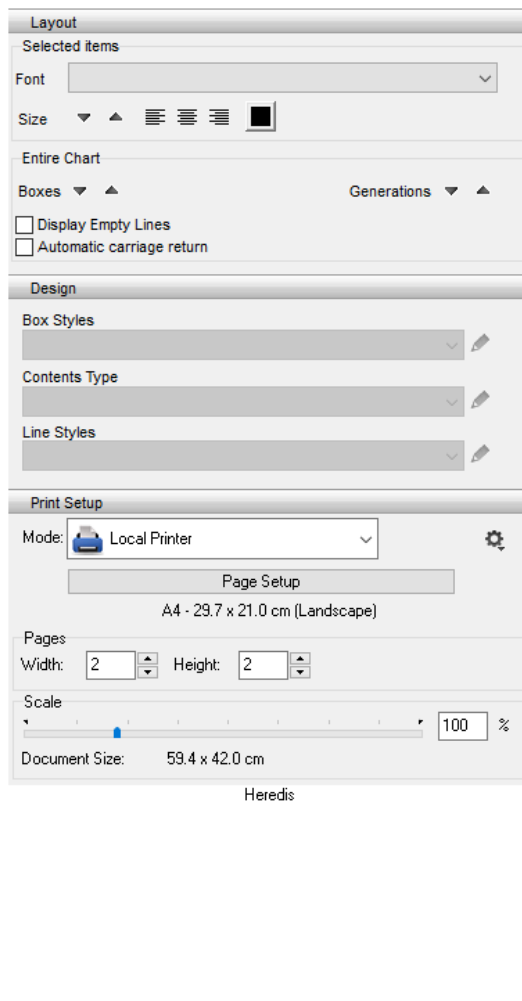
For more details, see the article (Windows) Finding your way around a tree (voir page 455)

Format the tree chart

To make changes, use the tools in the tree chart **Tools** panels. To go further in the formatting of the boxes,

make your changes in the **Layout** panel.

Layout Panel



Modify the contents of selected boxes

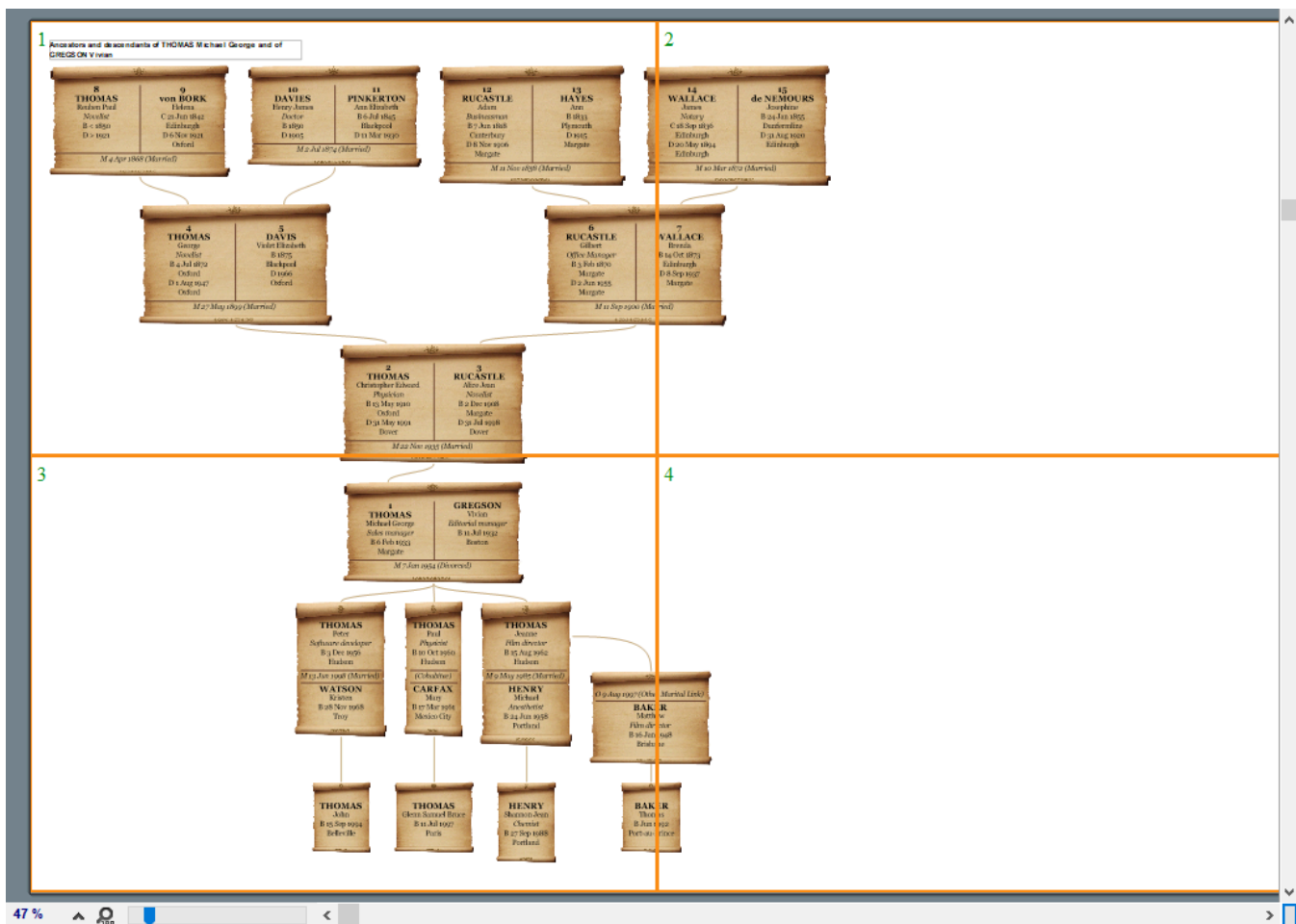
- Choose the content formats that suit you for surnames, given names, dates, places and genealogical headings from the drop-down menus.
- Tick the **Show Ahn./User Number** and **Show Preferred Picture** boxes to add this information, if it exists, in the selected boxes.

Change the text formatting

Without delay, change the font, size, color and text alignment with the drop-down menu, the cursor and the buttons of the **Layout** panel.

Info • Do not forget that you can make a selection of all men in the tree chart, then all women, to apply different text colors. For this, use the **Select** menu or right-click of the mouse.

Hourglass Chart



Change the layout of the tree

1. In the **Layout** panel, change the spacing between boxes or the spacing between generations by clicking the arrow buttons.

2. Tick the **Display Empty Lines** box for all boxes to be filled with the same number of lines, even if you do not have information.

3. Click the **Pages > Center Tree Chart** button to reposition it optimally after modifications.

Move elements in the tree chart. After selecting boxes, several methods for moving them are available.

Choose the one that suits you best

- Mouse: Drag the selection to its destination by holding the mouse button pressed.

Info • Hold down the **Shift** key to prevent any movement off the generation axis. Each box moved will remain aligned with the other boxes in the same generation.

- Arrow keys: press the arrow keys to move to the position you wish to select.

To cancel the moving of the selection, press **Ctrl-Z** or choose **Edit > Undo**. To restore the move, press **Shift-Ctrl-Z** or choose **Edit > Redo**.

Change the design of the tree chart

Change the graphical appearance of your tree charts with a few clicks. Some graphical changes apply to the whole tree chart, others apply only to the boxes you selected.

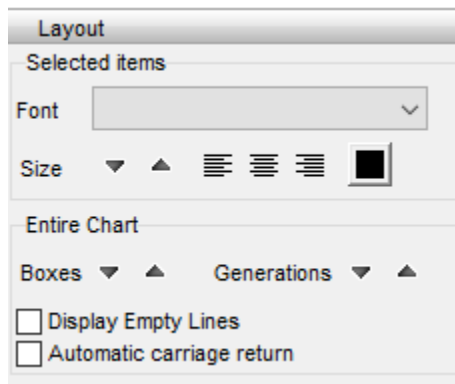
1. Select the boxes to be modified or choose **Select > Select All**.

2. In the **Layout** panel, change the overall font, size, alignment and text color.

3. The display of boxes on the tree chart is defined by three elements: box styles, content types and connecting line styles. The different themes that come with Heredis contain several presets for each of these elements. They are available in the **Tools > Layout** panel of the tree chart.

(Windows) Unlimited size tree chart : ancestors, descendant and hourglass

- Choose a preset to be applied to the selected boxes in the dropdown menus A preview screen shows you the appearance of available presets.

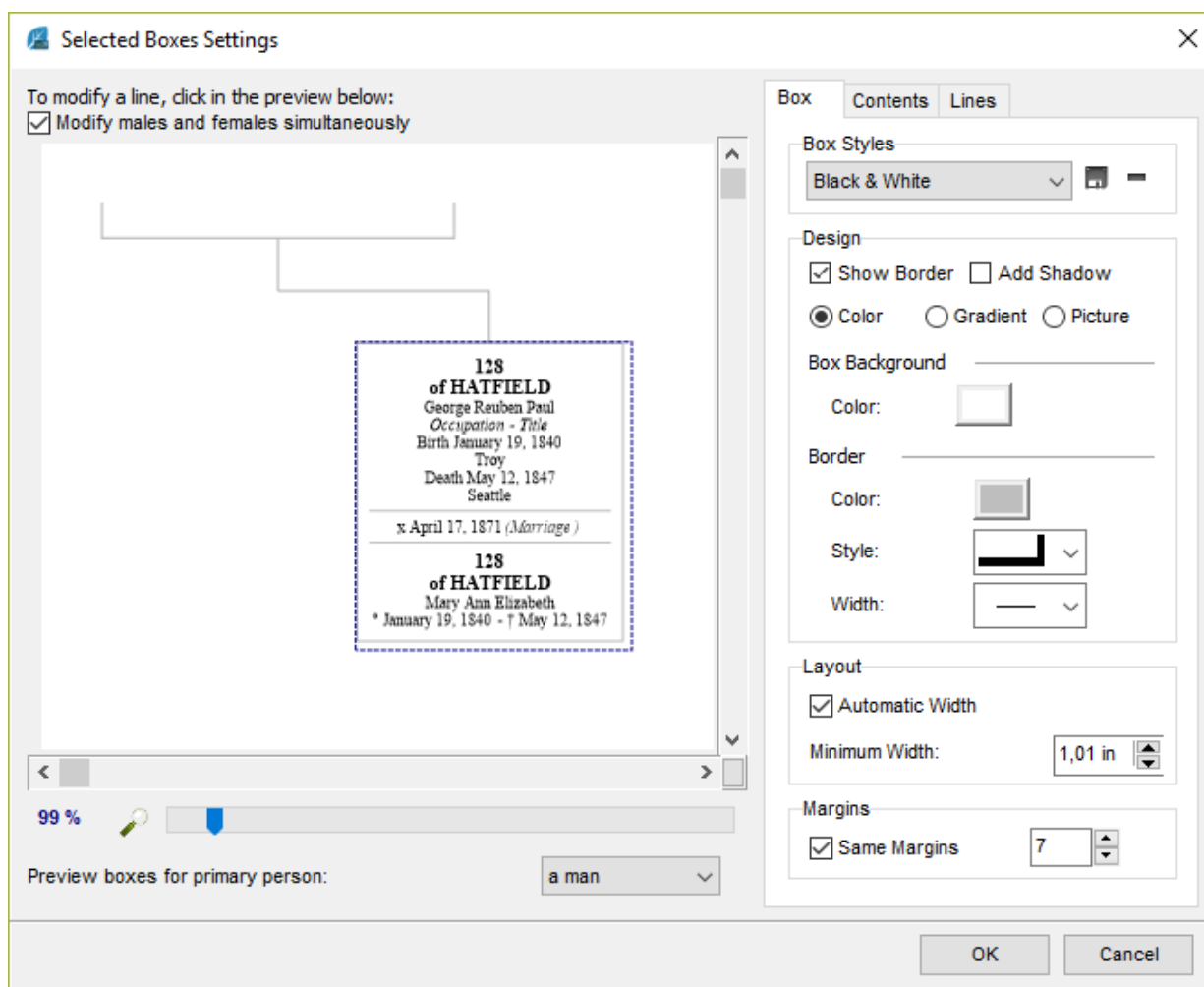


- You can change each preset of box styles, contents or connecting lines. Click the **Layout** button in the toolbar, use the right-click menu on the selected box, or click the **Edit...** box shown as a pencil to the right of each menu to access all the changes.

Info • By clicking on the pencil, you open the setup screen of the preset. To change the presets of box style, contents and connecting lines at the same time, click the **Layout** button.

- The box preview contains a tick box in the top left of the preset edit screen, for applying a modification to the males and females simultaneously.

Change the box style



Change the Box style preset displayed or choose a different preset from the Box Styles drop-down menu to form a base for your custom formatting.

1. Click the border of the box to change border, shading, box background, orientation and size of the box including padding.

2. Click on an item, eg. name, to access the formatting of this item. When a line contains two distinct elements, they may be changed independently of one another, for example Surname – Given Name or Date – Place.

3. Click on the picture to determine its size, its border and its eventual position in the box.

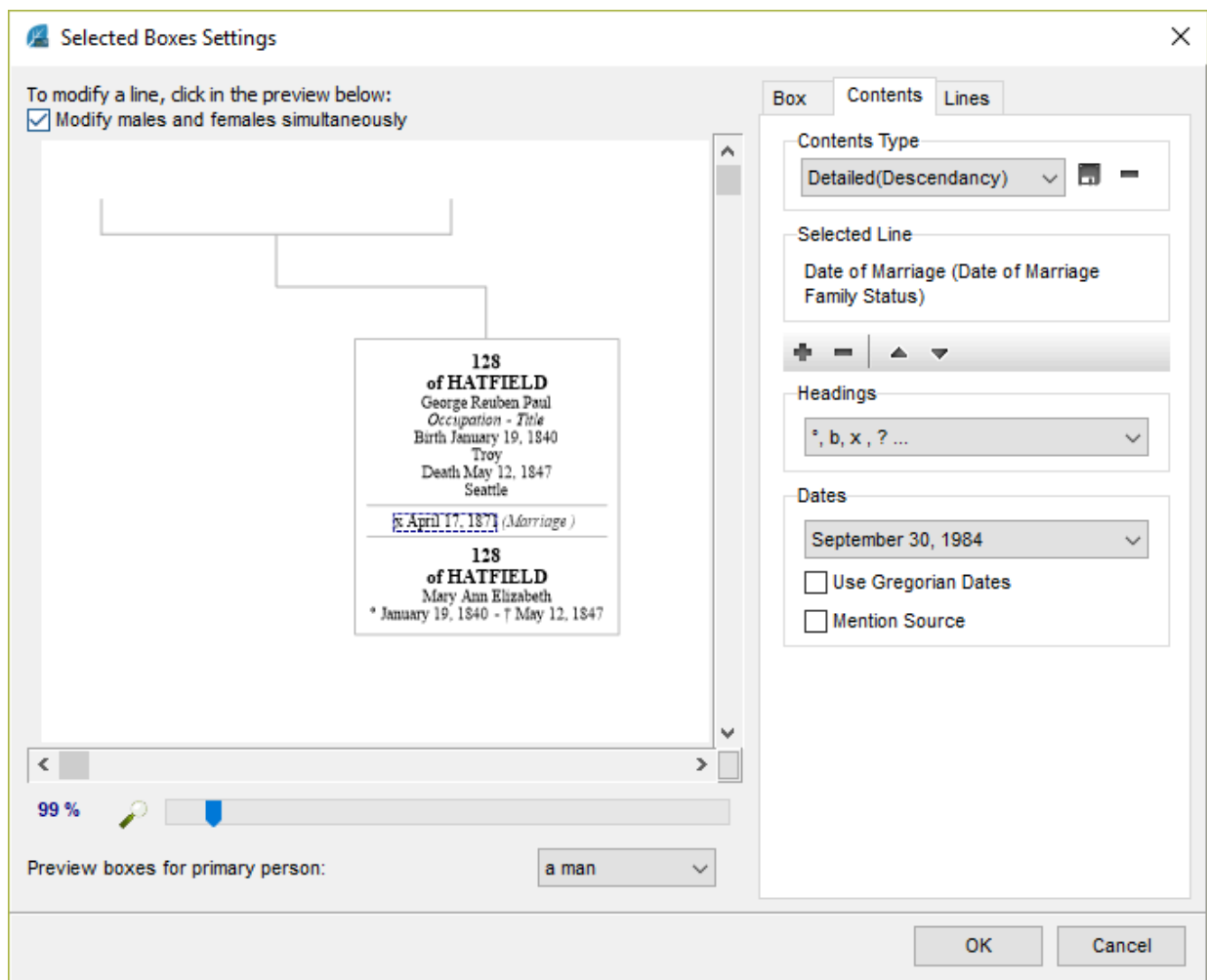
Info • One can only change the borders of the drawn boxes. If you choose an image for the box background, the outline must be included in the image.

All changes are immediately displayed in the preview of the box.

Info • To see better the changes made in the preview box, use the zoom slider at the bottom of the window or click the magnifying glass icon and choose a zoom percentage.

Click **OK** to apply the changes to all selected boxes on the tree chart.

Modify the content



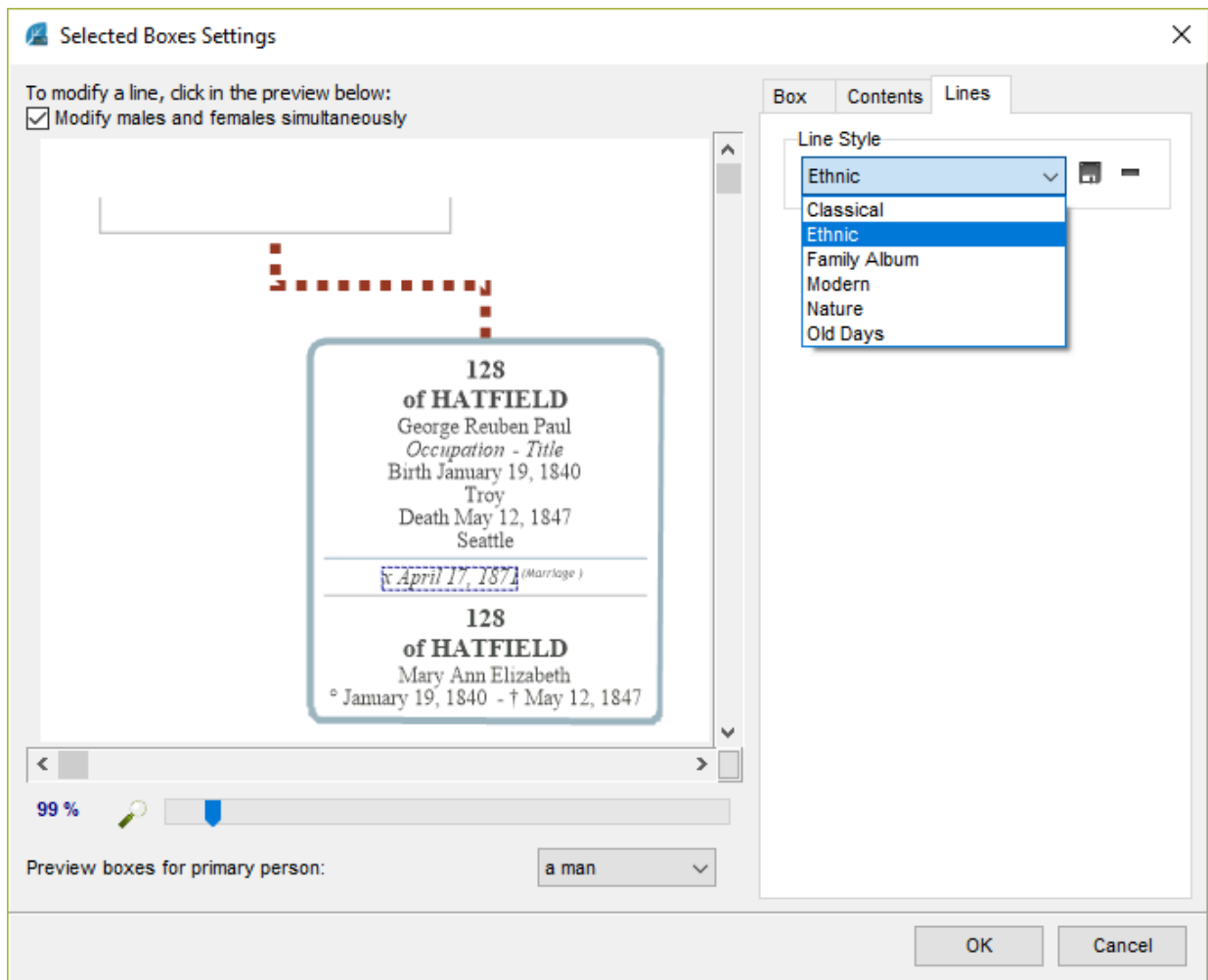
Change the **Content type** preset displayed or choose a different preset from the drop-down menu as a base for your custom formatting.

Click on each item displayed in the box to change the data formats. For example, click the name to indicate management of the particle, whether to include the prefix and suffix of the name. Click on a date to indicate the desired format (long, short, in numbers or letters, etc.).

Info • One can materialize the presence of a source for each event mentioned in the boxes. Select the date field and tick the Mention source box to add the symbol (s) following the dates shown.

Click **OK** to apply the modified contents of the selected boxes on the tree chart.

Modify connecting lines



Modify the Line style preset displayed or choose a different preset from the drop-down menu as a base for your custom formatting.

1. Click the border of the box or on the connecting line to display the **Line** tab.
2. Choose the type of line to connect the selected boxes from the dropdown menu: right angles, rounded corners or curves.
3. Specify the width of the connecting line with the cursor and click the color box to choose a color. Click **OK** to apply the modified lines to the selected boxes.

Edit the text of a box

(Windows) Unlimited size tree chart : ancestors, descendant and hourglass

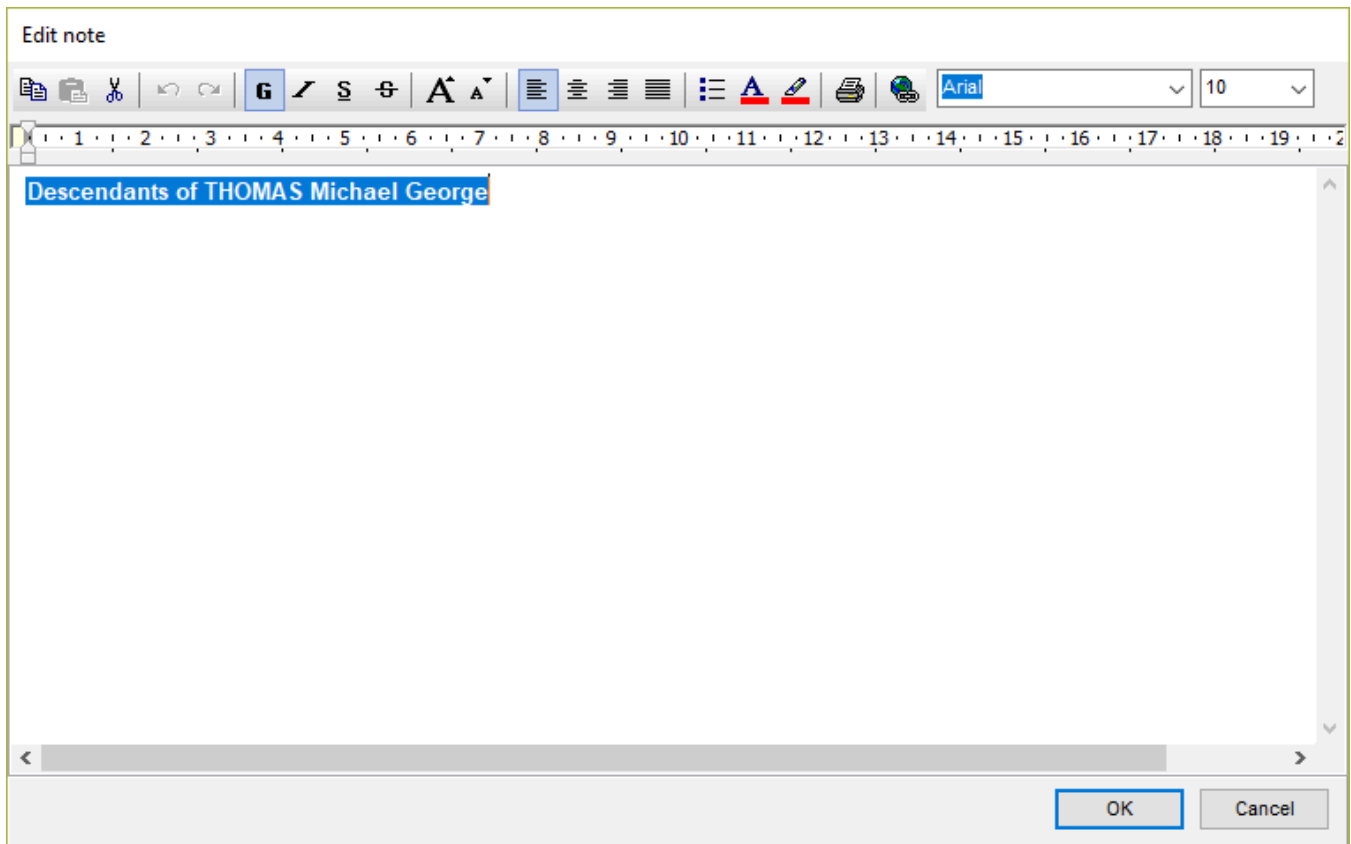
The image shows a software window titled "Edit Box" with standard Windows window controls (minimize, maximize, close). It features three tabs: "Child", "Family a", and "Family b", with "Child" selected. The main area contains several text input fields with labels on the left and a vertical scrollbar on the right. The fields are filled with the following text:

Label	Value
Number :	1
Surname :	THOMAS
Given Names :	Michael George
Occupation :	cabinet maker
Title :	
Date of Birth :	Birth : February 6, 1933
Place of Birth :	Margate
Date of Death :	
Place of Death :	

At the bottom of the window are two buttons: "OK" and "Cancel".

1. Right click on the box to be edited and choose Edit Text to open the editing field.
Info • You can only edit one box at a time.
2. Enter changes to the displayed text.
3. Click **OK** to apply changes.

Edit the tree chart title




The tree chart title is a modifiable text zone.

Heredis proposes a title containing the name of the primary person. Double-click the title to open the text editor and make the necessary content changes and formatting of the text.

Add a Picture

Select the **Edit > Add Picture** menu or click the **Add**  button on the toolbar to add a graphic illustration to your tree chart.

The picture is added at the top left of the tree chart displayed

- It is possible to add several pictures. If they must overlap, there are options for stacking images. Right-click the image to move the selected image forward, backward or to the background if it is a background image for the tree chart. Whatever option chosen, the boxes of the tree chart remain in the foreground
- When the picture is enlarged or reduced manually with the mouse, it is possible to restore the proportion between the picture and its frame by using the right-click **Resize Image Proportionally** option.
- The right-click Resize Image to **Fit Frame** and **Default Picture Size** options allow to resize the image in its display area.
- The image is an object that can be formatted. Click the  button on the toolbar or select **Modify Properties** from the right-click menu on the image. Only box style changes are possible As with the tree chart boxes, you have available presets applicable to the surround of the image.

You can also consult our articles (Windows) Print or export as PDF a tree chart (voir page 462), (Windows) Save a tree chart.

(Windows) Apply a selection to a tree chart

Heredis allows persons to be identified by applying a particular layout in ancestors tree charts, descendants tree charts, or hourglass tree charts.

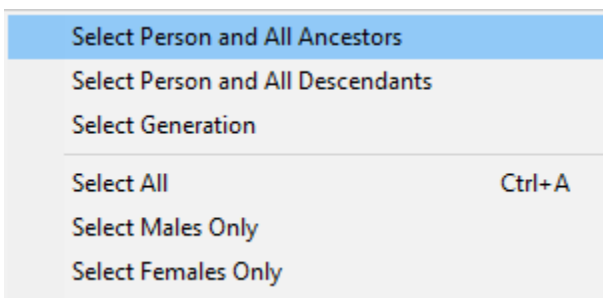
Select boxes in the tree chart

There are several possibilities for selecting a group of boxes.

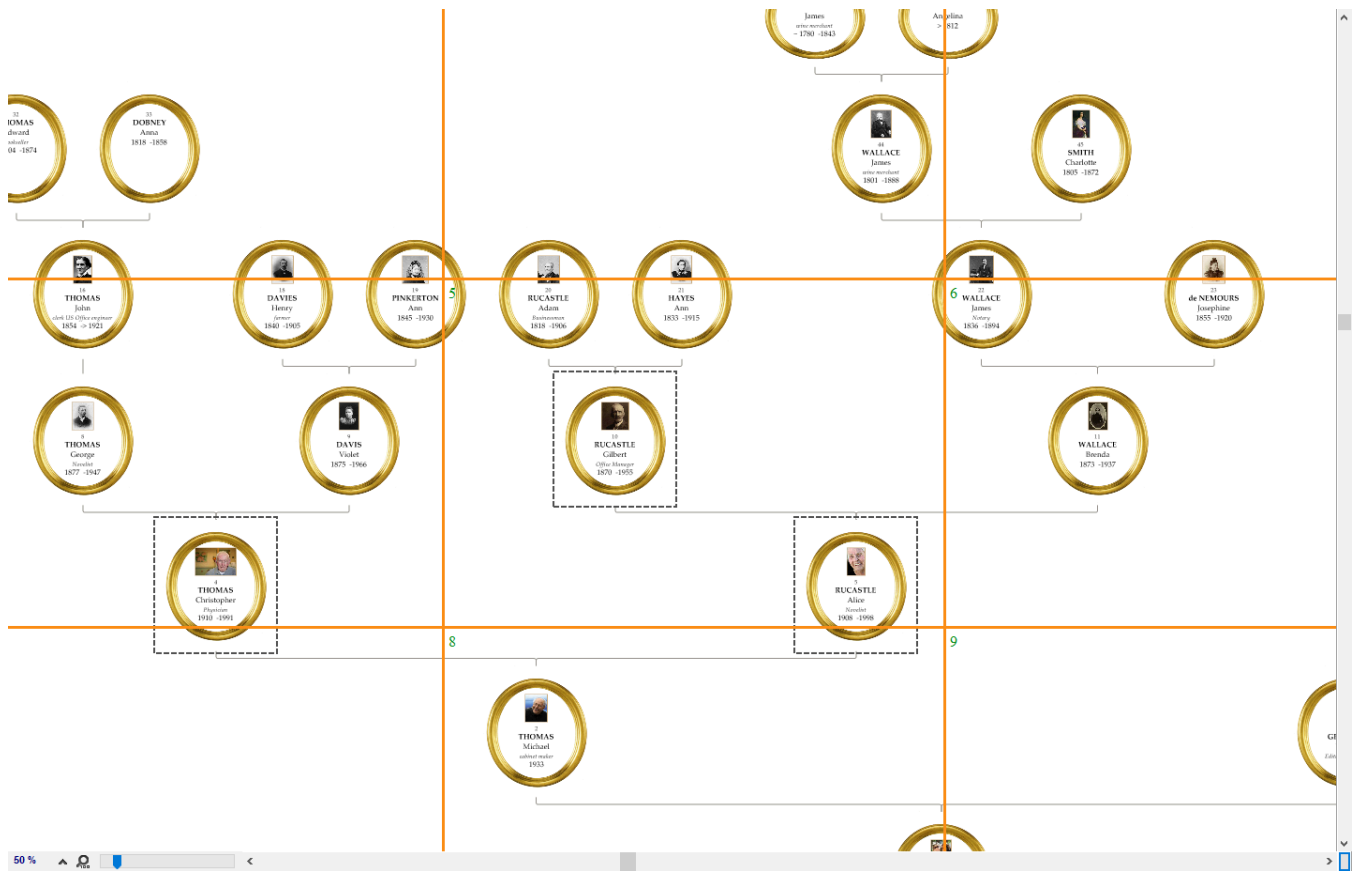
To select a box in the tree chart, click on the box.

To extend the selection, you can:

- hold down the left click of the mouse and draw a rectangle around the boxes you want to select.
- make a selection based on specific criteria, click right on the box or unroll the **Selection** menu. You can then extend the selection (**Ancestors**, **Descendants** or **Generation** of the selected **person**, or **All the Tree**), select only the **men**, or only the **women**.




- Use the **Shift** or **Ctrl** button to click on additional boxes or apply other extensions with the right click.



Apply a layout to the selection

In unlimited tree charts


Apply a preset of appearance or content to the selected boxes by selecting it from the drop-down menus of the **Tools panels**. You can also make a customized layout by clicking the button . Modify the **layout** and change any items in the selected boxes.

Check out the article (Windows) Unlimited size tree chart : ancestors, descendant and hourglass (voir page 440) for the details of customization manipulations.

In predefined sized trees (fan, single-page, designed)

For Single-page tree charts and designed tree charts, use the Tools panels to change the **layout** and **contents** of the selected boxes.

For fan tree charts, choose the highlight color in the **Boxes** area of the Tools Panels, it will apply to all tree boxes containing the selected persons. If you want to go back to the tree presentation before the change, click the

Default button for the same selection. You can change the format of the text by clicking the button  **Layout**.

Check out the articles (Windows) Predetermined size tree charts : Single-page Chart, Designed Chart, Fan Chart for detailing the setting of these trees.

(Windows) Finding your way around a tree

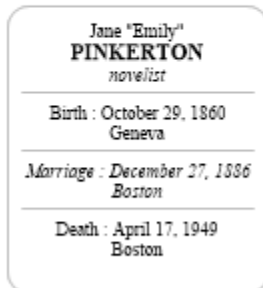
Use the preview window

In trees (except fan or wheel of the Charts menu), a window displaying only one box at a time allows:

- immediately see a box formatting change.
- to view the contents of a box in a tree that would be displayed with a reduction rate preventing the direct reading of the contents of the boxes.

This window is displayed at the bottom of the Tools panel. As soon as you select one of the boxes of the tree, it updates by showing you, in full size, the selected box.

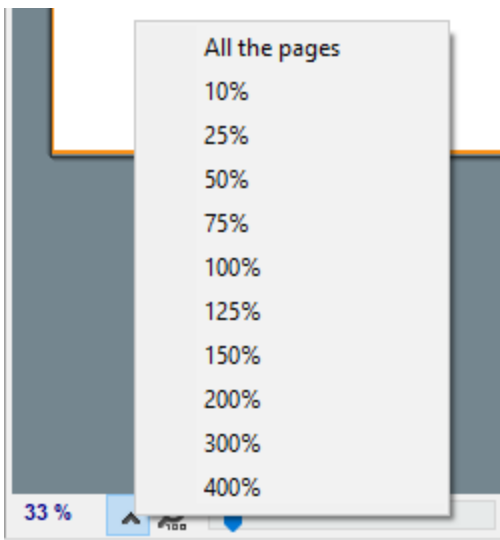
100 %



Enlarge or reduce the view of the tree

To display all the boxes, regardless of the actual size of the tree chart:

- Select the **Display menu – Zoom – All the Pages**.
- Select **All the Pages** from the zoom drop-down menu in the lower banner of the tree window or drag the slider to the left end.



To enlarge or collapse the tree chart image on the screen:



- Select a value from the zoom drop-down menu in the lower banner of the tree window, or drag the slider to change the display of the tree.



- Select the **Display menu – Zoom – Actual size** to get the full-size representation of the tree chart. or Select the **Display menu – Zoom – Zoom in** or **Zoom out**.
- Press the **Alt** key and left-click to increase and right-click to reduce the display of the part of the tree you click.

View pages

To materialize the pages according to the format of your printer:

- Select the **Display menu – Show/Hide Pages Breaks**.
- Click the button  and then click the button  on the tree toolbar. Click the same button to remove the display from the pages.

Go to a page in the tree

Use elevators to scroll the tree image horizontally and vertically.

or Press the **Spacebar** key, the cursor changes to a **Hand** tool that moves the tree chart image.

To view a particular page:

- Select the **Display menu – Go to Page** and then specify the number of the desired page.
- Validate with **OK**.

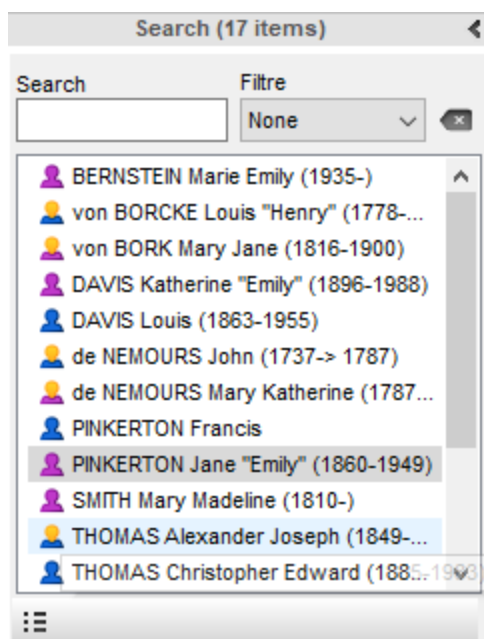
Spotting persons in the tree

Locate persons displayed on the tree screen

The **Search** list lists all the persons named in the tree chart.

A double-click on a name displays, in the center of the screen, the box of this person.

(Windows) Finding your way around a tree




potting implexes

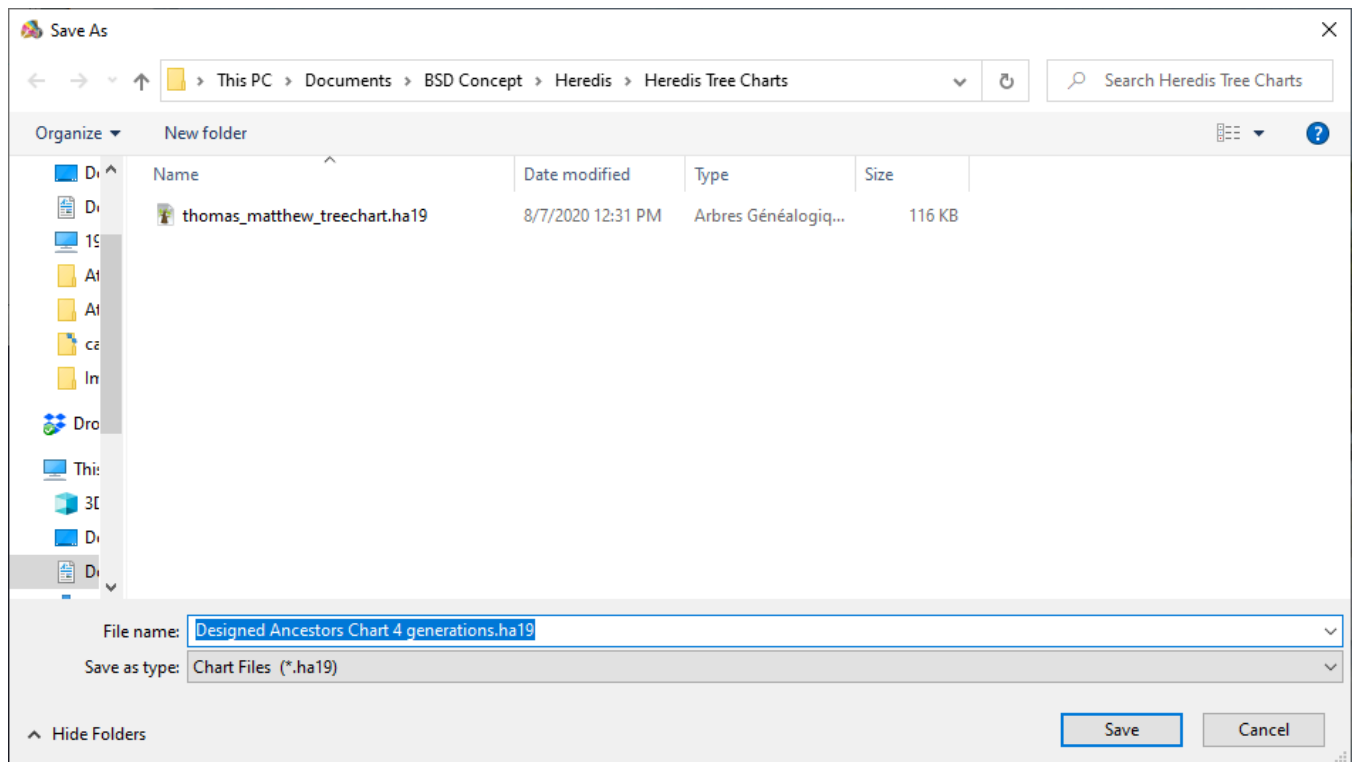
When you print a tree with ancestors for whom there is inbreeding (implexed), they appear several times. If the **Repeat duplicate branches** option has not been checked, the branch in which the implexed ancestors appear is stopped as soon as an individual already present in the tree appears for the second time. To find this person easily, Heredis places colored marks referring to the branch to consult the rest of the interrupted branch.

(Windows) Save the tree chart

Save the tree charts created with Heredis. You may modify or print them later. The tree chart file can be reopened, changed and saved, as a

Saving a tree chart for the first time

- Click the **Save**  button, choose **File** menu > **Save**.
- In the **File name** field, change the name of the tree chart if necessary.
- Choose the location where the tree chart should be saved, if you do not want to save it in the default folder.



- Click **Save**

After saving your tree chart for the first time, click again the **Save** button to save it as you work.

Save a copy of the tree chart

This action allows you to keep the displayed tree to continue its formatting and to duplicate it to apply other different changes or save it.

To obtain a copy of the tree chart and make further changes, select **File** menu > **Save a Copy...**

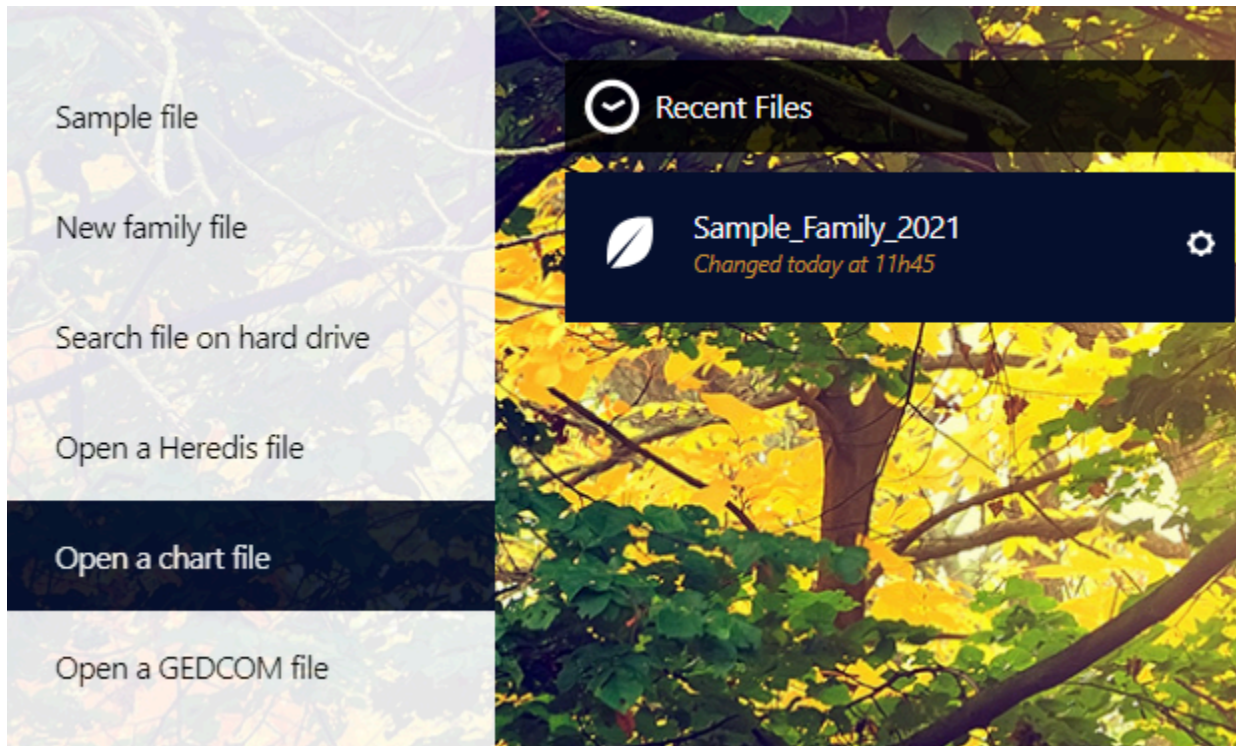
It doesn't open automatically the copy of the tree chart. You can keep working on the original tree chart.

Reopen a saved tree chart

To reopen a saved tree chart:

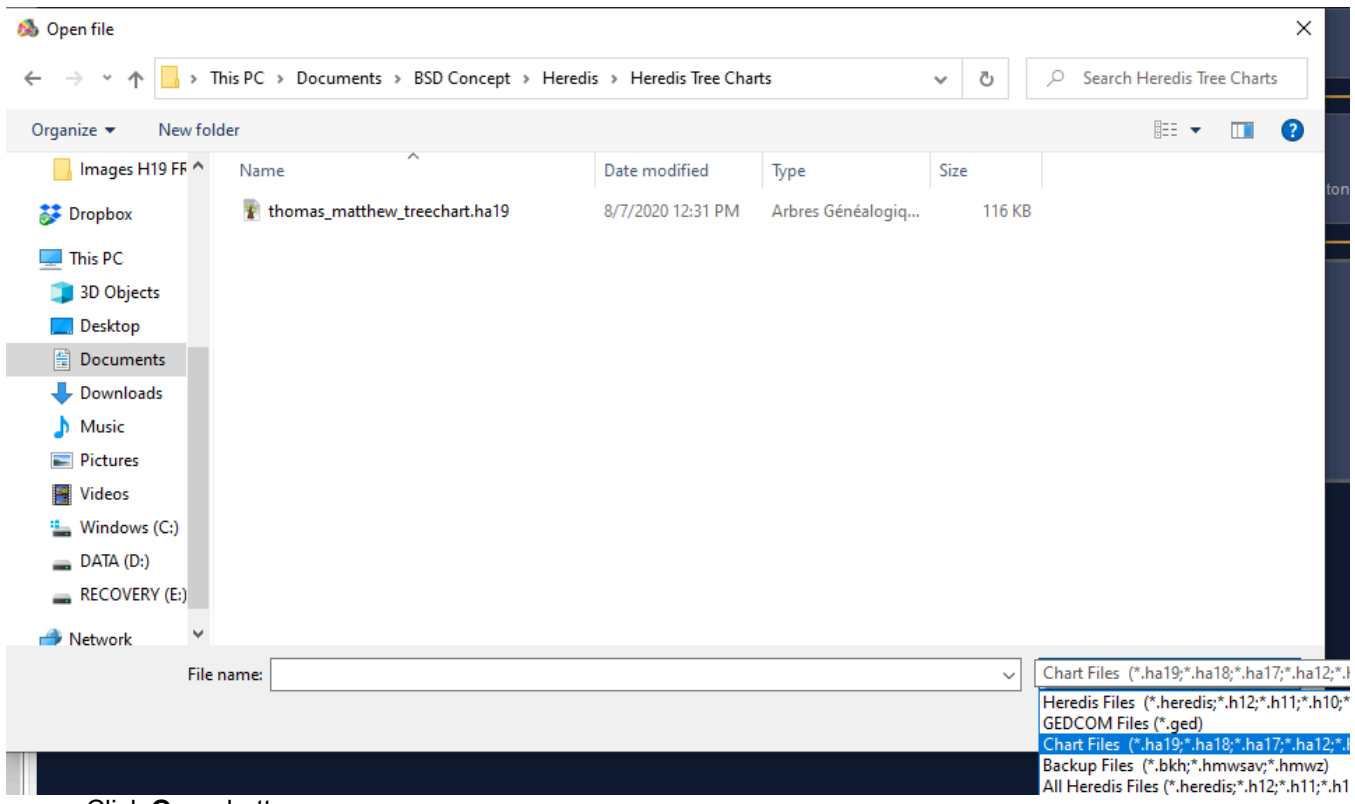
(Windows) Save the tree chart

- From the Heredis home page, click on **Open a chart file**.



Choose the location in your Windows Explorer and click **Open**.


- From your Heredis file, select the **File** menu > **Open**. Select the location of the tree file to open on your computer and make sure you have selected the **Charts Files** type. Heredis allows tree opening saved from version 11. Select the file you want to open. By default, Heredis saves the tree charts you created in the Documents/BSD Concept/Heredis/Heredis Tree Charts folder. If the tree chart was saved in another folder, select it in Windows Explorer.



Click **Open** button.

Open a Chart file


You have edited and saved a tree chart created with Heredis? You can reopen it to further edit it or print it. A tree chart file is a graphic file, it becomes independent of your Heredis file. It contains only the data of persons included in the tree chart. Data can not be changed in this tree chart file to modify the Heredis file.

- To open a tree chart saved when Heredis is already running, choose **File > Open**. Select the tree chart file your file directory and click **Open**.
- To open a tree chart from the **Home** page, click the **Home**  button and choose **(Windows) Open a Chart file; (Mac) Chart File** from the **Open** menu. Click **OK** and then select it.
- To open a tree chart file when another tree is already open, click **(Windows) File > Open; (Mac) the Open** button in the tree chart toolbar. Select the file in your tree chart directory of files and click **Open**.

Read also (Mac) Unlimited size tree chart : ancestors, descendant and hourglass, (Mac) Save the tree chart, (Mac) Predetermined size tree charts: Single-page Chart, Designed Chart, Fan Chart, (Windows) Unlimited size tree chart : ancestors, descendant and hourglass (voir page 440), (Windows) Save the tree chart (voir page 458), (Windows) Building single-page pedigree tree charts (voir page 432), (Windows) Building fan charts (voir page 436), (Windows) Apply a selection to a tree chart (voir page 453), (Windows) Print or export as PDF the tree chart (voir page 462)

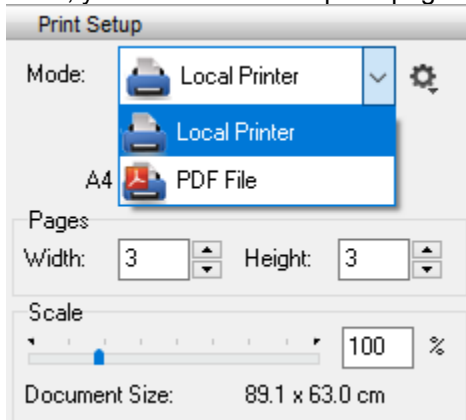
(Windows) Print or export as PDF the tree chart

You can create as many graphical representations of your genealogy as you wish. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

Choose from the different types of tree charts proposed in the **Charts** menu or click **Charts**  on the toolbar to visually select the tree charts proposed by Heredis. The tree chart will be created from the primary person.

Printing mode

First, choose between **Local Printer** or **PDF File** in the **Print Setup** panel. Then, you'll be able to setup the page setup as you wish.



Adjust the size of a tree chart.

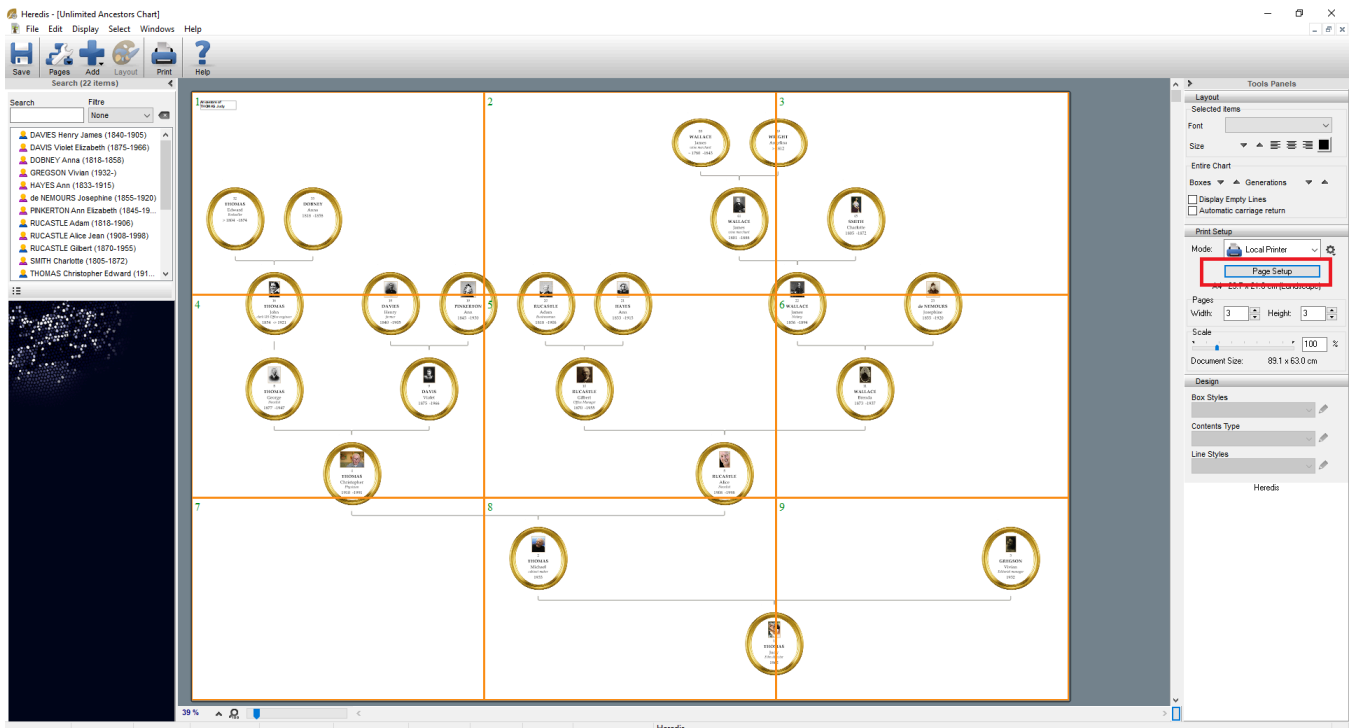
Before printing, you must make sure that the size and orientation of the paper are set as you wish. This setup will be different if you chose Local Printer or PDF file.

Paper size

After choosing the print mode and before printing the tree, indicate the paper size your printer uses (A4 – A3...) and the orientation of the paper you want (portrait, landscape).

- Choose **File > Page Setup** or click **Page setup**  in the **Print Setup** panel.

(Windows) Print or export as PDF the tree chart




A window opens and may be different according to your printer. Choose the orientation and paper size.

- Select the printer you will use in the **Name** menu.
- Choose a standard paper size in the corresponding menu. In PDF file Mode, if you want to select a customized paper size, choose **Personalized Paper Size** in the drop-down menu.
- Click the round button corresponding to the desired orientation.
- Click **OK** to confirm the print size.

Note: If you want to print through a professional printer, export to PDF. The PDF format can go up to 200" x 200", if your tree is larger and your printer has rolls larger than 200", consider removing the assembling link-up zone (see PDF Export part of this article).


If the tree is too large, you may change its size by reducing the number of pages in the **Print Setup** panel, but make sure to be able to still read what will be print (click on 100% focus button to see if you can read on your screen).

- Select **Display > Show/Hide Page Breaks** or click the **Pages > Show/ Hide Page Breaks**  button. Heredis displays how many pages corresponding to the selected paper size will be needed to print the tree chart.
- Change the number of pages in width and/or height.
- To enlarge or reduce the overall size of the tree chart, enter a percentage in the **Scale** field or move the cursor. A value below 100% reduces the size of the tree chart, a value greater than 100% enlarges it.

It only remains to launch the printing of the tree chart.

Launching the print-out

Depending on the printer you are using, you can print the tree on one page or series of pages to be assembled together.


- Click the **Print**  button on the toolbar or choose **File > Print**.
- Select the printer you want to use from the list of available printers. If your printer does not appear, select **Find Printer** in the **Windows Print** screen.

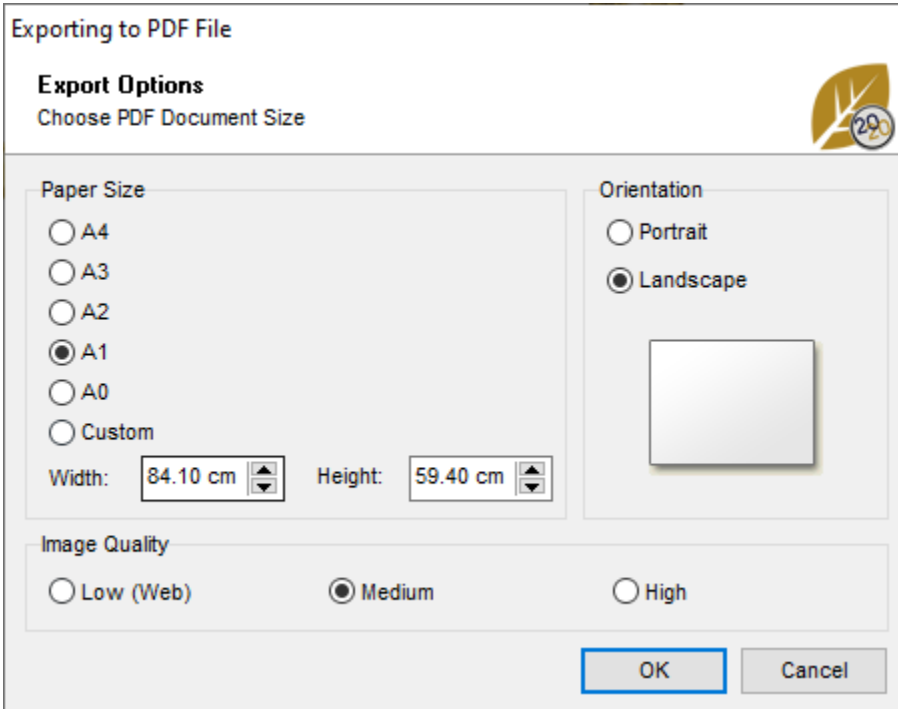
Info • For more information on adding a printer, type Add Printer in Windows Help.

- Click **OK** to start printing.

Export a PDF tree chart

Export the displayed tree to get it printed by a professional or share your Heredis trees with people who do not have the software. Heredis constructs a tree chart using a file format that is likely to be used on other computers or devices in the form of a readable file.

- Choose **Edit > PDF File Mode** or choose **PDF File** from the **Print Setup** drop-down menu.
- The **Print** button changes form and name. Click the **Export**  button on the toolbar.
- Before to export the tree chart, make sure to setup the paper size format and orientation. Click on **Page Setup** button in **Print Setup** panel.



Exporting to PDF File

Export Options
Choose PDF Document Size

Paper Size

A4
 A3
 A2
 A1
 A0
 Custom

Width: 84.10 cm Height: 59.40 cm

Orientation

Portrait
 Landscape

Image Quality

Low (Web) Medium High

OK Cancel

- Choose the location where the tree file in PDF format will be saved, if you do not want to save it in the default folder. If necessary, change the name of the tree proposed by Heredis in the **File Name** field.

Important: Note that you can generate customized size, but be careful, PDF format allows only 200" x 200". If your XXL Family is bigger and your printer can print on a paper roll, then click on the indented wheel near the PDF file mode (or assembling link-up zone of the new charts as the XXL Family for example) and chose **Delete assembling link-up zone**.

- Click **Save**.

What is a Heredis file?

Heredis files come in the form of a *.hmw* folder stored at the chosen location when it was created. On Windows, they are stored by default in *aDocuments/BSD Concept/Heredis/Heredis Files* folder of your documents. *Documents*

In this folder you will find various types of files: *.bak*, *.hmw*, media folder...

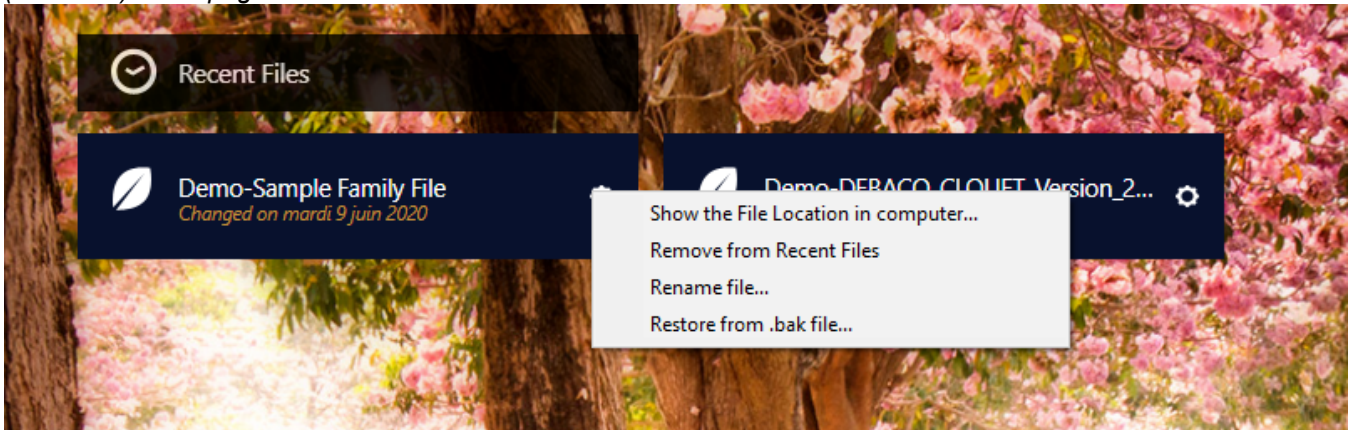
Do NOT change, move or delete files in this folder. Indeed, if you move, rename, modify these files, you may no longer be able to use this genealogy.

To rename your files or know where they are stored, use the indented wheel from the Heredis homepage.

(Windows) To find out where your files are stored click **Show the file location in computer**.

(Mac) To find out where your files are stored click **Reveal in Finder**.


(Windows) Homepage indented wheel



(Mac) Homepage indented wheel

 **New Tree**

New Family File

 **Open Tree**

Open Recent

Fichier Exemple

OK

Open

Heredis File

OK



Reveal in Finder
Rename file...
Restore from .bak file...

Center

Online resources:

• Sample file

Check out the article Find a file on your computer (voir page 179) for more details.

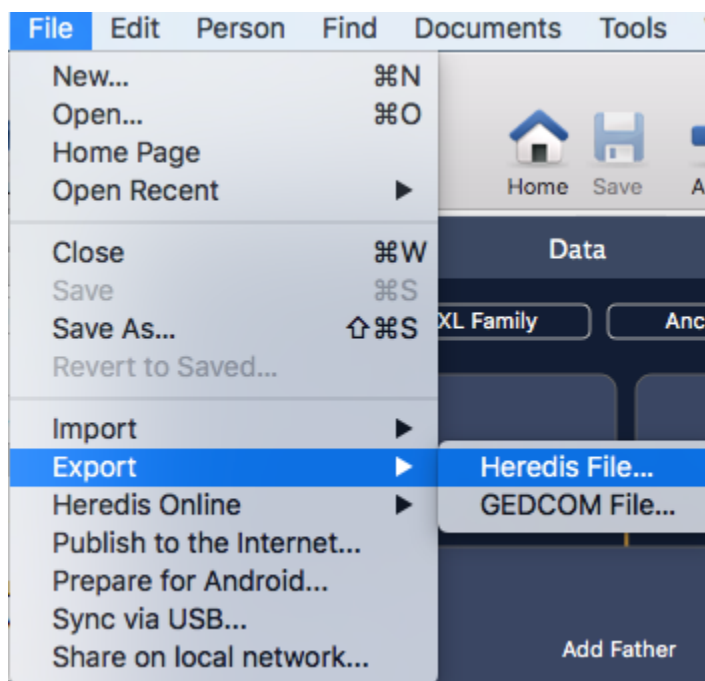
Export Heredis data

You export your data to exchange them. To share with other users of Heredis or to create branch files for your own use, use the Heredis export.

If they are using an older version of Heredis, use the GEDCOM format.

In a Heredis export, you can select what data to export: exclude confidential persons, limit to a branch or exclude alive persons.

1. Choose **File > Export > Heredis File**.
2. Identify the persons and types of data to be exported.
3. Click **Export**.
4. Name the new file and choose where the file should be saved.






The options for the exported file in GEDCOM or Heredis format are identical. They concern the persons included in the file and the type of data considered.

Select the branches concerned

1. Select branches from the export screen: **All People – Ancestors – Descendants – Ancestors & Descendants**.
2. Choose the number of generations of ancestors, of descendants, or both.
3. Specify the number of collaterals for the ancestor branches. Heredis goes back down the branch line for each direct ancestor to include them in the exported file.
 - 0 = only direct ancestors are exported (with spouses).
 - 1 = you export the direct ancestors with all their children and their spouses.
 - 2 = you export the direct ancestors, their children and grandchildren, along with their spouses.
 - 3 = you also add their great-grandchildren, etc.

Info • Remember to check who is the primary person displayed before making a branch export.

(Windows) Select the persons to be included in an export file

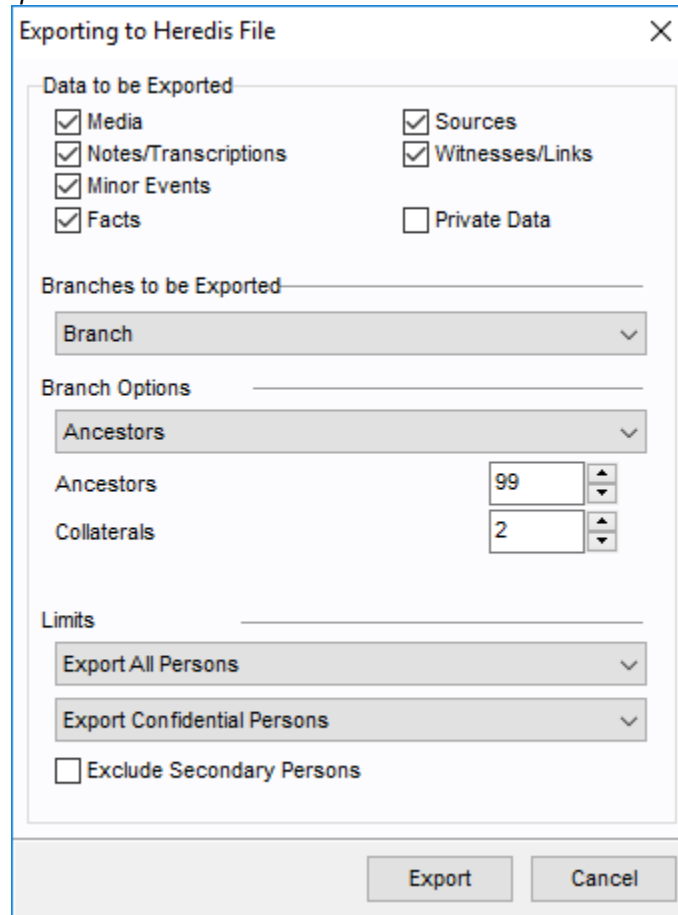
1. **Export All Persons:** export all persons included in your file or in the concerned branch.
2. **Exclude Marked Persons:** marked persons, the one with the  tag ticked in their personal data, will not be included.
3. **Export Marked Persons Only:** only the persons marked will be included in your export file.
4. **Hide all data for confidential persons:** persons with the  tag tick in their personal data are exported with no details.
5. Tick the box Exclude Secondary Persons to exclude from the export the persons considered as secondary  because they do not present a big interest to your family tree (children who died in infancy, persons with no links, persons on whom you do not want to make researches).

For further details on tags confidential, marked or secondary, see our article The different data fields (voir page 50).

Note • It is possible, just by marking a person, to ignore a branch. Using the marked tag has multiple purposes : cut a branch, erase duplicates, delete stillborn child, not show alive persons... You can use the Smart Search to identify persons of one or more criterias and mark them, tag them as secondary or confidential. Consult our Smart Search (voir page 208) article for further details.

Careful, if your primary person or root person is concerned by these limits (confidential, secondary, or marked), you file will be empty. It is not possible to export a file if the main person is not in it.

(Windows) Heredis export






The screenshot shows the 'Exporting to Heredis File' dialog box. It contains the following settings:


- Data to be Exported:**
 - Media
 - Notes/Transcriptions
 - Minor Events
 - Facts
 - Sources
 - Witnesses/Links
 - Private Data
- Branches to be Exported:** Branch
- Branch Options:** Ancestors
 - Ancestors: 99
 - Collaterals: 2
- Limits:**
 - Export All Persons
 - Export Confidential Persons
 - Exclude Secondary Persons

(Mac) Select the persons to be included in an export file

1. Tick all the boxes to include all persons saved in the file.
2. To prevent the export of certain types of people, untick the appropriate boxes. For further details on tags confidential, marked or secondary, see our article The different data fields (voir page 50).

- Marked persons are the ones with the  icon ticked in Personal Data of the person. It allows you to exclude or take only the marked ones.
- Secondary persons are the ones with the  icon ticked in the Personal Data of the person. They usually are the persons on which you do not specifically want to do researches.
- Confidential persons are the ones with the  icon ticked in Personal Data of the person. They usually are the alive persons.

3. To export data partially, make your selection from the export screen.

- **Confidential  Persons:** you may export all the information of confidential persons, or their surname only, or their surname and given names. You can also export all people by hiding the data. The recipient of your file will only know that such a person in a given place in the line existed, without knowing any information about him/her.
- **Persons Born Less Than ... Years Ago:** select the number of years to be considered for export of contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of **Persons Born Less Than ... Years Ago** specify the value and untick the box.

Info • It is possible to exclude a branch from the exported file. Declare the person at the base of this branch as **Marked**, then untick **Marked Persons** in the export screen. Using the marked tag has multiple purposes : cut a branch, erase duplicates, delete stillborn child, not show alive persons... You can use the Smart Search to identify persons of one or more criterias and mark them, tag them as secondary or confidential. Consult our Smart Search (voir page 208) article for further details.

(Mac) Export Heredis file

Select the types of data for export

1. Tick the boxes to include the different types of data in the exported file.
2. Untick the boxes to exclude a type of data.

Do you want to export:

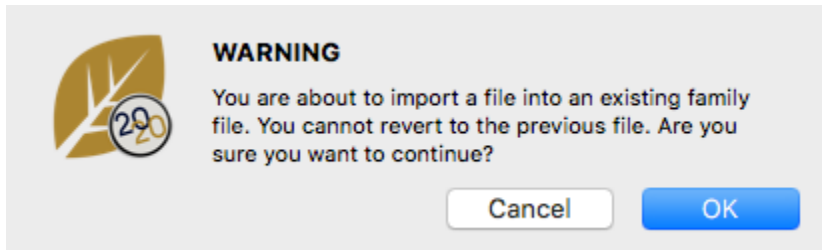
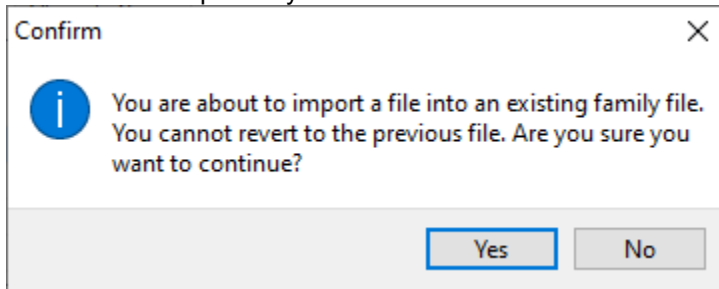
- Notes/Transcriptions
- Sources/Citations
- Witnesses and linked persons (of Sundry links tab in Personal Data, see Add other linked persons (voir page 134) article)
- Minor events (everything else that Birth/Baptism, Union, Death/Burial)
- Facts
- Media
- Private data: they are all data you ticked the « Private » box, it can be events, facts, sources, media...

Import a Heredis file in an existing file

Importing Heredis data to an existing file allows you to connect a new branch created in a separate file by yourself or by a family member.

1. Choose **File > Import > Heredis File**.

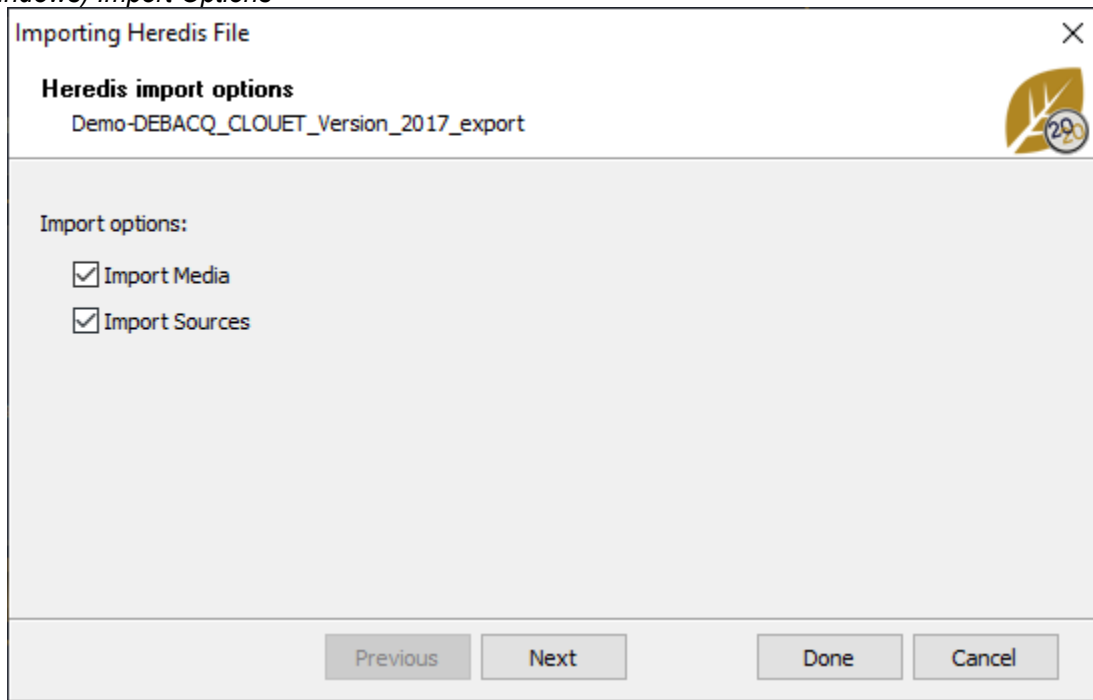
Note: A message will alert you that it is irreversible, so please make sure to make a copy of your file in case the result doesn't please you.

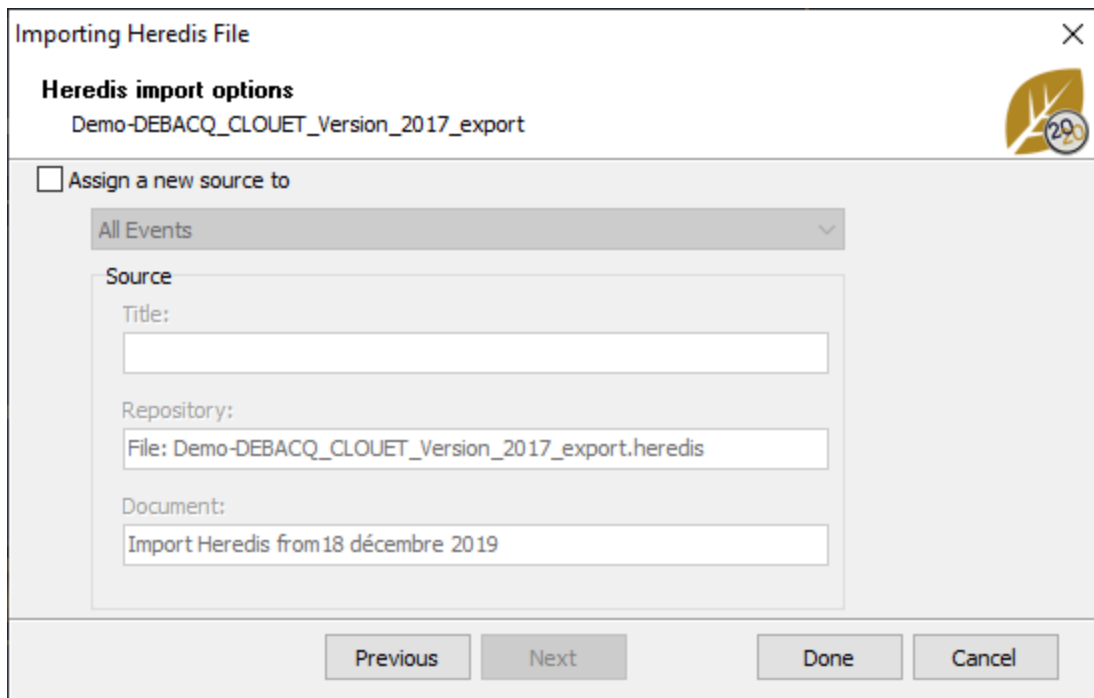


2. Select the Heredis file. Only files created with the same version of Heredis may be merged (Mac file or Windows folder with the extension *.hmv*).

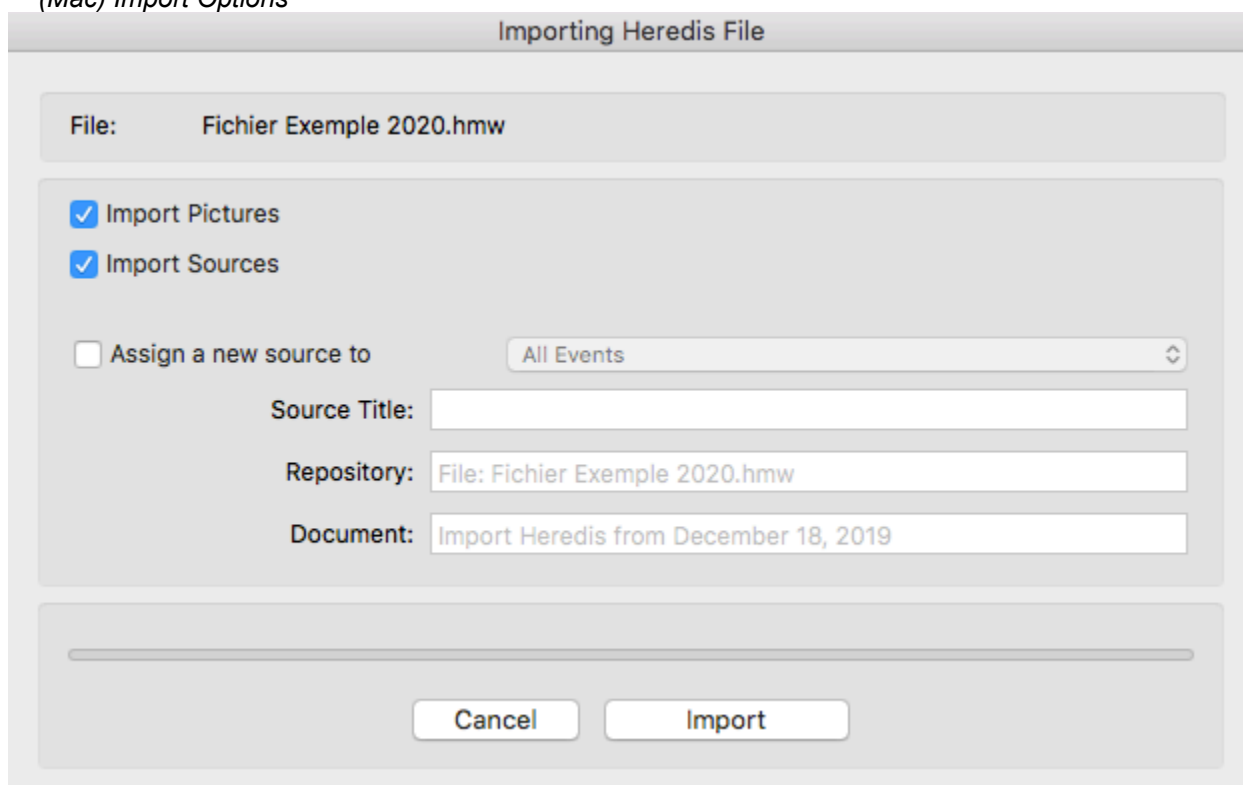
3. Click **Open**. Choose if you want to import or not medias and sources. **(Windows)** Click on **Next**. **(Mac)** Click on **Import**.

(Windows) Import Options





(Mac) Import Options



4. If you desire to associate a common source of data from the import, tick the box **Assign a new source to** and select in the list where you want this source to be assigned. Fill up the fields of this new source. You will be able to modify it on your **Sources index** later. After importing the new data, you must create links that will connect the imported persons to those already present in the main file.

See also (Windows) Permanent control for duplicates, (Mac) Permanent control for duplicates.

What is a GEDCOM file?

You want to share your genealogical data with other genealogists who don't use Heredis, or with some who uses an old version of Heredis, use the GEDCOM format.

A GEDCOM file is an exchanging format for genealogy, it was made by Mormons 25 years ago and make it compatible to most genealogy software.

The GEDCOM exchange format stands for Genealogical Data Communication. Almost all genealogy software programs recognize this universal format. We are currently using GEDCOM 5.5.1 norm.

The GEDCOM file must have the extension *.ged* to be recognized by Heredis.

Some data are normalized as for names, major events... but some are not. So each software tags the data as it pleases them (minor events, facts...), these tags are called Owner Tags and can be very different according to the software used to create the GEDCOM file. So some software might not be able to read the data.

This is what a GEDCOM file looks like when opened without a genealogical software.

```
1 ADDR jules
0 @732@ INDI
1 NAME Charles Alexandre/DUCHAMP/
2 GIVN Charles Alexandre
2 SURN DUCHAMP
1 SEX M
1 OCCU pharmacien
1 SIGN YES
1 _FIL LEGITIMATE_CHILD
1 FAMS @703@
1 BIRT
2 DATE 29 APR 1817
2 PLAC Annonay,07100,Ardèche,RHÔNE-ALPES,FRANCE,
2 _FNA NO
1 OCCU
2 TYPE Professeur
2 DATE BET 1852 AND 1855
2 PLAC Lyon,69000,Rhône,RHÔNE-ALPES,FRANCE,
2 _FNA NO
2 NOTE Enseigne à la faculté de Pharmacie de Lyon
1 DEAT
2 DATE 15 FEB 1878
2 PLAC Satillieu,07290,Ardèche,RHÔNE-ALPES,FRANCE,
2 _FNA NO
2 ASSO @734@
3 TYPE EVEN
3 RELA Informant
3 NOTE son fils
3 AGE 30
2 NOTE Témoins :
3 CONT Charles Marie DUCHAMP, son fils, 30 ans, docteur en médecine
3 CONT Célestin BOYER, non parent
0 @735@ INDI
1 NAME Catherine Émilie/COLIGNY/
2 GIVN Catherine Émilie
2 SURN COLIGNY
1 SEX F
1 OCCU sans profession
1 SIGN YES
1 _FIL LEGITIMATE_CHILD
1 FAMS @706@
1 BIRT
2 DATE 8 SEP 1902
2 TIME 0:00
2 PLAC Saint-Rambert-l'Île-Barbe,,Rhône,RHÔNE-ALPES,FRANCE,
2 _FNA YES
```

Note that a GEDCOM **do not contain media**. It only keeps the path to the original media and its name. So when you create a GEDCOM, make sure you create a folder with your media on your hard drive disk (or external drive if you wish).

If your GEDCOM contains media data, you will have to tell Heredis where to find the media.

As previously said, a GEDCOM file only keeps the path to the original media. When you import the GEDCOM in Heredis, just tell Heredis the path to the original of your media on your computer. Click **Yes** to locate your media.

You can check for media in the **Media index**.

See Media Index (voir page 249) at the « Check missing media section ». If your media didn't change names, Heredis will find them.

If Heredis do not recognize some tags, it will ask you what to do : Import or Do not import.

Importing GEDCOM File

Imported file

[REDACTED]	Persons: 17 756	<input type="text" value="0"/>
	Families: 5 150	<input type="text" value="0"/>
	Sources: 818	<input type="text" value="0"/>

Events/Facts

There is some unknown data in the Gedcom file.
 You can either transform it into events, store it in facts or discard it.
 Once it is imported, you can manage it in the Data tab in Heredis.

CLAW	CLAW	Import
CNTC	CNTC	Import
DEGR	DEGR	Import
EDTN	EDTN	Import
EDTR	EDTR	Import
EMAL	EMAL	Import
FILN	FILN	Import
INTE	INTE	Do not import
INTV	INTV	Import

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The Root Person (voir page 78) article.

Checkout GEDCOM tags generated by Heredis (voir page 473) article for further details on tags.

GEDCOM tags generated by Heredis

Some owner tags of Heredis

Each software tags the data as it pleases them (minor events, facts...), these tags are called Owner Tags and can be very different according to the software used to create the GEDCOM file. So some software might not be able to read the data.

Here are some owner tags you might find if you create a GEDCOM with Heredis.

- _ARCH = Archiving the Source
- _CLS = Person without descendants
- _EVID = Quality of the proof
- _FIL = Child Status
- _FNF = Father not find, untraceable (from Heredis 2021)
- _FNA = Search Status of an event
- _FSFTID = FamilySearch Identification Number
- _INFO = Quality of the information
- _MNF = Mother not find, untraceable (from Heredis 2021)
- _PRIM = Defined if the media is primary
- _QUAL = Quality of completed citations
- _SEC = Secondary person
- _SHAR = Link for shared events
- _SOUR = Quality of the source
- _SUBMAP = Geolocation of subdivisions
- _ULS = Unmarried person
- _UST = Union type

This is a non-exhaustive list.

See also [What is a GEDCOM file?](#) (voir page 471)

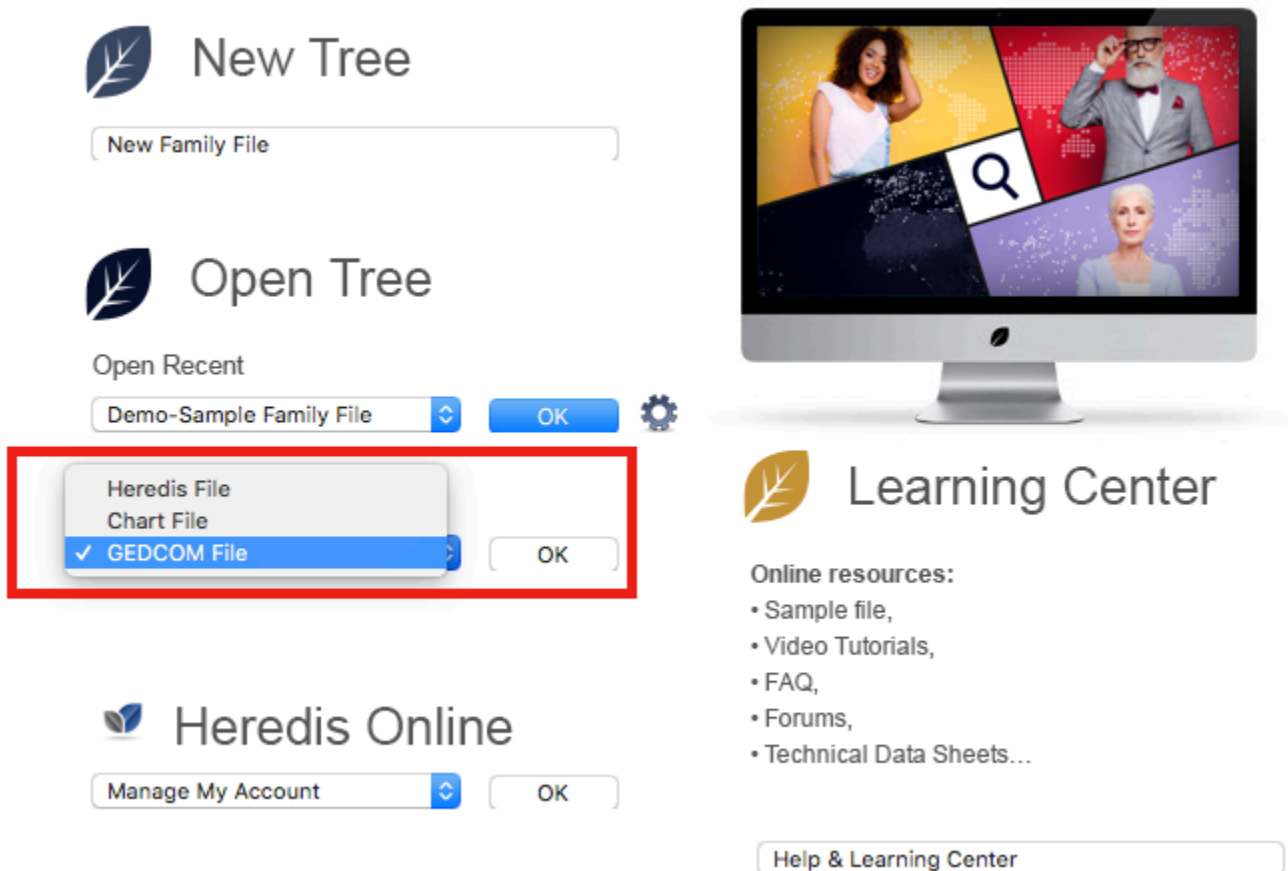
Open a GEDCOM in a new file

You have already created a genealogy file or you have been given one created on another application? Importing a GEDCOM file, the recognized standard in the world of genealogy, is very simple.

Though, importing a GEDCOM or opening it for the first time, takes time. Do not validate too quickly, you won't be able to change the import afterwards.

(Mac) Import a GEDCOM in a new file.

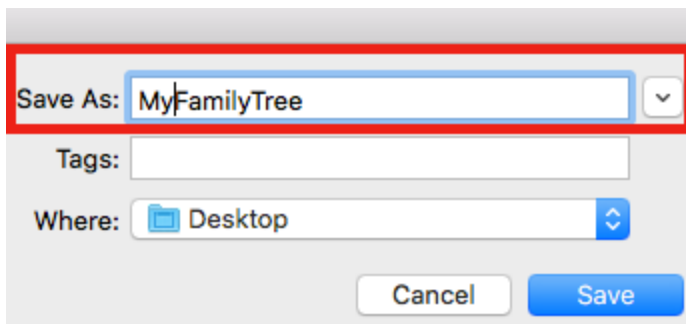
- From the Heredis **Home Page**, choose the **GEDCOM File** in the **Open** menu and click **OK**.
- The GEDCOM file must have the extension `.ged` to be recognized by Heredis. Select the file and click **Open**.



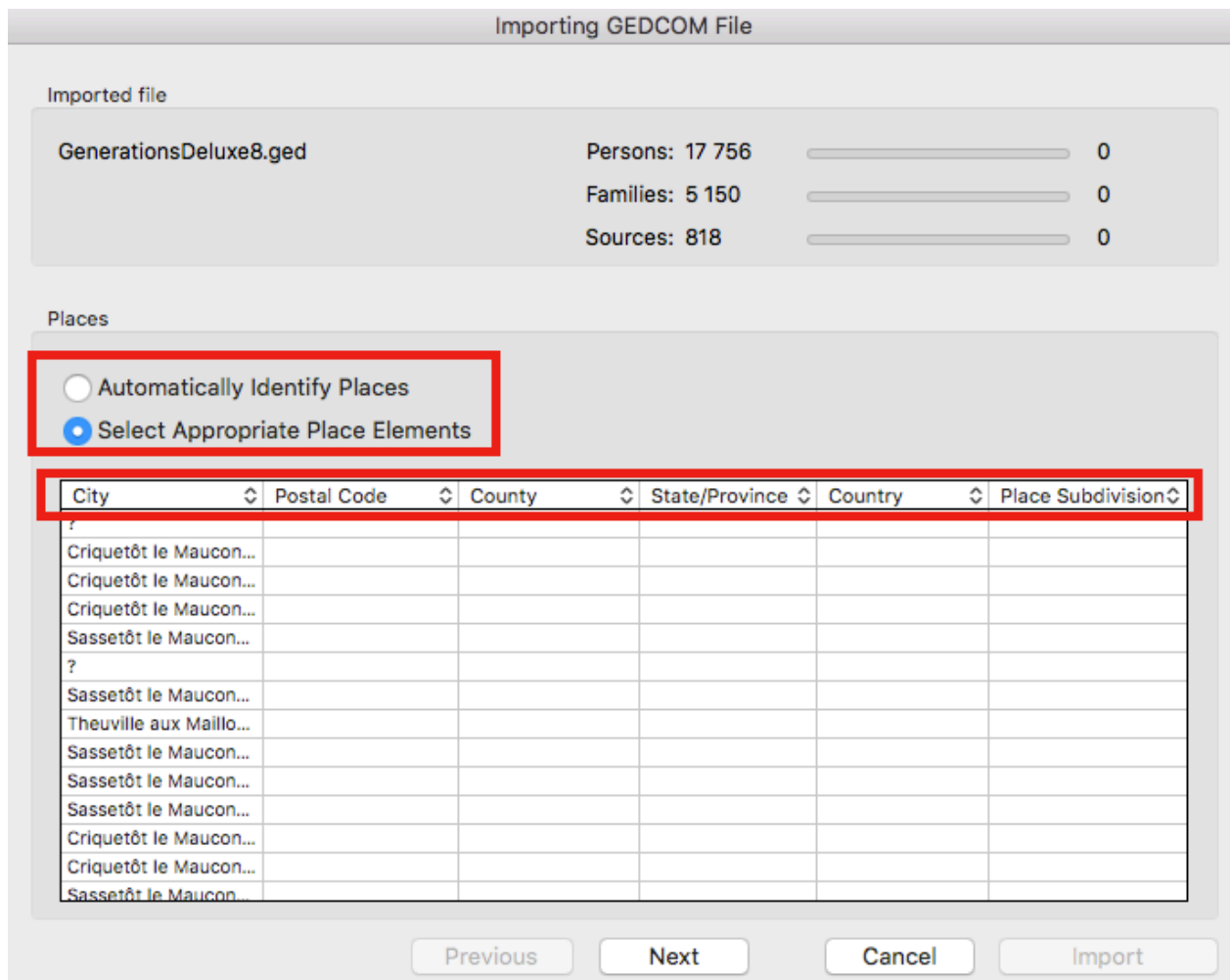
The screenshot displays the Heredis Online interface. On the left, there are three main sections: 'New Tree' with a 'New Family File' input field; 'Open Tree' with an 'Open Recent' dropdown showing 'Demo-Sample Family File' and a gear icon, and a file type selection menu where 'GEDCOM File' is highlighted with a checkmark and an 'OK' button; and 'Heredis Online' with a 'Manage My Account' dropdown and an 'OK' button. On the right, there is a computer monitor displaying a collage of people and a search icon. Below the monitor is the 'Learning Center' section, which lists 'Online resources' including 'Sample file', 'Video Tutorials', 'FAQ', 'Forums', and 'Technical Data Sheets...'. At the bottom right, there is a 'Help & Learning Center' button.

- Give it a name.
- Choose where to store it on your hard drive disk. Use the arrow on the right to access to all folders on your computer.

Open a GEDCOM in a new file



- Validate by clicking on **Save** and wait while Heredis analyzes the data.
- Check the information found in the GEDCOM file (quantity of data, structure of places). All softwares do not manage all data of places the same way. Click on **Select Appropriate Place Elements** if you need to reorganize the data and click on the headings of columns to change them.



Data are identified in a GEDCOM through the Tags. Every software has its own way to manage some data in GEDCOM format, so some tags are called Owner Tags and might not be read by other softwares (see also What is a GEDCOM file? (voir page 471) and GEDCOM tags generated by Heredis (voir page 473)). If Heredis doesn't know a tag, it will ask you what to do with it : **Import** or **Do Not Import**. If you do not recognize the meaning of an owner tag (those with a _), ask the editor of the software used to create the GEDCOM. Choose what you want to do with those unknown tags in the Heredis screen.

- Choose for each tag to **Import** or **Do not import**. If you do not import, the data won't be in Heredis.

Importing GEDCOM File

Imported file

████████████████████ Persons: 17 756

Families: 5 150

Sources: 818

Events/Facts

There is some unknown data in the Gedcom file.
 You can either transform it into events, store it in facts or discard it.
 Once it is imported, you can manage it in the Data tab in Heredis.

CLAW	CLAW	Import
CNTC	CNTC	Import
DEGR	DEGR	Import
EDTN	EDTN	Import
EDTR	EDTR	Import
EMAL	EMAL	Import
FILN	FILN	Import
INTE	INTE	Do not import
INTV	INTV	Import

- Choose to import or not medias and sources and how to manage given names in quotes. Be aware that a GEDCOM file **never contains media**, only the name and way to the original of the media. So even if you choose to import a media, you'll import only the name and way to the original.
- You may add a source common to all data imported. In this case, tick the box **Assign a new source to** and choose the kind of data to source (events, facts...). Fill in the name, repository and type of document of the source.

Open a GEDCOM in a new file

Importing GEDCOM File

Imported file

Persons: 17 756 0

Families: 5 150 0

Sources: 818 0

Options

Process given names in quotes as: Nickname

Import Pictures

Import Sources

Assign a new source to

All Events

Title:

Repository: File: GenerationsDeluxe8.ged

Document: Gedcom import dated July 24, 2020

Progress

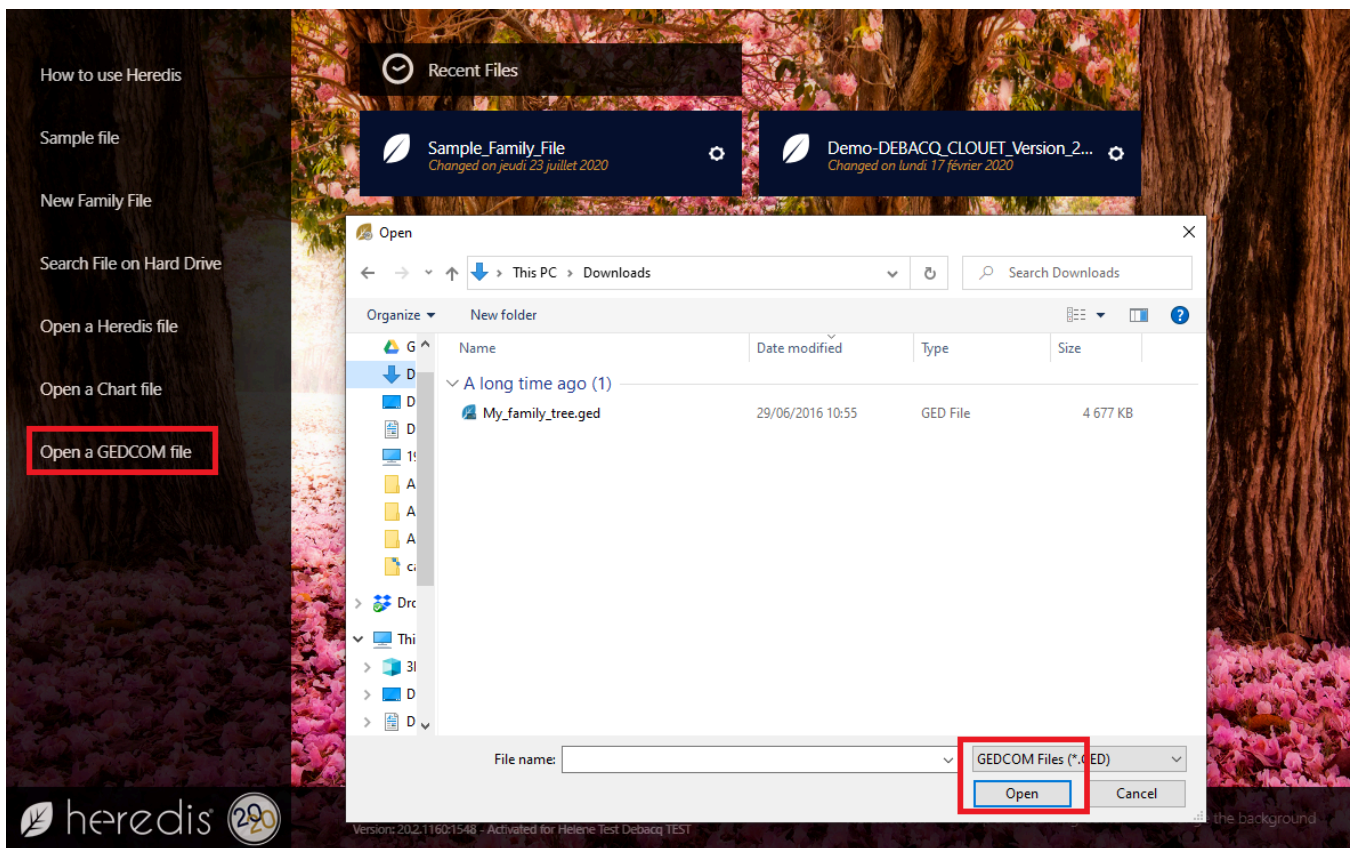
Previous Next Cancel Import

- Click on **Import** to start converting your GEDCOM into a Heredis format. This step can take some time depending on the size of the file, so be patient. Your GEDCOM file will still be available in the GEDCOM format. Heredis extract the data from the GEDCOM file and converted them into a Heredis format.

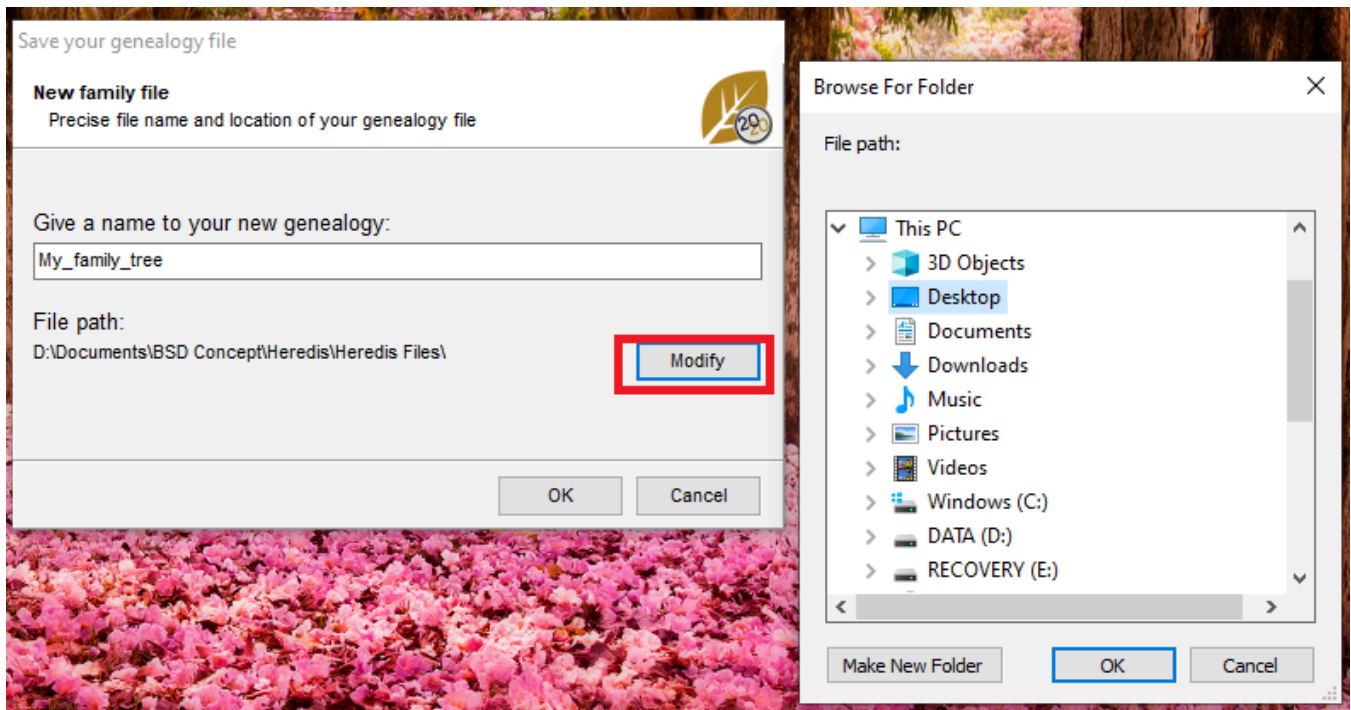
Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The Root Person (voir page 78) article.

(Windows) Import a GEDCOM in a new file.

- From the Heredis **Home Page**, click on **Open a GEDCOM file**.
- The GEDCOM file must have the extension `.ged` to be recognized by Heredis. Select the file and click **Open**.



- Give it a name.
- Choose where to store it on your hard drive disk. Click on **Modify** to change where to keep your file. By default Heredis puts it in Document > BSD Concept > Heredis > Heredis files.



- Validate by clicking on **OK** and wait while Heredis analyzes the data.

Open a GEDCOM in a new file

- Choose to import or not medias and sources and how to manage given names in quotes. Be aware that a GEDCOM file **never contains media**, only the name and way to the original of the media. So even if you choose to import a media, you'll import only the name and way to the original.
- Click on **Next**.

Import GEDCOM

Gedcom import options

...

Import options:

Import Media

Import Sources

Process given names in quotes as:

Usual Given Name

Back Next Done Cancel

- Check the information found in the GEDCOM file (quantity of data, structure of places). All softwares do not manage all data of places the same way. Click on **Select Appropriate Place Elements** if you need to reorganize the data and click on the headings of lines to change them.

Import GEDCOM

Gedcom import options

Check and modify the different place fields.

Automatically identify places

Select appropriate place elements

City	?	Criquetôt le Maucondu	Criquetôt le Maucondu	Criquetôt le Maucon
Postal Code				
County				
State/Province				
Country				
Subdivision				

Back Next Done Cancel

Data are identified in a GEDCOM through the Tags. Every software has its own way to manage some data in GEDCOM format, so some tags are called Owner Tags and might not be read by other softwares (see also What is a GEDCOM file? (voir page 471) and GEDCOM tags generated by Heredis (voir page 473)). If Heredis doesn't know a tag, it will ask you what to do with it : **Import** or **Do Not Import**. If you do not recognize the

meaning of an owner tag (those with a _), ask the editor of the software used to create the GEDCOM. Choose what you want to do with those unknown tags in the Heredis screen.

- Choose for each tag to **Import** or **Do not import**. If you do not import, the data won't be in Heredis.

Import GEDCOM

Choose how to process the following GEDCOM tags.

URL	URL	Import
SUBM	Submitter	Import
REGI	REGI	Import
PLAC	Place	Import
OWNR	OWNR	Import
LOCA	LOCA	Import
INTV	INTV	Import

Back Next Done Cancel

- You may add a source common to all data imported. In this case, tick the box **Assign a new source to** and choose the kind of data to source (events, facts...). Fill in the name, repository and type of document of the source.

Import GEDCOM

Gedcom import options

Assign a source to each imported data

Assign a new source to

All Events

All persons

All Events

All Persons and Events

All Persons, Events and Facts

Repository:

File: My_family_tree.ged

Document:

Import GEDCOM file from 24 juillet 2020

Back Next Done Cancel

- Click on **Done** to start converting your GEDCOM into a Heredis format. This step can take some time depending on the size of the file, so be patient. Your GEDCOM file will still be available in the GEDCOM format. Heredis extract the data from the GEDCOM file and converted them into a Heredis format.

Open a GEDCOM in a new file

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The Root Person (voir page 78) article.

Import a GEDCOM into an existing file

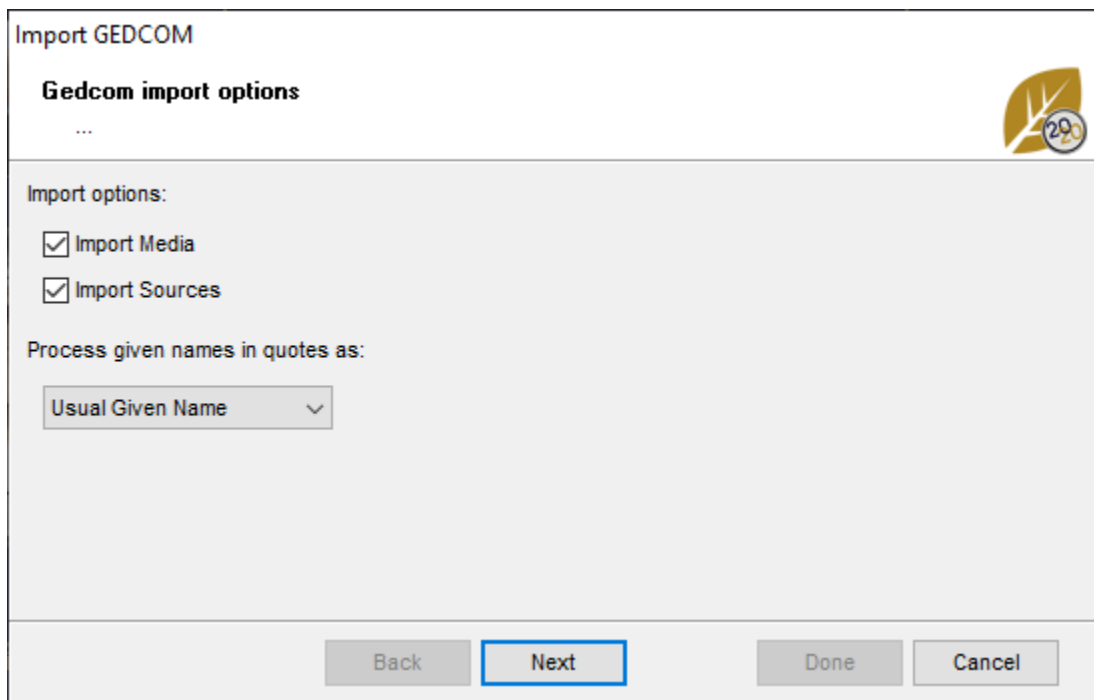
Warning: Any import into an existing file changes its structure. Consider before this type of operation to save a copy of your original file if necessary or back up the modified file under another name.

Importing a GEDCOM requires taking its time, don't validate too fast, you won't be able to make any changes after the import.

(Windows) Importing a GEDCOM

From the file in which you want to import the GEDCOM file.

- Choose **File > Import > GEDCOM file**.
- Select the file (it must carry a *.ged* extension to be recognized by Heredis), then click **Open**.
- Choose whether or not to import media and sources, and how to handle quote names.
- Click **Next**



- You will probably have to check the places, not all software manages them in the same way. If you see a window like the one below, check the locations. Click **Select appropriate places elements** if the order does not match the data correctly. Click on the title of the column on the left to change the categories. (Example: below, the line *Postal Code* should be *County*)

Import a GEDCOM into an existing file

Import GEDCOM

Gedcom import options
Check and modify the different place fields.

Automatically identify places
 Select appropriate place elements

City	San Jose	Palo Alto	San Jose	Bellville
Postal Code	Santa Clara Co	Santa Clara Co	Santa Clara Co	Richland Co
County	CA	CA	CA	OH
State/Province				
Country				
Subdivision				

Back Next Done Cancel

Each software has its own way of managing certain data in the GEDCOM format. So there are Owner Tags that may be unknown to Heredis (see article [What is a GEDCOM?](#) (voir page 471) and GEDCOM tags generated by Heredis (voir page 473) for more details). If Heredis doesn't recognize certain tags, it will ask you what you want to do with them: **Import** or **Do not Import**. If you don't know what some owner tags mean (those prefixed by a _), ask the publisher of the software that generated them for clarification. So choose what you want to do with the unknown Tags if the screen shows up.

Import GEDCOM

Choose how to process the following GEDCOM tags.

_UID	_UID	Import
_CONTACT	_CONTACT	Import
VOL	VOL	Import
URL	URL	Import
UMAR	UMAR	Do not import
TODO	TODO	Import
SUBM	Submitter	Import

Back Next Done Cancel

- Check the **Assign a new source to** box and choose which data to add that source to you. Fill the fields out of the source if you want to assign one. By adding a common source to all the information from this GEDCOM, you'll know where you get your information from.

Import GEDCOM

Gedcom import options
Assign a source to each imported data

Assign a new source to

All Persons, Events and Facts

Source

Title:


Repository:

File: Sample-file.ged

Document:

Import GEDCOM file from 28 juillet 2020

Back Next Done Cancel

- Click **Done** to validate the import with the settings you've indicated.
- After the GEDCOM data is imported, it is necessary to create the links that will link the imported persons to those that were already present in the main file. To do this, use the  **Add** features.

A GEDCOM **never contains media** because it is a text file format. On the other hand, the path and the name of the media are kept, so you can reintegrate them through the media index (if their name has not changed, Heredis will quickly reintegrate all of your media in a few clicks). See the article Media > Searching Media (voir page 105) for more details.

(Mac) Importing a GEDCOM

From the file in which you want to import the GEDCOM file.

- Choose **File> Import > GEDCOM**.
- Select the file (it must carry a *.ged* extension to be recognized by Heredis), then click **Open**.
- You will probably have to check the places, not all software manages them in the same way. Click **Select Appropriate Place Elements** if the order does not match the data correctly. Click on the header of the column to be changed to change the categories. (*Example: below, the line Postal Code should be County*)

Import a GEDCOM into an existing file

Importing GEDCOM File

Imported file

Persons: 10 182 0
Families: 3 319 0
Sources: 701 0

Places

Automatically Identify Places
 Select Appropriate Place Elements

City	Postal Code	County	State/Province	Country	Place Subdivision
San Jose	Santa Clara Co	CA			
Palo Alto	Santa Clara Co	CA			
San Jose	Santa Clara Co	CA			
Bellville	Richland Co	OH			
Jefferson Twp	Richland Co	OH			
Great Lakes	IL				
San Jose	Santa Clara Co	CA			
Oak Hill Memorial P...	San Jose	Santa Clara Co	CA		
Salina	Saline Co	KS			
Salina	Saline Co	KS			
San Jose	Santa Clara Co	CA			
San Jose	Santa Clara Co	CA			
Oak Hill Memorial P...	San Jose	Santa Clara Co	CA		
San Jose	Santa Clara Co	CA			

Previous Next Cancel Import

Each software has its own way of managing certain data in the GEDCOM format. So there are Owner Tags that may be unknown to Heredis (see article [What is a GEDCOM?](#) (voir page 471) and GEDCOM tags generated by Heredis (voir page 473) for more details). If Heredis doesn't recognize certain tags, it will ask you what you want to do with them: **Import** or **Do not Import**. If you don't know what some owner tags mean (those prefixed by a _), ask the publisher of the software that generated them for clarification. So choose what you want to do with the unknown Tags if the screen shows up.

- Choose for each tag to import or ignore the data.

Importing GEDCOM File

Imported file

Persons: 10 182

Families: 3 319

Sources: 701

Events/Facts

There is some unknown data in the Gedcom file.
 You can either transform it into events, store it in facts or discard it.
 Once it is imported, you can manage it in the Data tab in Heredis.

AFN	File ID number	Import
ALIA	ALIA	Import
CITN	CITN	Import
CLAW	CLAW	Do not import
CLER	CLER	Do not import
CPLR	CPLR	Import
DETA	DETA	Import
EARL	EARL	Do not import
EDTP	EDTP	Import

- Choose whether or not to import media and sources, and how to handle quote names.
- Check the **Associate a Common Source** box and choose which data to add that source to you. Fill the fields out of the source if you want to assign one. By adding a common source to all the information from this GEDCOM, you'll know where you get your information from.

Import a GEDCOM into an existing file

Importing GEDCOM File

Imported file

Persons: 10 182 0

Families: 3 319 0

Sources: 701 0

Options

Process given names in quotes as: Nickname

Import Pictures

Import Sources

Assign a new source to All Events


Title:

Repository: ged

Document: Gedcom import dated July 28, 2020

Progress

Previous Next Cancel Import

- Click **Launch import** to start importing. This may take more or less time depending on the size of the file to be imported.
- After the GEDCOM data is imported, it is necessary to create the links that will link the imported persons to those that were already present in the main file. To do this, use the  **Add** features.

A GEDCOM **never contains media** because it is a text file format. On the other hand, the path and the name of the media are retained, so you can reintegrate them through the media index (if their name has not changed, Heredis will quickly reintegrate all of your media in a few clicks). See the article [Media > Searching Media](#) (voir page 105) for more details.

You will then need to link the persons in your file to those in the imported file. You should also check for duplicates. See also [\(Windows\) Permanent control for duplicates](#) (voir page 346), [\(Mac\) Permanent control for duplicates and Merging Two Persons](#) (voir page 352)

Export a GEDCOM

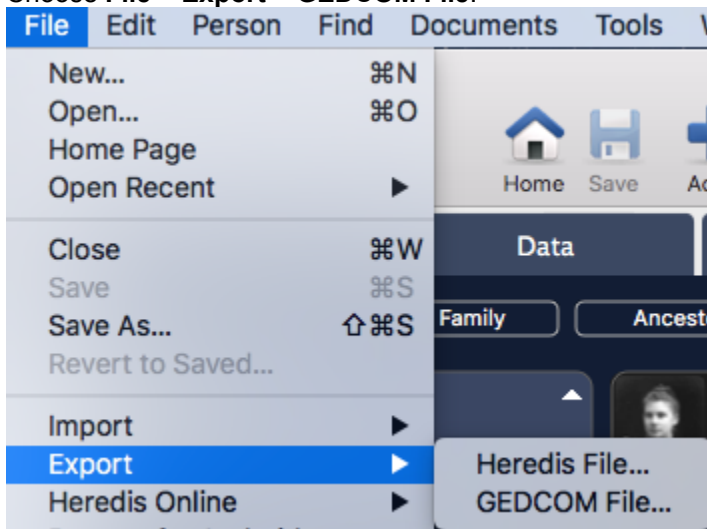
You're exporting your data to exchange them. If you wish to submit your genealogy to a correspondent who does not have Heredis, or an older version of Heredis than yours, or you wish to keep a version of your data to be used by any software, you have to export your file in a Gedcom file.

It is a text format file, it contain only text, no media. See also [What is a GEDCOM file?](#) (voir page 471)

Important: If you are making limitations on persons (marked, confidentials...) and the root person (for entire file export) or the primary person (for the export of a branch) is included in the limitation, your GEDCOM file will be empty! You can't create a file of ancestors or descendants or both if the person at the base is excluded.

Export all your file in GEDCOM format

Choose **File > Export > GEDCOM File**.



- Choose to export (**Windows**) Entire file ou (**Mac**) All People.
- Choose what data to export (media, notes...). If you export notes, choose if you wish to **Preserve text format** or **No formatting text**. Some softwares can not read text formatting. To be sure to get all the data in your notes, we advice you to choose **No formatting text**.

Info • If you want to export media, tick the **Create a folder for media** box to accompany the GEDCOM file with a folder containing all media attached to the exported data. The paths of the media listed in the GEDCOM file match the media in this folder. If you don't create a folder, only the way to the media and its name will be kept in the GEDCOM.




- Heredis manages different calendar as for Hebrew, French Republican or Julian calendar. Some software can't. Tick the **Use Gregorian Dates** box in order to make sure all dates will follow and be read by the other software.
- Heredis allows to share an event between many persons, this way you won't have to enter the event on everyone. This function is specific to Heredis. Tick the box **Convert shared events to individual events** so Heredis will copy the event to every person concerned.
- Complete the information concerning the sender of the file. This allows the person receiving the file to identify you and to be able to contact you if necessary.
- Choose the character set for data to be exported:
 - **Mac**: characters readable by all Mac software.
 - **Windows (ANSI)**: use this format if you know the recipient of the file uses Windows software.
 - **UTF-8**: use this format to preserve all special characters. This is a recent universal file format. But note, some genealogy software programs do not support this format.





Export a GEDCOM

Info • Use UTF-8 characters, which is an international language for computer encoding if the software that opens the GEDCOM is less than 6 years old.

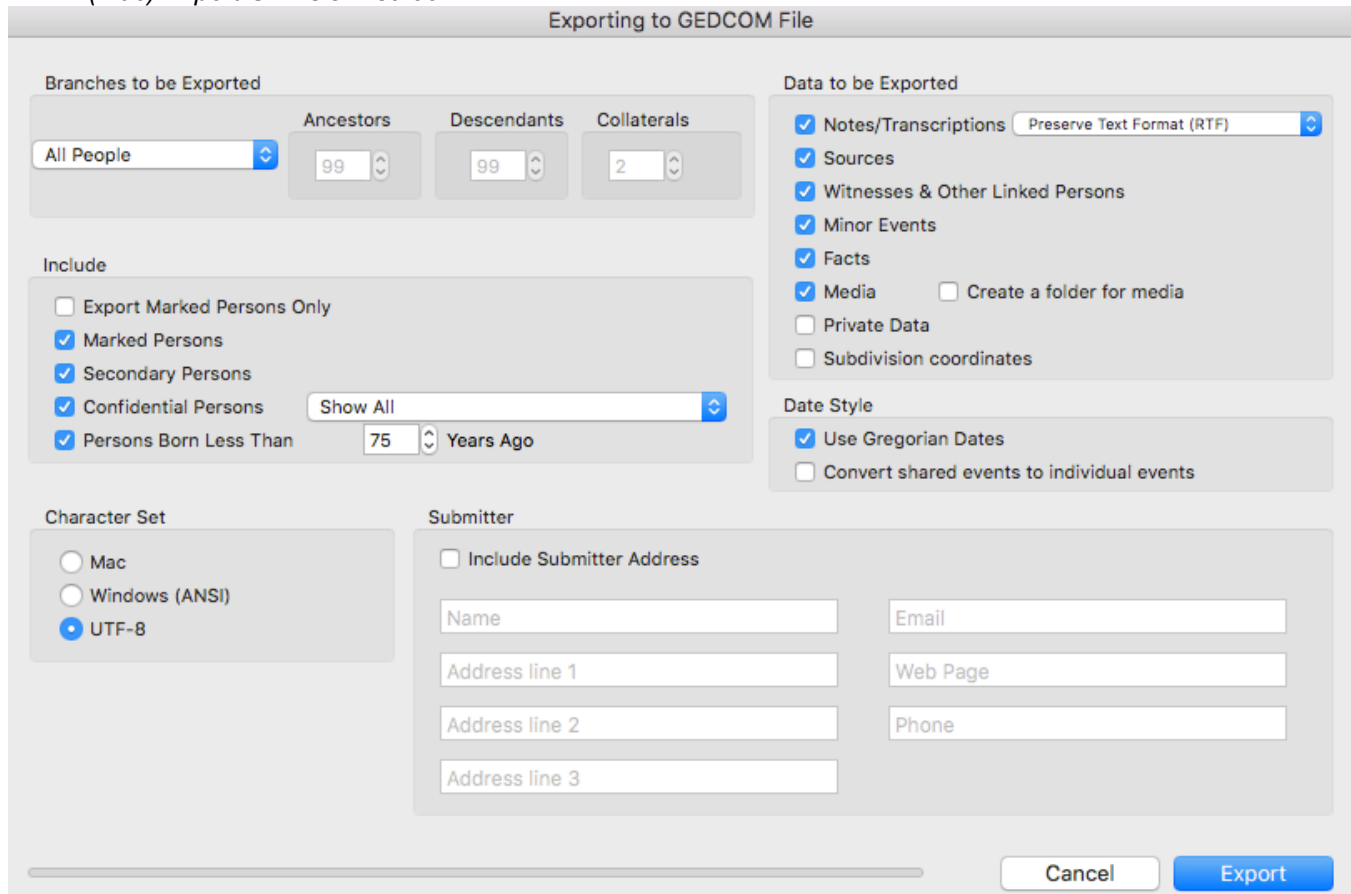
- You can add your contact information so the person who will read the GEDCOM will know where the data comes from.

(Mac) Select the persons to be exported

1. Export **All people**: export all persons contained in your file.
2. **Export Marked Persons Only**: only the persons with  ticked in their personal data will be exported.
3. **Marked Persons**: if ticked, the marked persons will also be included.
4. **Secondary Persons**: if ticked, the persons with  ticked in their personal data will be exported.
5. **Confidential Persons**: you may export all the information of confidential persons (those with  ticked in their personal data), or their surname only, or their surname and given names. You can also export all people and blur the confidential persons' data. The recipient of your file will only know that such a person in a given place in the line existed, without knowing any information about him/her.
6. **Persons Born Less Than ... Years Ago**: select the number of years to be considered for export of contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of **Persons Born Less Than ... Years Ago** specify the value and untick the box.

Info • It is possible to exclude a all branch from the exported file. Declare the person at the bottom of the branch you do not want to export and tick the  in his/her personal data. You can also tag as , ,  a lot of persons at once with **Smart Search**. See Smart Search (voir page 208) and The different data fields (voir page 50) articles.

(Mac) Export GEDCOM screen



The screenshot shows the 'Exporting to GEDCOM File' dialog box. It is organized into several sections:

- Branches to be Exported:** Includes a dropdown menu set to 'All People', and three numeric input fields for 'Ancestors' (99), 'Descendants' (99), and 'Collaterals' (2).
- Data to be Exported:** A list of checkboxes for various data types: 'Notes/Transcriptions' (checked), 'Sources' (checked), 'Witnesses & Other Linked Persons' (checked), 'Minor Events' (checked), 'Facts' (checked), 'Media' (checked), 'Private Data' (unchecked), and 'Subdivision coordinates' (unchecked). A dropdown menu for 'Notes/Transcriptions' is set to 'Preserve Text Format (RTF)'. There is also an unchecked checkbox for 'Create a folder for media'.
- Include:** A group of checkboxes: 'Export Marked Persons Only' (unchecked), 'Marked Persons' (checked), 'Secondary Persons' (checked), 'Confidential Persons' (checked), and 'Persons Born Less Than' (checked) with a numeric input field set to '75' and the text 'Years Ago'.
- Character Set:** Three radio buttons: 'Mac' (unchecked), 'Windows (ANSI)' (unchecked), and 'UTF-8' (checked).
- Submitter:** An unchecked checkbox for 'Include Submitter Address' followed by text input fields for 'Name', 'Address line 1', 'Address line 2', 'Address line 3', 'Email', 'Web Page', and 'Phone'.




At the bottom right of the dialog are two buttons: 'Cancel' and 'Export'.





- Click **Export**.
- Give a name to the new file and choose where the file should be saved.

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The Root Person (voir page 78) article.

(Windows) Select the persons to be exported

In the Limits section, choose to :

- Export **All persons** (export all persons contained in your file) or **Export Marked Persons Only** (only the persons with  ticked in their personal data will be exported) or **Exclude Marked Persons** (the marked persons won't be included).
- **Export Confidential Persons** (you may export all the information of confidential persons, those with  ticked in their personal data), or **Exclude Confidential Persons** (they won't be included), or **Export surname only** (Confidential persons will be exported with only their surname), or **Blur all data for confidential persons** (all the data of confidential will be blurred), or **Hide all data for confidential persons** (all the data of confidential persons will be hidden).
- **Exclude Secondary Persons:** if ticked, the persons with  ticked in their personal data won't be exported.

Info • It is possible to exclude a all branch from the exported file. Declare the person at the bottom of the branch you do not want to export and tick the  in his/her personal data. You can also tag as , ,  a lot of persons at once with **Smart Search**. See Smart Search (voir page 208) and The different data fields (voir page 50) articles.

(Windows) Export GEDCOM screen

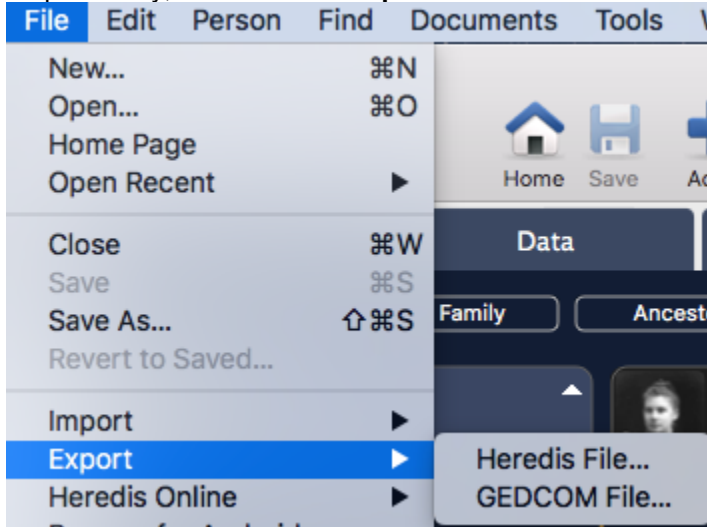
- Click **Export**.
- Give a name to the new file and choose where the file should be saved.

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The

Root Person (voir page 78) article.

Export a branch of your file

As previously, choose **File > Export > GEDCOM File**.



Choose the branches to process

- Choose the person you want at the base of your GEDCOM file and put him/her as the primary person of Heredis' screen.
- Choose to include **Ancestors** or **Descendants** or **Ancestors & Descendants**.
- Choose the number of generations of **Ancestors**, of **Descendants**, or both.
- Specify the number of collaterals for the ancestor branches. Heredis goes back down the branch line for each direct ancestor to include them in the exported file.
 - 0 = only direct ancestors are exported (with spouses).
 - 1 = you export the direct ancestors with all their children and their spouses.
 - 2 = you export the direct ancestors, their children and grandchildren, along with their spouses.
 - 3 = you also add their great-grandchildren, etc.

Info • Remember to check who is the primary person displayed before making a branch export.

- Choose what data to export (media, notes...). If you export notes, choose if you wish to **Preserve text format** or **No formatting text**. Some softwares can not read text formatting. To be sure to get all the data in your notes, we advice you to choose **No formatting text**.

Info • If you want to export media, tick the **Create a folder for media** box to accompany the GEDCOM file with a folder containing all media attached to the exported data. The paths of the media listed in the GEDCOM file match the media in this folder. If you don't create a folder, only the way to the media and its name will be kept in the GEDCOM.




- Heredis manages different calendar as for Hebrew, French Republican or Julian calendar. Some software can't. Tick the **Use Gregorian Dates** box in order to make sure all dates will follow and be read by the other software.
- Heredis allows to share an event between many persons, this way you won't have to enter the event on everyone. This function is specific to Heredis. Tick the box **Convert shared events to individual events** so Heredis will copy the event to every person concerned.
- Complete the information concerning the sender of the file. This allows the person receiving the file to identify you and to be able to contact you if necessary.
- Choose the character set for data to be exported:
 - **Mac**: characters readable by all Mac software.





- **Windows (ANSI)**: use this format if you know the recipient of the file uses Windows software.
- **UTF-8**: use this format to preserve all special characters. This is a recent universal file format. But note, some genealogy software programs do not support this format.

Info • Use UTF-8 characters, which is an international language for computer encoding if the software that opens the GEDCOM is less than 6 years old.

- You can add your contact information so the person who will read the GEDCOM will know where the data comes from.

(Mac) Select the persons to be exported

1. Export **All people**: export all persons contained in your file.
2. **Export Marked Persons Only**: only the persons with  ticked in their personal data will be exported.
3. **Marked Persons**: if ticked, the marked persons will also be included.
4. **Secondary Persons**: if ticked, the persons with  ticked in their personal data will be exported.
5. **Confidential Persons**: you may export all the information of confidential persons (those with  ticked in their personal data), or their surname only, or their surname and given names. You can also export all people and blur the confidential persons' data. The recipient of your file will only know that such a person in a given place in the line existed, without knowing any information about him/her.
6. **Persons Born Less Than ... Years Ago**: select the number of years to be considered for export of contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of **Persons Born Less Than ... Years Ago** specify the value and untick the box.

Info • It is possible to exclude a all branch from the exported file. Declare the person at the bottom of the branch you do not want to export and tick the  in his/her personal data. You can also tag as , ,  a lot of persons at once with **Smart Search**. See Smart Search (voir page 208) and The different data fields (voir page 50) articles.

(Mac) Export GEDCOM screen

Export a GEDCOM

The screenshot shows the 'Exporting to GEDCOM File' dialog box. It is organized into several sections:

- Branches to be Exported:** A dropdown menu is set to 'All People'. To the right are three columns: 'Ancestors' (99), 'Descendants' (99), and 'Collaterals' (2).
- Data to be Exported:** A list of checkboxes with 'Notes/Transcriptions' selected. A dropdown menu next to it is set to 'Preserve Text Format (RTF)'. Other checked items include 'Sources', 'Witnesses & Other Linked Persons', 'Minor Events', 'Facts', and 'Media'. 'Private Data' and 'Subdivision coordinates' are unchecked. There is also an unchecked checkbox for 'Create a folder for media'.
- Date Style:** 'Use Gregorian Dates' is checked. 'Convert shared events to individual events' is unchecked.
- Include:** 'Export Marked Persons Only' is unchecked. 'Marked Persons', 'Secondary Persons', 'Confidential Persons', and 'Persons Born Less Than' are checked. A dropdown menu next to 'Confidential Persons' is set to 'Show All'. A field next to 'Persons Born Less Than' is set to '75' with 'Years Ago' next to it.
- Character Set:** 'Mac', 'Windows (ANSI)', and 'UTF-8' are listed. 'UTF-8' is selected with a radio button.
- Submitter:** 'Include Submitter Address' is unchecked. There are input fields for 'Name', 'Address line 1', 'Address line 2', 'Address line 3', 'Email', 'Web Page', and 'Phone'.




At the bottom right, there are 'Cancel' and 'Export' buttons.





- Click **Export**.
- Give a name to the new file and choose where the file should be saved.

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The Root Person (voir page 78) article.

(Windows) Select the persons to be exported

In the Limits section, choose to :

- Export **All persons** (export all persons contained in your file) or **Export Marked Persons Only** (only the persons with  ticked in their personal data will be exported) or **Exclude Marked Persons** (the marked persons won't be included).
- **Export Confidential Persons** (you may export all the information of confidential persons, those with  ticked in their personal data), or **Exclude Confidential Persons** (they won't be included), or **Export surname only** (Confidential persons will be exported with only their surname), or **Blur all data for confidential persons** (all the data of confidential will be blurred), or **Hide all data for confidential persons** (all the data of confidential persons will be hidden).
- **Exclude Secondary Persons:** if ticked, the persons with  ticked in their personal data won't be exported.

Info • It is possible to exclude a all branch from the exported file. Declare the person at the bottom of the branch you do not want to export and tick the  in his/her personal data. You can also tag as , ,  a lot of persons at once with **Smart Search**. See Smart Search (voir page 208) and The different data fields (voir page 50) articles.

(Windows) Export GEDCOM screen

GEDCOM Export ✕

File Options

Use Gregorian Dates

Convert shared events to individual events

Characters: UTF-8 ▾

Notes: No Formatting (Plain Text) ▾

Submitter _____

Include Submitter Address

Name

Address

Phone

Email

Web Page

Data to be Exported

Media Sources

Create a folder for media Witnesses/Links

Notes/Transcriptions

Minor Events Private Data

Facts

Subdivision coordinates

Branches to be Exported _____

Entire File ▾

Limits _____

Export All Persons ▾

Export Confidential Persons ▾

Exclude Secondary Persons


Export
Cancel

- Click **Export**.
- Give a name to the new file and choose where the file should be saved.

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering washed. See The Root Person (voir page 78) article.

Share on the local network

To share the open genealogy in Heredis, select the **File** menu > **Share on the local network** or click the

Share button in the  toolbar, if you've put it. Check out the [Customize Heredis](#) article to learn more about customizing the toolbar.

This tool allows you to have your file on multiple remote devices (computer, tablet or phone).

Requirements for sharing

- Make sure you have 2 compatible versions of Heredis. For a connection between 2 computers, you must have the same version of Heredis on both computers. On your phone or tablet, you need the free Heredis app for Android or iOS.

Beware, for versions prior to Heredis 2020, you need the iOS or Android Heredis app without a version number. Since Heredis 2020, each version of Heredis now has its own app. When you change versions, consider downloading the similar version for iOS or Android.

- Make sure your computer and/or Internet box firewall or anti-virus allows Heredis to access your private network.
- Open Heredis on both devices.
- Turn off 3 or 4G on your phone or tablet. Sharing is done via WiFi only.

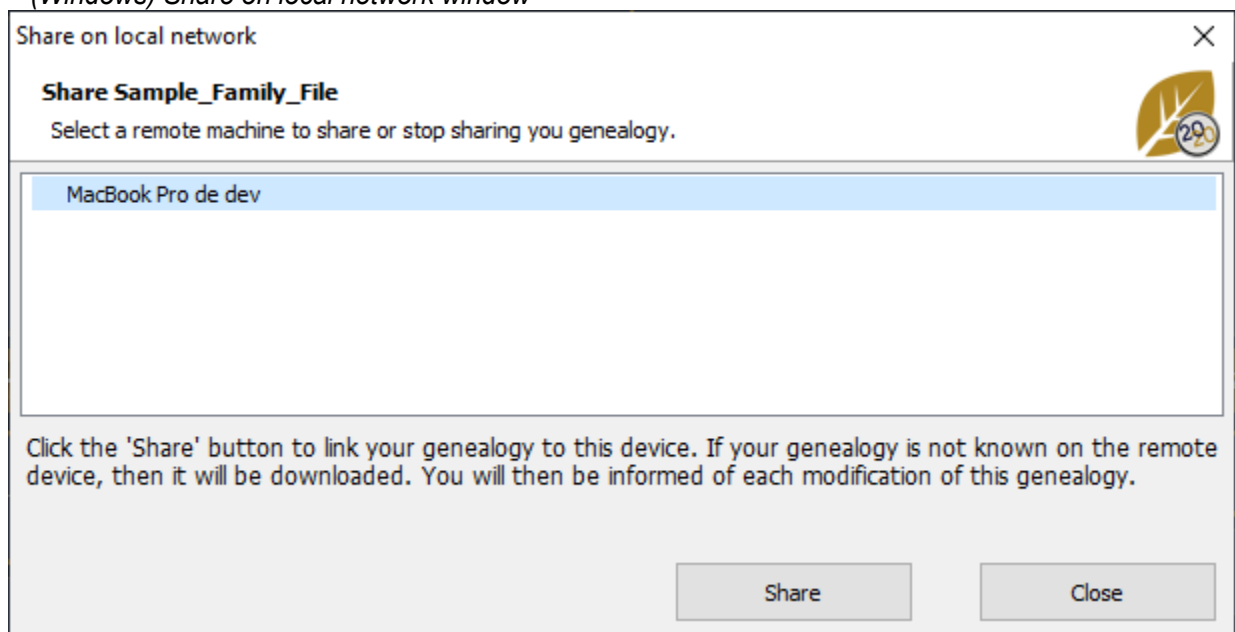
Share your file for the first time

Heredis opens a sharing window and displays the list of devices connected to your local network and on which the software is launched.

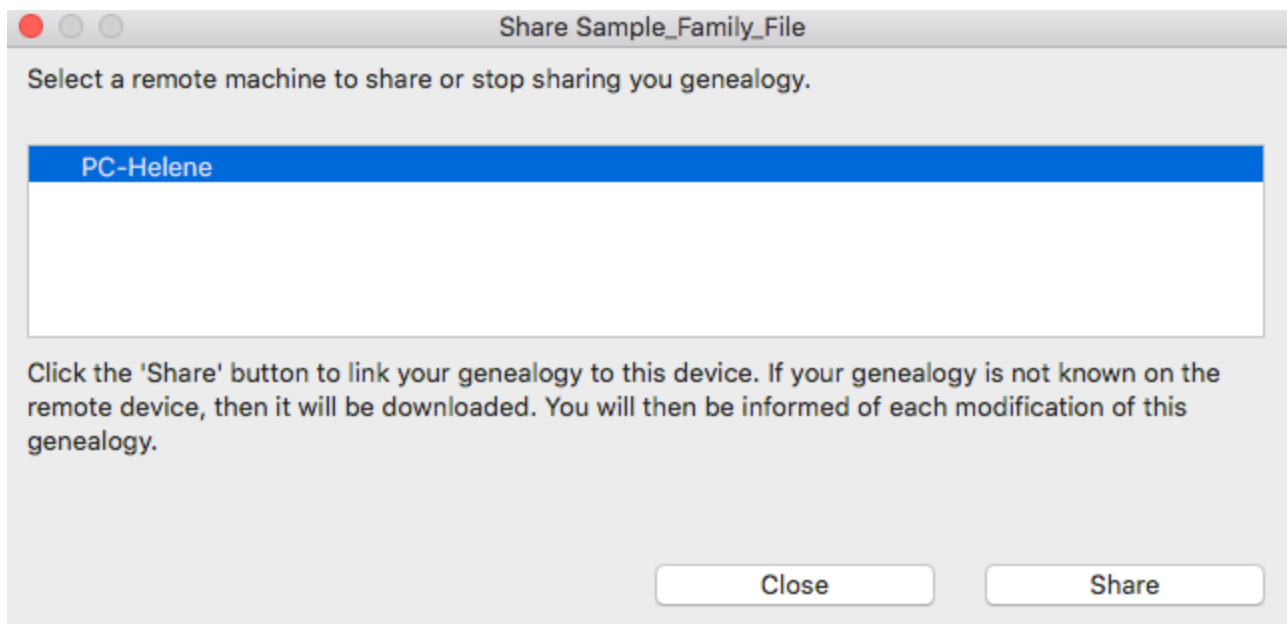
If the open genealogy has never been shared, choose a device available from the proposed list and then click **Share** to link the genealogy with the chosen device. The remote device then receives a sharing request.

Note: The remote device must have double the volume of the transferred file. Be sure to turn off your device's automatic sleep.

(Windows) Share on local network window



(Mac) Share on local network window



On the remote device, Heredis asks you for permission to receive the file. When you click the button (Windows) **Yes**, (Mac) **Accept**, Heredis copies, on the remote device, all the data of the open genealogy as well as the media.

Your genealogy is now linked to two devices, such as your desktop computer and your laptop or your phone.

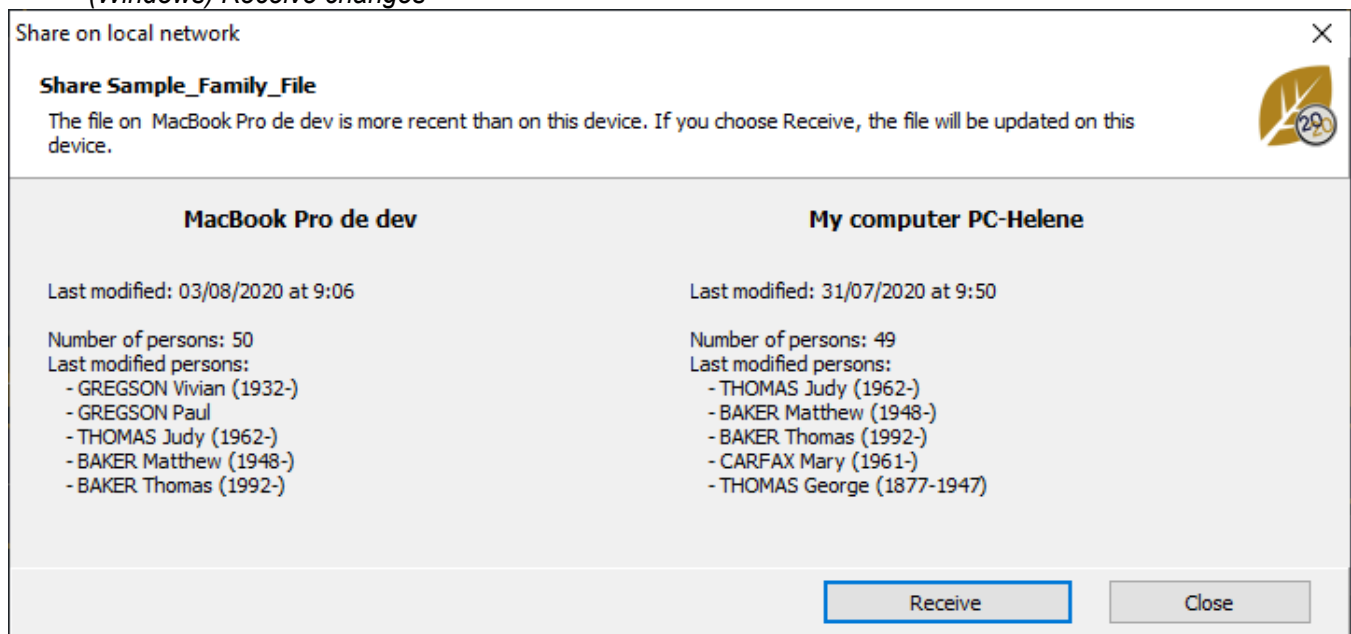
Share your file again after changes when the link is already made

From Heredis on your laptop or phone or tablet, make changes and save new data in your genealogy. Then open this genealogy on all your devices with this shared file.

If you're connected to the local private network, Heredis automatically alerts you that a newer version of your file is available on the device from which you made changes and which is connected to your local network. In this window, the key info in the remote file is displayed (change dates, number of individuals, last modified individuals) and you can compare them with those of the open file.

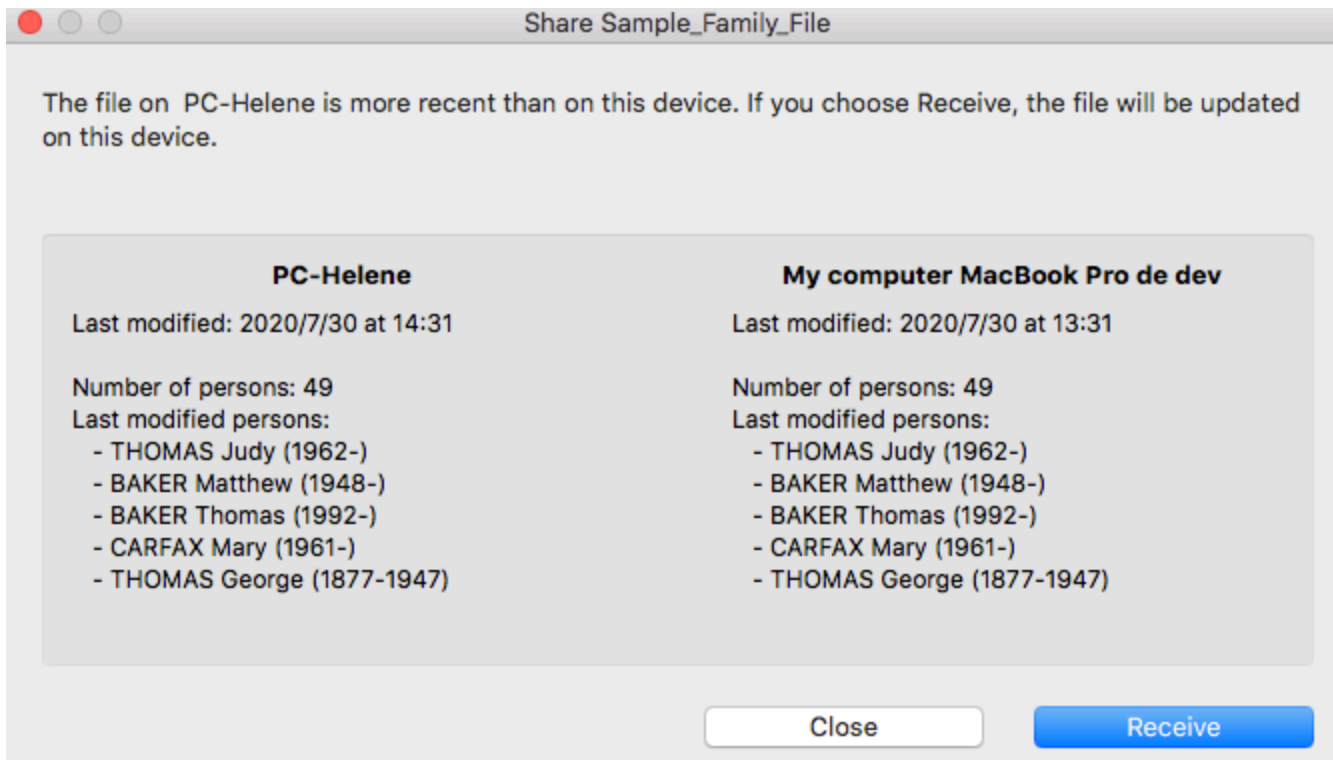
If you click the **Receive** button, Heredis updates the genealogy with the data entered or changed. Only genealogical data or media that have been modified, or added will be transmitted.

(Windows) Receive changes



(Mac) Receive changes

Share on the local network



Warning: Remember to update your devices before making any changes. If you've made changes to your phone without updating your file on your computer, and then make changes to the computer, Heredis will only keep the latest information in chronological order. So you'll lose the modified data on the phone.

Heredis will always offer you the latest file. If you agree to receive it, changes made to the least recent file will be lost.

If you no longer want to share your file with a remote device:

From the **File** menu > **Share on local network**, select the device.

Click the **Don't Share** button.

The device in question will no longer receive notifications regarding updates to this genealogy.

You can reactivate this sharing at any time by clicking the **Share** button **again**.

Info – For the information to be shared, the genealogy file must be recorded.

A problem with sharing?

Share on the local network no longer works:

- Make sure your firewall and/or antivirus doesn't block Heredis. On Windows, there is a built-in firewall, so it may duplicate if you have one in your anti-virus. Also check the firewall of your Internet box.
- Make sure you have 2 similar versions of Heredis. For example, Heredis 2020 for Windows communicates with Heredis 2020 for Mac, iOS or Android only.
- Are you on Windows? Check out the article (Windows) Heredis cannot detect my remote devices – I am getting Bonjour messages.


Synchronizing via USB

Heredis can detect removable devices (USB, external hard-drive) connected to your computer. You are going to your country home? Synchronize your genealogy on a USB flash drive with the **Sync** button then the USB button and then connect it to your home computer in the countryside. You can update your file instantly.

Before leaving, synchronize your computer again with the USB flash drive and update your files with all your weekend work as soon as you return home.

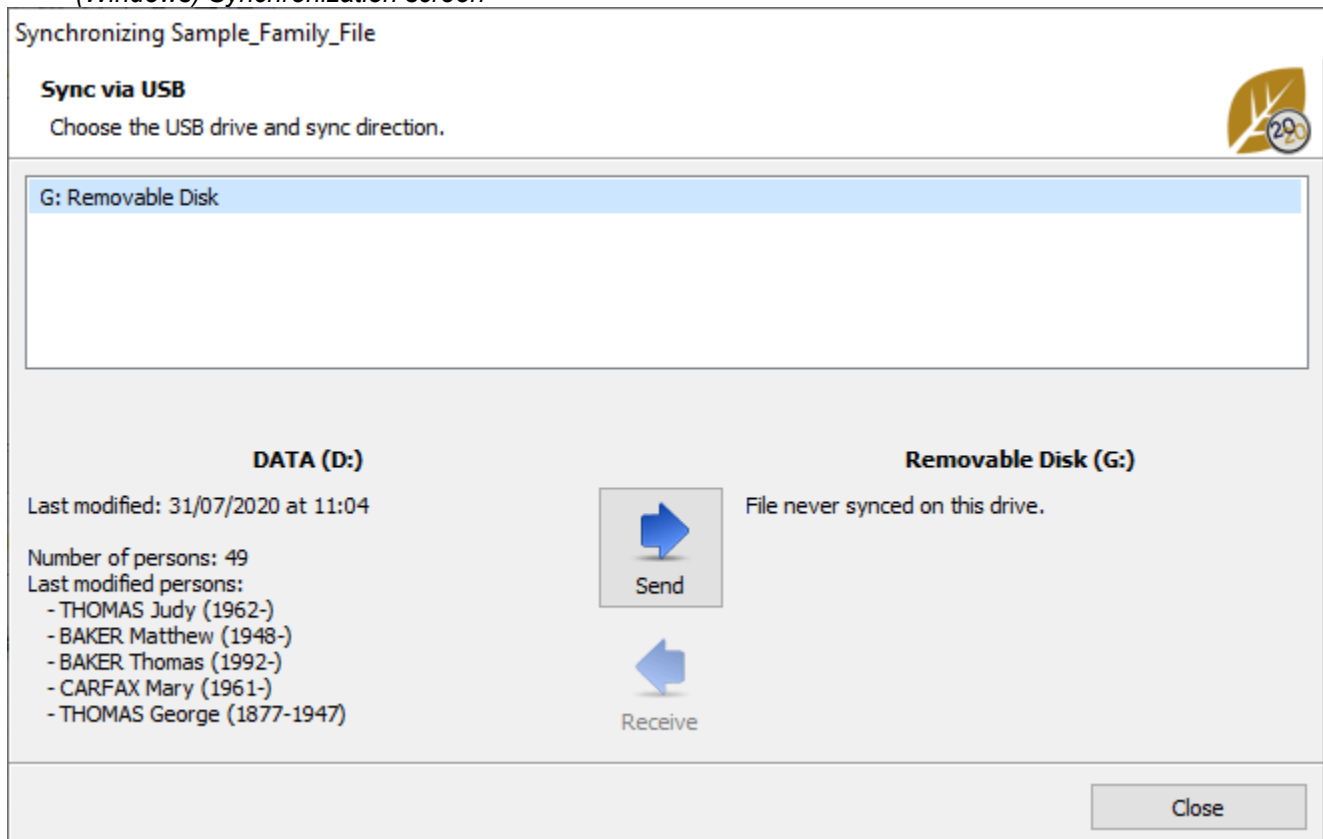
Exchange with another Windows or Mac

Synchronize your genealogy on a USB flash drive or an external hard drive. The synchronization process is the same as for the devices on the WiFi network.

Click the **Sync via USB**  button or choose **File** menu > **Sync Via USB....**

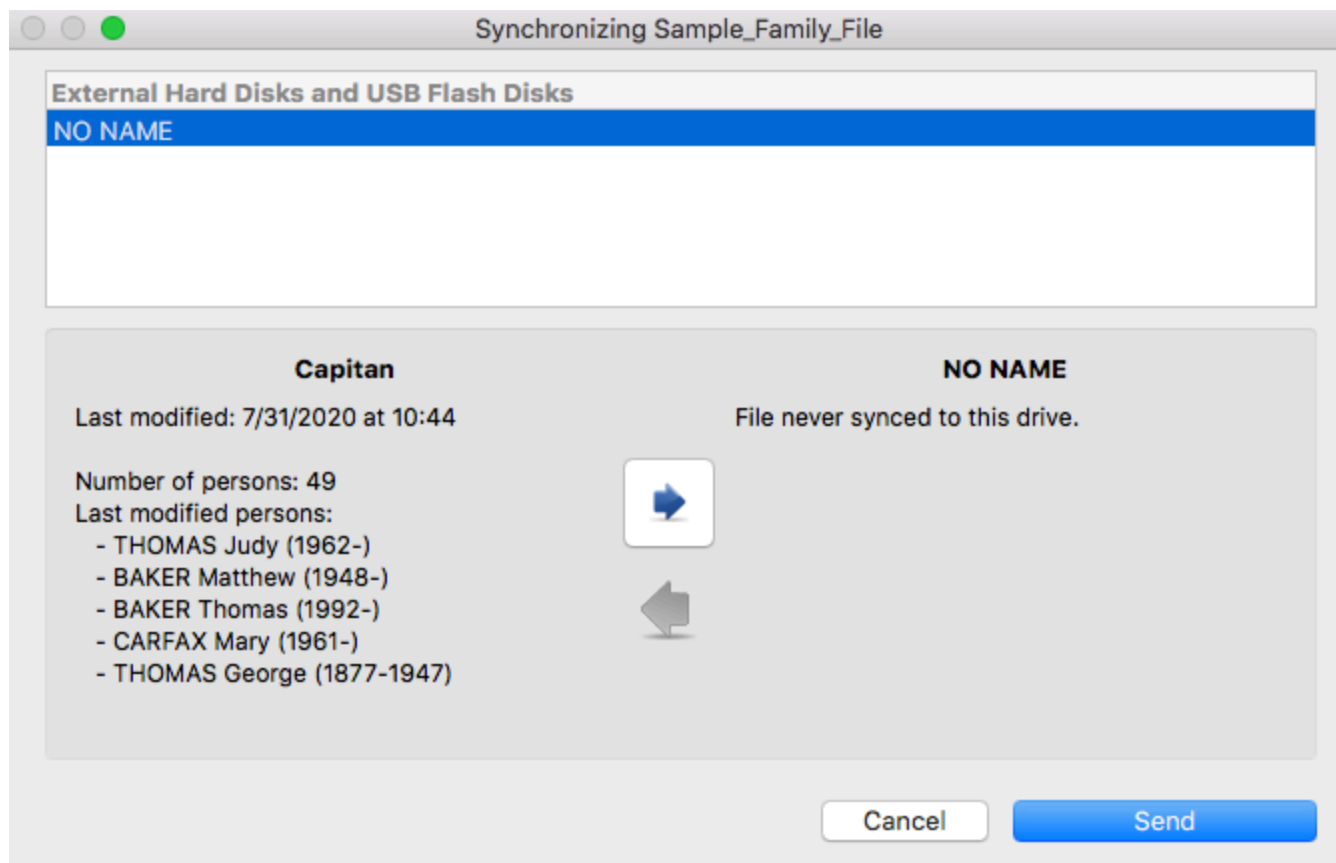
In the Synchronization window, select the device that you have connected, check the direction of synchronization then click **Send** or **Receive** according to the synchronizing direction you have selected.

(Windows) Synchronization screen



(Mac) Synchronization screen

Synchronizing via USB



When synchronization is complete, you may plug in the device to another computer (Windows or Mac).

Whether on launching Heredis or during work, Heredis will inform you if a new genealogy or a newer version of the genealogy exists on the device you have connected and will propose to synchronize your computer with this genealogy. So, when you work, just think of plugging your USB key or external hard drive disk.

Import/Export a file with Heredis iOS

If you have Heredis Windows or Mac, it is better to import a file in Heredis format rather than a GEDCOM.

Import a Heredis or GEDCOM file to iOS

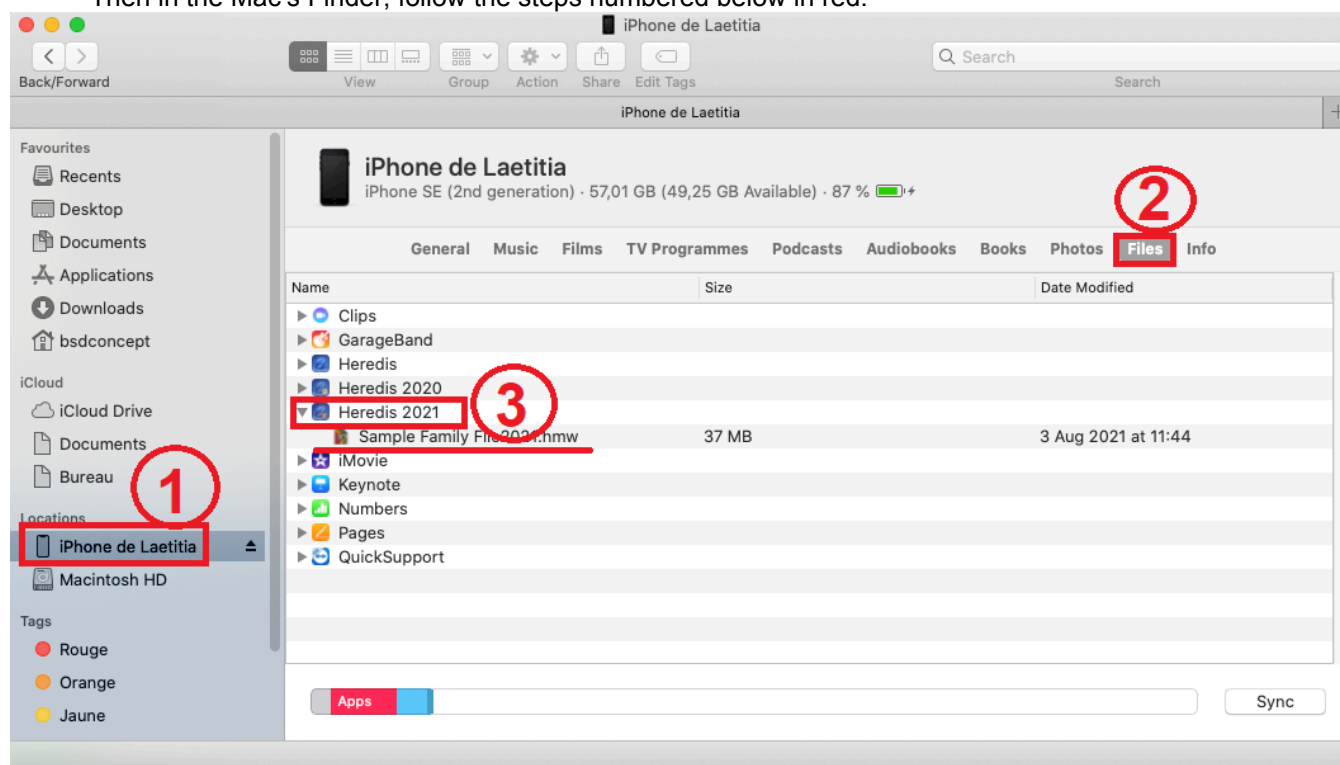
Import allows you to receive your genealogy on one device from another. For example, on the iOS device from the computer.

If you have a Mac computer,

Since Mac OS 10.15, simply plug your iPhone, iPad or iPod Touch into your Mac (via the charger cable). Here is the Mac procedure giving more details:

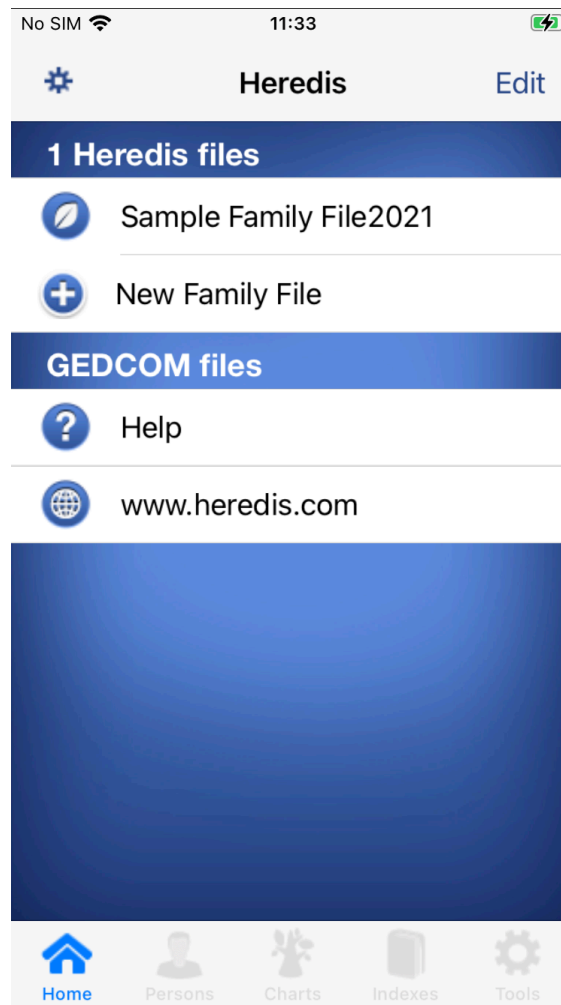
<https://support.apple.com/fr-fr/guide/mac-help/mchld9a31f1/10.15/mac/10.15>

Then in the Mac's Finder, follow the steps numbered below in red:



1. In the left panel, click your **Apple device**.
2. Then click **Files**.
3. Then click on the small arrow to the left of Heredis, to display the **list of files attached to Heredis iOS**.
4. Then drag and drop the corresponding .hmw file (if Heredis file) or .ged (if GEDCOM file) from your Mac computer.
5. Once the copy is complete, eject the device from your Mac.
6. On the iOS device, launch Heredis and open your file by selecting it from the list of files.

Import/Export a file with Heredis iOS

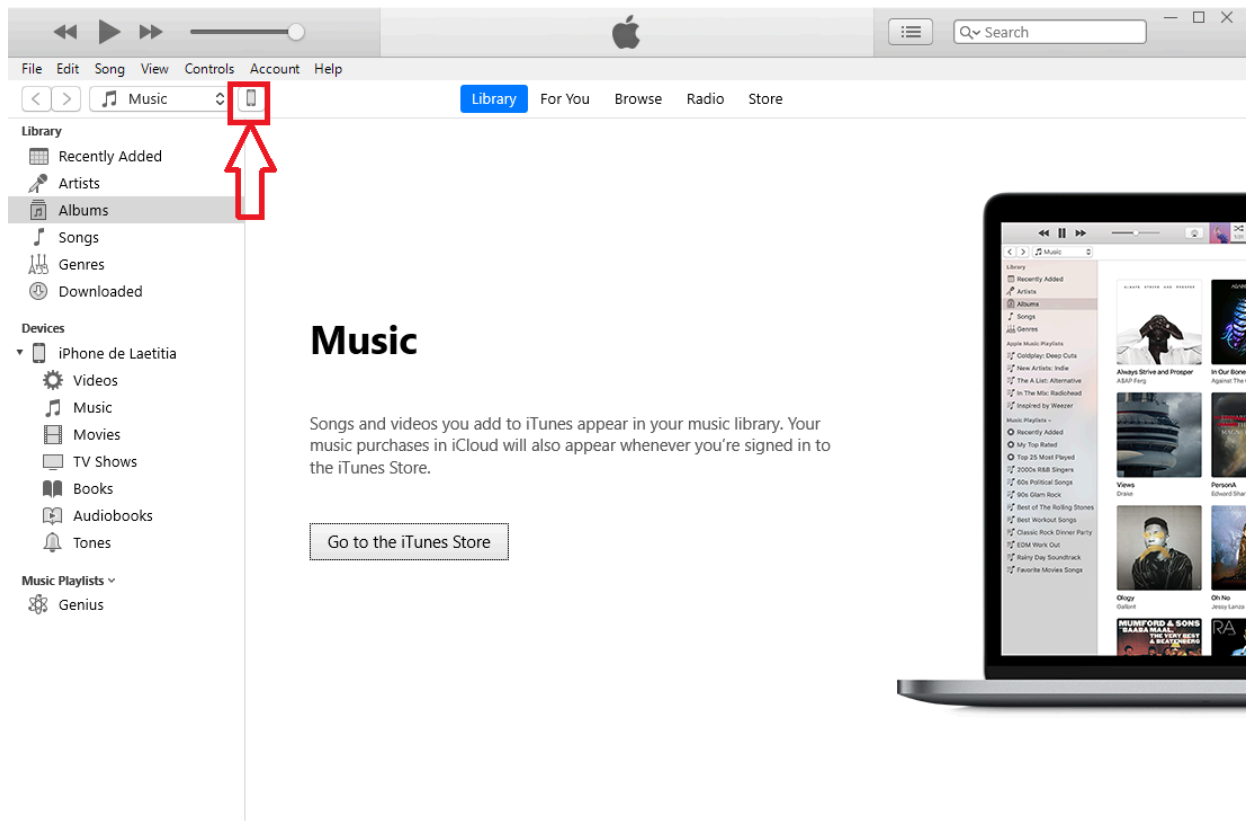


If you have a Windows computer,

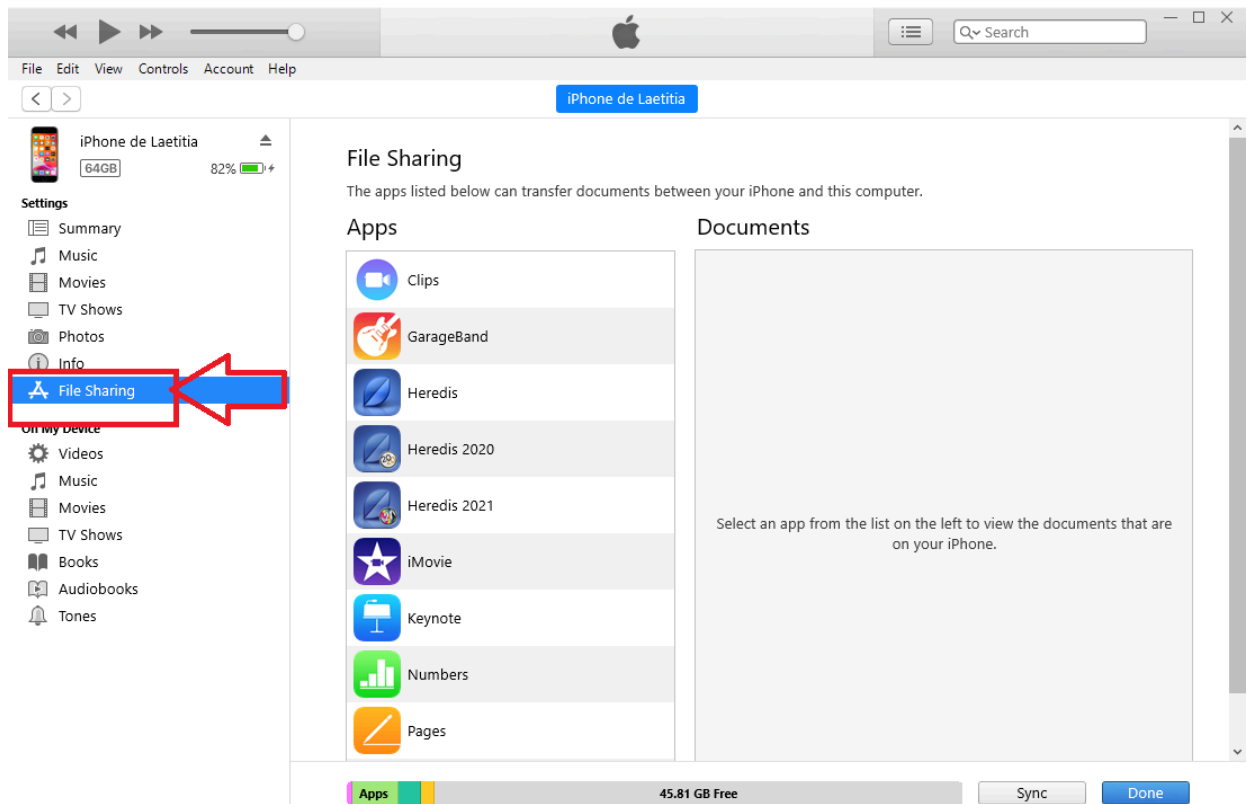
Plug your iOS device into your Windows computer.

Make sure you have iTunes installed on your computer. You can find the app on the Apple website <https://www.apple.com/itunes/>

1. Launch iTunes and click **Continue**.
2. Connect your iOS device (iPad, iPhone, or iPod touch) and select it in iTunes.
3. Validate the message on your iOS device.
4. In the iTunes app on the computer, click the icon of the iOS device.

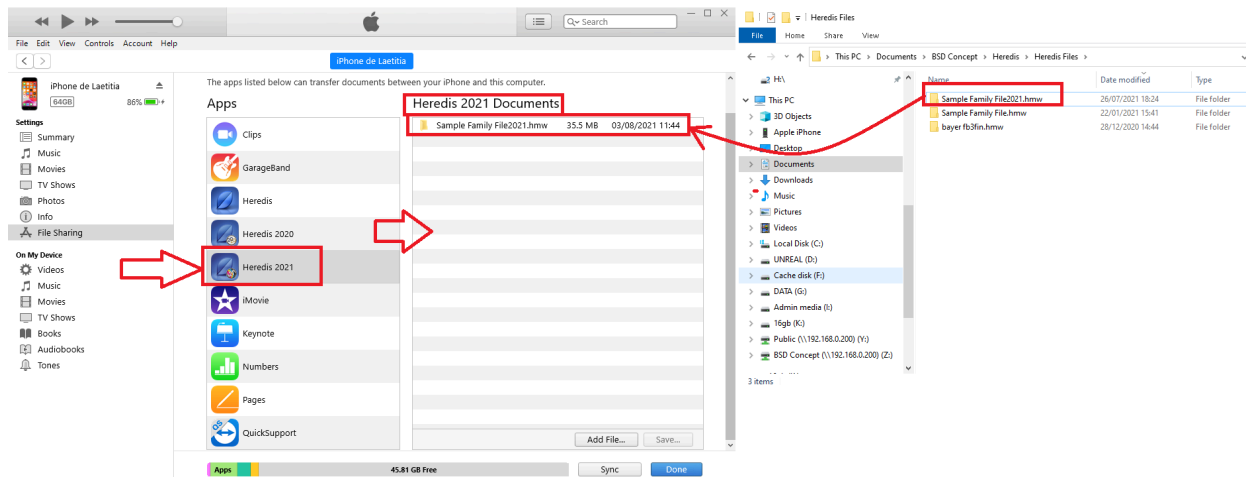


5. Click **File Sharing**.

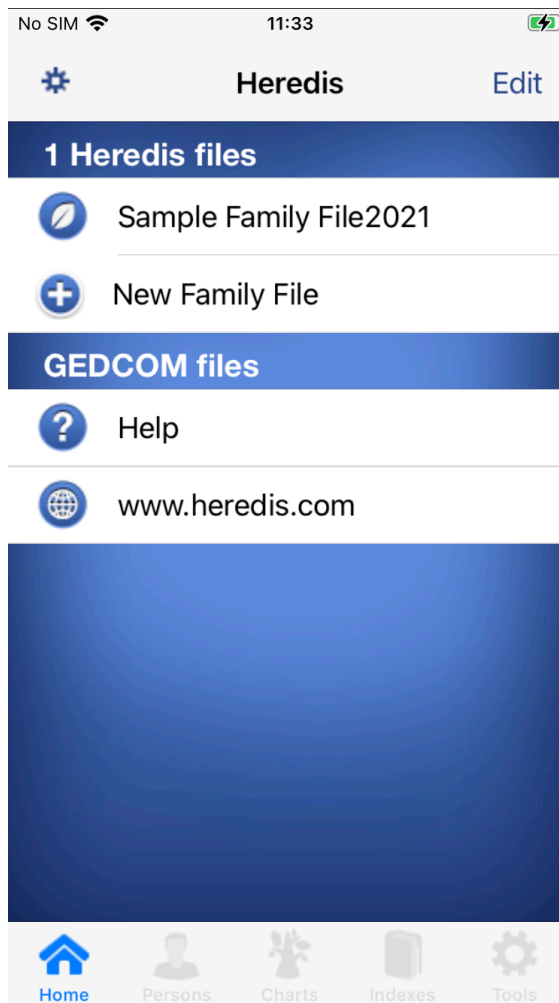


6. Select your version of Heredis. Drag and drop the corresponding file (.hmw or .ged) from your Windows computer.

Import/Export a file with Heredis iOS



7. Once the copy is complete, unplug your iOS from the computer.
8. Launch Heredis on your iOS device and select the file from the list of files.



Export your genealogy file

Export allows you to send from one device to another. For example, from the iOS device to the computer.

In Heredis format

You can do the same procedure as before but in the opposite direction. That is, plug the iOS device into your computer and take the file from the iOS device to drag and drop it to your computer's internal hard drive via the Finder for Mac and iTunes for Windows.

In GEDCOM format

Warning, a GEDCOM does not contain media and sending by email is limited to the authorized size of a file by email (about 10 MB). If you have Heredis on your computer, do not use this method.

Transmit your genealogy to other genealogists who do not have Heredis via a GEDCOM export of your file.



Tap the **Tools** icon in the bottom bar and then tap Export GEDCOM.

Tap **send by email**, the conversion of your data to GEDCOM format starts and then opens your mail app.

Heredis has created a file with an extension .ged which is attached in the message. All you have to do is complete the email with the address of the recipient of the file. GEDCOM file containing your data can be opened by any other genealogy software.

Importing and exporting a genealogy file in Heredis for Android



Prerequisites :

You must have at least:

- Heredis 2015 for Windows version 15.3 or Mac 2015 version 4.2.0.
- Android 4.0.3 or a more recent version

On your Android tablet or mobile phone, from the Play Store, you need to:

- Enable Google Drive
- Download and install the Heredis application for Android
- Have enough internal memory space available to be able to import your genealogy.

To import your data file, your available storage space must be at least twice the size of the file to be imported.

Important: since Heredis 2020, each new version of Heredis for Mac or Windows has its own Android application. It is necessary to download the application corresponding to your version in order to use Heredis for Android. Versions prior to Heredis 2020 will need to use the Heredis no-number version for Android.

See also Share on local network (voir page 495).

Importing a genealogy file in Heredis for Android

1. Preparing your genealogy for Android

Before you can copy your genealogy from the Heredis format onto an Android device, you need to prep the genealogy file.

Note: This method can be used for files not exceeding 4 GB. If your genealogy file is more than 4 GB, then choose to share on the local network.

From Windows or from your Mac:

- Launch Heredis
- Open your genealogy file
- Select from the File menu **Prepare for > Heredis Android...**

Hereditas creates a compressed file recognizable by the Heredis for Android app.

- Click **Yes** to start creating the file. It will bear the same name as the original file with the *.hmvz* extension.
- Heredis opens Explorer if you are using Windows, Finder if you are on Mac, thus showing you where the compressed file is located so you can transfer it into Google Drive.

2. Copying a genealogy file prepared for Android into Google Drive

From Windows or from your Mac:

- Launch your web browser and go to this link: drive.google.com
- Sign in to your Google account (choosing or adding the same account linked to the Play Store or on your Android device)
- Click on **My Drive**
- Choose the file you prepared for Android (with the *.hmvz* extension) from Windows file explorer or from the Finder on Mac.
- Drag it into your browser window, in **My Drive**, in order to copy it to your Google Drive account.

3. Importing a genealogy file from Google Drive into Heredis for Android

Note: This method can be used for files not exceeding 4 GB. If your genealogy file is more than 4 GB, then

choose to share on the local network.

From your Android tablet or mobile phone:

There are two ways you can proceed:

Solution #1

- Launch Heredis
- Click the Home menu and select **Import Family Tree**.
- Click the **Continue** button and choose, in your Google Drive account, the genealogy prepared for Android.

Solution #2

- Launch Google Drive
- Click on the file to load
- Click the **Continue** button

The *Heredis for Android* application will open the file automatically.

Note:



If you transfer your file prepared for Android directly to the SD card of your Android device or on another online storage application (Dropbox, OneDrive...), the process to retrieve your genealogy in *Heredis for Android* remains the same.

Exporting an Android genealogy file into Heredis for Windows or for Mac

You have made modifications to your genealogy on your Android device and you wish to transfer your work to Windows or to your Mac.

Note: This method can be used for genealogies not exceeding 4 GB. If your genealogy file is more than 4 GB, then choose to share it on the local network.

From your Android tablet or mobile phone:

- Launch Heredis
- Open your genealogy
- Click on the menu icon 
- Click on **Export Family Tree** 
- Click on the **Continue** button
- Choose a transfer mode (Google Drive, Dropbox...) and confirm.
- Heredis creates a compressed file recognizable by the *Heredis for Android* app. It will bear the same name as your genealogy with the *.hmvz* extension.

From Windows or from your Mac:

- Choose the transferred file with the *.hmvz* extension and copy it onto your computer's hard drive, in the folder containing your genealogical documents.
 - Double click directly on this file.
 - The Heredis application launches automatically, decompresses your file, and offers to save it.
 - **After confirmation, browse through and find the modifications made to your file from your Android device.**
-

Heredis Online

What is Heredis Online?

Heredis Online gathers all data published by Heredis users. It can be consulted freely, anywhere in the world, from an internet browser.

What is Heredis Online for?

With Heredis Online publish your genealogy easily and free of charge to share with family members or other genealogists around the world.

For more details, see also: Publishing with Heredis Online (voir page 517), Manage your Heredis Online account (voir page 508), Browse a Heredis Online tree (voir page 528), Search on Heredis Online (voir page 536), Change theme or language in Heredis Online (voir page 514).

Requirements to view the Heredis Online website

Heredis Online is optimized for Chrome/Firefox/Edge/Safari browsers => current version

Heredis Online is optimized for Heredis' software from Heredis 2021 version.

If you have display problems, check that you have a compatible browser and make sure it is up-to-date.

Manage your Heredis Online account

Heredis Online is a free online service that allows you to search through the millions of online data of Heredis Online from your software (from the Search Wizard (voir page 203)).

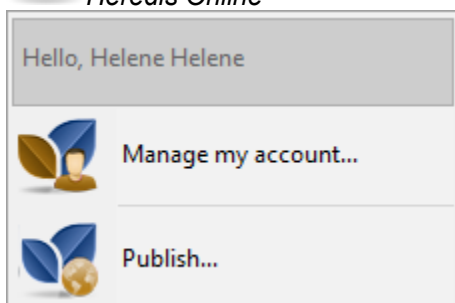
It also allows you to publish your genealogy on Heredis Online's servers for free.

From the home page of the software, go directly to your Heredis Online account. You can then manage your account, set up the confidentiality of your online tree, access it ...

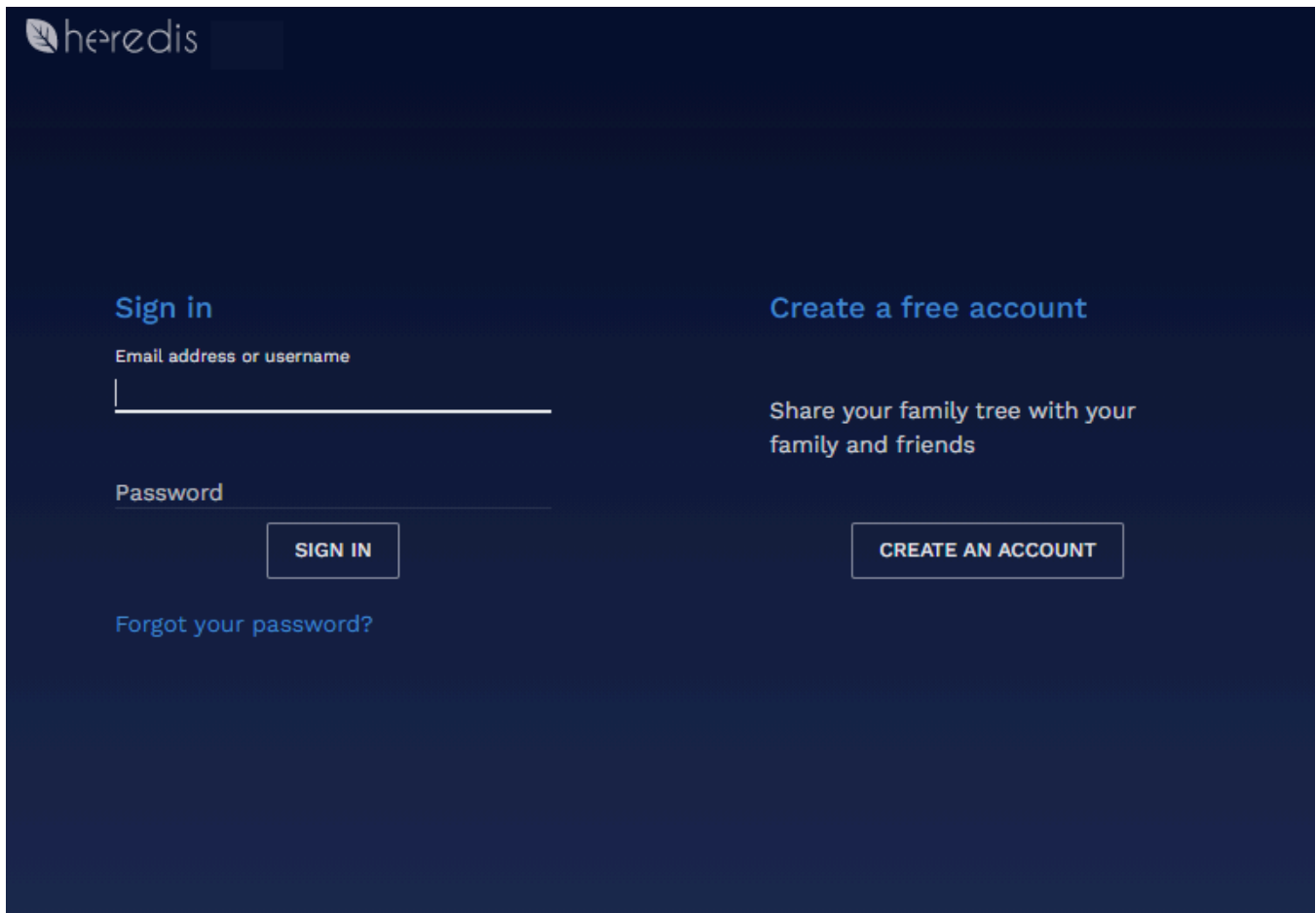
Once logged into your account (this is the same one that allowed you to buy Heredis), you can manage it from your Heredis software. Once your file, open on Heredis, you'll be able to publish.



Heredis Online



Heredis Online Homepage



Create a Heredis Online account


Have you bought a Heredis product?

If you have the Heredis software on Heredis'Shop, you must have an account.

The ID corresponds to the email address you bought Heredis with. If you forgot the password, click on **Forgot your password?** You will receive an email to reset it. This reset email is valid only once. Don't try to click more than once on the reset button. Remember to check your spam box if you don't see it in the inbox.

You have a trial version limited to 50 persons?

In this case, you do not have an account, if you want to publish, you must create one before publishing your genealogy.

1. Choose the **File** menu > **Heredis Online** > **Manage my account** or click the Heredis Online  button on the toolbar.
2. Click the **Create Account** button.
3. Enter your email address, username, password. Fill in the credentials and consult the conditions of use of the Heredis Online site then check the box to validate the general conditions of use (you can read them by clicking on the link). Check the box « I want to receive Heredis newsletters » if you wish to receive our newsletters.

Close button (X) in the top right corner.

Create your free account

Personal information

Email address

Name

First names

Username

Password

Password confirmation

[See your rights for your personal data.](#)


I want to receive Heredis newsletters

I have read and accept the [Terms and Conditions of Use](#)

CANCEL OK

4. Click **OK**.

5. You must validate your email address. An email is sent to you to verify your email address. Check your emails (remember to check in spam or junk mail if necessary). Click the button inside the email to validate your address. Your account is created! You can now publish.

6. Proceed as before by clicking on Heredis Online in the Heredis software and log in. Then, once in a Heredis file, click the  **Publish** button.

[You want to view a publication but don't have Heredis products?](#)

If your family members want to view your online tree, they need to create an account. It is free and mandatory for a security issue.

1. Go to online.heredis.com/en
2. Click **Register/Log In**
3. Click **Create Account**.

heredis

Sign in

Email address or username

Password

SIGN IN

[Forgot your password?](#)

Create a free account

Share your family tree with your family and friends

CREATE AN ACCOUNT

4. Enter your email address, username, password. Fill in the credentials and consult the conditions of use of the Heredis Online site then check the box to validate the general conditions of use (you can read them by clicking on the link). Check the box « I want to receive Heredis newsletters » if you wish to receive our newsletters.

Create your free account

Personal information

Email address

Name

First names

Username

Password

Password confirmation

[See your rights for your personal data.](#)

I want to receive Heredis newsletters

I have read and accept the [Terms and Conditions of Use](#)

CANCEL OK

5. Click **OK**. You must validate your email address. An email is sent to you to verify your email address. Check your emails (remember to check in spam or junk mail if necessary). Click the button to validate your address. Your account is created!

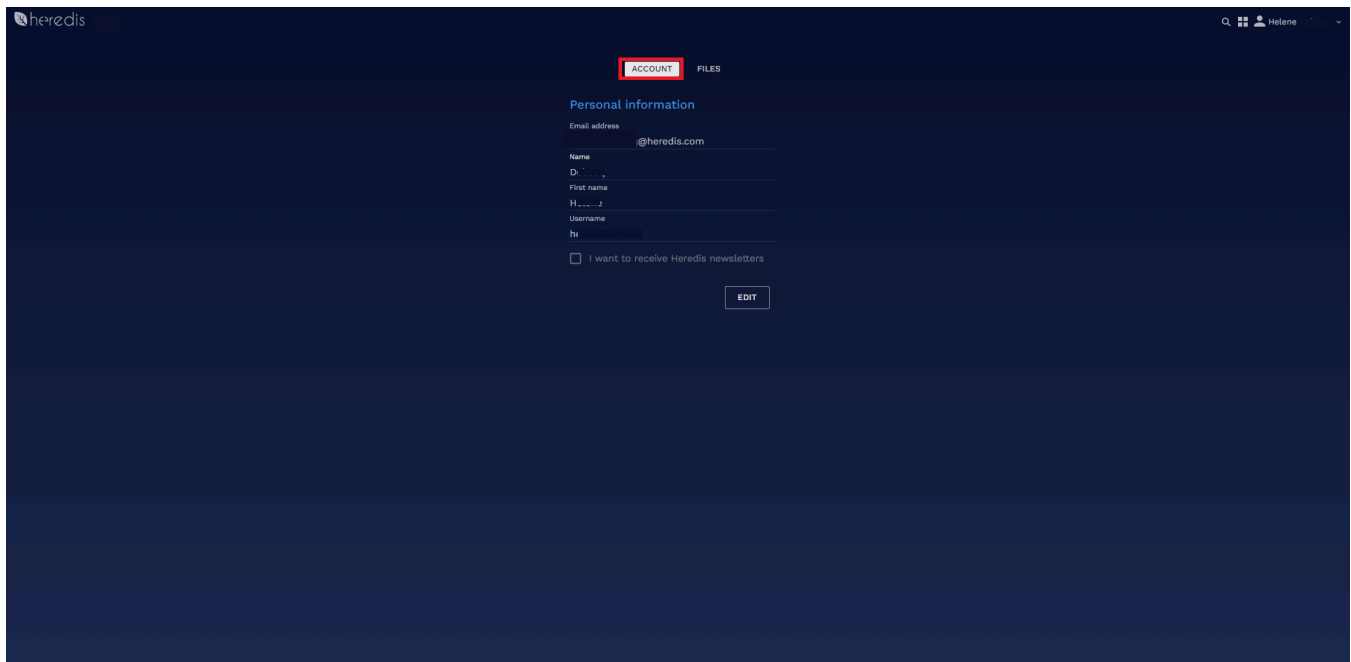
6. Go back to the online tree you want to view and log in.

Manage account information

From the Heredis software:

- Click the Heredis Online  button.
- Identify yourself by filling in your email address and password.
- Click the **Account** tab to access the account information.

Manage your Heredis Online account



The account management window allows you to change your login information, email address, name, first name, username. It also allows you to subscribe or unsubscribe from Heredis newsletters.

- Click the **Edit** buttons to be able to edit your personal data.

Change theme or language in Heredis Online



Change theme

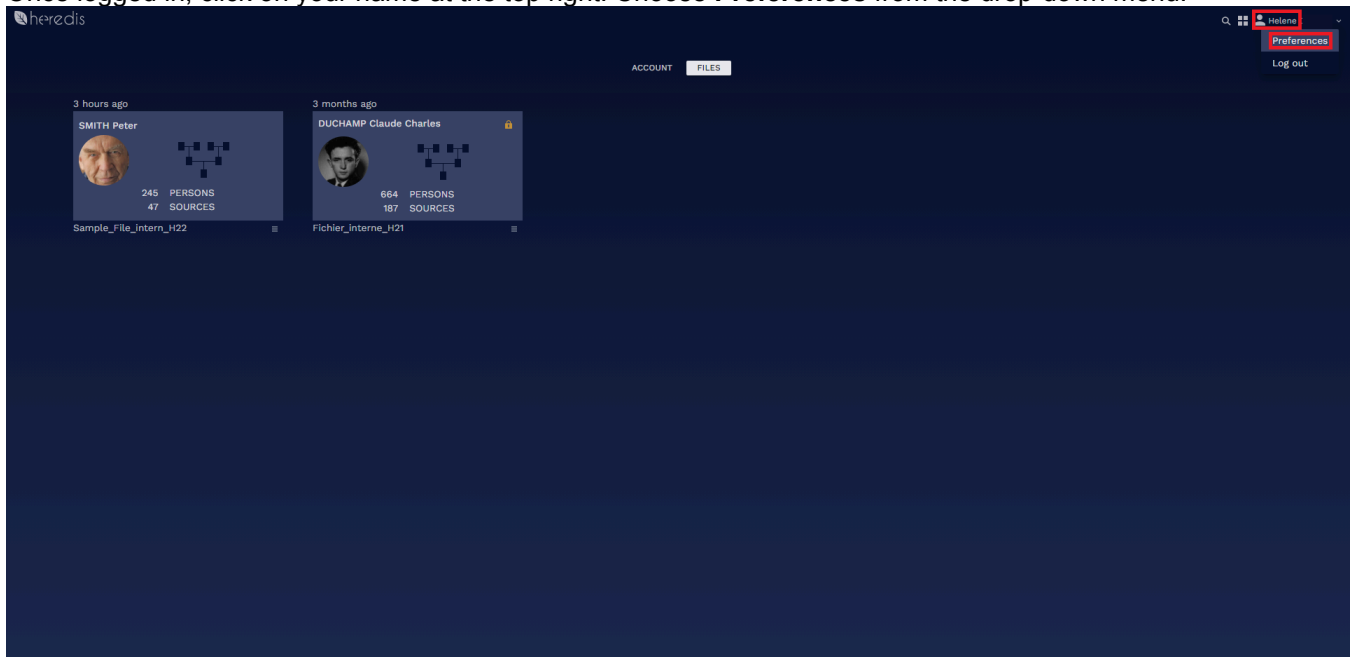
White and bright colors are aggressive to the eye, your eyes force and get tired faster. That's why with the new Heredis Online we have provided a night mode by default.

However, this mode may not be suitable for you either. So you have the option to change and switch to day mode.

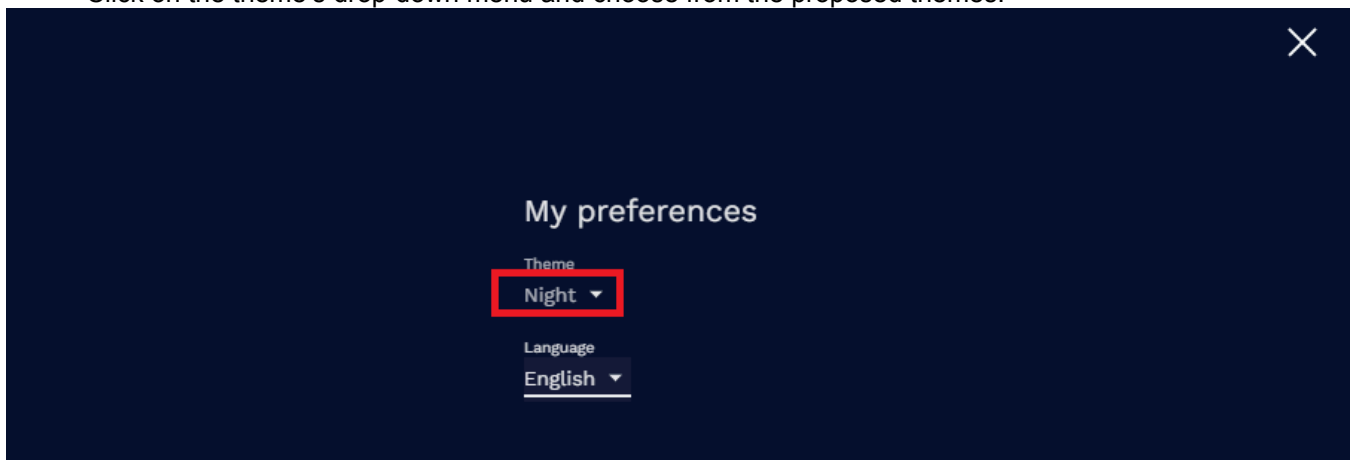
From the online.heredis.com/en site or from the Heredis software, after clicking on the **Heredis Online**



button or  or  and **Manage my account** from the toolbar, log in to your Heredis account. Once logged in, click on your name at the top right. Choose **Preferences** from the drop-down menu.



Click on the theme's drop-down menu and choose from the proposed themes.



Close the window by clicking on the cross.

Day Mode

Change theme or language in Heredis Online

Change language

Prefer to see your site in French or German? This setting can be done by a member of your family directly in their browser. You don't need to change your online tree for this. Heredis Online recognizes the language of the account. If you have an English account, Heredis Online trees will appear in English. If a member of your family has a German or French account, then Heredis Online will be displayed in German or French, even if the online tree was made in English.

From the online.heredis.com/en site or from the Heredis software, after clicking on the **Heredis Online**



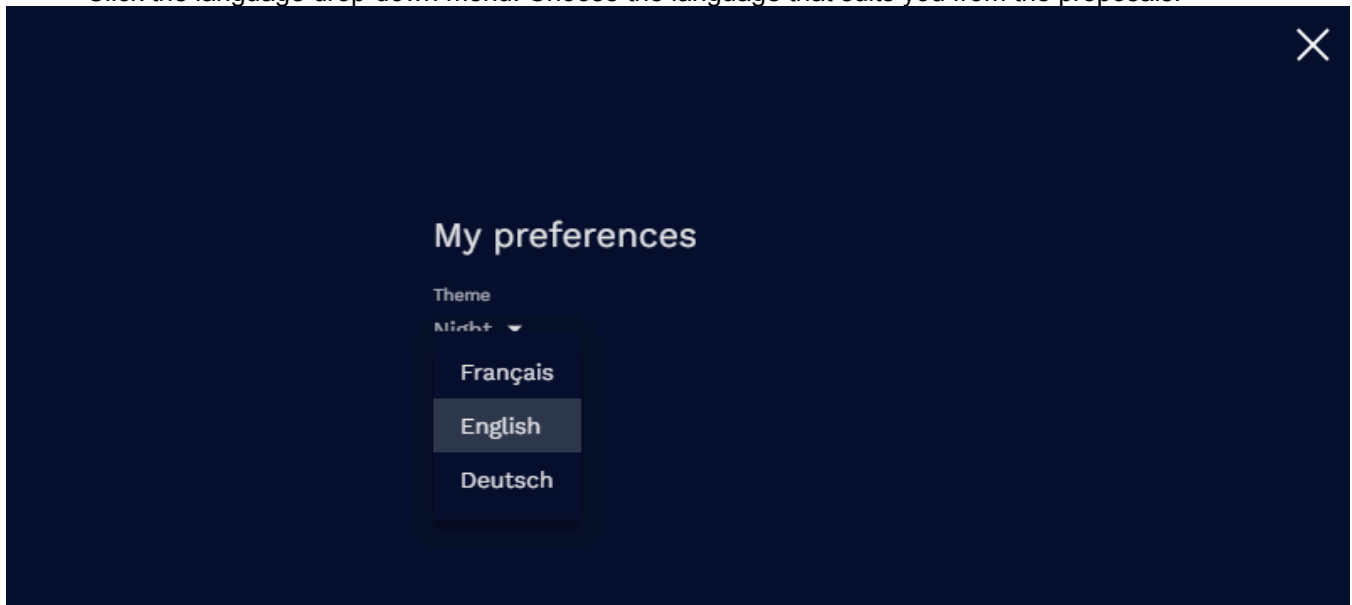
or

or

and **Manage my account** button from the toolbar, log in to your Heredis account.

Once logged in, click on your name at the top right. Choose **Preferences** from the drop-down menu.

Click the language drop-down menu. Choose the language that suits you from the proposals.



The Heredis software only exists in French, English and German, which is why the other languages are not available.


Close the window by clicking on the cross.


Publish with Heredis Online

Publishing on Heredis Online allows you to create a website highlighting your searches. You can share it with all genealogists or only with your family members by adding a password.

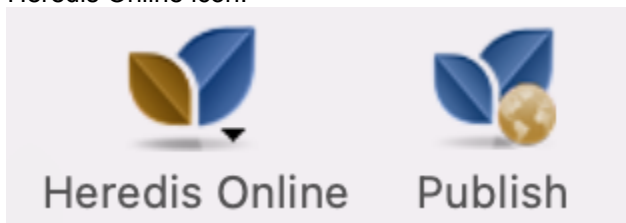
Publish on Heredis Online


Open your Heredis software and choose the genealogy you want to publish.
Click the **Heredis Online** button in the toolbar of Heredis (optimized for Heredis 2021 and above).

If you are not logged in, the icon is gray and blue .

If you are logged in, the icon is blue and gold .

Log in to your Heredis account (this is the same one that allowed you to purchase the software) by clicking on the Heredis Online icon.




Click  **Publish** to publish your file to Heredis Online.
Set up the **Privacy** options.

✕

Publication settings for "Sample_File_intern_H22"

Contemporaries

Consider persons born less than 120  years ago as contemporaries, and:

Show all their data

Only show their surname and given names

Don't show them

Other data

Show private or confidential elements (persons, events, notes, ...)

Show all notes

Show all sources

Show photos High quality (Heredis 2018 at least) ▼

Protect this publication with a password Test

I would like this genealogy to appear in Heredis Online searches

Reminder: The legislation prohibits the publication of personal data less than 120 years in most countries, sometimes less.

Set up contemporaries

In the **Contemporaries** section, indicate to **Consider persons born less than 120 years ago** as contemporaries.

You can choose to show all or part of the data or don't show them.

If your publication is not privatized, we advise you not to show them.

Important! This setting is valid on persons with a birthdate. If your close cousins do not have birthdates, their data may be displayed.


Contemporaries

Consider persons born less than 120 years ago as contemporaries, and:

Show all their data

Only show their surname and given names

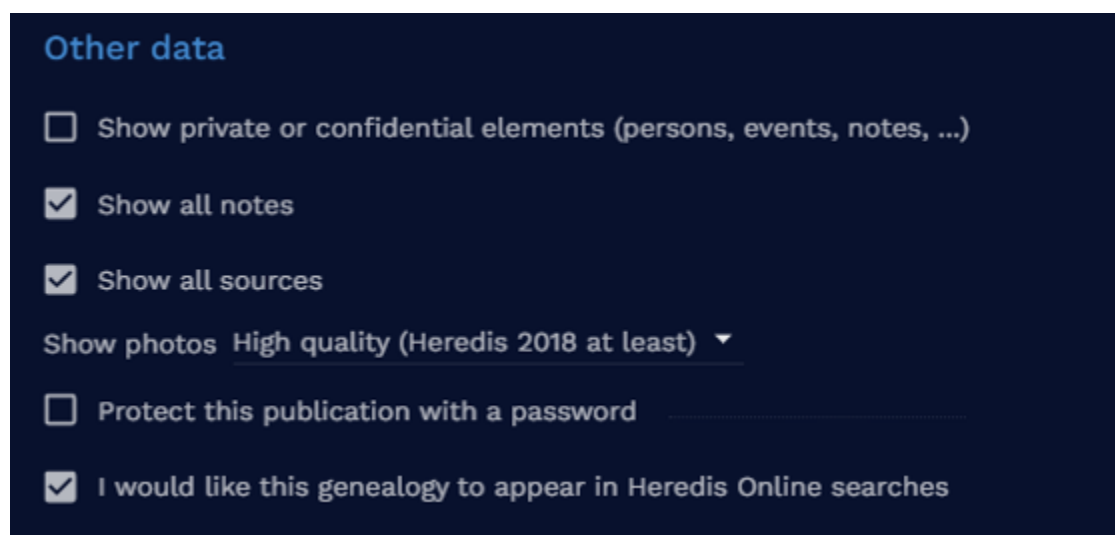
Don't show them

In this case, use the  « Confidential » tag in the Heredis **Personal Data** to make the persons concerned confidential. If you have a lot to label as confidential, use Smart Search. Check out Smart Search (voir page 208) article for more details.

Set up other data

In the **Other data** section, choose

- **Show private or confidential elements:** everywhere in Heredis, you have ticked « Private » boxes, for an event, a media, a source, a note...
If you check the box « Show private or confidential elements », this data will be public and in full view. If you uncheck it, all data that has the « Private » box checked, or all persons that have the Confidential tag checked, will be hidden. No one will see this data except you.
- **Show all notes:** if the box is checked, all your notes (except the private ones if you unchecked the previous category) will be published and visible to all.
- **Show all sources:** If the box is checked, all your sources (except the private ones if you have unchecked the private or confidential items category) will be published and visible to all. The sources allow you to validate your work, they allow other genealogists to find the original document.
- **Show photos:** choose between **Do not show**, **Thumbnail size**, or **High quality (from Heredis 2018)**. If your photos have the Private box checked in Heredis and you have unchecked the Private or Confidential elements category, the photos will not appear.



Protect your online tree with a password. So you can display all the information on your online tree. Only people with the password will be able to access your online tree. It's up to you to regulate who accesses or not your online tree.

Select the checkbox and enter the password in the empty field that appears.

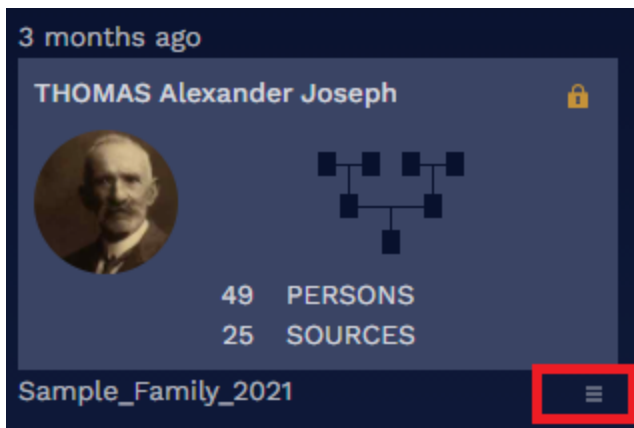
The option « I would like this genealogy to appear in Heredis Online searches » allows you to really privatize your site. Only people with your online tree URL address and password will be able to access it. If the box is checked, other genealogists will be able to know that you have information about a person they are looking for, but if there is a password to your online tree, they will not be able to access it without having the password.

Publication of your Online Tree

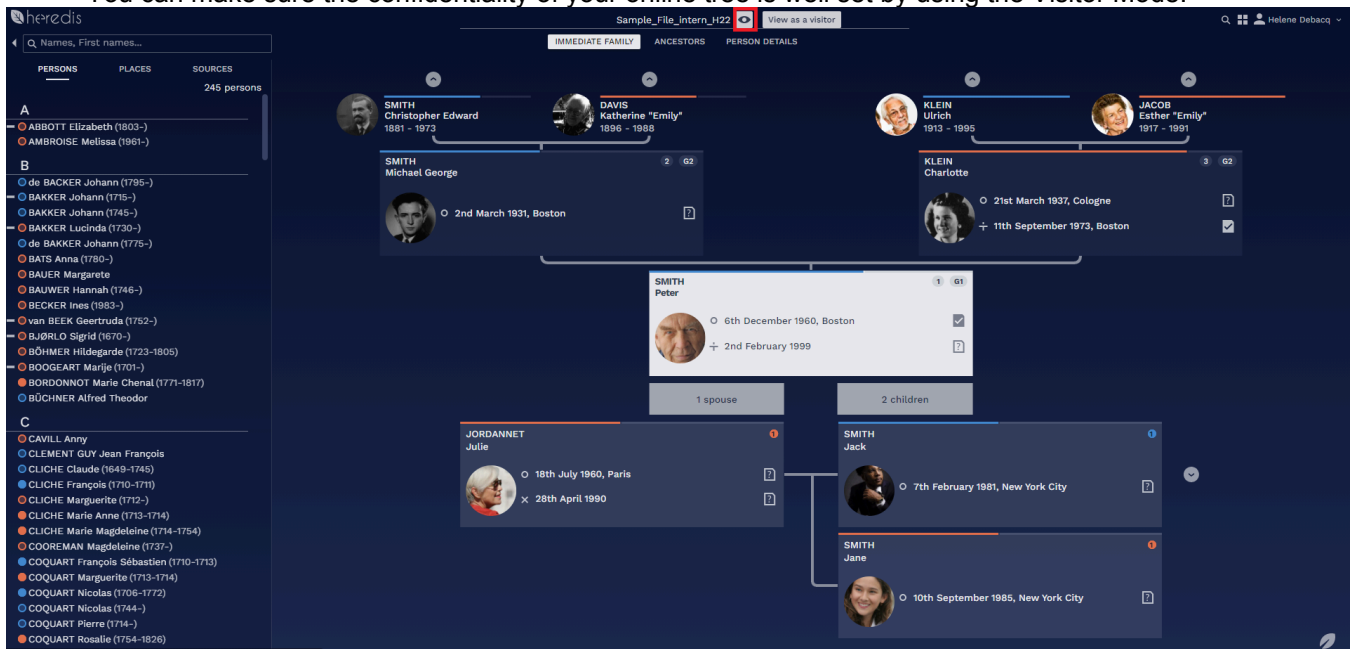
Once everything is set up, click **OK**.

The progress wheel indicates the pace of publication of your online tree. When the transfer is complete, click the file to open it. Your genealogy website is online!

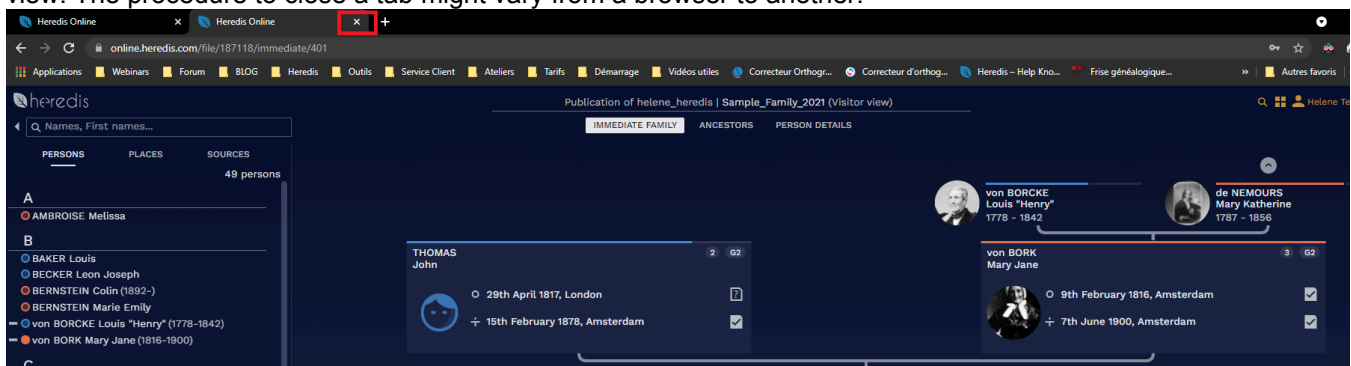
Heredis Online creates for you a free hosted website to present your genealogy. In a few clicks you will get a pleasant site to consult by the whole family. **You remain the owner of your data.** You can therefore manage your Heredis Online account directly in your software or in your Internet browser. Change the view of your online genealogy by clicking the burger button below the file, delete it, or set privacy differently.



You can make sure the confidentiality of your online tree is well set by using the Visitor Mode.

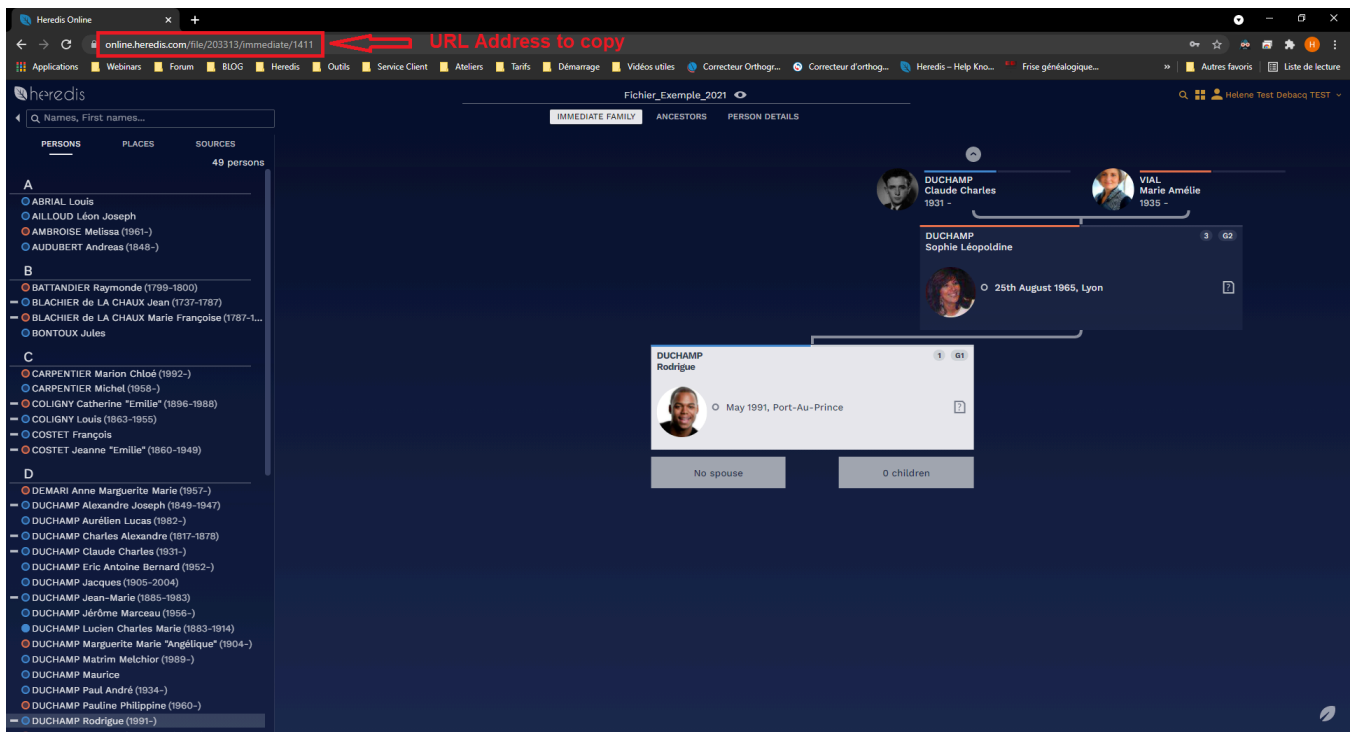


Visitor mode opens a new tab on your browser. Close this tab to get back to your online family tree owner view. The procedure to close a tab might vary from a browser to another.



Share your online family tree

Share your online family tree with family members by sending them the URL address of your personal website. For that, select the URL address and make a right click on your mouse and choose copy to copy the address.



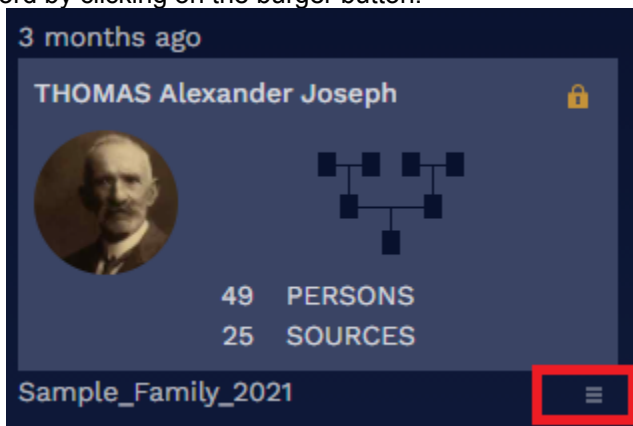
Open your mail box. Create a new message and make a right click with the mouse to paste the URL address.

Don't forget to give your family members the password if you privatized your online family tree.

Members of your family will have to create a free Heredis account in order to consult your online family tree. If they have one, they'll have to connect to their account. See [Manage your Heredis Online](#) (voir page 508) account for all details.

Delete or modify the confidentiality of your family online tree

You can delete anytime your online family tree or modify the setting of your online family tree from dashboard by clicking on the burger button.



To learn more, see the articles [Heredis Online](#) (voir page 507), [Manage your Heredis Online account](#) (voir page 508), [Search on Heredis Online](#) (voir page 536), [Change theme or language in Heredis Online](#) (voir page 514), [Browse a Heredis Online tree](#) (voir page 528).

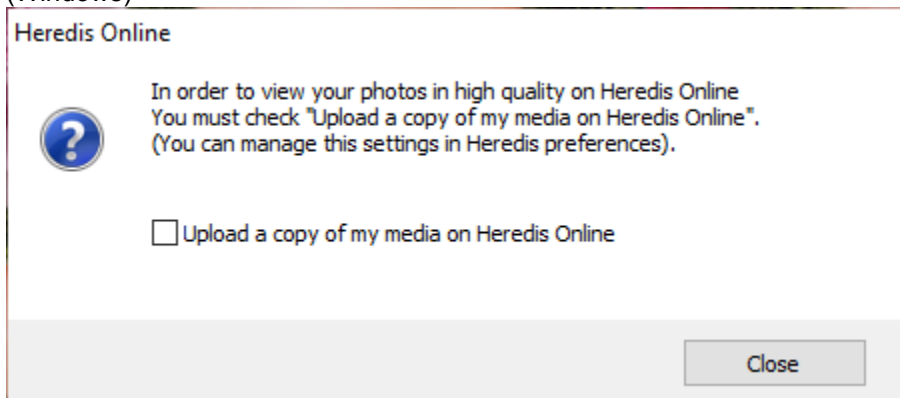
High quality photos on Heredis Online

When you first log in to your Heredis Online account, from Heredis 2018 or higher, a message informs you that your photos are displayed in high quality in your online trees on Heredis Online. Check the box before validating if you want to view your photos on Heredis Online.

(Mac)



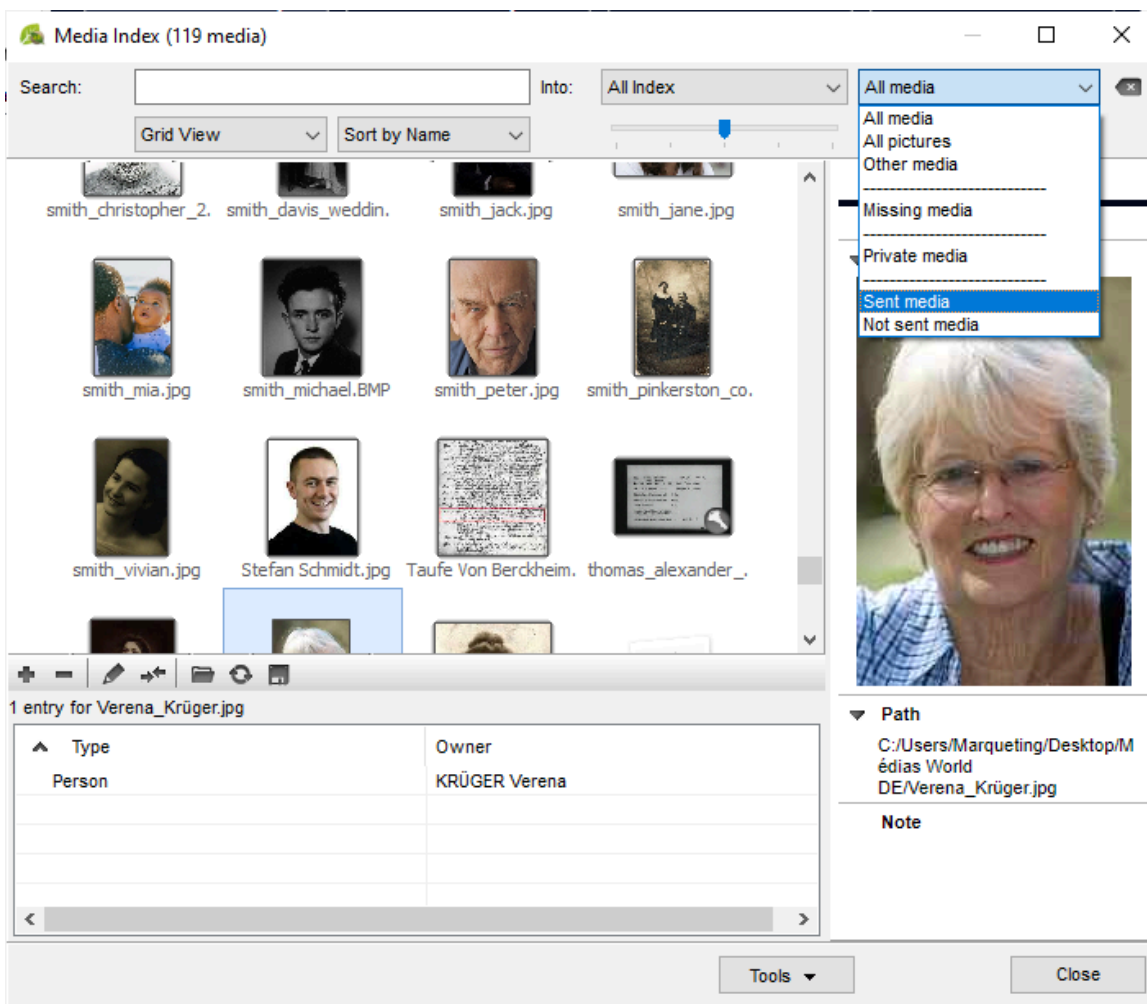
(Windows)



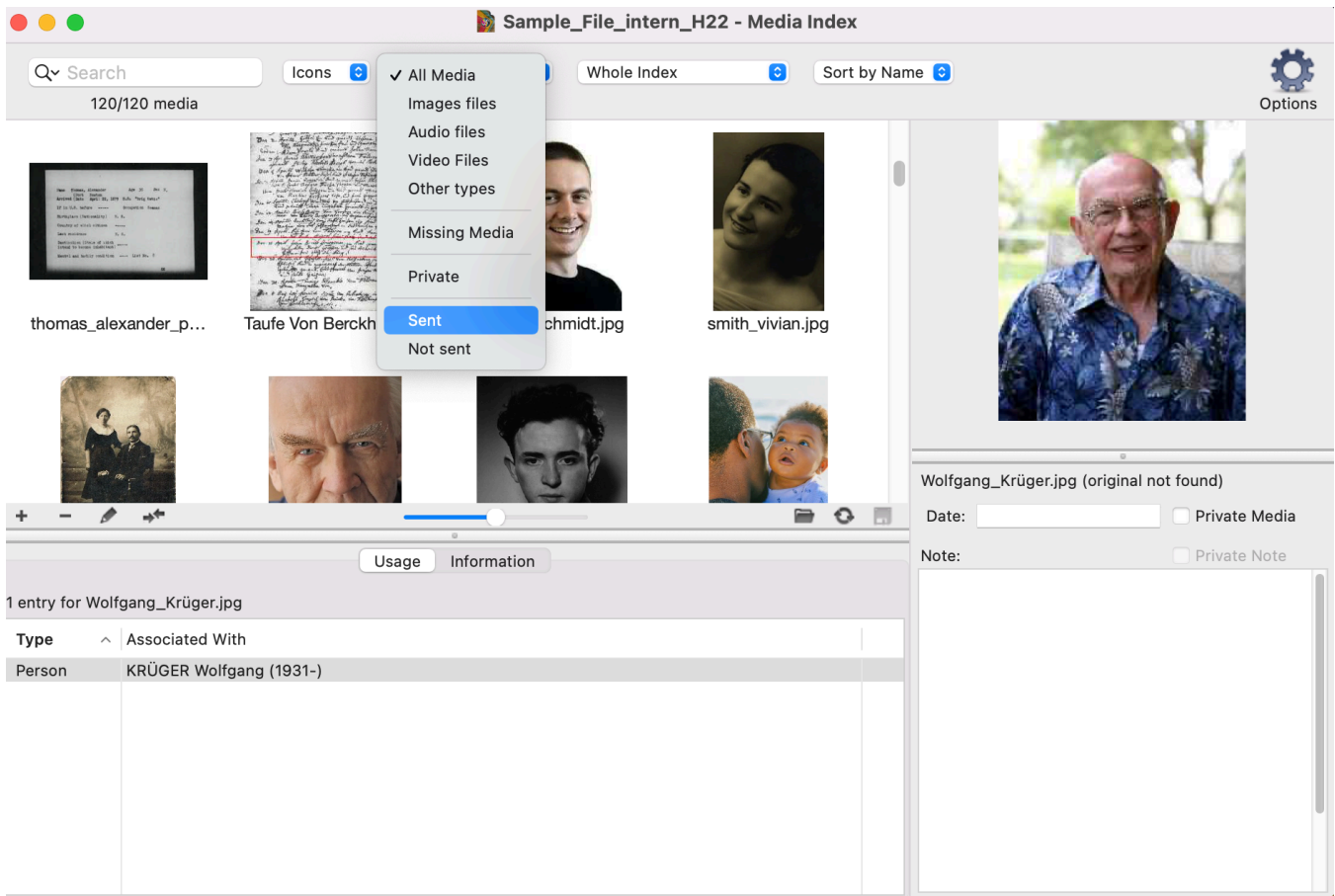
In the Media Index, the **Sent**, **Not sent**, and media status filters displayed on the **Information** tab on Mac and in the **summary** on Windows, allow you to list media that is online or not.

(Windows) Media Index / Filter Sent or Not sent media

High quality photos on Heredis Online



(Mac) Media Index / Filter Sent or Not sent media



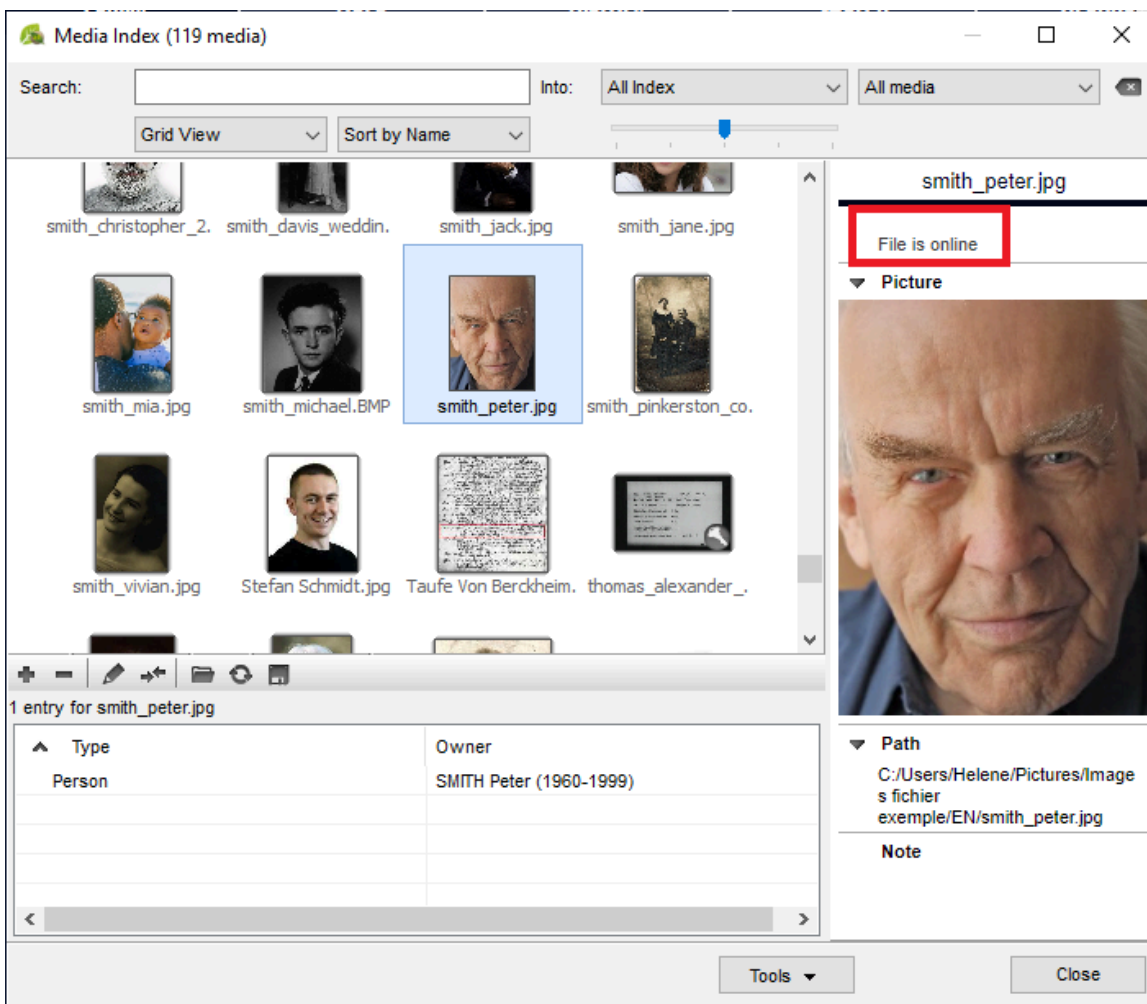
Each media of an online tree on Heredis Online has a status that allows you to clearly identify its status: File is online / File is too large / File error / File waiting to be sent / Unauthorized file format / Missing file / File being sent / Unverified file.

(Windows) This status is visible in the media summary that appears in the media index.

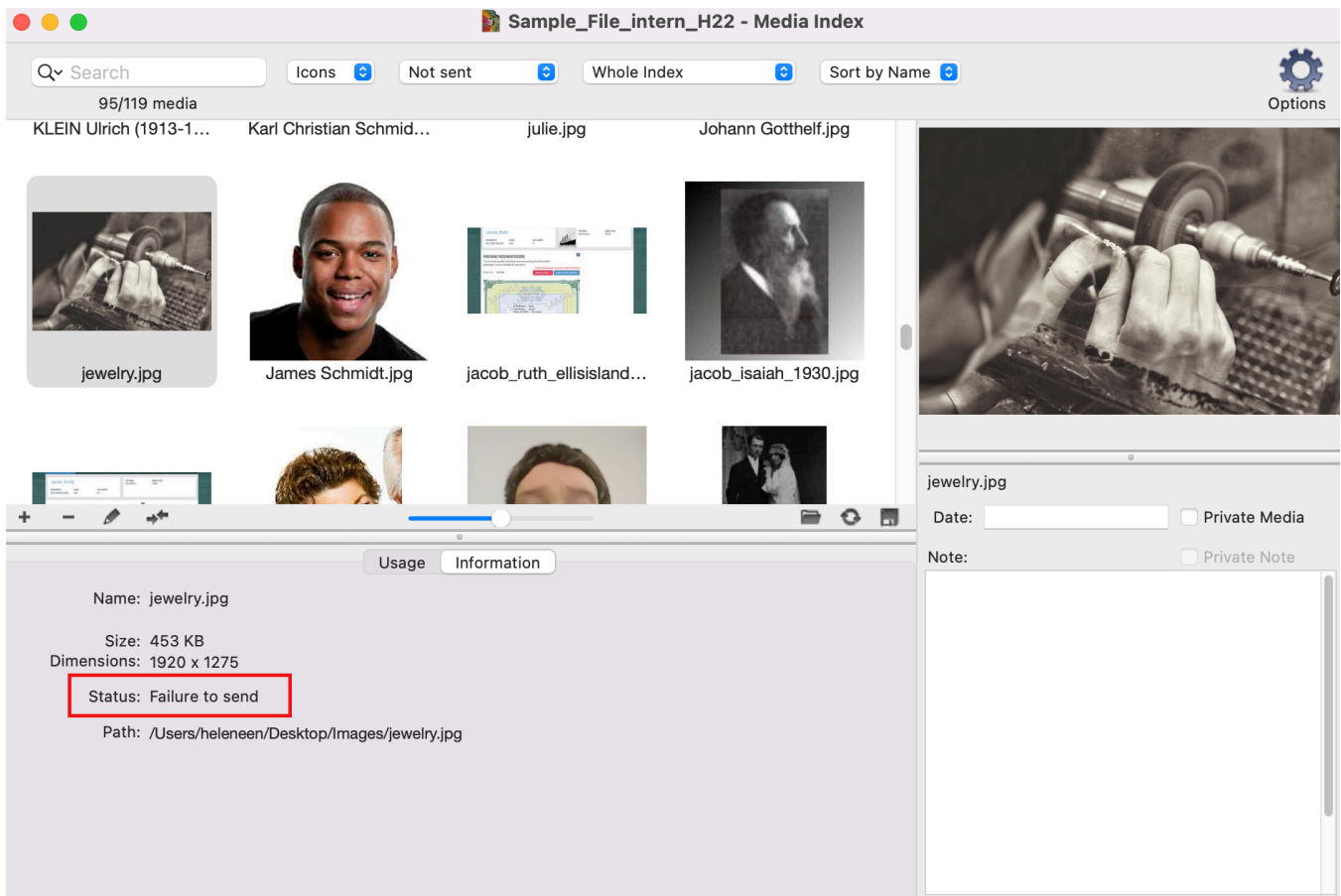
(Mac) The media status is available in the Media Information tab in the Media Index.

Media Status on Heredis Windows

High quality photos on Heredis Online



Media Status on Heredis Mac

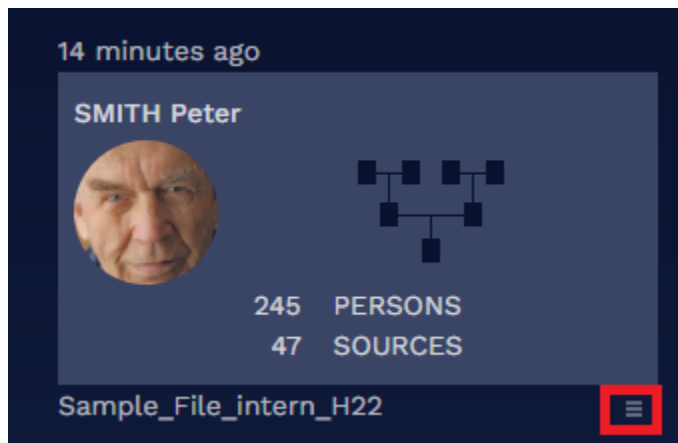


Notes:

- From the software preferences, **(Windows) Tools menu > Preferences > Heredis Preferences > Advanced;** **(Mac) Heredis 20xx > Preferences > Advanced** you can choose whether or not to send your media. You can also modulate the sending of these media in relation to your internet connection. By default, the sending is based on an ADSL connection used at 50%. These settings can be modified and customized at any time, however they will only take effect after restarting your software.

- From your Heredis Online account:

You can choose how to display your media in an online tree, click the burger button at the bottom right below the online tree file (see screenshot below) and then click **Configure**, section **View photos**, select the option that suits you.





• From the media index, check if your media has been sent. Filter on **Not sent** media, select a media, and view the sending status in the **summary (Windows)** or the **Information tab (Mac)** of each media. If you find that the sending process is blocked and some media retains as a status « File in error » or « File not verified », you can force their return by clicking, from the media index, on (Windows) **Tools; (Mac) the indented wheel** and then selecting the option **Reset sending of online media**. You must leave and then restart Heredis for the sending of media to resume.

The following are excluded from the shipment:

- files with the following extensions: « exe », « app », « bin », « zip », « rar », « sit », « cab », « ace », « arj », « lha », « lzh », « lzx », « zoo », « arc », « ice », « ics », « 7z », « tar », « gz », « gzip », « tgz », « z », « bz », « bz2 », « hqx », « sit », « sea », « uue », « apk », « dmg », « bat », « sh », « asp », « php », « js », « jse », « iso », « iss », « msi », « jar », « war », « bak », « sav », « old », « log », « pif », « py », « pyw », « rb », « ged », « heredis », « mdb », « sqlite »
- files larger than 4294967295 bytes (~4.2 GB)

Browse a Heredis Online tree

You have published your personal website with Heredis Online or you want to view a family member's website or an online tree found as a result of a search on Heredis Online.

Here we will see how to navigate an online tree.

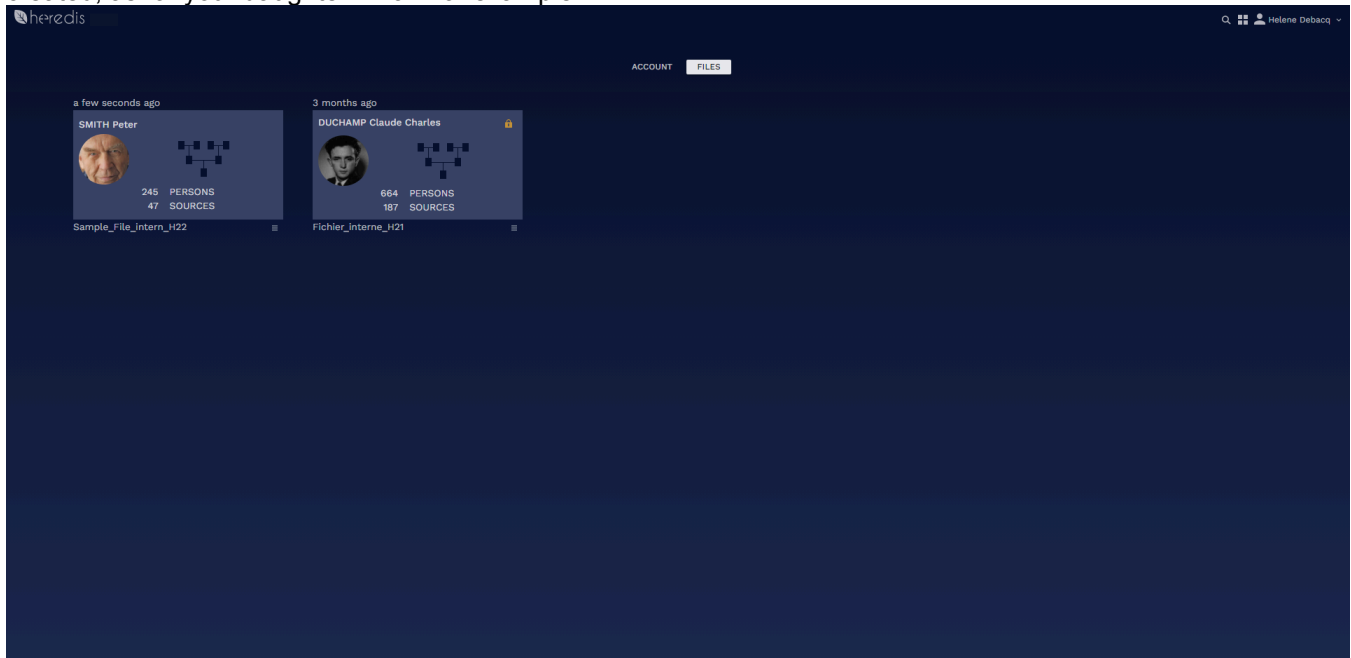
Please note that, to visit a personal Heredis Online tree, you must be logged into your Heredis account.

Access your online tree


You clicked  **Publish** button, so you published your work. To open your personal website and view your online trees, click the **Heredis Online**  or  or  > **Manage My Account** button. If you are not logged in, log in.

By default, you arrive directly on the **Files** tab which corresponds to the different online trees you have been able to make.

Indeed, you can publish your genealogy with yourself as a root person, but also other genealogies that you have created, as for your daughter-in-law for example.



We remind you that it is necessary to setup privacy in order not to publish personal data less than 120 years old. See Publishing with Heredis Online (voir page 517) for more details.

Click on the rectangle corresponding to the online tree you wish to consult. Since you are the owner, you see everything, even if there are privacy restrictions. You have a « Visitor » mode, click on the  eye, to see your online tree as an average visitor.


Browse a Heredis Online tree

The screenshot shows the Heredis Online tree interface. On the left, there is a search bar and a list of persons categorized by letter (A, B, C). The main area displays a family tree with several individuals and their details. The tree is set to a night blue theme. The top navigation bar includes 'IMMEDIATE FAMILY', 'ANCESTORS', and 'PERSON DETAILS'. The tree shows a central figure, SMITH Peter, with a spouse (JORDANNET Julie) and two children (SMITH Jack and SMITH Jane). Other individuals shown include SMITH Christopher Edward, DAVIS Katherine "Emily", KLEIN Ulrich, JACOB Esther "Emily", SMITH Michael George, KLEIN Charlotte, SMITH Peter, JORDANNET Julie, SMITH Jack, and SMITH Jane. Each individual has a profile card with a photo, name, and birth/death dates.

A new tab opens and you can browse the online tree with restrictions. We will see how to navigate in the paragraph below **Navigating in a Heredis online tree**.

View someone else's online tree

- Have you received a link from a cousin to visit his Heredis online tree?
Click the link to go to the online tree and, if you are not already logged in, log in to your account.
- Have you searched Heredis Online and would like to consult the online tree of one of the results?

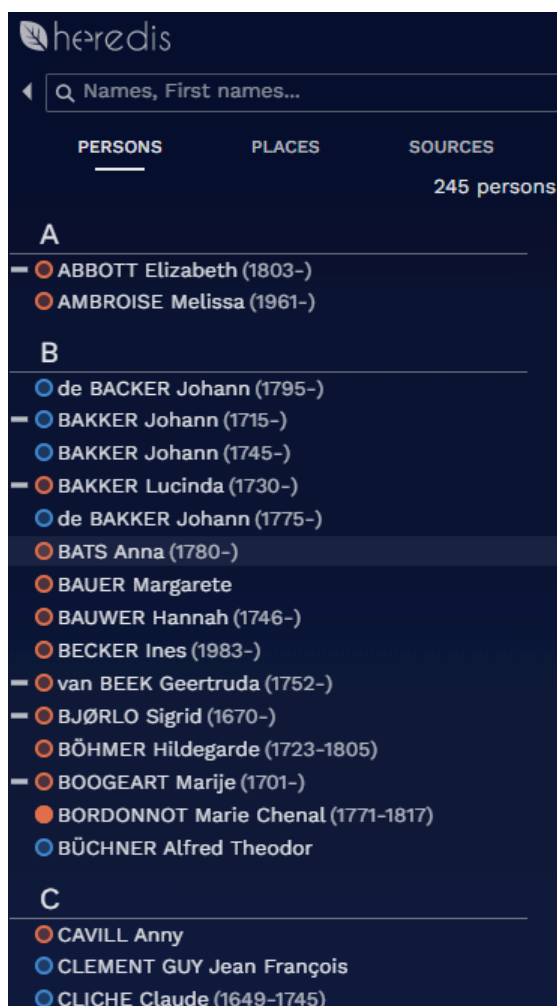
Click the family tree button  to access the online tree. Log in to your account if you are not logged in. If the author has put a password, a padlock is visible, you will not be able to access the online tree without having the password. See also Search on Heredis Online. (voir page 536)

Navigating in a Heredis online tree

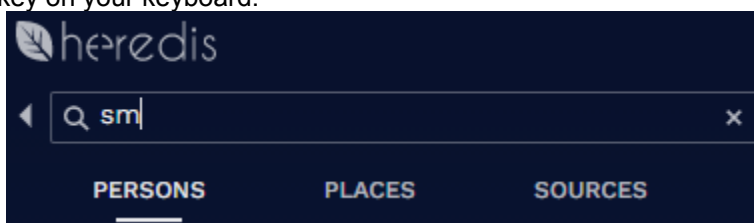
The night blue theme does not suit you. See Change theme or language on Heredis Online. (voir page 514)

The panel on the left

The panel on the left gives you access to the list of persons, places and sources of the online tree.

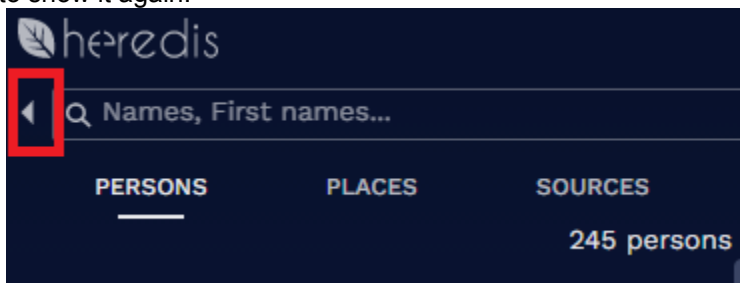


The search box is used to search these lists.
 Select the list you are interested in by clicking on its title, then type all or part of a name or word and press the Enter key on your keyboard.
















To clear a search, click the cross at the  end of the search field. If there is nothing indicated in the search box, the cross does not appear.

To save space, you can fold the panel by clicking on the arrow to the left of the search box. Click this arrow again to show it again.

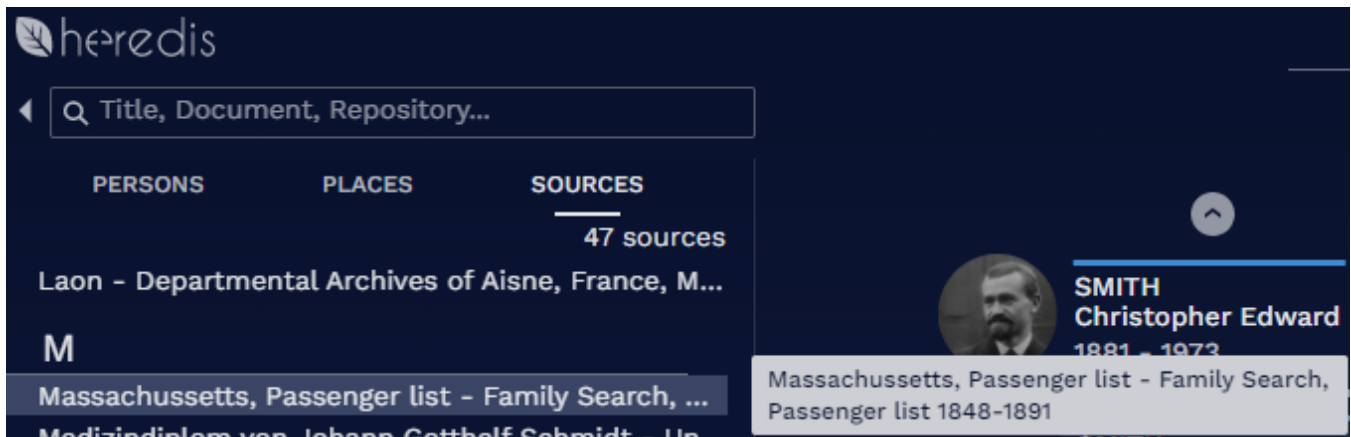


The list of persons provides you with several pieces of information at first glance.

Browse a Heredis Online tree

- The sex of the person: represented by a blue circle  or  for men, orange  or  for women, grey  or  if the sex is not determined.
- The filling of this colored circle indicates whether the person has all the major events (Birth or Baptism, Union, Death or Burial) completed or not.
 - A full circle  or  or  indicates that these 3 types of events are complete, i.e. there is a complete date (not calculated and whole), a place is mentioned and a source is attached.
 - An unfilled round  or  or  indicates that one of the above criteria is missing, date, location or source.
- Belonging to the direct line of the root person (Ahn. lineage): if the person is part of the direct lineage of the root person, a line  appears in front of the colored circle.





Whatever the list, if the name is too long to appear in full, hover over the relevant line to bring up a tooltip with all the text.

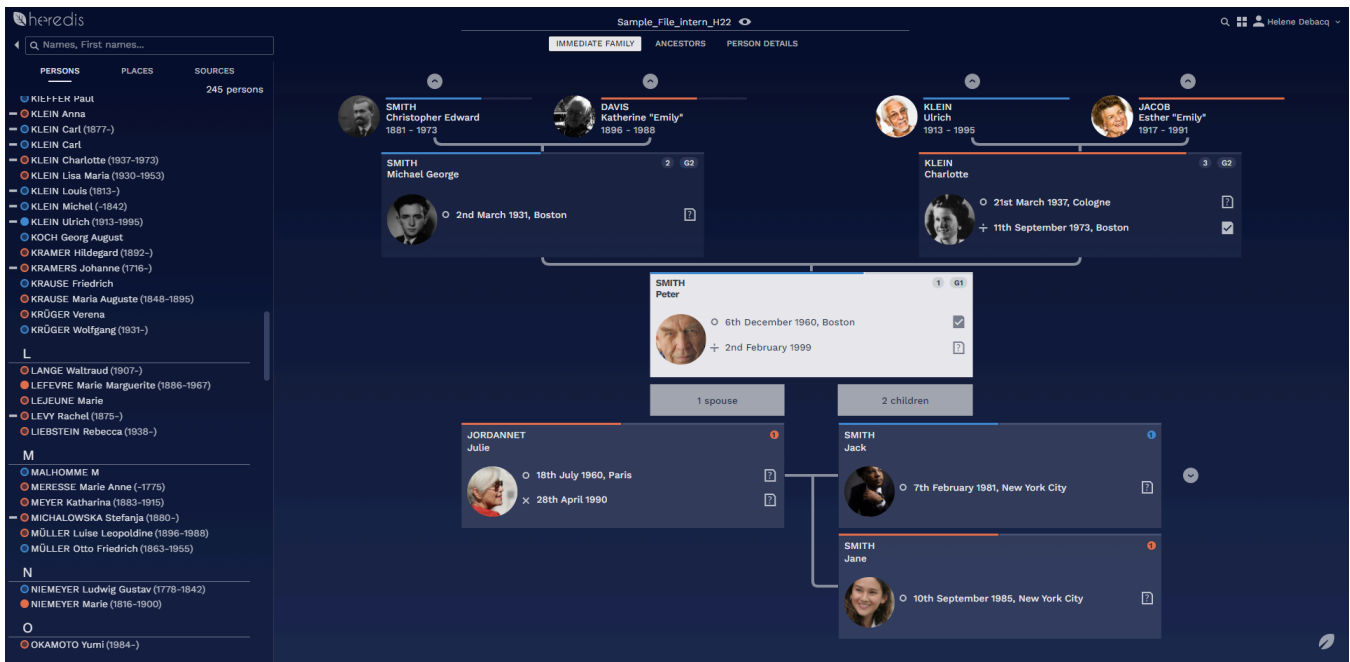


The central screen

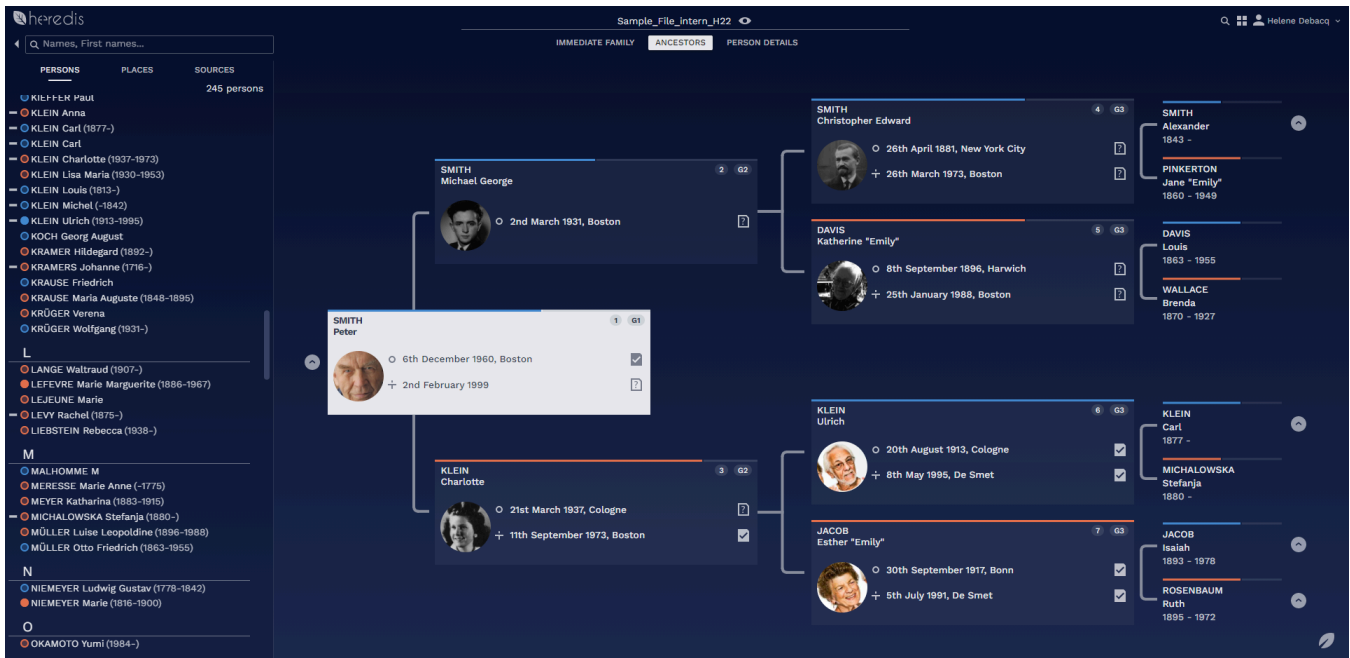
In the center of the screen, you can access different views.

Heredis Online uses the same navigation codes as the Heredis software. As a reminder, the primary person is the person whose box is in the center of the screen. Its box is white for the night theme and blue for the day theme.

- The **Immediate family** shows you the relatives of the primary person: parents, grandparents, spouses and children. You will find the blue, orange and gray color codes according to the sex. The colored bar indicates the level of completeness of major events. Each box contains:
 - the main profile picture (if you don't see it fully, hover over it to see it in full),
 - name
 - first names
 - Ahnentafel number and generation (if the person is part of the direct lineage),
 - date and place of birth or baptism,
 - date and place of death or burial.
 - an icon indicating whether  or not  a source is present.
 - The spouses boxes also contain the date and place of union and a bed number placed in front of the Ahnentafel number, if the person is part of the direct lineage. This bed number is carried over to the children of this union.
 - Finally, if an arrow is present to the right of the children's list  or above the  grandparents, it means that you have additional generations. A click on this arrow changes the primary person and goes up or down a generation.




- **Ancestors** displays ascending generations up to great-grandparents. This view presents the same information as mentioned above in the boxes of the **Immediate Family** view. The generation of great-grandparents contains less information due to lack of space. As before, a click on the arrow to the right of the great-grandparents or to the left of the primary person (box located on the left at the base of the tree) allows you to go up or down a generation.



Whether in the **Immediate family** view or in the **Ancestors** view, to change the primary person, double-click on the box of a person.


You can also drag and drop a box. For example, select the paternal grandfather's box and drag it in place of the primary person. The grandfather is displayed as a primary person.

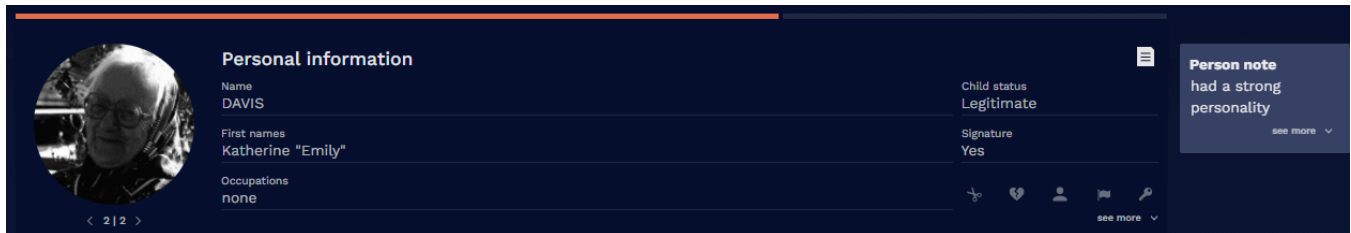
To return to the root person (the one at the base of the genealogy), click on the leaf  always present at the bottom right of the screen.





- The **Person details** view gives you access to detailed information about the primary person. It can be very long, remember to use the wheel of your mouse or the elevator on the right to scroll on the page. It

Browse a Heredis Online tree

contains, in particular:

- the colored bar for the completeness of major events,
- personal information with name, first names, occupations,... Click on **See more** for more details.
- profile pictures, you can click on the arrow below the image if there are several. As in **Immediate Family** and **Ancestors** view, the main profile picture is the same as the main photo displayed in the Heredis software. If it doesn't appear fully, hover over it to see it in full.
- person or union notes. Click the note icon  to read it and click **See More** to read it in full. A window opens with the entire note. Click the cross to close.







- facts with an icon system indicating the presence of a source  or not , note  and/or source media . Click the rectangle containing the source icons to display the name of the source. To view the details of this source, click on the name of the source.



- Relationships: parents, spouses, children and by clicking **See More**, siblings, aunts and uncles and other sundry links. A simple click on a person displays him/her as the primary person.



- Major events displayed as a timeline. An age is displayed if the person has a known birth or baptism. For each event, you will find icons indicating the presence of note , media  or witness  and icons already presented for sources (source, note, media) . Check the **All** box if you want also to display the minor events of the person (residence, will ...).

Finally, be aware that by clicking on a source or on one of the note, media or witness icons of the event, you display a window with the details of the source or event.

Similarly, if you click from the list of a source or location, a window opens to show you detailed information about that source or location. Click the window cross to close it.

Source window

Location window

Browse a Heredis Online tree

The screenshot displays a dark-themed interface for a genealogical tree. At the top center, a window titled "Place information" is open, showing a map of Boston, MA, and a list of location details. To the right of the map, a "Variants" section indicates "No variant". Below the map, a vertical timeline of "Events" is shown, with dates and descriptions of life events for individuals in the tree. The events are color-coded by individual: blue for DAVIS, orange for PINKERTON, and red for THOMAS.

Place information

City: Boston
County: Suffolk County
State/Province: MA
Country: UNITED STATES

Variants
No variant

Events

- 1863 Birth 12/20/1863 DAVIS Louis
- 1863 Birth 12/20/1863 DAVIS Louis
- 1879 Immigration 04/22/1879 SMITH Alexander
- 1880 Marriage 04/04/1880 SMITH Alexander and PINKERTON Jane "Emily"
- 1911 Birth 04/15/1911 THOMAS Sylvette
- 1925 Marriage 12/10/1925 SMITH Christopher Edward and DAVIS Katherine "Emily"
- 1925 Marriage 12/10/1925 SMITH Christopher Edward and DAVIS Katherine "Emily"
- Birth 03/07/1931

Search on Heredis Online

Heredis Online allows you to search for free among genealogies published by other users.

Each genealogy published on Heredis Online appears, unless the author has unchecked the box « I would like this genealogy to appear in Heredis Online searches. »

In this case, indeed, the publication can not be found by research, it is the author who will spread his website URL address.

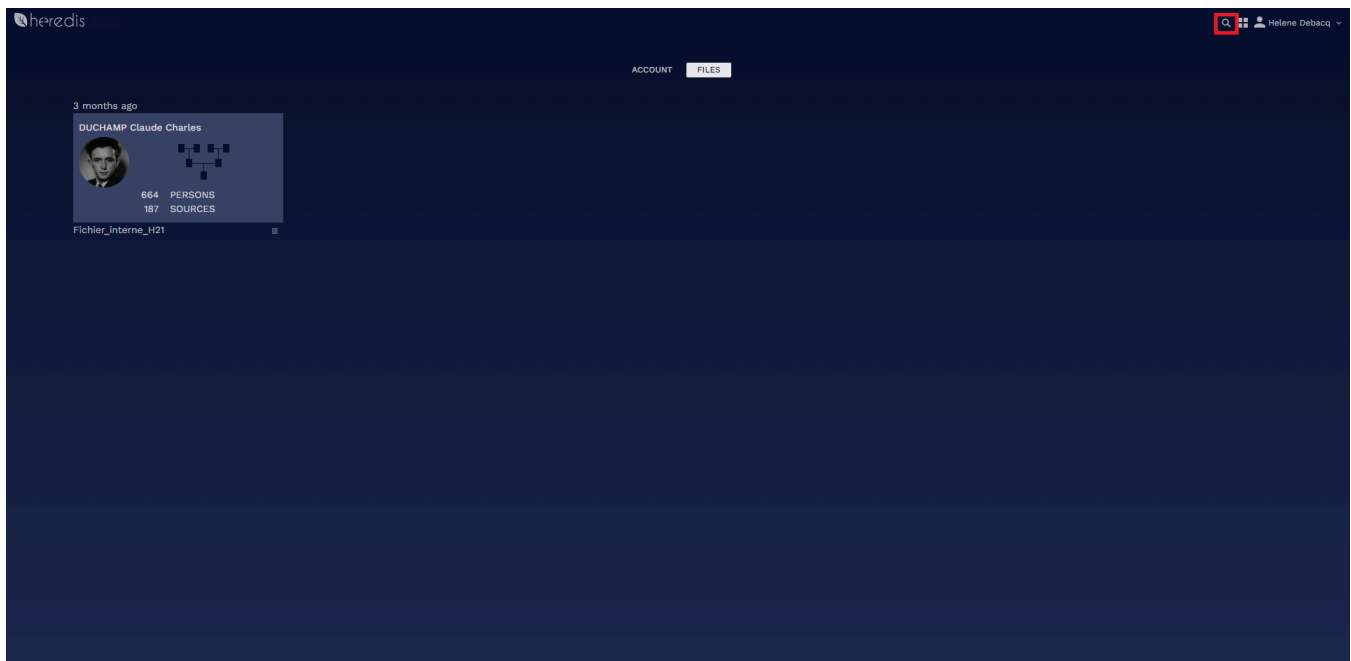
You can change the night theme if needed. See Change theme or language in Heredis Online (voir page 514).

Access Heredis Online searches

Access searches from:

- the website online.heredis.com/en in Chrome, Firefox, Safari or Edge browsers current version.
- Heredis' Search Wizard. See Search Wizard (voir page 203) article

- the **Heredis Online** toolbar button  or  or  then **Manage my account** then by clicking on the magnifying glass to the left of your name after logging in.



Start a search

Fill in the desired fields:

- **Name** of the person to search for. This field is required.
- **First names**. One or more first names are possible.
- **Name of spouse**.
- **Location**, if you want to restrict to a geographical area. It can be a city, a county, a state or a country.
- **Date**. You can restrict over a period of time. Indicate a year of start to have all persons with an event after that date. Put a date of end to have all persons having an event before that date. You can also put a year of start and a year of end to have persons with an event in that period.
- **Events**. Choose to restrict to one type of event from Birth/Baptism, Union, or Death/Burial.

Search on Heredis Online

– **Published since.** If you have already done this search and run it again, you can limit it so that you do not have all the results already consulted but only those that have been published since the day you carried out this search.



Click the magnifying glass button to start the search.

The screenshot shows the Heredis search interface with the following fields:

- Main person: Name (smith), First names
- Spouse: Spouse name
- Place / Date: Place, Year started, Year end
- Event Type: All
- Published since: (calendar icon)
- Search button (magnifying glass icon)
- RESET button (X RESET)

View search results

The results appear in the table below the search form. Each row corresponds to a person in a publication. To know the events of the person, click on the line. You will then have, if they are informed, occupation, major events and spouses.

The screenshot shows the Heredis search results page with the following table:

Name	First names	Birth-Death	Spouses	Places	Author
SMITH	Abel	1717 - 1788	BIRD / de BEAUMONT		greg_heredis
Occupation: Banquier à Nottingham Birth: about 14th March 1717 Spouse: BIRD Mary Marriage: 1713 - Spouse: de BEAUMONT Jane Death: 12th July 1788					
SMITH	Abel	1748 - 1779			greg_heredis
SMITH	Abel	1788 - 1859			greg_heredis
SMITH	Ada	1863 - 1881		London	greg_heredis
SMITH	Addaon		TEEPLES	Michigan	henrikrub
SMITH	Adelia Estella	1867 - 1951		Vermont / Vermont	henrikrub
SMITH	Alfred	1815 - 1886			greg_heredis
SMITH	Alice	1476 - 1515	CAVENDISH	?	greg_heredis
SMITH	Alice Maud Smith	1859 - 1931			greg_heredis
SMITH	Alyssa Whitall Pearsall	1867 - 1951		Philadelphie	greg_heredis



The icon allows you to know if his parents are inputted.



Click the family tree icon to visit the publication's website.

