HEREDIS® 2014

Heredis Help

Heredis for Windows

2014 Release

DISCOVER HEREDIS

1   What can Heredis do?

1.1   Entering data

Data

Who were your ancestors? Heredis will help you find them. Through guided and intuitive progression, you enter all the information that 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…

Illustrations

You have found some photos or copies of acts? Every item of data will be shown directly in your genealogy.

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

1.2   Family tree charts and other documents

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

Print tree charts

The Heredis tree charts trace ancestors or descendants in different forms and adapt to all formats.

Print reports, sheets, or fully illustrated books

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

1.3 Making your work known to others

What could be more simple than the publishing free online 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.

1.4   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 (computer, laptop, Windows or Mac, iPhone, iPad).

2   Your software up-to-date

2.1   Being kept informed of all updates

Heredis updates are automatic. You do not need to bother with this.
To be kept informed, simply be connected.

2.2   Reinstalling Heredis

You may reinstall the application after downloading it from the
www.heredis.com. site. You simply enter your license number to be
able to continue your work.

3 How to start?

3.1 Launching Heredis

Double-click the Heredis icon to launch the application.

For easy access, slide the icon to your task bar, wherever it is convenient for you.

3.2 Creating a genealogy file

New genealogy file

Click **New Family File.**

Save your new genealogy: give it a name and click **OK**. Heredis saves the new file in the *My Documents/ BSD Concept/Heredis/Heredis Files* folder.

New Tree

New Family File
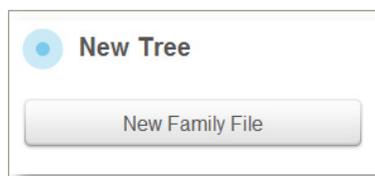
Click in the center of the square to create the first person.

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.

Import a genealogy file

You have already made or you were given a genealogy created with another software program? Importing a GEDCOM file, a standard recognized in the world of genealogy, is very simple.

Click **GEDCOM File** in the Home Page or choose **File** > **Import** > **GEDCOM File**. Check the data identified in this GEDCOM file

Open Tree

Heredis File

Chart File

GEDCOM File

Search File on Hard Drive
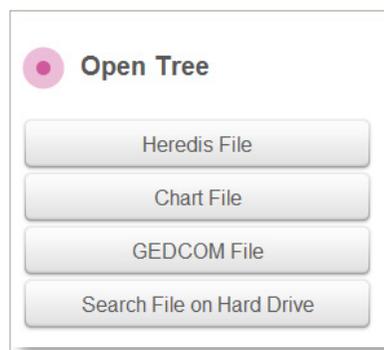
and modify if necessary, the import options by clicking **Next**. Click **Finish** to start importing data.

You can now work on your genealogy, add to it, edit it. Heredis will save your data whenever you use the **Save** button or press **Ctrl-S**.

Reopen a family tree

Select your genealogy from the list of files recently opened or double-click the *.heredis* file in Windows explorer.

3.3 Overall view

The main Heredis screen

At the top, menus and buttons provide access to all functions of the software.

Some buttons allow access to more detailed choices: **Add** (> Unrelated Person), **Find** (> Search by Number), **Indexes** (> Given Names). The toolbar may be modified at any time to meet your work needs: click the **Customize** button to add, remove or rearrange buttons on this bar.

The central part of the screen displays four tabs.

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.

The **Lineage** tab displays the ancestors or descendants of the primary person and allows you to navigate speedily through the generations.

The **Search** tab provides a helpful research tool to assist you in reviewing your work and evolving your genealogy.

On both sides of the main screen, there are panels which provide access to data lists or tools.

Right panel hidden   Left panel hidden   Both panels hidden

Open or hide the panels, select the display method (one at a time or both visible at the same time).

At the bottom of the Heredis screen, you find the management buttons for each panel as well as all key information concerning the genealogy which is open.

3.4   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** screen appears.

Drag any person shown in the **Tools** and **Search** panels, or on any data entry tab input or from one panel to another: a bookmarked individual as the primary person, an individual from the **Persons** panel to the **Bookmarks** panel or as primary person, etc.

Display the **Navigation square** in the **Tools** panels, and use it as a compass. A simple click will navigate to the father, the mother, the 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, click **Find** (> **Search by Number...**) and navigate directly to the person.

Use the **Back** and **Forward** arrows to redisplay those already consulted. 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**.

3.5   Adding and linking persons

A click on any empty box on the **Immediate Family** screen will suffice for creating the parents, spouses, children and even the grandparents of the primary person. The family simply grows.

The data entry screen for a new person displays the most normally required information. Start by entering the surname and given names. They take shape automatically.

As you enter the data, you will see a list of all persons with the same name and given names appear on the right side of the screen. Heredis does all it can for you to avoid duplicates. If you think you

have identified the person you want to add, do not continue typing, but select the person from the list and click **Choose**.

If there is no existing person displayed in the list of individuals, continue filling out the data.

The dates are displayed in full, regardless of the input format.

Most places in Western Europe and North America are made available as you type. Select the place with the **Enter** key or create a new place.

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

If you add a spouse, make the most of the opportunity to submit all the information concerning the marriage: what type of marriage, date and location and status of this union. Then click **OK**.
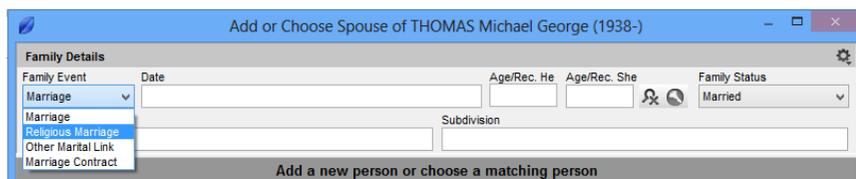
You can also work with other tabs, as and how it suits you. Add the parents on the **Ancestors** tab, or other family members on the **Family Group Data** tab and **Extended Family** tab. Complete or modify known information on the **Personal Data** tab.

3.6   Illustrating your genealogy

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

Nothing is easier than to associate media: select it your hard drive or on the **Media Index** and drag to the display area.

3.7   Deleting

Sometimes it takes a good deal of trial and error to get things right and you can always recover your mistakes. The toolbar has a **Delete** button. This feature allows you to detach a person from the family without destroying the data. Permanent removal applies only to the primary person.

If the child is not the right one, cut him out by choosing **Unlink Child**. He can then be linked to other parents.

3.8   Creating a tree chart

You have collected plenty of data and you want to see an illustration of your work in a family tree chart. Heredis proposes a wide variety of tree charts, each of which can be broken down into different graphical themes.

Click **Charts** and choose a category of tree chart: **Ancestors**, **Descendants** or **Hourglass**.
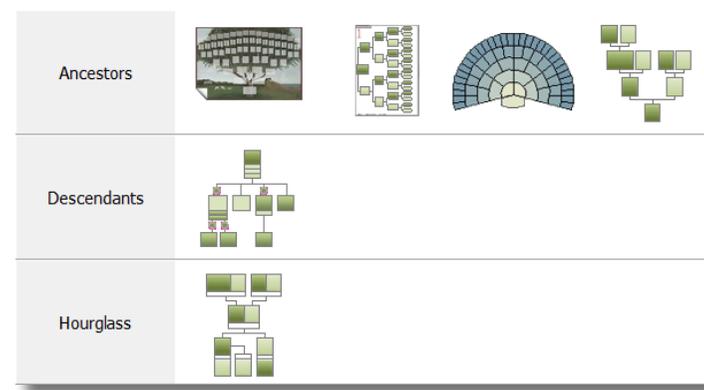
Ancestors tree charts are displayed in a fixed format (from A4 to A0

or Letter to Quad Demy) and the tree charts are unlimited in size. Of course, they are printable on A4 (or Letter) pages.

When you have selected a tree chart type, scroll through the themes with the arrow keys or mouse.

When you have tested the different themes, you may select your favorites. Click the **Add to favorites** button at the bottom of the window, the theme is marked with an icon to distinguish it immediately from all the other themes. You have a search filter for favorite themes. Check the box to show only the favorite themes in the selection window.

Choose from the options for the type of tree chart required, indicate the number of generations to be handled, persons to be excluded or hidden, choose the orientation and overall presentation of the tree and then click **OK**.

The tree chart appears on the screen. Use the buttons and zoom slider at the bottom of the screen to see the entire tree chart or a detail.

Select one or more boxes to change them if necessary. To do this, wrap them by dragging the mouse or use right-click to select a branch or a whole generation.

You can then, depending on the type of tree chart displayed, change the color, change the content, rotate the boxes. All these tools are available in the tree chart panels or by clicking the **Layout** button.

In large tree charts, you may look for someone with the **Persons** panel and double-click on the name to the display the person in the center of the screen.

In the **Print Setup** panel, you can manage the size of your printer paper and resize the final size of the tree chart with ease.

Save the tree chart if you want to keep it.

To print the tree chart, click the **Print** button. You may then assemble the pages as they emerge from your printer.
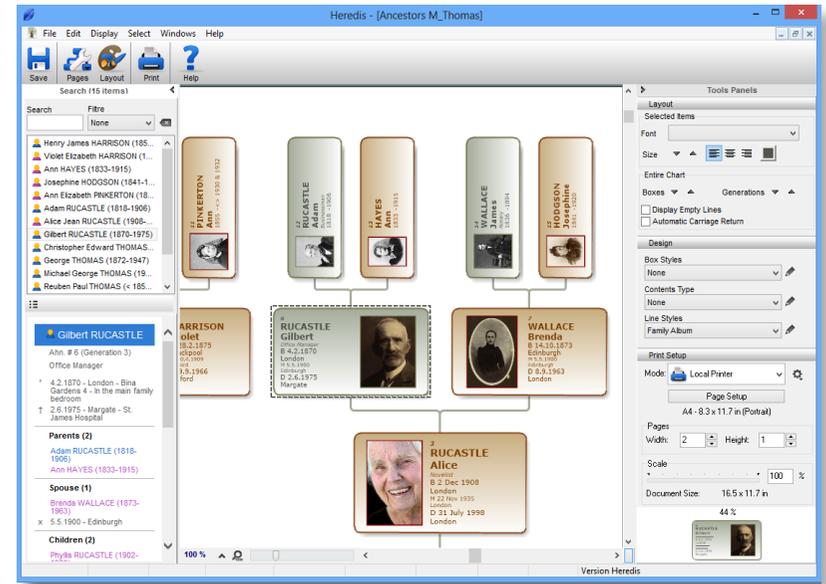
You want your large tree chart to be printed by a professional? From the **Print Setup** panel, choose the **Export PDF** mode for easy transfer.

3.9   Printing documents

Heredis will create all the documents which the genealogist may require. From the **Reports** menu, you may print reports, sheets, books to enhance the scope of your genealogy, or to create working papers.

Reports

For example, choose **Person reports** (**By Name...**).

Make your choice from the options proposed for the type of report you have selected. Click the **Options** tab to determine the information to be handled (select **Males only**). Click the **Styles** tab to define field styles and colors.

Click **OK**.

Heredis launches your normal word processor provided it can handle RTF files.

Changes in presentation can be made in the word processor that is familiar to you, then you may start printing.

A report published by Heredis in your word processor becomes a document independent of the Heredis software. This document can be saved for later re-printing or modifying.
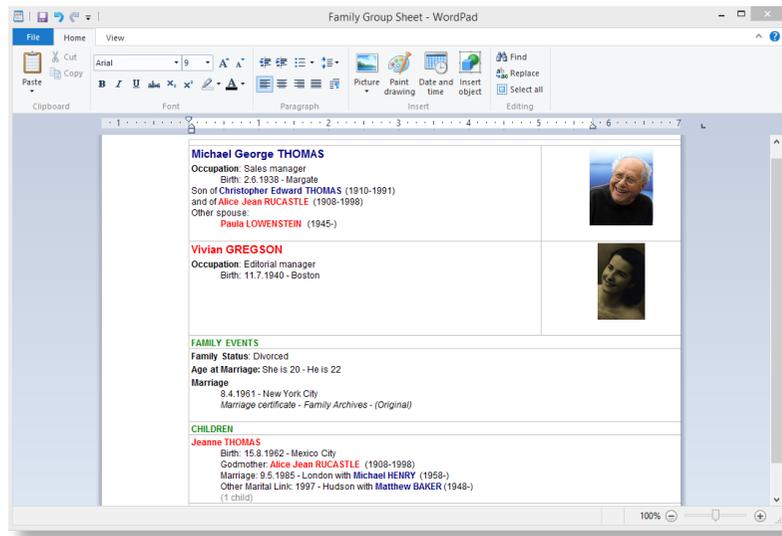
None of the proposed reports suits you? Write your own custom report; you have complete freedom to create it: choice of number, headings and layout of columns, selection of contents in each column, order and style of contents.

The formatting screen of a custom report has an additional button. Click the **Modify** button to open the construction screen of the report, to change the default report or create your own report.

Modify an existing default report by clicking Save or create your own personal default report by clicking **New Report**.

You work with sheets? Heredis proposes a series of varied sheets that are easy to personalize.

Sheets

Select **Reports** > **Sheets** > **Person sheet** or **Family Group sheet**. They summarize all the information saved concerning the primary person displayed on the navigation screen.

Define the information you want on the sheet (show notes, mention witnesses of the events, etc.) and the format of the data (dates in full and places with the subdivision, etc.).

Click **OK**. You can then make even more changes in presentation or print it immediately.

Books

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. Choose **Reports** > **Books** > **Ancestors** or **Descendants** and select the options which suit you. You have many possibilities for presenting the document. Then launch your word processor.

3.10 Researching your genealogy
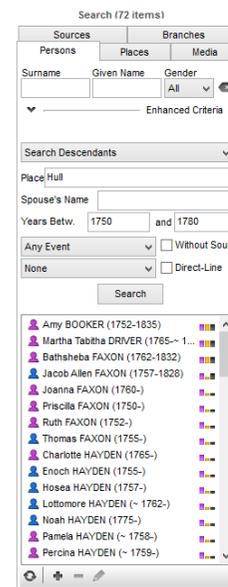
You may easily find any information you need in your genealogy by using the different tools of the **Search** panels. A simple search by **Surname** – **Given Name** will bring immediate results.

For a more specific result, Heredis proposes options according to events or other pertinent genealogy criteria.

By selecting the criteria to be considered, you will easily find all the descendants of Edward Brown born in Hull between 1750 and 1780, all the marriages for which you have not cited a source, or all your ancestor branch ends.

Searching by number (Ahnentafel number or User number if you have entered them) is also available by clicking the **Find** menu.

For more advanced search options, choose **Find** > **Multiple Search** or click the **Find** > **Multiple Search** button.

3.11 Sharing

Publish to Heredis Online

Heredis Online creates for you a website hosted for free, to publish your genealogy. With a few clicks, you will obtain a most pleasing site for consultation by your whole family. Anyone may give you more data via the **Contact me** link directly on your website.

Create a website which is in your image: write your own introductory message and select an illustration. All you have then to do is to invite your family and friends to visit the website.
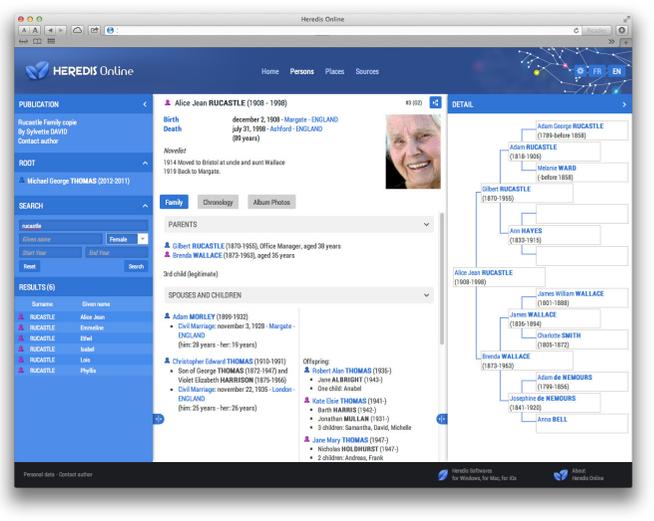
Manage your Heredis Online account directly from your Heredis software or with your Internet browser. Change the display of your online genealogy, delete it, update your personal data, all this without exiting Heredis.

Import/export data

Heredis is able to communicate with other genealogy applications by using GEDCOM files. Open a GEDCOM file in Heredis and transform it into a new Heredis file on the home page.

Heredis allows you to add to your genealogy all the data contained in another file. Import a GEDCOM file or another Heredis file directly to your genealogy from the **File** > **Import** menu.

If you wish to submit your genealogy to a correspondent who does not have Heredis, use **File** > **Export** > **GEDCOM** and send the resulting file.
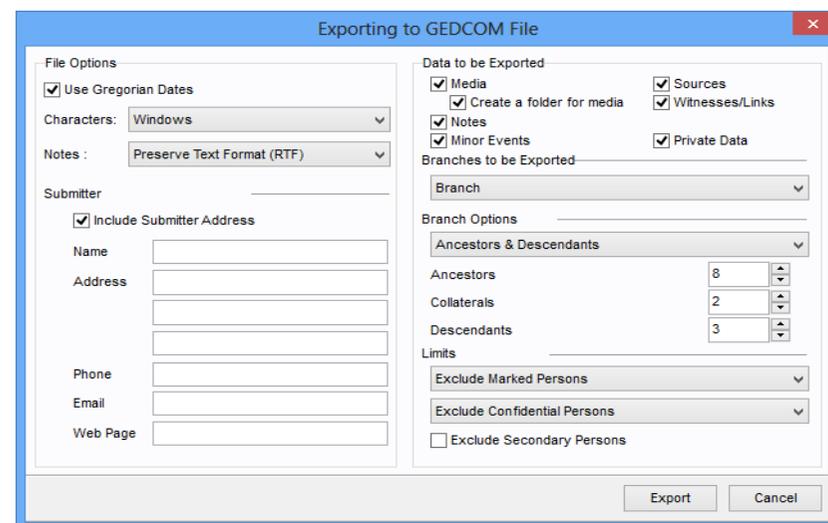
In either GEDCOM or Heredis export, you can select the data to be exported: exclude confidential persons, restrict to one branch or exclude living persons.

3.12 Synchronizing

Heredis is open to other platforms and can exchange data with any device which has an up-to-date version of Heredis: another PC, a Mac, an iPhone, iPad or iPod touch.

Heredis will recognize all the different devices which are connected to the network, or the removable storage devices you have plugged in to your PC (USB flash drive, external hard drive).

Start the update of data on your PC with the **Sync** button then the **WiFi** button. Heredis will identify what data has been changed.

You have altered a date and added two photos from your iPhone and these changes will be updated on your PC.

Your cousin is visiting you and he has his Mac with him? Connect it to the network and give him your genealogy.

You are going to the Public Archives with your iPad? Synchronize your file first to have to hand all the information fully updated. Then if you add any new data, you will recover them on your return by turning on both devices.
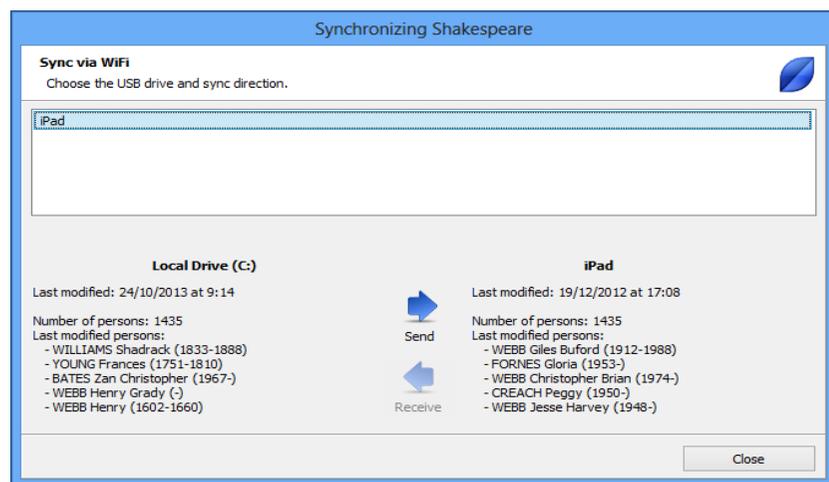
You are going to your country home? Synchronize your genealogy on a USB flash drive with the **Sync** button then the **USB** button and then connect it to your home computer in the countryside. You can update your file instantly. Before leaving, synchronize your computer again with the USB flash drive and update your files with all your weekend work as soon as you return home.

4   Going further

4.1   Arranging your work environment

You may adapt Heredis to your personal work methods.

Manage the panels

Use the buttons at the top of the panels to change their display. The arrow button to the right or left will show or hide the panel.

Select **Open one panel at a time** and the panel which is open will automatically close when another panel is opened. Otherwise the panels will remain open as long as you have not clicked on the open/close triangle.

Change if necessary the width of the panels or height of the **Summary area** on the **Tools** panels. Once the cursor changes form when sliding over the limit, drag to resize the panel.

Choose the graphics

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

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

Customize your toolbar

Click the **Customize** button to select the tools you need. Choose an icon in the left column and drag it to the desired location on the right.

To delete an icon, select it and click **Hide**.

Drag the icons and place them in the order you want. You can also add dividers between the buttons.

To display the buttons as they were when Heredis was first launched, click **Default Set**.
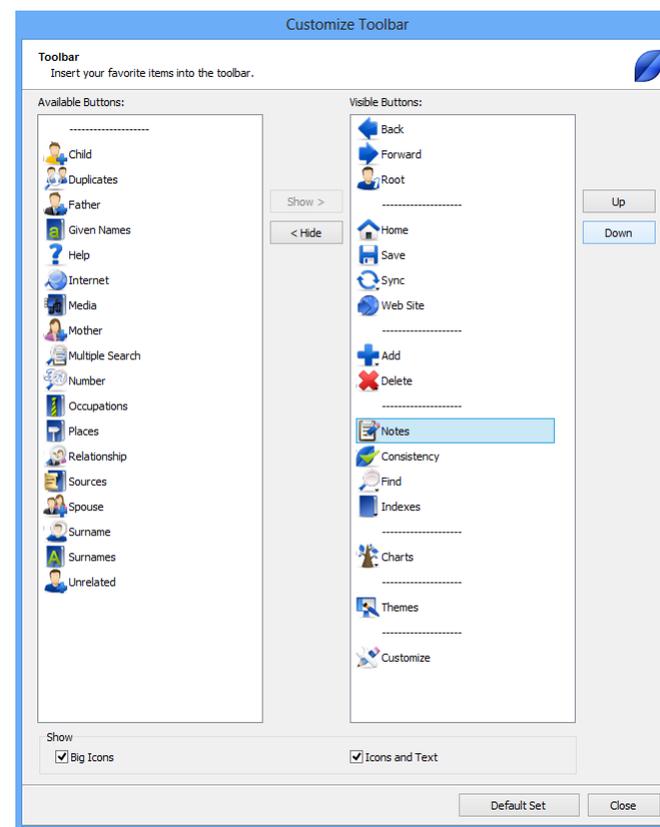
You need more space; then change the display format of the icons. **Untick Big Icons** and **Icons and Text**.

Select data entry method

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. Choose between **Basic**, **Comprehensive** or **Customized** formats by clicking on the setting button in all screens dedicated to data entry.

Prepare the data entry screen to your liking by using the **Customize view** menu. Each data entry screen will then display the selected items.

Define your preferences

In the **Tools** > **Preferences** > **Heredis Preferences** menu, 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.

Select your work screen

Maybe you visualize your genealogy better with the **Extended Family** or study their movements in **Migrations**? Choose this view by clicking the arrow on the **Family** tab. You work more with **Descendants**? Choose this view in the **Lineage** tab.

The view you have last used is stored for each of the **Family**, **Data** and **Lineage** tabs.

When you change a tab, the last used view is displayed.

4.2   Getting assistance during data entry

Heredis does everything to help you enter data as quickly and safely as possible.

Enter data quickly

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.

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 **+** button in this section after selecting a word or a phrase. The new elements will be proposed in subsequent data inputs.
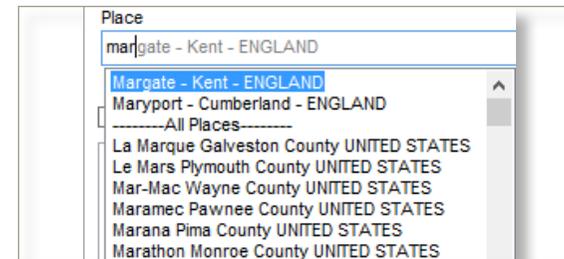
Where no proposal for a place appears or it is not suitable for you, (different spelling, place in a country not listed), enter the location and type the **Tab** key. Immediately, the **Places Index** opens.

Click **+** (Create a new place) to record and geotag the new place in the index. Complete the various fields for the place.

Click **OK** to confirm the new location.

Preferences

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

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.

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.

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 **Kinship** panel and drop her over the **Personal Data** > **Event** >**Christening** event 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.

Error-free data entry

Consistency Control

Heredis will check the validity and consistency of any data entry.

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). You may search for any inconsistency throughout the whole genealogy file by choosing **Find** > **Multiple Search**. Select the **Persons** > **Consistent Data** > **No** criteria.

Permanent Control for duplicates

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

4.3 Entering a type of event

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

Add events with the buttons at the bottom of the screen.

Major events have their buttons for direct entry. For any other event to be created, click on the **Add a person event** or **Add a family event** buttons to select the type of event from the list.

To facilitate your entry, Heredis will first display all the events already in use in your genealogy.

When an event is added, you may rename it by double-clicking on its name. Transform a Diploma event by entering Master's. The event will be available later as Master's in a submenu of the Diploma event.

4.4 Entering a family group

The **Family Group Data** tab is designed to add easily to expanded family groups and is particularly suited for the entry of descendants.

Each generation has an adapted data entry field: parents, spouses and children and their spouses may be entered one after another.

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

Children (3)

#	Surname	Given Nam...	Ge...	B/C	Date B/C	Place B/C	D/B	Date D/B	Place D/B	✂	♀	👤	✏	🔗	Spouse's ...	Spouse's ...	
1	THOMAS	Robert Alan	M	B	06/09/1935	London				☐	☐	☐	✏	1	ALBRIGHT	Jane	✏
1	THOMAS	Michael G...	M	B	02/06/1938	Margate				☐	☐	☐		2	GREGSON	Vivian	
1	THOMAS	Marion La...	F	B	11/03/1951	Margate				☑	☐	☐		0			

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**. If no person displayed in the list corresponds to your individual, continue filling out the data fields.

Each data input is validated by pressing the **Ctrl Enter** keys or 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).

4.5 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: surnames, given names, occupations, places, sources, media.
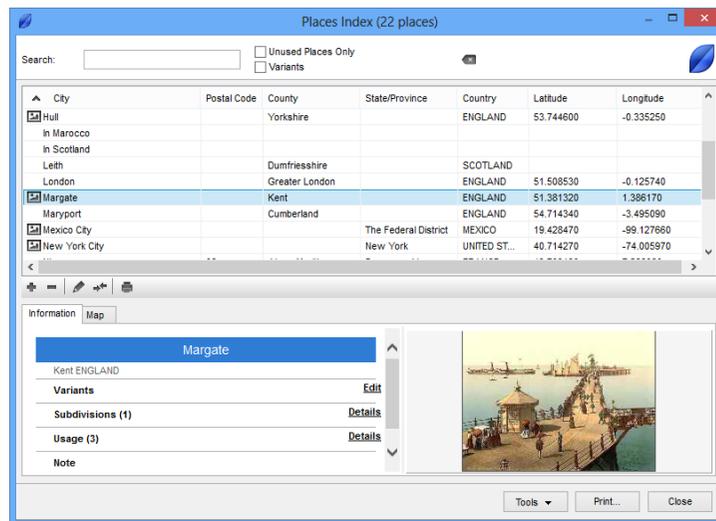
You may consult the list of uses for every item of data and the variants by clicking the link.

Edit, comment, 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 act, 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.

4.6 Managing the results of any search

The **Multiple Search** provides a tool for advanced research to select a category of persons corresponding to a set of criteria.
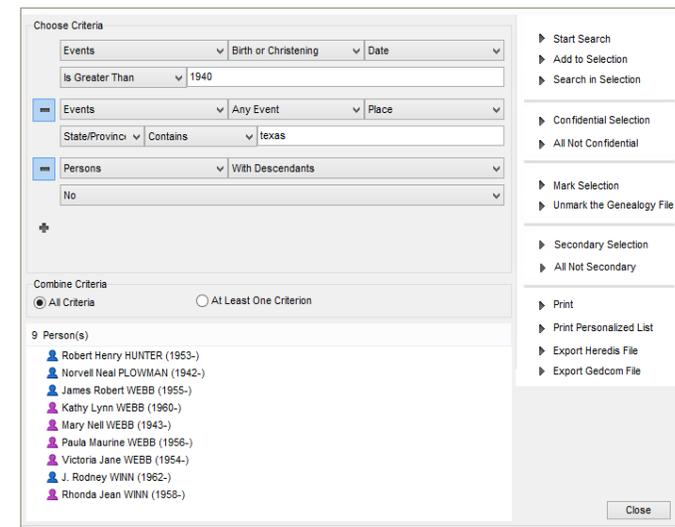
Search all the direct-line ancestors born in Yorkshire after 1800. The resulting list can be used for printing, navigating around these people but also for applying a specific treatment to them: marking them, making them into secondary or confidential persons. Click the appropriate links for defining the treatment to be applied or to print the list of results.

4.7   Searching for duplicates

Heredis will control for duplicates at all times during the entry of data; 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. Select **Find** > **Find Duplicates** or click the **Duplicates** button. Research and verification is carried out easily. Choose the name, given name and event criteria to obtain the list of potential duplicates.

Heredis detects a potential duplicate? Click the **Results** tab. You may check it out in the summary of the information about the persons concerned. If there is indeed a duplicate, click the **Prepare Merger** button and merge the two persons by selecting the most appropriate information.
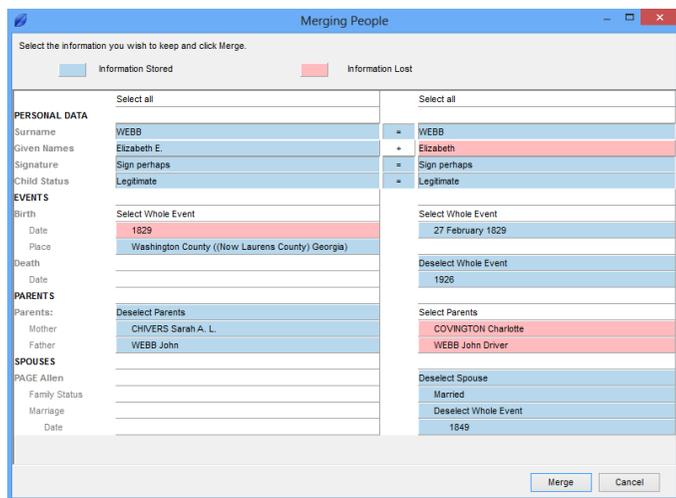
MANAGING HEREDIS

5   Heredis architecture

5.1   Heredis files

Heredis creates data files (genealogies), files of tree charts and transmits data to third-party software for printing (documents).

Heredis files contain both genealogical data and media attached to the data and for this reason they take the form of a *.hmw* folder that contains the data file (with the extension *.heredis*) and the folder containing the media.

Manage files on the Home page

The Heredis Home page allows access to all types of file that Heredis can handle.

To find this screen during a work session, click the **Home** button in the toolbar or choose **File** > **Home Page**.

Create a new genealogy

Click New Family File. Enter a name for the new genealogy file and click **OK**. Heredis saves the new file in the folder *Documents/BSD Concept/Heredis/Heredis Files*.

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.

Open a recently used file

Click the box showing the file to be opened.

Info • To delete a file from the list of recent files, click the right icon and choose **Remove from Recent Files**.

Open an existing file

Click the file type to be opened in the **Open Tree** box. You can open Heredis files, including files from earlier versions, GEDCOM files (Genealogical exchange file) or chart files created and saved with Heredis Blue Suite or chart files created with previous versions as from Heredis 11.

Select the file in the explorer and click **Open**. Only files which match the selected file type are accessible.

Discover Heredis

• Click the **Learning Center** button to access training and learning pages on the www.heredis.com site or to download a sample file if not displayed in the **Recent files** field. The sample file gives you an overview of the functions of the software and illustrates the main topics encountered in genealogical research.

• Click **Search on Hard Drive** to find all files created with Heredis or GEDCOM anywhere on your hard drive. Select the file you want to open and click **Open**. To stop the search, click **Stop** at the top of the search window.

Display of genealogies

Display a genealogy

The genealogy file will open in a screen. This screen can occupy all available space on the screen, occupy only a part, or may be reduced as an icon.

Several views of the same genealogical file may be opened simultaneously: the main navigation screen, tree charts, documents, the multiple search screen...

Display several genealogies simultaneously

Several genealogies may be opened simultaneously with Heredis. Each file can display data differently: in **Family**, in **Data**, in **Lineage** 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.

Open a genealogy file

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

Open a data file

- To open a file when Heredis is already running, choose **File** > **Open** or type **Ctrl-O**. Select the genealogy file in the explorer, and then click **Open**.

- To open a file from the Home page, click the Home button, then click **Open Tree** > **Heredis File**. Select the file and click **OK**.

Info • By default, your PC opens the *Heredis Files* folder. To find another location, select it with Windows Explorer.

- To open a file you worked on recently, display the **Home page** and select it from the displayed files. You can also select **File** > **Open Recent**, then the genealogical file in the submenu.

- To open a Heredis file from Windows Explorer, double-click the *.hmw* folder, then double-click the *.heredis* file, or drag it to the Heredis application icon

  You may open a Heredis file created with an older version of the software (as from Heredis 2000).

Open a tree chart file

You have edited and saved a tree chart created with Heredis? You can reopen it to further edit it or print it.

- To open a tree chart saved when Heredis is already running, choose **File** > **Open**. Select **Heredis Tree Charts** in the **Open file** screen. Select the tree chart to be opened in the explorer, then click **Open**.

- To open a tree chart from the Home page, click the **Home** button then click **Open Tree** > **Chart File**. Select it in the explorer and click **Open**.

- To open a tree chart file when another tree is already open, click the **Open** button in the tree chart toolbar. Select the file in the explorer and click **Open.**

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** or press **Ctrl-F4**. You can also click the close button in the upper right corner of the file screen.

- To close all open Heredis documents, press the **Option** (⌥) 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.

Save a file

Remember to save your file regularly during your genealogy work session. When the file has been modified, a star appears in the file name bar; it needs to be saved.

Save a genealogy file

Manually
Click the **Save** button, choose **File** > **Save** or press the **Ctrl-S**.

Automatically
For security you can schedule automatic saving of your data.

1. Choose **Preferences** > **Heredis Preferences...** from the **Tools** menu.

2. Click the **General** tab and tick the **Activate every...** box in the **Automatic Save** field. Indicate at what frequency you want the data saving to be performed.

3. Tick the **Confirm Saves** box for Heredis to warn you before each

automatic saving.

Save a file under another name

If, for example, you want to make a copy of your genealogy, or create a back-up copy or make several versions, you can save the file in another location.

Choose **File** > **Save a copy** and then change the name and location of the new file if necessary.

Info · You can rename a genealogy file at a later date from the home page. Click the information icon for the file in the **Open Recent** list and choose **Rename the genealogy file...**

5.2   Heredis data structure

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 or 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 or 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.

Surnames, occupations and locations entered may also be discussed and illustrated.

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.

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 appropriate, 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 (Untraceable, found, to be researched), 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.

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 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.

  All sources entered are managed by the **Sources Index**.

Witnesses

Each person involved in the lives of your ancestors can be entered, be they 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 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.

- 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 is the same as for any other individual: identity, flags, notes, media...

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.

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.

- 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.

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.

6   Work environment

6.1   Menus and toolbar

The Heredis menus

They provide access to all functions of the software (research, printing, exchanges, backups... They vary according to the screen in the foreground (navigation and data input, indexes, editing of documents or construction of tree charts).

Customize the toolbar

The Heredis toolbar is entirely modular.

• Select **Windows** > **Customize toolbar**, or click the **Customize** button to display the content screen of the toolbar. All available buttons are displayed.

1. Drag the new button or a separator to the desired location in the list of visible buttons or select it and click the **Show** button.

2. Delete buttons by dragging them to the list of available buttons or select it and click the **Hide** button.

• Change display options for the icons:

1. Tick or untick **Big Icons**.

2. Tick or untick **Icons and Text**.

Redisplay the toolbar by default

1. Select **Windows** > **Customize toolbar**, or click the **Customize** button.
2. Click **Default Set** to display the original toolbar proposed by Heredis.

6.2   Display Tabs

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

Family tabs

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

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

The **Extended Family** screen shows the composition of the family with remarriage, stepchildren, stepbrothers and stepsisters, children from other unions of the different spouses ... noting or not when they belong to the direct lineage.

The **Migrations** screen positions on a map the places of the life of the primary person or any other family member. Pins are numbered to display the sequence of movements. Each place pin 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.

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.

Lineage tabs

The screen displays 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.

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, with the presentation of

generations and the data format. Implex 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.

The Search tab

The **Search** tab contains a research tool for the primary person. The upper part of the screen displays 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.

6.3 Removable panels

The removable panels display data and tools.

Display or hide the panels

One 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** > **Show/Hide Tools Panels**, or **Show/Hide Search panels** or type the **Ctrl-3** or **Ctrl-4** key.

Resize the panels

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

The cursor shape will change and 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.

Arrange the panels

They may be positioned to the right or left of the navigation screen. You can change their position by using the menu **Windows** > **Swap Tools and Search** panels.

Select **Open one panel at a time** in the **Windows** menu. Heredis automatically closes the open panel when you click the arrow to display the other panel.

6.4 Adapting the workspace

Menus and toolbar

The menus are displayed at the top of the screen as with most applications. The Heredis toolbar occupies the upper part of the displayed screen.

The menus and buttons displayed give you access to all features of the software: search, navigation, printing, exchanging, backups…

Panels

The panels contain search tools for the file or management tools for file data. You may display or hide the panels according to your needs.

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.

Display more than one genealogy file

Each file opened can display data differently: in **Extended Family** mode, in **Personal Data** entry screen…

Display more than one workspace

Different workspace screens may be open simultaneously for the same genealogical file: navigation screen, tree chart screen, search screen...

All the screens displayed for different files open are visible in the **Window** menu.

7 Adding, linking and unlinking persons

7.1 Linking an existing person or creating a new individual?

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 choose **Person** > **Add** > **Add Unrelated Person**, or press **Ctrl-F8**.

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.

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 arrow 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 menu 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 the **Enter** to select it.

In the **Occupation** field, recognized occupations are underlined. If you type a word that is not recognized as a occupation and want to add it as a occupation, with the mouse select the word or group of words and click the **+** icon 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

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 **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 drop-down 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. When no proposed place appears or it does not suit you (different spelling, place in an unlisted country), enter the place then press the **Tab** key. The **Places Index** opens.

Complete the information on the **Add New Place** screen to store it and confirm with **OK**.

Death

1. Click the **Death** event title to bring up the drop-down 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 (indented wheel icon).

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**, **Add Mother**, **Add Spouse** links to complete the immediate family.

Add a person

Each person in the genealogy file may be linked to others by ties of kinship, as a witness to an event, or as a person related in another way.

Heredis allows you to link any individual already in the genealogy file or create a new person with his/her kinship. In the **Add** or **Choose**… field, enter the surname and given name in the **Personal Data** tab. You will see in the **Matching Persons** column, appear a list of persons already entered with that surname and given name. Step by step, as you enter new letters, the list of corresponding persons will mature.

Select a person from the list and check his/her details. This allows you to compare more effectively the different individuals found.

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

If you do not detect a possible duplicate, you can then create the new person by completing the other entry fields and click **Add**.

Delete a person

Heredis allows you to delete

• Either the person - then the person will no longer exist in your file.

• Or the links that bind the person to his family or to an event in which he played a role. In this case the individual will always remain in your genealogy file.

Info • The Root Person of the file, that is to say the individual numbered Ahnentafel 1, cannot be deleted. To remove this person, you must first reassign the number to another person.

• Place the individual in the primary person position.

• Click the **X** (Delete) button on the toolbar or choose **Person** > **Delete Primary Person** to delete the link.

Merge two persons

If you find a duplicate in the genealogy file (the same individual entered twice), merge the two persons to get a single person with all the information recorded.

Merge the primary person with another person

1. Display one of two supposed duplicates as the primary person.

2. Choose **Person** > **Merge with Another Person**… or click the **Merge** button on the toolbar. The **Primary Person** appears on the **Merging People** screen.

3. Select the other person by clicking the **Choose Another Person** link.

4. Click **Prepare Merger**.

Merge as a result of a search for duplicates

1. Start a search for all duplicates in the file from the menu **Find** > **Find Duplicates**.

2. In the **Results** tab of the **Search for Duplicates** screen, select the two individuals who are obvious duplicates.

3. Click **Prepare Merger**.

Select the data to be merged

Review carefully all the data in the merge screen to retain all relevant information.

Organize the Merge screen

The Merge screen contains four columns: the list of topics, one column for each of the two duplicates and one center column indicating **=** or **+**. A color code identifies the data to be stored (in blue) and the data which will be lost (in pink).

Select the data to be retained

At the opening of the merge screen, by default the preset boxes show the information on the person in the first column and the additional information on the person identified in the second column.

Only single events like birth, baptism, death and burial are placed in direct comparison. For all other events (travel, decoration...), with an individual possessing one or more events of this type, they will not be displayed as parallel in the merge screen.

Only unions with exactly the same spouse for both persons are compared directly. If two unions with a spouse who appears to be identical (same surname, same given name, etc.) are not shown opposite, this is because both spouses are treated as two distinct persons in the file. They are probably also potential duplicates to be processed at a later date.

Some fields allow you to retain both the data of person A and person B, such as given names, occupation or notes.

• To remove any merged data, click the item to be deselected and the topic for the other individual will be automatically deselected and will appear in pink.

- To take into account both sections of person A and person B, click the + symbol in the center column and the two items appear in blue.

Certain other topics cannot be added, such as signature or family status. To change the data retained for the merged person, click the data stored to deselect it or click the data not to be retained to replace it with the other data.

Events and families may be selected or deselected in their entirety. Click the header of the event or the family to change its status. The color of the data changes.

Info • Remember to allow color codes to help you.

- Blue = The data will be stored in the merged person.
- Pink = The data will be lost.

When you are sure of your selection, and the **Merged Person** column no longer contains orange fields, click **Merge**.

Check the merged person

Heredis open the **Immediate Family** tab of the merged person.

If you were still in the **Search for duplicates** screen, you can continue the fusion of new duplicates.

1. In the **Immediate Family** tab, check that the merged person has the right persons as parents, spouses and children.
2. Click the **Personal Data** tab to check all the information retrieved. Remember to click each event to check notes, sources, witnesses, media.
3. Click to verify the different families, and the identity of the spouses.

Info • If you are unsure and want to undo the merger, choose **File** > **Revert to Saved**.

7.2   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 links in the empty boxes for the father or the mother.
   - Choose **Person** > **Add Father** or **Add Mother** or press **Ctrl-F9** for the father or **Ctrl-F10** for the 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** or **Choose Father** or **Add** or **Choose Mother** field, 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.
- To change the gender, simply select another gender in the drop-down menu.

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.

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**.

3. Continue the data input with the information you have. To validate the new individual, click outside the entry field.

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** or press **Ctrl-F9** for the father and **Ctrl-F10** for the 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** or **Choose Father** or **Add** or **Choose Mother** fields, select the person to be linked from the list of **Matching 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**, **Kinship, Links**…), 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** or press **Ctrl-F9** for the father and **Ctrl-F10** for the mother.

   • Click the **X** (Delete) 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.

7.3   Spouses

Add a new person

All tabs

Enter the spouse
1. Place the person for whom you want to add a spouse, as the primary person.

2. Create the link.

   • Click the **+** (xx spouse(s)) sign in the display field of the spouse on the **Family** tab.
   • Choose **Person** > **Add Spouse** or press **Ctrl-F11**.
   • Click the **+** button on the toolbar and choose **Add Spouse**.

3. Enter the new person.

   In the **Add** or **Choose Spouse** screen, complete the input fields with the information you have, including details concerning the union. Gender is prefilled. To change the gender, simply select another gender from the drop-down menu.

   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.

   Click **Add**.

   Enter information about the family

   See below.

Family Group data tab

1. Click the **+** button at the bottom of the Families entry fields.

2. Choose **Add a Spouse**.

3. 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 the chapter *Enter a family group*.

Link an existing person

During data entry

Choosing a spouse
1. Place the person for whom you want to add a spouse, as the primary person.

2. Create the link.

   • Choose **Person** > **Add Spouse** or press **Ctrl-F11**.
   • 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.

   See below.

Drag and drop

1. Place the person for whom you want to add a spouse, as the primary person.

2. Take the spouse from a side panel (**Persons**, **Bookmarks**, **Kinship, Links**…), 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.

1. Indicate date and place of marriage and any other information you have on the family event.

2. Specify the family status in the drop-down menu.

3. 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».

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 Group Data** 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

Right-click the box of the union to move or choose **Person** > **Families Order**, then use the **Before** and **After** buttons on the **Order of Spouses** screen to position each union in the required order.

Return to the default order

You may cancel a manual order change of families if you have made mistakes or entered new dates. To do this, reopen the Order of Spouses screen and tick the **Leave Heredis determine the order** box**.**

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 remove the couple's children for the family to be deleted. 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 **X**.

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.

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.

7.4   Children

Add a new person

All tabs

1. Place the person to whom you want to add a child as the primary person. Select the other parent.

2. Create the link.

   • Click the **+** (xx child(ren)) sign in the display field of the spouse on the **Family** tab.
   • Choose **Person** > **Add Child** or press **Ctrl-F12**.
   • Click the **+** button on the toolbar and choose **Add Child**.

3. 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.

   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.

   Click **Add**. The child is created and the links with his/her parents.

Family Group Data tab

1. Click the spouse who is the other parent of the child to select him/her in the Families data entry fields.

2. Click the **+** button at the bottom of the Children entry fields.

3. 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.

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3. 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 the chapter *Enter a Family Group*.

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

Link an existing person

During data entry

1. Place the person to whom you want to add a child as the primary person.

2. If the primary person has several spouses, click the spouse who is the other parent of the child to select him/her.

3. Create the link.

   • Choose **Person** > **Add Child** or press **Maj-Ctrl-11**.
   • Click the **+** button on the toolbar and choose **Add Child**.
   • Click the **+** (xx child(ren)) sign in the display field of the spouse 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

1. 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.

2. Take the child from a side panel (**Persons**, **Bookmarks**, **Kinship, Links**…), 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

Right-click any box of the children to move or choose **Person** > **Children Order**, then use the **Before** and **After** buttons on the **Order of Children** screen to position each child in the required order.

Return to the default 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 the **Automatically sort children** option...

Unlink a child and his/her parents

All tabs

1. Place the child or one of the parents as the primary person.

2. 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 **X** 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 **X** button on the toolbar and choose **Unlink Father** or **Unlink Mother**.

Family Group Data tab

1. Select the child to be unlinked from the Children fields.

2. 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.

7.5 Witnesses

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

Add a new person

1. Click the **Witnesses** tab in the event information fields.

2. On the button bar at the bottom of the Witnesses fields, click **+** (Link a witness to the event).

3. The **Associate a witness to**… fields open. Enter the information you know about the person.

4. Click **Add**.

Link an existing person

During data entry for an event

1. Click the **Witnesses** tab in event information fields.

2. On the button bar at the bottom of the Witnesses field, click **+** (Link a witness to the event).

3. The **Associate a witness 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**, **Kinship, Links**…), 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…

1. Disclose the **Witnesses** field (click the disclosure triangle if it is folded).

2. In the button bar at the bottom of the Witnesses field, click the **+** button.

3. The **Associate a witness to…** screen opens. Enter the information you know about the witness and click **Add**. Or select an existing person and click **Choose**.

4. Provide information on the link with the witness and press **OK**. The witness is added to the Witnesses fields of the input screen.

5. Enter another witness or continue typing the data for the primary person.

Change a Witness 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** tab.

2. Select the **Witness link** to be changed and click the **Edit and modify the link with the selected witness** button (shown as a pencil), 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 drop-down menu.

Age

• Age on record: many acts 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 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, the comment appears in the list of witnesses.

Unlink a witness and an event

1. On the **Personal Data** tab, select the event and click the **Witnesses** tab.

2. On the bar at the bottom of the event, click - (Unlink the selected witness from the event).

3. Press **OK** to validate and the person is detached from the event but remains available in your genealogy file.

7.6   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 Jeannine was a friend of Maria. Create a personal link (**Sundry Link**) Friend between these two persons.

Linked persons are displayed on the **Tools** panels. Click the **Sundry Links** tab to add, edit or delete them. When at least one person

is linked, a chip is displayed on the **Links** tab. The personal link appears in the **Links** panel of both related persons.

Add a new person

1. Click the **Links** tab of the **Tools** panels.

2. In the button bar at the bottom, click **+** (Add a link to the primary person).

3. The **Linking a Person to...** screen opens. Enter the information you know about the person.

4. Click **Add**. You may access the detailed data of that person later if you wish to expand on the information about the person.

Personal links with an existing person

Personal Data tab

1. Click the **Links** tab of the **Tools** panels.

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 **Links** tab of the **Tools** panels.

2. Drag the person to be linked from the **Immediate family** tab or in the **Persons** tab of the **Search** panels, and release on the **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 **Links** tab of the **Tools** panels.

1. Click the **Links** tab.

2. Select the link to edit by clicking the name of the related person. If the link is closed, click the arrow to display the name of the linked person.

3. Click the **Edit and modify the selected link** (indicated by a pencil), or double-click the line.

4. Edit the information concerning the link.

Type of link

Choose the type of link between the two persons from the drop-down menu.

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).

Info • You can rename an existing link by entering a different type of link in the **Modifying the Link** screen. For example, type Spiritual Leader in place of Another link, or Universal Legatee in place of Heir.

Direction of the link

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 (directional arrows)**.**

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 on the **Links** tab once the individual has been selected in the list of links.

The appropriate type of link is specified in the **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 **Links** tab of the **Tools** panels.

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.

8 Adding and changing information

8.1 Data entry mode

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 display mode at any time.

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

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

Change the data entry mode

1. At the top right of the input screen, click the indented wheel icon (Choose data fields you wish to use).

2. Select the desired mode.

   • To show only the main fields, use the **Basic** mode.
   • To make use of all the input fields, use the **Comprehensive** mode.
   • To display only the information that interests you, select the **Customized** mode. This mode will display only the items you have selected in the Customize personal data view screen.

Personalize the data entry mode

1. Click the indented wheel icon (choose data fields you wish to use).

2. Choose **Customize View**.

3. Tick the items of information to appear in the **Add or Choose**… screen. You will proceed in the same way for data entry and display on the **Personal Data** tab or the **Family Group Data** tab. The items

chosen may be different in the various screens. Confirm with **OK**.

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 (**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.

8.2 Identity of persons

Identity fields

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**.

Prefix

The Prefix is used to specify an attribute found often in an old act, 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 arrow to the right of the field for entering given names, and select the usual name in the list

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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.

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

Title

Indicate here any title of nobility or honorary title.

User number

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

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 upper case, including accented characters.

Automatic filling of fields

Heredis includes databases of several thousand names and occupations. In addition, Heredis stores all the information you enter, item by item.

Type the first letters: immediately appears the list of already stored data that may match your entry.

Continue with new letters, the list is updated.

Use the keyboard arrow keys to select the desired item and press **Enter** or click the proposed item with the mouse.

The Auto-fill tool is available for all input fields, with the exception of notes and comments.

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 **Tools** > **Preferences** > **Heredis Preferences** > **Format**.

Child status

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

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.

Childless

Click the **Childless** icon if you know that the person had no offspring.

Unmarried

Click the **Unmarried** icon if you know that the person never married.

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.

User fields

On the **Personal Data** tab, you may display up to 13 different user fields for data entry that Heredis has not covered.

Create or modify user fields

1. On the **Personal Data** tab, click the **User Fields** tab. Click the **Edit and modify user fields** icon shown in the form of a pencil.

2. Tick the items you wish to use in this genealogy.

3. Enter a field name.

4. Using the drop-down menu, indicate the type of information that you enter in each field displayed. The data that you enter in these fields will be recognized and treated accordingly with GEDCOM format exchanges.

5. Confirm with **OK**.

   In the **User Fields** tab, you may complete the additional fields that you have created for this file.

Delete user fields

1. Click the **User Fields** tab, then the **Edit and modify user fields** icon shown in the form of a pencil.

2. Untick the fields you no longer wish to be used in this genealogy.

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.).

Enter or modify a note

1. Display the note:

   • On the toolbar, choose **Person** > **Edit Person Note** or **Edit Family Note**.

   • Click the **Notes** button in the toolbar if it is displayed.

   • Click directly in the note field when displayed on the **Family Group Data** tab.

   Info • If the note is not visible on the **Family Group Data** tab, change the data display mode.

2. Enter the text of the note or paste the contents of the clipboard.

4. Use the formatting tools in the text editor. In the input tab, click the **Edit** button of the note (shown as a pencil) to access.

5. Tick the **Private Note** box if you wish to keep this note excluded from export of the file, printing or publishing on the Internet.

   Info • The Person note and the Family note concern the displayed primary person and his/her spouse.

8.3   Placing persons

The Root Person

The root person is the individual who is at the base of your genealogical research. By default, Heredis defines the first person entered in the genealogy file as the root person, with Ahnentafel No. 1.

Access the Root Person

• Click the **Root button** on the toolbar.

• Choose **Find** > **View Root Person** or press **Ctrl-1**.

Change the Root Person

1. Display the new person to be at the base of the open genealogy file.

2. Choose **Person** > **Modify Root Person...**

The new root person will carry the No. 1 and all Ahnentafel numbers are redefined accordingly by Heredis.

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 N°. 1 (irrespective of gender). This is the person who is at the base of the genealogy file. He/she is called the **Root Person**.

The father of the root person is N°. 2 (twice the N°. 1), his mother N°. 3 (N°. 2 +1). His paternal grandfather is N°. 4 (double the N°. 2), his paternal grandmother N°. 5 (4 +1). His maternal grandfather is N°. 6 (double the N°. 3), his maternal grandmother N°. 7 (6 +1), etc.

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

The primary person's number is displayed in the status bar. If a marriage between blood relatives in his/her ancestry has created a duplicate line (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

The direct line navigation buttons are available in the **Navigation** 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 numbering to treat individuals listed in a descending genealogy.

The three basic rules for d'Aboville numbering are:

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 N°.1, the next youngest N°.2, the very youngest N°.3, etc. The two children of the eldest are numbered N°. 1-1 and N°.1-2. The child of the first husband of the youngest bears the number N°. 2-1a, those of the second husband are numbered N°. 2-2b, N°.2-3b and N°.2-4b. The only child of the youngest is numbered N°.3-1.

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

Implex

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.

8.4   Events

Click the **Personal Data** tab to view, enter or modify the events in the life of the primary person.

Heredis distinguishes between individual events which the person has lived and the events he/she has experienced with each of his/her spouses.

The list of events displays chronologically all events in the life of a person and the family events may be identified by the order of families concerned.

After creating an event, you may complete or modify it at any time.

Add an event

Add a person event

1. Click **Add a person event** on the bar below the list of events. To facilitate the selection of the event, Heredis displays at the top of the list, the major events, then the other events already in use in your genealogy file, and finally the events not yet used.

2. 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 **B** 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

1. Select the spouse of the event from the list of families.

2. Click the **Add a family event with the selected spouse** 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.

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

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.

1. Click the **Add a person event** or **Add a family event** buttons.

2. Choose **Ready-to-use events**, then the neutral event called **Event Misc**.

3. Double-click the event that has appeared in the list of events. The **Edit Event...** window opens.

4. Enter the new name of the event.

Now this new type of event will automatically appear in the list of events to create. However, you can choose not to display it from the events management screen.

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 a 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.

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 **Add a person event** or **Add a family event** buttons on the **Personal Data** tab, in the events list.

2. Choose **Customize**…

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

   Heredis always shows major events 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.

Date

To enter the date, numerous input options are available, whatever the period concerned, in four different types of calendars: Gregorian, Julian, Hebrew or Republican.

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 if it exists, by entering the number of years in numbers. Any other word may not be recognized.

If the birth date of the primary person is known, you may compare the age on the act 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 place is suitable, enter the place and then type the **Tab** key.

4. The **Places Index** opens. Complete the information on the new place to save it in the **Add New Place** screen, and press **OK**. The new location will be added to the **Places Index**.

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.

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 help track your research, for each event, Heredis proposes what action you should take. Specify the status of the source in the drop-down menu. Choose **No Search Record**, **Search Record**, or **Untraceable Record**, whichever corresponds to the event entered. You may choose the default option for each new event in **Tools** > **Preferences** > **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.

8.5 Dates

Recognized calendars

Heredis treats dates entered in 4 different calendars: Gregorian, Julian, Hebrew and 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 promulgated in 1582 and applied at widely varying dates in different countries (from the fourteenth to the twentieth century). Dates prior to the promulgation of the Gregorian calendar are considered as being expressed in the Julian calendar.

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 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. If there is no month name which is characteristic of a Hebrew or Republican calendar, Heredis considers that the date entered is expressed in the Gregorian calendar.

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

To enter a date expressed in Julian after December 10, 1582, 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 **Tools** > **Preferences** > **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
• 2 February 1794
• J 2 Feb 1794
• J 2 /02/1794
• J 02.02.1794

Hebrew calendar
• 2 ADAR1 5554

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.

Approximate dates

Heredis manages the chronology of events based on the dates entered, exact or approximate. Use keywords to express the 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
• /23.08. 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
• 6.6.1774/

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

• about February 1811
• abt 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

- 11.10.1914//4.1917

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 **(cal)**.

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.

Info • Remember to choose the **Customized** or **Comprehensive** input mode to display this field.

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 in the list of events on the **Personal Data** tab.

Conversion tool for dates

For the equivalent of a date expressed in an unusual calendar for you, select the **Dates** tab on the **Tools** panels.

1. Choose **Date Converter** from the drop-down menu.

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

3. To use one of the dates displayed, click the **Copy Date** button to the right of the date you want.

4. To insert this version of the date in a data entry screen or in a note, click the insertion point and choose **Edit** > **Paste**, or type **Ctrl-V**.

The dates of movable feasts

Who has not found the words «Easter Day» or «two days after Pentecost» in an old document?

Heredis facilitates your genealogical research by indicating the dates of these moveable feasts for all the years between 325 AD and the year 2500.

1. Select **Movable Feasts** in the drop-down menu of the **Dates** tab.

2. Indicate the year for which you are looking for this feast day. Heredis displays the dates of Christian, Jewish and Orthodox movable feasts for this year.

8.6   Places

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 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** tab. You can consult the list of all places in your genealogy in the **Places** panel or in the **Places Index**.

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.

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.

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, enter the full name of the place then press the **Tab** key.

Heredis opens the **Places Index** and the data entry screen for a new place. Complete the various administrative details of the new place, and press **OK**. The new place will be added to the **Places Index**.

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.

Info · Remember to tick the countries for which you would like suggestions for places using **Tools** > **Preferences** > **Heredis Preferences** > **Countries**.

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4. 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.

Information for the place

The input and modify screen of the place contains items to be filled in, a zone for display of media associated with the place, a **Note** tab and a **Map** tab.

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 on the **Map** tab.

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.

Media assigned to the place

To assign one or more media to a place, click the **+** (Add a Media) button or the access button to the **Media Index** in the display field of the media.

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 is displayed in the **Map** tab of each event where it is used and in the **Places Index**.

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.

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1. Double-click the place in the **Places Index** or click the pencil icon (Modify Selected Place) to open the entering/modifying screen for the selected place.

2. Click the **Map** tab and select one of the places proposed by Heredis in the **Suggestions** field. Heredis searches in various global databases to identify the place you entered.

   If no proposal is displayed, type the name of the place in the **Suggestions** search field or the name of a nearby location, then click **Search**.

Info • This function is only available if you are connected to the Internet.

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3. Click each of the proposals and observe the map that is displayed to clearly define which corresponds to the place you entered.

   As you check the different proposals, the empty input fields (especially the longitude and latitude fields) will be simulated in blue.

4. Refine your entry.

   • Click **Fill up** to geolocate the place with the appropriate proposal while retaining the elements that you had already entered.

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. Heredis 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.

Choose the recognized places

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.

1. Choose **Tools** > **Preferences** > **Heredis Preferences** > **Countries**.

2. Check the different countries where you are likely to have places to enter.

The places proposed during data entry in the **Add or Choose…**, **Personal Data**, **Family Group Data** or **Places Index** tabs will be limited to those countries.

8.7   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.

Sources assigned to the events are displayed in the **Personal Data** tab. If at least one source is assigned to the event, a visual indicator (green bar) appears. Select the event and click the **Sources** tab.

Info · You may consult the list of all sources in your genealogy in the **Sources** search panel or in the **Sources Index**.

Assign an existing source to an event

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.

Info · Remember to scroll to **Recently Used Sources** in the **Sources** search panel to assign the source to a series of events.

From the Sources tab of the event

1. Click the **+** (Link a source) button to open the list of sources registered in the **Sources Index**.

2. Select the source from the list then validate by clicking **Choose**. The source is assigned to the event.

Create a new source and assign it to an event

1. Select the event from the **Personal Data** tab.

2. Click the **Sources** tab.

3. Click the **+** (Link a source) button to open the **Sources Index**.

4. Click the **+** (Create new source) button at the bottom of the list.

5. Enter the information for the source and press **OK**. The new source is assigned to the event.

Create a new source and assign it later

1. Display the **Sources** search panel, or open the **Sources Index**.

2. Click the **+** (Add New Source) button.

3. Enter the information for the source and press **OK**.

A new source has been created but it is not assigned to any event. You may use this source later to assign it to 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

Specify the type of information that allows you to advance in your genealogy. Is it an act? 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** search panel and in the **Sources** tab of events, as well as in the genealogy documents you may print.

Document

Specify the type of act (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 place 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 act? 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** field, enter the information on the source: the details of the genealogist who 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.

Private Source

Declare that a source is private for all information contained in the source to be excluded from exports or printed documents.

1. Open the data input screen for the source.

- Click the **Personal Data** tab, then select the event and click the **Source** tab.
- Display the **Sources** search panel.
- Click the **Sources Index** button, or choose **Tools** > **Sources Index**.

2. Double-click the source or click the **Edit and modify the selected source** button (shown as a pencil).

3. Tick the **Private Source** box, at the top right of the field.

Info • In the **Sources Index**, you may declare a source as private directly in the list of sources. Tick the box in the column **P** (Private Source).

Media and interpretation of the source

The quality of the information contained in a source is often confirmed by a reproduction of the original document. Heredis can assign one or more media to each source.

Assign media to a source

1. Select the source from the list of sources and use the media zone displayed on the right side of the window or double-click the source to open the entry/modification screen.

2. Assign the media to the source

At the bottom of the media display zone:

- Click the **+** (Add media from hard disk) button.
- Click the access button to the **Media Index** if you are certain that the media to be assigned is already saved in the genealogy file.

Aid for interpretation

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.

Open the enter/modify screen. Click the **Display Mode** button to see on the same screen, both the note and the source image.

- Click the **Horizontal** button to see the entire width of the scanned document, even if you have already zoomed the image. You may then enter the text to be displayed above the lines.
- Click the **Vertical** button to see the document as a whole, including marginal notes. You may enter the text to the left of the displayed image.

Info • The deciphering of an act may often be long, so remember to click **Save** regularly to save the information you entered in the note of the source.

8.8 Checking of data

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.

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.

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.

Validity Control

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

Dates

Dates should be entered properly. See the chapter *Dates* for possible formats.

Links

Links created between people must be consistent. Heredis prevents the entering of incoherent 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.

Consistency control

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.

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.

Check if a person is coherent

The consistency check is systematic. When incoherent information is detected, a message alerts you immediately at the data entry. On the toolbar, the **Consistency** button is highlighted displaying a red cross.

Understanding incoherences

1. Choose **Person** > **Check Consistency** or press the **Consistency** button on the toolbar.

2. 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.

Check all persons in the file

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

1. Select **Find** > **Multiple Search** or type **Ctrl-Shift-M** or click **Find** > **Multiple Search**.

2. Select the **Persons** criteria from the first drop-down menu.

3. Select **Consistent Data** from the second drop-down menu, then **No** from the drop-down menu below. Then click **Start Search**.

4. Click on each of the persons shown in the results list to verify the data on the **Summary** panel.

5. Double-click a person to access his/her **Personal Data** tab and make any necessary changes.

6. Return to the **Multiple Search** screen using the **Windows** menu or by typing **Shift-Ctrl-M**.

Info • To do this at a later date, you may store the list obtained by marking all the people displayed. Click **Mark Selection** in the right part of the search screen. You can also keep the results displayed by printing the list of inconsistent persons. To do this select **Print** or **Print Personalized Report**.

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 coherence criteria

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

1. Choose **Tools** > **Preferences** > **Heredis Preferences**.

2. Open the **Consistency** tab.

3. 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 temporarily the minimum age for marriage for the furthest ancestors, for until the seventeenth century it was common to get married by contract between 5 and 14 years.

These amendments are effective immediately.

Completeness of data

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

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.

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.

Regardless of the information collected in Heredis, you may determine that certain individuals will not require further research. Open the **Search** tab and click the **Consider that this individual is complete** button. The icon changes color.

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.

9 Illustrate your data

9.1 Media

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 Pages 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.

- Drag an information email from one of your cousins to the display field of the media and Heredis will open your mail program to read it.

  Info • To select these types of media, select **All Files** (*.*) from the drop-down menu of the **Open** screen.

What data can be illustrated?

- A person: in the media display field of the primary person in the **Immediate Family**, **Personal Data** or **Family Group Data** tabs. You may also add media to the **Personal Data** field of **Add or Choose...** screen.

- A couple: in the Family 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 quantity of media assigned to each item of data is unlimited. Each media may be assigned to several items of data.

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

A date and/or a note may be added to the Media.

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.

Importing 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** search panel. In this case the media are integrated into the

file but not yet assigned to data. They are classified as **Unused Media**.

In the media display field for each data item

- Click the button to access the **Media Index** if you are certain that the media required is already saved in the genealogy file.

- Click the **+** (Add media from the hard disk) button.

Select one or more media using the Windows Explorer tools and then click **Open**.

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

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

1. Click the **+** (Add Media) button.

2. Select one or more media using the Windows Explorer tools 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.

Info • You can change the main displayed image. Roll over the display area of the media with the mouse to display the media button bar. With the **Previous Media** – **Next Media** arrows, display the image you want to set as the **Preferred Picture**. Click the **Preferred Picture** button (shown as a star).

Media details

In the **Media Index** or **Media** search panel, double-click a media and display its entry/modify screen

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, it may also be defined as a **Private Note**.

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

Information on the media file

By opening the **Media Index**, you may access other information. Select a media then check the information displayed.

Path: Find here the original location of the media, before it was assigned to your genealogical file.

Uses: See the list of data that is associated with the selected media.

Info • Media are copied to the genealogical file and the format is slightly modified to optimize the file size. Their original location is given as an indication, there being no longer any connection between the media at the original location and media in your genealogy file.

Display order of media

Heredis displays media according to their date. With no date, they are classified in the order in which they were attached to the data.

9.2 Searching media

Check missing media

You have imported a file from an earlier version of Heredis or GEDCOM? If the original location of the 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.

They are displayed differently depending on whether Heredis had a thumbnail display or not.

- When a Heredis file has a thumbnail image, you will see its representation.

- In the case of a file where there was no thumbnail image, the icon **media not found** (a cross over the Polaroid) is displayed in the place of the media.

Find a group of media

Open the **Media Index**.

1. Click the **Tools** button at the bottom of the index.

2. Select **Locate Missing Media**.

3. Select the folder that contains one or more media not found, and press **OK**.

Info • Heredis will find the media with the same name as that carried during their assignment in the genealogical file. Heredis will widen the search to all subfolders in the named folder, provided they have the same name as that when assigned to genealogical file.

Reassign media

In the edit screen of the media or in the **Media Index**, click the **Update the selected media** icon (shown as a folder) in the button bar of the media display field.

- To process a media not found, locate the media through Windows Explorer. You may have changed its name or its location. It will be copied to the genealogical file and can no longer be lost.

- To reassign a media, select it using the Windows Explorer tools. If you had made changes to the media by resizing or by changing the framing of an image, or if you have changed the text of an assigned document in your word processor, it is copied to the genealogy file and you will see its latest updated version.

Update all media

You have associated with your genealogy Microsoft® Word documents and you wish to continue adding to them? You have tweaked a lot of photos of acts with an image management program? You have worked on documents stored on your hard drive, in your *Pictures* folder, or your current *Genealogy* folder...

Any media that you have already associated with your Heredis data will not be impacted by these changes as they have been copied to your file in the state they were in when you entered them.

To be sure that you have the latest versions of all your media in Heredis, open the **Media Index**.

1. Click the **Tools** button at the bottom of the index.

2. Select **Update media files from the originals**.

9.3   Unlinking, replacing or deleting media

Unlink media

In all the display fields for media, right-click the media concerned and choose **Unlink Media**, or click the - button on the toolbar for media management.

On the screen displaying all media assigned to a person or data:

- Select the media in the left column, right-click and choose **Unlink Media from..,** or click the - (**Remove Selected Media**) button at the bottom of this column.

- Click the media in the left column and then, in the display field of the media, right-click and choose the **Unlink Media from...** option.

The media is unlinked from the person or data but remains available in the **Media Index** and may be assigned to other.

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 selected from your hard drive and in your iphone photo library...). You may keep one media only but use it several times.

1. Double-click the media displayed or open the **Media Index** and select the media to be replaced.

2. Click the **Update...** icon (shown as a folder).

3. Select the media to be kept and click the **Choose** button.

Delete media

Display the **Media** search panel, or open the **Media Index**.

1. Click the **-** (Delete the selected media) button on the toolbar for media management.

2. 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.

9.4   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 Media export screen.

When you synchronize your genealogy file with your iPhone 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.

• In the edit screen of the media,

1. Click the **Save** (the picture) as icon on the button toolbar of the media.

2. Choose the destination location for the exported media, its name remaining unchanged.

• 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 **Tools** button at the bottom of the Index and choose **Export Selected Media....**

3. Select the destination folder for the exported media.

10   Overall management of data

As you enter data, Heredis groups data by type and creates the corresponding Indexes: **Surnames** - **Given names** - **Occupations** - **Places** - **Sources** - **Media**.

Each Index groups all data entries of the same type and provides tools to illustrate, edit or delete data throughout the genealogy file.

10.1 Accessing Indexes

Indexes are permanently available.

• On the Heredis toolbar, click the **Indexes** button and select the Index to be opened.

• Choose **Tools** > **Indexes…**

• Display the **Places**, **Sources** or **Media** search panels to view all data of this type identified in your genealogy file. The panels show the same content as the Indexes.

To access all the tools of the Index, click the **Open an Index…** button on the panel toolbar.

10.2 Searching and sorting

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.

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 exclude items that are not used in your genealogy by ticking the Unused… box.

In the **Media Index**, choose a drop-down menu to display media type (**All media** – **Private media**…) and use (**Sources** - **Persons**…).

Only results that match your search criteria are displayed.

The number of results obtained compared with the total number of elements is shown in the screen title of 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, to classify given names according to the principal given name….

The **Media Index** may be displayed sorted either by file name or by date. Click the buttons on the toolbar of the index.

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 (symbolized by a cross) to the right of the search filters.

To cancel the filter, uncheck the options. In the **Media Index** choose **All Media** and **Whole Index** in the drop-down menus.

10.3 Consulting usage

Visualize easily all the locations where an item appears in your genealogy, and navigate with ease from the Indexes.

1. Open the desired Index.

2. Select the line corresponding to the desired item.

3. Heredis indicates the number of entries in the right side of the screen. Click **Details** to view them.

4. Select the name of the required person, then click **View** to display him/her on the navigation tabs.

Each Index item is analyzed to make you know better the contents of your genealogy.

Click the **Statistics** tab to see usage statistics for the selected item. Heredis shows graphically the number of uses and their distribution in time.

The Index will remain open until you close the screen. You can return at any time to search for another use or to carry out another search.

10.4 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 auto-matically 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:
   • by entering directly on the right of the Index screen,
   • by double-clicking on the line,
   • by clicking the **Edit and modify…** button (shown as a pencil) 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 **Tools** > **Preferences** > **Heredis Preferences** > **Appearance**. 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.

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…** (shown as a double arrow) 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.

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 act found: the Taylor family is sometimes noted with the spelling Taylour or Tayler.

<u>Specify the variants</u>

1. Open the Index in question.

2. Select the item

   • Double-click the surname, given name, occupation or place, or click the **Modify selected**... button (shown as a pencil).

   • Click **Edit** on the right of the screen.

3. In the variants field on the right of the create/modify screen, click the **+** (Link a variant…).

4. 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.

<u>Unlink variants</u>

To unlink a variant, click **Edit** on the right side of the Index. Select it in the variants zone of the create/modify 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 from your genealogy file at one go all variants in the Index, click the **Tools** button at the bottom of the Index and select **Remove 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.

10.5 Deleting data throughout the file

Delete an element from an Index

1. Open the Index in question and select the item to be deleted.

2. Click **-** (Delete). Confirm by clicking **OK**.

Info · Surnames, Given Names and Places cannot be deleted if they are used.

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 **Tools** button at the bottom of the Index and select **Delete All Unused…**

2. Confirm the deletion by clicking **OK**.

10.6 Consulting Place 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

1. Display the map of the selected place.

   Open the **Places Index** then click the **Map** tab on the lower part of the screen to display the interactive map of the selected place.

2. Browse the map using the navigation tools. Zoom or shrink to get a

better understanding of the geography of the place.

Geolocate unrecognized places

If no map appears on the **Map** tab, you must specify the coordinates of the place.

See the chapter *Places* to find how to ensure that Heredis recognizes this place and displays the map.

Info • You may also access the map of the **Place** on the **Personal Data** tab. Click the **Map** tab for each event provided that a place has been entered in the **Details** tab of the event.

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11   Searching for information

11.1 Searching by type of information

Search 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 Number 1.

• Click **Root** on the toolbar.

• Choose **Find** > **View Root Person** or press **Ctrl-1**.

Search for a direct-line ancestor

If the person is a direct-line ancestor in the lineage of the Root Person, Heredis has automatically assigned an Ahnentafel number to this person.

1. Click **Find** > **Search by Number** on the toolbar or choose **Find** > **Search by Number** or press **Maj-Ctrl-S**.

2. Click the **Ahnentafel Number** in the data entry field 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).

3. 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

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** > **Search by Number** or press **Maj-Ctrl-S**.

2. Click the **User Number** in the data entry field and type in the number to search.

3. Click **OK** to display the person corresponding to the number as the primary person.

Search for a bookmarked person

Display the **Bookmarks Tool** 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.

Search for people linked to the primary person

Display the **Links** tab in the **Tools** panels. It will show all individuals who have a link with 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: Descendant of, Godfather to, Witnesses to, etc.

Info • When a category contains persons connected with an event (godfather, declarant, witness...), it is marked with a blue symbol.

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.

Search for the primary person's kinship

Display the **Kinship** tab in the **Tools** panels. It will display all the family members close to the primary person.

Click the arrows to display the different relations: grandparents, nephews and nieces, cousins....

Double-click the required individual to display as the primary person of a new **Immediate Family**.

Info • The step relations (aunts and uncles by marriage, brothers and sisters-in-law, etc.) are shown in italics under the name of their spouse. Half-siblings are displayed in gray.

Look for any kind of link between two persons

The **Find** > **Find Relationships** menu function analyzes all connections in your genealogy file to find how two people may be linked, even if they are not relatives, nor related by marriage.

The primary person is proposed by default as the first individual to be analyzed. You can change this by clicking on the magnifying glass (Choose a person).

Click on the magnifying glass to choose a second person. Then click **Search** to search for relationships.

Heredis will search for potential common ancestors. By selecting common ancestors found, a table displays the parallel paths of each selected individual leading to this ancestor.

Heredis will then check if they have a relationship by blood or by marriage: maternal great-uncle, brother-in-law, spouse of a cousin.

Heredis finally looks for any non-family links: Is there a person who was a witness at their marriage, or who declared their death?

Whatever type of relationship, it is displayed as a table where each line determines the relation: son of, mother of, declarer of the death of, etc. You will easily find the link that connects the two individuals.

All the tables showing links are printable.

Search for duplicates in the file

The search for duplicate identifies persons entered several times in the genealogy file.

1. Choose **Find** > **Find Duplicates…** or click **Duplicates** on the toolbar.

2. Select your search criteria.

Criteria for comparing the given names

Ignore the given names: the search will consider only surnames.

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.

Common Given Names: 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.

Tick the box **One Given Name of One parent is identical** to narrow your search by including this criterion.

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.

<u>Criteria for comparing surnames</u>

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.

Info • The search for duplicates automatically includes the following controls: duplicates cannot be of opposing gender, two individuals in the same ancestry may not be proposed as duplicates.

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3. Click **Start Search**.

The list of all potential duplicates identified in your genealogy is displayed in the left column. A person may appear several times in the list if there are several possible duplicates.

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. B clicking on one of them, you display opposing summaries of the two selected individuals.

You can use the following options for dealing with duplicates:

• **Delete an individual**: 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 individuals**: 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.

After selecting an individual and his/her duplicate, you can of course prepare the merger of the two .

Research of Branches

The **Branches** tab in the **Search** panels allows you to memorize the different family branches as a base for your research and its evolution.

Heredis will open the **Branches** tab by clicking the **Display Family Branch** icon on the **Search** tab of the primary person displayed. Both functions are truly complementary and 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** tab.

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 in black. Double-click any person to display the details.

You have a display filter available in a drop-down 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.

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**

The list of persons displayed in the drop-down 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 drop-down 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 drop-down menu.

Do not overlook to suppress the memorized branch once you have finished your research of this lineage. Open the drop-down 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 search panel

Use the search box in the **Sources** tab to type a word contained in any input field for the source selected: its title, the document, the depository, etc.

The number of items found matching your search is displayed at the top of the panel.

To cancel a search on any word, click the **Delete** icon (symbolized by a cross) to the right of the search box.

Refine the search by selecting sort criteria from the drop-down menu: **Recently Used Sources**, **Unused Sources**, **Private Sources**, **Sources Linked to Primary Person**. The list is updated according to the selected criteria.

To cancel the sort criteria, select **All Sources** from the drop-down menu.

With the Sources Index

Open the **Sources Index** from the **Tools** menu or click the **Indexes** button 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 on the title bar of the Index.

Click the **Search** icon to select Search mode: «Search Contains» the word entered, or 'Search Starts With' the entered letters.

To cancel a search on any word, click the **Delete** icon (symbolized by a cross) 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 Title, Document, Origin... by clicking the column header.

For a list of events in which this source is used, click **Details** on the right side of the Index screen.

In the Source Usage screen,

- Select the name of the individual and click **View** to display the individual as the primary person of a new **Immediate Family**.
- Select an event and click **View** to display the details of the event.

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 search 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 top of the panel.

Limit the search by ticking the box: **Unused Places**

To cancel a search on one element of the place, click the **Delete** icon (symbolized by a cross) to the right of the search box.

With the Places Index

Open the **Places Index** from the Tools menu or by clicking the **Indexes** button on the toolbar.

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 on the title bar of the Index.

To cancel a search on elements of the index, click the **Delete** icon (symbolized by a cross) to the right of the search box.

You will limit the search to unused places by checking the **Unused Places** box.

The results can be classed by type: City, County... by clicking on the column header.

To consult the list of events in which this place is used, click **Details** on the right side of the Index screen.

In the Place Usage screen,

• Select the name of the individual and click **View** to display as primary person in a new **Immediate Family**.

• Select an event and click **View** to display the details of the event.

Search for Media

You have several tools available for finding an item of media for assignment to data or for replacement.

With the Media search panel

1. Display 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 **Delete** icon (symbolized by a cross) to the right of the search area.

3. Refine the search by selecting sort criteria from the drop-down 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 drop-down 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.

   The number of items found matching your search is displayed at the top 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 or by clicking the **Indexes** button on the toolbar.

• 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 on the title bar of the Index.

• Limit the search based on the type of data to which the media is assigned by selecting from the second drop-down menu: **Persons**, **Families**, **Sources**, **Events**, **Surnames**, **Given Names**, **Places** or **Unused Media**.

• Limit the search to a type of media by selecting from the drop-down menu: **Private Media**, **Media not found**, **Other Media**, etc.

   To better identify the media selected,

• Sort the list or thumbnails by media name or by the date that you entered. Make your choice with the buttons on the toolbar of the Index.

• You can enlarge the thumbnails by using the zoom slider.

   When the media is selected, check the list of data to which the media is associated.

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 or given names. 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.

1. Open each of these Indexes, from the **Tools** menu, or clicking the **Indexes** button on the toolbar.

2. 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 on the title bar of the Index.

   Click the **Search** icon to select Search mode: «**Search Contains**» the word entered, or «**Search Starts With**» the entered letters.

3. To consult its usage in the genealogy file, click **Details** on the right side of the Index screen 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.

   In the Usage screen, select the surname of the individual and click **View** to display as primary person in a new Immediate Family.

11.2 Searching for individuals

Rapid Search

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**.

   The list of corresponding individuals is updated as you enter details.

   When you click the name of an individual in the list, his/her summary appears in the **Summary Tool** panel. To view an individual as prima-ry person in a new **Immediate Family**, just double-click the name.

   To start a new search, click **Delete** the selected person icon. All individuals in the file are displayed again.

3. When the list of results is too long and fails to isolate the search person, click the **Show/Hide Advanced Criteria** arrow to unfold the advanced search criteria.

4. 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**, **Multiple Search Results**.

5. Combine the following criteria to refine your search:

   • a place. You can either enter a town, a county, a full or partial zip code, a region or a country.

   • the surname of the spouse

   • a range of years, for example, between 1850 and 1870

     By typing 1850 only the first zone, Heredis will show persons with an event in 1850 or after.

     By typing 1870 only in the second zone, Heredis will show per-sons with an event in 1850 or before.

   • a type of event selected from the drop-down menu,

   • events without a source

   • Direct-Line ancestors (Sosa line)

   • Childless Family, Single Parent Family or treetop branches.

   To display the individuals corresponding to these Advanced criteria, click the **Search** button to update the list.

Search by Name

Select **Find** > **Search by Name**, type **Ctrl-F** or click the **Find** button on the toolbar and then click **Search by Name**.

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**.

   The search is carried out in the mode you have chosen. To change it, select **Tools**> **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. 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.

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4. 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.

Info · To print or export the result of the search, click the Print box.

Multiple criteria Search

You can search for individuals by combining the information in the different seizure fields.

Choose **Multiple Search** in the **Find** menu or press **Shift-Ctrl-M** or click the **Find** button in the toolbar and then click **Multiple Search**.

Define the first search criteria

Choose what type of information to be searched

First, specify the type of information sought. Do you want to search for persons, events, unions ...? The type you choose will determine the choices.

Information about individuals: These are criteria concerning the identity, gender, kinship and known links, personal topics or labels (confidential, marked individuals...).

Event information: Indicate the type of event to be searched.

Witness information: This is to select individuals according to the roles they played in this or that event.

Information on Unions: This search may focus either on family notes (specific to each union), or type of union.

Search criterion based on calculated data: Heredis will select individuals based on the number of children, the number of unions, or age. One can also select individuals according to the dates of creation or modification of their file.

Choose the category in which to search

The items on which you want to base the search depend on the type of search you have previously selected. To search for individuals exercising a given occupation, you must have selected the Persons type. From the Events type, you perform a search on baptism and a date or a specific place ...

Select the factor of choice

The different choice factors are proposed according to the category in which you are searching. In the case of a search based on the occupation, choose one of the following factors: Is Empty – Is Not Empty - Contains - Begins with....

Combine several criteria

After setting the first search criterion, activate the following criteria by clicking the **+** button to add a new criterion.

Define the following criterion. It is possible to apply a combination of four different criteria.

You can remove criteria by clicking the **-** button.

To combine multiple criteria, tick the **All criteria** button or **At Least One Criterion** button.

Start Search

Once you have determined the different search criteria, click the **Start Search** button. The result of the selection is displayed on the

lower part of the screen. The total number of selected individuals is indicated above this list.

Add other individuals to the initial search

The selection of individuals that you have obtained is not sufficient? You can search again by using other criteria and add individuals found in the previous search.

Specify the new search criteria, as above, and click the **Add to Selection** button. The list of individuals found expands on the lower part of the screen. The total number of individuals found has been increased.

Search in a selection of individuals

The selection of individuals that you have obtained is too large? To refine the list, select new criteria that will apply only to individuals already in the list displayed.

Specify the new search criteria, as above, and click the **Search in Selection** button.

11.3 Handling information found

Handle the results of search for persons

Check the results

To view an individual found by the multi-criteria search,

1. Select the individual in the list to display information in the main **Summary** panel.

2. Double-click an individual on the list to view as the primary person.

Info • To have on screen the outcome of your criteria search as well as the navigation screen, use the **Search by Name** panel. Unfold the advanced search by clicking the arrow. Select **Multiple Search** from the drop-down menu.

Heredis displays the search result, allowing you to navigate directly to the individuals found.

Exploit the search

You can work on all individuals found and displayed in the **Multiple Search**.

1. Click **Mark Selection**, **Confidential Selection** or **Secondary Selection**. Each individual contained in the selection is updated and the corresponding operations are enabled.

2. Print the search results displayed by clicking **Print** to obtain an alphabetical list of individuals or **Print Personalized List** to obtain a list at your convenience.

Info • With **Multiple Search**, you can apply specific treatment to the entire genealogy file. Click **Unmark the Genealogy File**, **All Not Confidential**, **All Not Secondary**, before applying a new search based on .

Manage duplicates

Check for duplicates

Review the list of potential duplicates found by Heredis and choose the treatment to be applied to them. You can either merge two duplicate persons, or mark them, or print them.

To check the reality of the duplicate:

1. Click the **Results** tab and select an individual A, in the left column. A potential duplicate B appears in the right column of the screen.

2. Compare the summaries corresponding to individual A and individual B.

3. Continue the display of all potential duplicates of the individual A.

   Once they have been checked, you can merge the duplicates found. Or you can also declare that the two persons proposed by Heredis are not duplicates.

Merge duplicates

1. Select a proven duplicate of individual A.

2. Click the **Prepare Merger** button.

Mark potential duplicates

Click **Mark Duplicates**. All individuals shown on the left side of the **Results** tab will be defined as **Marked**.

Print the potential duplicates

Click **Edit Duplicates Report**. Heredis generates an alphabetical list of all potential duplicates, with your usual word processor.

12   Creating documents

Take a look at the wide variety of print outs offered by Heredis. Most tree charts or documents concern the primary person displayed, but sometimes the couple. Some lists relate to the whole of your genealogy.

Save and print your tree charts directly from Heredis. To edit, change or save your reports, sheets or books, you will use your normal word processor. This method keeps you in a familiar environment, facilitates any manipulation you wish to carry out, allows complete reshaping of the presentation of data and if you so wish, saves the documents displayed as independent files.

12.1 Editing reports, sheets and books

Heredis will edit standard reports included in the software or create your own report templates. Each displayed report may be changed simply. You can also save or print it directly.

You can edit individual reports or family reports.

You can also edit real illustrated books to tell the story of your genealogy. The ancestors or descendants books will cover the number of generations you require.

Create a predefined report

1. Choose the report to edit from the **Reports** menu.

2. Select the report type from the menu or sub-menu.

3. Determine the **Options** for the report.

   • Tick the appropriate options to determine the persons you wish to include in the report (men, women, witnesses...) according to the genealogical role they play.
   • Determine the limits which you wish to apply to the report (confidential, Ahnentafel number bearers...).

   The options vary according to the type of report you are editing.

4. Click the **Styles** tab to indicate your choice of data formatting.

   Determine the field styles options for the report: given names (all, usual, etc.), name order, dates format, places format (full place name, city only, etc.), the way you wish to mention sources…

   Choose font and letter size. Indicate what should appear in the header:

   • any personal text which you may enter in the title field.
   • the total number of items in the report.
   • the name of the genealogy file.
   • the date of edition of the report.
   • the page number.

   Give a distinct color to important elements in the report. The elements are different according to the type of report required.

   Choose page format:

   • Document margins
   • Print grid to border all information displayed with grid lines and with separations between persons mentioned.
   • Click on the **Print setup** button to display the printer dialog panel and select the printer, paper orientation and paper size.

5. Click **OK**.

   The document appears in your usual word processor. If you want to operate differently, you may export it in a particular file format by clicking **Export** instead of **OK**.

Compose a book

Options for presentation and content are selected from different tabs. Any changes to a theme are saved for future use of the same theme.

1. In the **Structure** tab, select the information to be included in the book, photo album, number of generations, location of notes, etc.

2. Click the **Front Cover** tab of book to choose titles and illustrations for the cover page.

3. Click the **Persons** tab.

- Choose the surname and given name format. Tick the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered corresponding data.
- Tick the boxes to indicate what information to be included in the book: images, child status, signature, flags (confidential, childless…), user fields, calculated data, etc.
- Children options: tick the boxes to add the spouses of each child in the document and indicate whether or not there was an offspring.

4. Click the **Events** tab to choose which events to include: witnesses, sources, notes, minor events, etc.

- Choose the formats for date and places of events. Select the place format from the drop-down menu. Select which place items you want to show in the report from those you have entered.
- For each event indicate witnesses, sources and notes.
- Add the minor events (other than the event of birth, the life-ending event and the event of marriage).

5. Click the **Style** tab and select the formatting for the book: font, size and text color, specific colors for men, women and numbers, colors for titles and banners of the document.

6. Click **OK** to start. Default format for the reports is *.docx*.

Info • In the book, a personal text for the **Dedication**, **Acknowledgments** and **Introduction** sections may be written directly in your word processor.

Compose a Custom Report

The setup screen for a custom report has an extra button. In the **Options** tab, click the **Modify** button to open the building screen for the report. You can change the default report or create your own report.

To build a custom report, you have the following options:

- **Columns**: Add or remove columns, change their width, their title and

fill each column with the fields you want.

- **Fields**: Most of the fields included in the input screens are usable as well as some calculated fields (age at death, number of children...).
- **Field formatting**: Each field you include in the report can be formatted (headings, alignment ...). You can also assign a prefix and a suffix to each selected field.

When you first open a customized report, Heredis displays a default report that you can use as it is or modify it. Customized reports that you have changed may be saved.

Click the **New Report** button to create a personal report composed entirely by yourself.

Columns

The columns are displayed at the bottom of the screen that represents the usable width of the page. The columns are divided between the two margins in the same proportions as the screen regardless of the chosen print format (portrait or landscape). You may create up to 32 columns in the limit of space available for printing.

- **Add Columns**: Click the **Add** button to create the desired number of columns to the personal report under construction.
- **Swapping columns**: Click in the column to move, then click the arrow buttons left or right until the column reaches the desired location.
- **Delete a column**: Click in the column to select it and click the **Delete** button.
- **Give a title to a column**: Click in the column to select it. Type the title chosen for the selected column in the **Title** box. Specify the alignment for the title of the column by checking the boxes **Left**, **Center** or **Right**. Indicate in the same way the alignment chosen for fields contained in this column.
- **Change the width of columns**: Place your mouse over the right edge of the column you want to enlarge or shrink. The cursor turns into a double arrow. Hold the left mouse button and drag the right

edge of the column to the desired width.

Fields

1. Depending on the type of information to be placed in the column, click on the tabs containing data for the individual, his father, his mother, his spouses, and calculated data. Click in the list of fields on the one you want to include.

2. Click the **Add** button for it to be inserted in the selected column or double-click the name of the field in the list so that it falls in the selected column.

Formatting fields

Indicate the required character attributes for the added field by ticking the Bold, Italic or Underline boxes.

The fields will be presented side by side in the published report. To print one below the other, insert a line skip by clicking the **Line skip** button.

The total number of fields and line skips are limited to 32 per column.

• **Swapping the order of the fields on a line or in a column**: Select the field to be moved. Click on the **Up** or **Down** arrow buttons until the field has reached its required position.

• **Delete a field in a column**: Select the field to be deleted. Click the **Delete** button.

• **Add a suffix or prefix to a field**: Select the field to be modified in the column. Click the **Prefix** box and then type the prefix to be applied to this field. Click the **Suffix** box and type the suffix to be applied to this field.

To indicate the age at death of an ancestor for example, select the **Age at Death** field in the **Calculated Fields** tab and insert it. Then click in the **Prefix** entry field and type aged. This will give you the words: aged <age at death>.

Save a custom report template

Modify an existing report

You have changed the report on which you are working? Your changes are saved for later use.

You can create another template for a custom report, based on the formatting that you just defined:

1. Click the **Save** button.

2. Give a name to the report template that you have created. It will be saved in the folder *Documents/BSD Concept/Heredis/Heredis Custom Reports*.

This template will be available for any type of custom report.

Create a new custom report template

To create an entirely new report, click the **New Report** button.

Heredis displays a new empty report, to be completed with the required columns and fields.

Open a Custom Report Template already saved

To recall all templates of custom reports that you have created:

1. Click the **Open** button.

2. Choose the existing template to be reused.

This template is displayed on screen and will open by default at the next application of a custom report.

12.2 Saving a document

A sheet, a report or a book edited in your word processor becomes an independent document in 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.

Heredis has created a *My Documents/BSD Concept/Heredis/Heredis Genealogy Reports* folder to help you consolidate all your genealogy documents.

To change the name of the document proposed by Heredis, enter another name in the **File Name** field.

12.3 Printing a document

You will start printing from your word processor having made changes if required.

1. Choose **File** > **Print** or press **Ctrl-P**. These commands are generally the same in all word processors.

2. Select the printer you wish to use from the list of available printers. If your printer does not appear, select **Printer set-up** in the Windows Print command.

Info • For more information on adding a printer, type **Add a printer** in Windows Help.

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3. Click **OK** to start printing.

12.4 Exporting a genealogy document

Exporting the document you have created will enable you to apply specific treatment with other programs. Share your documents with others by using a file format that they are likely to use on their computers or other devices in the format of a universally readable file.

1. Click the **Export** button in the formatting screen of the document.

2. Give the export document a name.

Documents are exported in simple text format (ASCII Files).

3. Click **Save**.

The exported document may be read by any text editor. It may also be opened as a spread-sheet as with Microsoft Excel on either a Windows or Mac machine.

Info • The table layout and certain typographical peculiarities may possibly not be retained in the exported document.

12.5 Constructing tree charts

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 left.

Heredis proposes various types of tree charts, the size of which is predefined (from A4 to A0 or Letter to Quad demy) but also 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

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 the Bookmarks** button and the theme is marked with an icon that allows it to be recognized.

Info • You have a search filter for bookmarked 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.

Tree charts of unlimited size

1. Indicate the number of generations. It is unlimited for ancestors as well as descendants.

2. Choose the orientation of the tree chart, building from bottom to top, from left to right or from right to left.

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 charts of a predetermined size

1. Indicate the number of generations, which may range from 4 to 8 depending on the type of tree chart and the theme selected in the Chart Settings field.

2. Select the persons to be included on the tree chart. By default all persons included in the ancestry of the primary person are displayed on the tree chart. You may untick marked, secondary or confidential persons. You may also not display private data.

   Click **OK** to start the display of the tree chart.

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**, **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.

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 choose **View** > **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 or choose **File** > **Page Setup**.

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 **View** > **Zoom** > **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** (or press **Ctrl-A**). 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.

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, click the **Layout** button.

Tree chart of predetermined size

The changes apply to the selected boxes. The formatting of the text is customizable, but the visual environment cannot be changed.

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.

Modify the fan tree charts

The fan tree charts offer the particular feature allowing the number of generations to be displayed (from 4 to 12), varied graphic charts and formatting according to the generations, the quarters of ancestry or the gender of persons, as well as limitations on the individuals to be displayed.

1. Select the fan theme from the Templates drop-down menu.

2. Choose the number of generations and the angle. The angle may vary between 180° and 300°.

3. Choose the color base for the theme.

   - Click the **By Quarters** box to materialize the quarters of ancestry. If the **By Quarters** option is ticked, the number of Quarters to differentiate in the tree is editable. This number can range from 4 (for a 180 ° angle) to 16. To change this, move the cursor.

   - Click the **Males/Females** box to distinguish the box color by gen-

der.

- Click the **By Generations** box to apply a different color to each generation.
- Tick the **Gradient Fill** box to spread the colors at start and at end that you have selected throughout the fan chart. If the **Gradient Fill** box is not ticked, click on each zone of the fan chart to select the color to be applied to it.

Info • When you have made personal changes to a template, the formatting is saved until the next personal change you may make to the fan chart. You may test the different models but also return to Latest Layout in the Template drop-down menu.

4. Format the contents of the boxes of the tree chart.

- Change the data format (names, dates, places) with the drop-down menus.
- Display boxes containing more or less information by selecting 4 lines or 6 lines in each box of the tree chart.
- Change the text formatting depending on the type of data (males, females, other text).

Click **OK** to display the fan chart according to your determined layout.

Unlimited tree charts

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.

- Choose a preset to be applied to the selected boxes in the drop-down 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 drop-down 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

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 **Layout** 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.

Print the tree chart

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.

1. Choose **File** > **Page Setup** or click **Page setup** in the **Print Setup** panel.

2. Select the printer you will use in the **Name** menu.

3. Choose a standard paper size in the **Paper Size** menu. If you want to select a customized paper size, choose **Personalized Paper Size**

in the drop-down menu.

4. Click the round button corresponding to the desired orientation.

5. Click **OK** to confirm the print size.

If the tree is too large, you may change its size by reducing the number of pages in the **Print Setup** panel.

1. 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.

2. Change the number of pages in width and/or height.

3. 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.

1. Click the **Print** button on the toolbar or choose **File** > **Print**.

2. 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.

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3. Click **OK** to start printing.

Export a 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.

1. Choose **Edit** > **PDF File Mode** or choose **PDF File** from the **Print Setup** drop-down menu.

2. The **Print** button changes form and name. Click the **Export** button on the toolbar.

3. 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.

4. Click **Save**.

Save the tree chart

Save the tree charts created with Heredis. You may modify or print them later.

Saving a tree chart for the first time

1. Click the **Save** button, choose **File** > **Save** or press **Ctrl-S**.

2. In the **File name** field, change the name of the tree chart if necessary.

3. Choose the location where the tree chart should be saved, if you do not want to save it in the default folder.

4. Click **Save**.

   After saving your tree chart for the first time, click again the **Save** button or press **Ctrl-S** to save it as you work.

   To obtain a copy of the tree chart and make further changes, select **File** > **Save a Copy...**

Reopen a saved tree chart

To reopen a saved tree chart and make further changes or print it, choose **File** > **Open** in a tree chart screen.

You can also open a saved tree chart from the Heredis home page. Click **Open** Tree.

Choose the location in your Windows Explorer and click **Open**.

Info • The Heredis tree charts are saved by default to the *My Documents/BSD Concept/Heredis/Heredis Tree Charts* folder.

13 Exchanging

13.1 Importing and exporting data

Import data in GEDCOM format

The GEDCOM exchange format stands for Genealogical Data Communication. Almost all genealogy software programs recognize this universal format.

Import to a new file

1. From the Heredis **Home Page**, choose **Open Tree** > **GEDCOM File**.

2. The GEDCOM file must have the extension *.ged* to be recognized by Heredis. Select the file and click **Open**.

3. Save the new Heredis file to be created and wait while Heredis analyzes the data.

4. Check the information found in the GEDCOM file (quantity of data, structure of places). Open each field of places, to change, if necessary, the type of data it contains.

5. Complete the import options by ticking the information you want to find in your Heredis file (images, sources). You may add a source common to all events imported. In this case, tick the box and fill in the name of the source.

Import to an existing file

1. Choose **File** > **Import** > **GEDCOM File**.

2. Select the file (it must have the extension *.ged* to be recognized by Heredis), then click **Open**.

3. Check the information found in the GEDCOM file (quantity of data, structure of places). Open each field of places, to change, if necessary, the type of data it contains.

4. Complete the import options by ticking the information you want to find in your Heredis file (images, sources). You may add a source

common to all events imported. In this case, tick the box and fill in the name of the source.

5. After importing the GEDCOM data, you must create the links that will connect imported persons to those already present in the main file.

Import Heredis data

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**.

2. Select the Heredis file. Only files created with the Blue Suite may be merged (Mac file or Windows folder with the extension *.hmw*).

3. Click **Open**.

4. After importing the new data, you must create links that will connect the imported persons to those already present in the main file.

Export data

You export your data to exchange them. If you want to transmit data to other genealogists who do not have Heredis for reading them, or if they are using an older version of Heredis, use the GEDCOM format. To share with other users of Heredis 2014 or to create branch files for your own use, use the Heredis export.

Info • Use the **Sync** function to transfer complete files to other people who have their device near to you or on a removable storage device (USB flash drive or external hard drive).

Export in GEDCOM format

1. Choose **File** > **Export** > **GEDCOM File**.

2. Indicate the persons and types of data to be exported.

Info • 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.

3. 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.

4. 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.

5. Click **Export**.

6. Give a name to the new file and choose where the file should be saved. Heredis proposes the same folder as your genealogy file. To select a different location, choose a location in your file directory, then click the **Save** button.

Export a Heredis file

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.

Select the data to be exported

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 types of data for export

1. Tick the boxes to include the different types of data in the exported file.

2. If you want to include notes (person notes, family notes or event notes), specify the export format of the text depending on the software to be used by your recipient.

   • **Preserve Text Format** (RTF)
   • **No Formatting** (Plain Text).

Select the branches concerned

1. Indicate if you export the entire file or a branch starting from the primary person by selecting **Entire File** or **Branch** from the drop-down menu.

2. Select the type of branch in the **Branch Options** drop-down menu: **Ancestors** - **Descendants** – **Ancestors & Descendants**.

3. Choose the number of generations of ancestors, of descendants, or both.

4. 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.

Select the persons to be included in an export file

1. Choose **Export All Persons** in the **Limits** drop-down menu to include all persons saved in the file.

2. To prevent the export of certain persons, choose **Exclude marked persons** or **Export Marked persons only**.

3. To protect the privacy of your data, please indicate your choice in the following drop-down menu:

   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.

4. Tick the **Exclude Secondary Persons** box if necessary.

Info • It is possible to exclude a branch from the exported file. Declare the person at the base of this branch as **Marked**, then choose the **Exclude Marked Persons** option in the export screen.

13.2 Synchronize with other devices

Today you frequently use your WiFi network to connect to the Internet. Heredis proposes to use it also to dialogue between your various devices (PC - Mac - iPhone - iPad - iPod touch) and transfer your data from one to the other.

Your computers are not on a WiFi network? You can also synchronize your genealogy via a removable storage device (USB flash drive or external hard drive).

Is there another version of the file on the WiFi network? Is it more recent? Heredis shows you all the devices where the Heredis software is open, as well as all removable storage devices plugged in to your computer.

How to exchange via WiFi network?

For all your various devices present on the network to be recognized, the **Bonjour** service, published by Apple, must be installed on your computer. If it is not, click the link in the alert message for free download. Once it is installed, your computer can identify the other devices and allow you to synchronize your file with them.

How does synchronization work?

You may trigger a synchronization whenever you want.

Click the **Sync** button then the **WiFi** button or choose **File** > **Sync** > **Via WiFi...**. Heredis opens the synchronization window for you to give your instructions and checks what other devices are present on the network.

If the genealogy file which is open has never been synchronized, choose an available device from the list and click **Send** to start the exchange. All your genealogical data and your media will be copied to the other device.

Info • Please note that the first synchronization copies all of your genealogical data and associated media to your other device. **Do not copy your file first**. This function only can mark your data as being duly synchronized.

If the open genealogy file has already been synchronized, choose the device with which you wish to synchronize. Depending on the most recent file date, Heredis will propose synchronization in one direction or other.

Heredis displays key information (change dates, number of persons, persons last modified) for comparison with those of the open file. If necessary, click the arrow to select the other direction for synchronization.

Click **Send** or **Receive** according to the direction of the synchronization. Only genealogical data or media that have changed are transmitted.

If the genealogy has been modified on both devices since the last synchronization, the synchronization is not possible until you have selected which file to keep and which to synchronize.

Click the arrow to select the appropriate direction then click **Send** or **Receive** according to the synchronizing direction which you have selected.

How to exchange without WiFi?

Those who have no WiFi network or do not have their devices in the same premises can synchronize their genealogy by connecting a removable device (USB flash drive or external hard drive).

Exchange with another PC 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** button then the **USB** button or choose **File** > **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.

When synchronization is complete, you may plug in the device to another computer (PC 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.

13.3 Transmit without synchronizing

You can copy your genealogy in a format suitable for exchange with a Mac by using the **Prepare for Heredis Mac** function, or to a mobile iOS (iPhone, iPad, iPod touch) using iTunes.

Please note that in this case, it is not a synchronization (update of latest data), but a transfer of the complete file (including the media).

Exchange with a Mac

You want to send your genealogy file to a Mac? Heredis allows you to create a fully compatible file and transfer your data and media created on your PC to a Mac.

1. Select the menu **File** > **Prepare for** > **Heredis Mac...**

2. Choose the destination folder for the PC-Mac compatible file and press **OK**.

   Heredis creates a copy of the original folder to which name it adds «-Mac». When saving the compatible file is finished, Heredis will open Windows Explorer to show you where the copy was made.

3. Transfer this folder to any user whose Mac has the Heredis Blue Suite installed; it will be recognized immediately and can be opened without conversion.

However, Heredis for Windows will open directly any genealogy file from Heredis Blue Suite for Mac.

Exchange via iTunes

To transfer your genealogy to a mobile iOS, prepare the file to be sent via iTunes.

1. Choose **File** > **Prepare for** > **iTunes...**

   Heredis creates a compressed file, recognizable by both iTunes and on your mobile iOS. This file contains all your data and all your media.

2. Click **Yes** to create the file. It has the same name as the original file with an extension *.hmwit*.

3. Heredis opens Windows Explorer to show you where the file is for transfer to iTunes.

Insert the file into the iTunes application

1. Launch iTunes.

2. Connect your iPad, your iPhone or iPod touch and select it in iTunes.

3. Click the **Apps** tab (at the top of the screen), then scroll down the list of applications until you reach **File Sharing**.

4. Select Heredis. All genealogies already synchronized are visible. Click the **Add** button or drag & drop the file.

5. The transfer of the genealogy is carried out.
If Heredis is not running on the mobile, the file will appear on the homepage the next time the App is launched.

Recover data from a mobile via iTunes

After a work session on the iPhone or iPad, retrieve the changed data by passing through iTunes again.

• Select the *.hmw* file modified on the **Apps** - **File Sharing** tab.

• To extract it from iTunes, click **Save to**… and save the genealogy file recovered to the location of your choice.

Info • Remember to select the same folder if you want to replace the existing genealogy file on your PC.

APPENDICES

Available buttons

The buttons give you access to the principal management functions of the genealogy file.

MAIN SCREEN	
	Reopens the persons previously displayed as the primary person
	Reopens the immediate last person displayed as the primary person
	Displays the Root Person of this genealogy
	Returns to the Heredis Home Page and allows management of genealogy files
	Saves the current genealogy file
	Synchronizes the open genealogy file with other devices turned on on which the Heredis software is open
	Selects which person to be added
	Selects which person to be deleted
	Creates or selects the father of the primary person
	Creates or selects the mother of the primary person

	Creates or selects a spouse for the primary person
	Creates or selects a child of the primary person and selected spouse
	Selects a new person not linked to the primary person
	Adds a personal connection between the primary person and another individual in the file
	Deletes the primary person
	Deletes the father link with the primary person
	Deletes the mother link with the primary person
	Deletes the link with the spouse of the primary person
	Deletes the child link with the primary person
	Merges the primary person with another person

	Displays notes on the primary person: the Person note or the Family note for each of his/her spouses
	Displays the data consistency analysis for the primary person
	Launches a search for any person in the genealogy file
	Allows to search for a person by surname and given name
	Launches a search for any person by his/her genealogy number or user number assigned by you
	Opens the Search tab to analyze data and launch Web Search
	Searches for duplicates in the open genealogy file (which persons may have been entered more than once in the genealogy file)
	Searches for all types of links between two persons (common ancestors, kinship, other links)
	Launches Search Status Report
	Accesses the different Indexes by type of data entered in the file
	Manages surnames in the file
	Manages given names in the file

	Manages occupations in the file
	Manages places in the file
	Manages sources in the file
	Manages media in the file
	Launches web publishing to a Heredis Online personal website hosted for free
	Opens the tree chart construction screen
	Selects another graphical theme for the application
	Opens the Help manual in PDF format
	Launches the customization of the toolbar
SCREEN FOR MANAGEMENT OF TREE CHARTS	
	Allows to change the display settings of the tree chart
	Adds an illustrated image to the tree
	Deletes the selected illustrated image

	Saves the displayed tree chart
	Opens the formatting screen for the selected boxes
	Launches the printing of the displayed tree chart on a printer
	Launches the export of the tree chart in PDF format

Functional Shortcuts

General Commands

F1	Help
Ctrl F4	Close active window
Ctrl 2	Show/Hide search reports
Ctrl 3	Show/Hide work reports
Ctrl Q	Quit Heredis
Alt F4	Quit Heredis

File Management

Ctrl N	Create new genealogy
Ctrl O	Open a genealogy file
Ctrl S	Save a file or tree chart

Edition

Ctrl X	Cut
Ctrl C	Copy
Ctrl V	Paste
Ctrl A	Select All
Ctrl Z	Cancel action in a text zone
Ctrl Maj Z	Redo typing in a text zone

Navigation

Ctrl 1	Display Root Person
F9	Display Father
F10	Display Mother
F11	Display Selected Spouse
F12	Display Selected Child
F5	Display Family tab
F6	Display Data tab
F7	Display Lineage tab
F8	Display Search tab

Data Entry

Tabulation	Move from field to field
Ctrl F8	Enter a new person
Ctrl F9	Add the father
Ctrl F10	Add the mother
Ctrl F11	Add the spouse
Ctrl Maj F11	Add a Spouse of the child in the Family Group Data tab
Ctrl F12	Add a child
Entrée	Validate choice or entry of a person, name, place, source or media
Ctrl H	Tag the primary person as Childless
Ctrl J	Tag the primary person as Unmarried
Ctrl K	Tag the primary person as Secondary

Ctrl L	Tag the primary person as Marked
Ctrl M	Tag the primary person as Confidential

Search

Ctrl 1	Display the Root Person
Ctrl F	Launch Search by name
Maj Ctrl S	Launch Search by number (Ahn # or User #)
Maj Ctrl M	Launch Multiple Search

Tree Chart Management

Ctrl A	Select All
Ctrl O	Open a tree chart
Ctrl S	Save chart
Ctrl P	Print chart
Ctrl F4	Quit chart
Ctrl Z	Cancel movement in chart
Ctrl Y	Restore movement in chart
Maj Click left	Widen the selection or deselection
Ctrl Click left	Widen the selection or deselection
Alt Click left	Zoom in on a chart zone
Alt Click right	Zoom out on a chart zone
Ctrl wheel	Zoom in or Zoom out on a chart zone
Space	Display Hand to move around the chart
Ctrl Left-click	Mark a theme as bookmarked in the theme selection screen

Heredis exists for Mac, Windows et IOS (iPhone, iPad and iPod touch)

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