

Heredis 2019 EN

User Guide Heredis 2019

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PC

- Windows from 7 to 10
- 500 MB disk space required
- Screen 1024×700 minimum
- Local administrator account
- Internet connection for research, publishing, integrated maps and dashboard

For an optimal use :

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

Mac

- El Capitan (11.11), Sierra (10.12), High Sierra (10.13), Mojave (10.14)
- 500MB disk space required
- Screen 1366×768 minimum
- 64 bits only
- Internet connection for research, publishing, integrated maps and dashboard

For an optimal use :

- 8 GO of RAM
- SSD Hard Disk

Other software to detain

A text processor managing the RTF and DOCX formats is necessary to edit documents such as sheets, lists or books. You can open easily those documents with the main freeware and software text processors.

Visit [Heredis'shop](#) to buy and download Heredis' software. You will receive an email with your licence code and the link to the shop to download the software.

(Mac users) You can also buy and download Heredis from App Store, the licence is included, you will not see it.


(PC) Click on Cortana's toolbar (Windows 10) or the search field in the Start menu and write InstallHeredisWorld2018.exe, press Enter.

(Mac) If you bought Heredis from the [Heredis' shop](#), check your applications.

If you bought from App Store, go to Download.

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

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

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

(PC)

1. Double-click on InstallHeredisWorld2019.exe file.
2. Follow instructions, it will guide you through the setup process.
3. When setup is over, double-click on Heredis 2019 icon on your desk or access through Windows explorer (Programs – BSD Concept – Heredis 2019).
4. Then login to activate your licence. For further information see [Activating Heredis](#).

(Mac) Click on the downloaded link. When the download of InstallHeredisWorld2019.dmg is over, the installation windows opens. If not, double-click on the downloaded file.

In the Installation window:

1. Drop Heredis in Applications
 2. Open the Applications folder and start Heredis. Drag and drop the Heredis icon to your dock to easily access Heredis.
 3. When setup is over, double-click on Heredis 2019 icon.
 4. Then login to activate your licence. For further information see [Activating Heredis](#).
-

If you acquired the software through the [Heredis store](#), you may download the application from your [Heredis'shop account](#) in My Keys section.

You just have to enter your email address and password in order to continue your work. (no licence needed if you bought from App Store)

(Mac) If you bought Heredis from App Store, you can download it directly from App Store as any application.

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

If you installed Heredis on a second computer, see the article on [Share on local network](#) to share your file with the second computer.

You can also find the downloads of the software in [Heredis.com](#).

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

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

Entering

Data

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

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

For further details, see [Add persons](#), [Input events](#), [Save time by inputting faster](#) and more...

Illustrations

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

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

For further details, see [Photo Tool](#), [Media](#), [Geolocation](#).

Family tree charts and other documents

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

Print trees

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

For further details, see [\(PC\) Predetermined size tree charts](#), [\(PC\) Unlimited size tree chart](#) or [\(Mac\) Unlimited size tree chart](#), [\(Mac\) Unlimited size tree chart](#).

Print reports, sheets, or fully illustrated books

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

For further details see [Create and edit sheets](#), [\(PC\) Create and edit reports](#), [\(MAC\) Create and edit a](#)

[report](#), [Create and edit a book](#).

Making your work known to others

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

For further details, see [Heredis Online](#).

Exchanging

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

For further details, see [Share your genealogy](#), [Export Heredis data](#), [Export a GEDCOM](#).

Double-click the Heredis icon  to launch the application.

(PC) For a quick access, slide the icon to your taskbar, wherever it is convenient for you.

(MAC) For a quick access to Heredis, select the icon in the Applications folder, drag it to your dock, wherever it is convenient, or drag it to the Launchpad icon.


Thanks to the new license activation process, as long as you are connected to the internet, you no longer need to enter your license number.

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

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

Start with the purchase of a Heredis 2019 license on the Heredis online store, then download and install the Heredis software on your computer.

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



Discover Heredis Demo

Create a new genealogy or test your genealogy by importing a GEDCOM or Heredis* file

*Saving possible only if under 50 individuals.

Buy Heredis

Visit the Heredis store.

Activate your license

Log in to your account to activate your license.

Note: It is no longer necessary to enter your license number.

When you log in to your online account, the 2019 license you have just purchased will automatically be assigned to the computer on which you have just installed Heredis.

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

Heredis can be installed on up to 3 of your computers.

Download and install Heredis from your account (under My Licenses & Codes) onto your other computer

and log in to your account.

Note: when you reach the maximum number of installations allowed on your license, Heredis informs you that you can no longer install this license on an additional computer and offers to help you manage your installations in order to potentially detach a license from a computer you no longer use so you can then install it on another computer.

heredis Family tree software Find ancestors Mobile App Need help? Shop

Heredis 2018 for Windows | Heredis 2018 for Mac | Try free edition

Sign out Hello Helene [redacted]

Cart (empty)

MORE ON HOW TO MANAGE MY INSTALLATIONS

A license allows you to use the Heredis software on a maximum of 3 different computers.
Note: If you no longer use Heredis on one of your computers, you can detach the license assigned to this computer and install it on another computer.

Your licenses

Heredis 2019 [redacted] Order #: @729455 Purchase: 12-07-2018 Heredis 2019 - Mac History [redacted]

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

HP19: [redacted] Order #: Purchase: Heredis 2019 - Pro - Windows History [redacted]

Computer Name	Information System	Detach
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How to install and activate Heredis on a computer that is not connected to the internet

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

Note: If this computer is later connected to the internet, the following time Heredis is launched you will be asked to log in to your account to finalize the activation process.

How to manage my Heredis installations

Easily access the management of your installations, either from your account on our online store or directly from the application by clicking on the Help scroll-down menu>Manage my installations. This window will display all the information on your licenses, starting with the 2019 Heredis version, including the numbers of the licenses you purchased, the related order number, date of purchase, and the data available on this Heredis version.

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

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

How to detach a license

If you no longer use your Heredis software on a computer, uninstall the application from this computer then log in to your account on our online store, click on My Installations, and detach the computer you no longer use so you can install this license on another device.

heredis® Family tree software Find ancestors Mobile App Need help? Shop

Heredis 2018 for Windows | Heredis 2018 for Mac | Try free edition

Sign out Hello Helene [redacted]

Cart (empty)

MORE ON HOW TO MANAGE MY INSTALLATIONS

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

Heredis 2019

Computer Name	Information System	Detach
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Computer Name	Information System	Detach
HP19 [redacted]	Order #: Purchase: Heredis 2019 - Pro - Windows	History

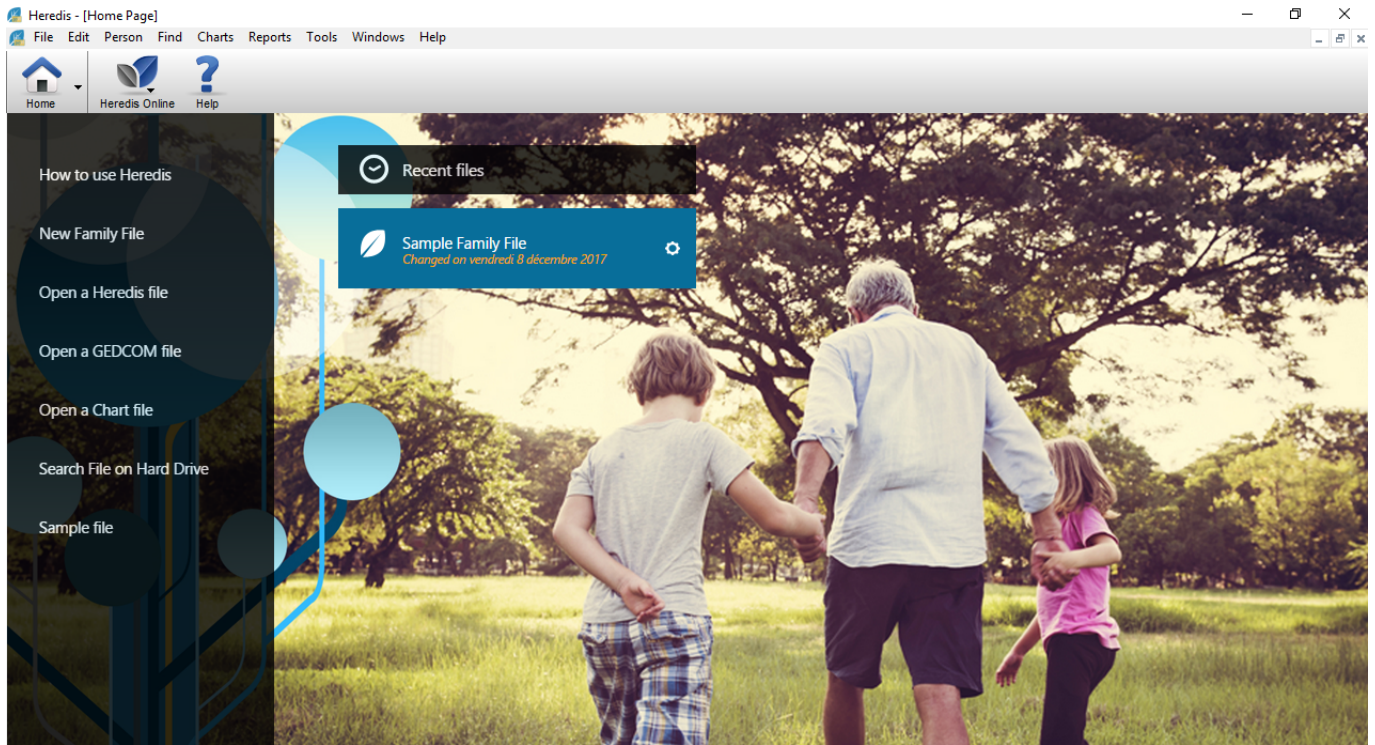
In case of problems

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

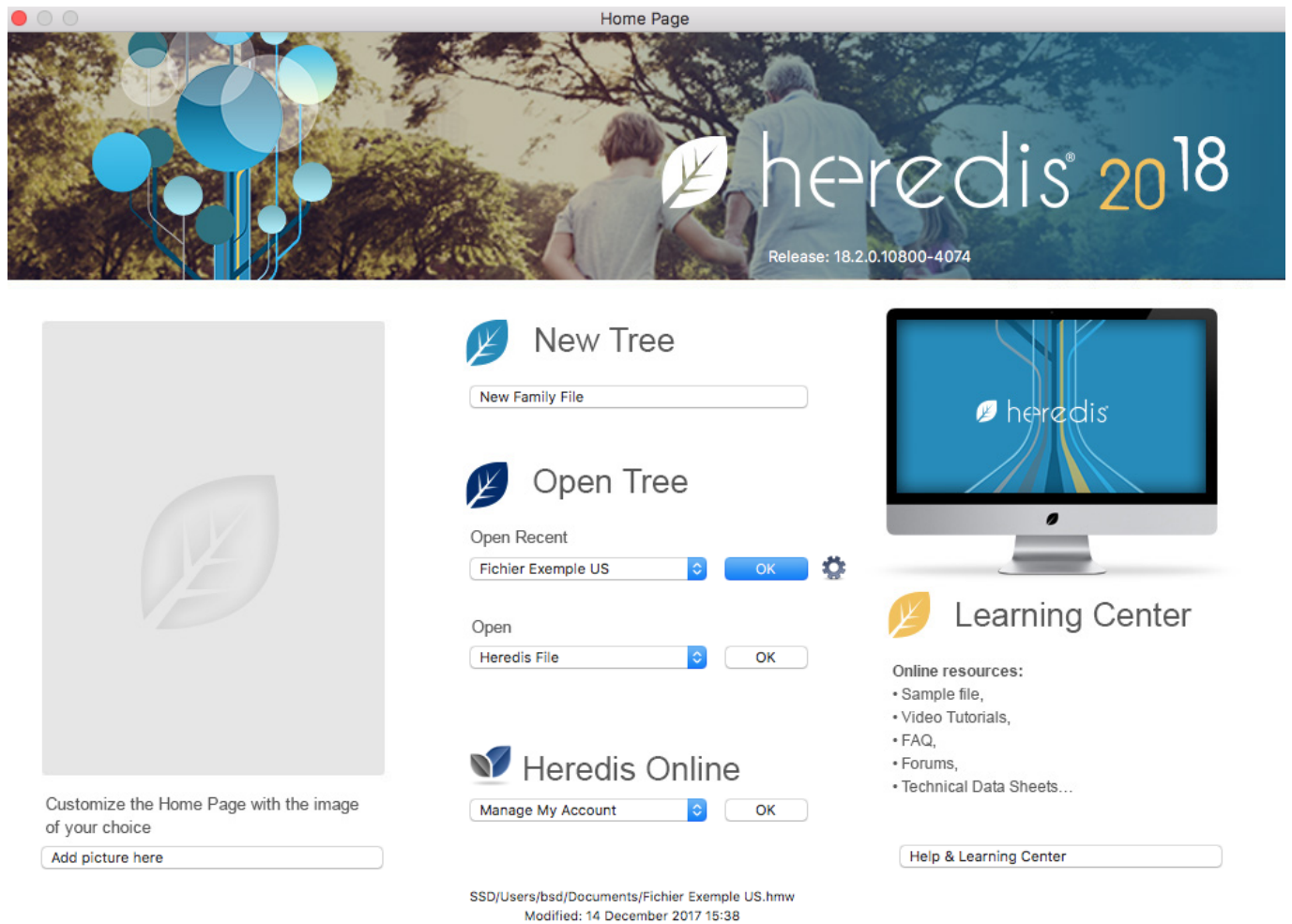
Check that the antivirus/firewall installed on your computer or embedded in your internet box does not block Heredis. If so deactivate it while installing Heredis and authorize Heredis to access the network, tell those software that Heredis is trustworthy.

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

PC's Home Page



MAC's Home Page



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

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

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](#).

You can also check you [Create the first person](#) article.

Remember to save your file regularly during your genealogy work session. When the file has been modified, a black dot appears in the close icon of the file screen ; it needs to be saved.

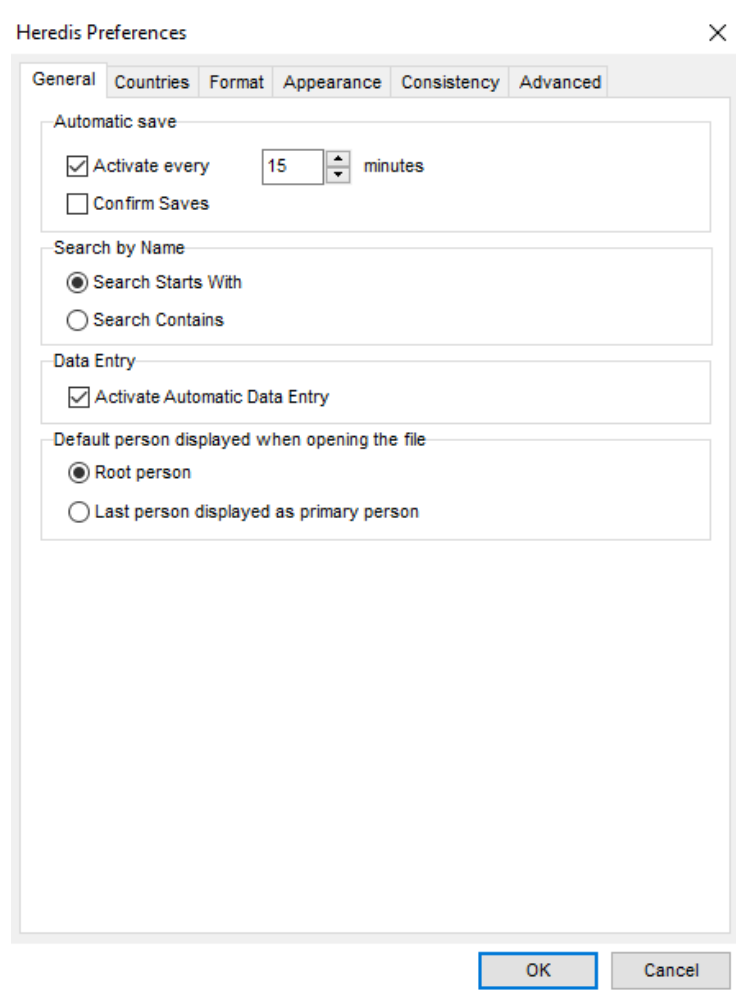
Manually

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

Automatically

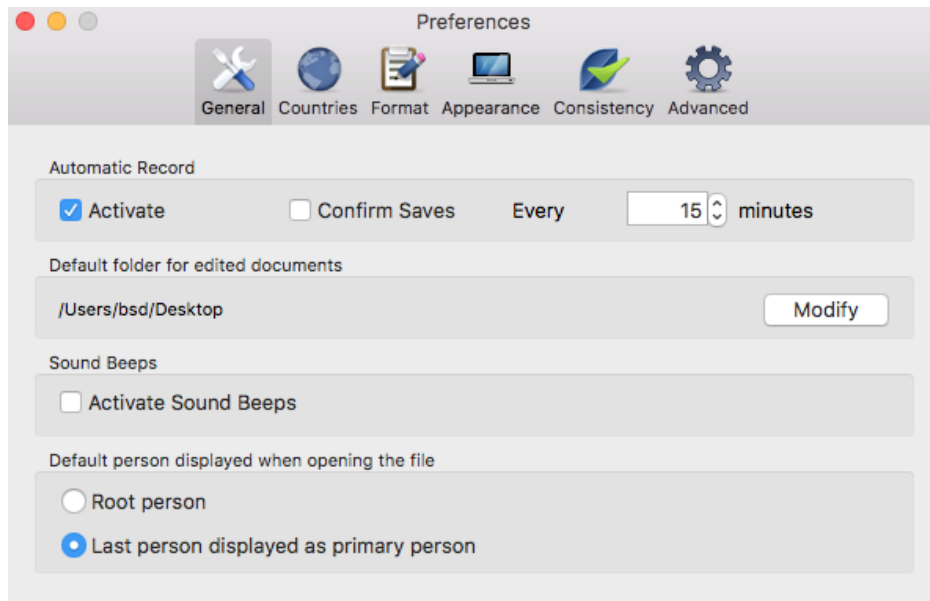
For security you can schedule automatic saving of your data.

PC Select Automatic Save



(PC) Select **Tools > Preferences > Heredis Preferences**. Click on the **General** tab and tick **Activate every...** to indicate the frequency of the savings. If you tick the **Confirm saves** box, Heredis will ask you a confirmation for every automatic saving.

MAC Select Automatic save



- (MAC)** 1. Choose **Preferences** from the Heredis menu
2. Click the **General** button and tick the **Activate** 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 under a different name or in another location.

(PC) Select **File > Save a copy**. Indicate where you want to save the duplicated file. Heredis creates a file *.hmw*, with genealogical data (file *.heredis*) and the folder containing the medias or a *.hal2* file if it is a tree chart. Then click **Save**.

(MAC) Choose **File > Save as** and specify a name and location.

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

(MAC) Return to the saved version

Heredis allows you to reopen your genealogy as it was the last time it was saved. This is very useful, for example, when one has made a mistake during an import.

Choose **File > Revert to Saved**.


Heredis closes the active file without saving and then reopens it as it was before the latest changes.

Info • Any changes made after the last saving will be lost.

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**. Choose the genealogy file in your file directory, and then click **Open**.
- To open a file from the **Home** page, click the **Home**  button, then select Heredis File in the **Open** menu. Click **OK** and then select the file.

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

- **(MAC)** To open a Heredis file from the Finder, double-click the file icon or drag it to the Heredis application icon.

You may open a Heredis file created with an older version of the software.

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

For more details, see [Import a Gedcom in a new file](#).

Open a recently used file

Select the file from the **Open Recent** menu and then click **OK**.

MAC Info • To delete the list of recently used files, choose **File > Open Recent > Clear Menu**.

PC Info • To delete a recently used file, click on the indented wheel near the name of the file you want to remove, then choose **Remove from Recent Files**.

Open an existing file

Choose the type of file to open from the **Open** menu and then click **OK**.


You can open Heredis files, including files from previous versions, GEDCOM files (Genealogical exchange files) or tree charts created and saved with Heredis.

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

Read also [Import a Gedcom in an existing file](#), [Import a Heredis file in an existing 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 the tree chart file your file directory and click **Open**.


- To open a tree chart from the **Home** page, click the **Home**  button and choose

(PC) Open a Chart file; (MAC) Chart File from the **Open** menu. Click **OK** and then select it.

- To open a tree chart file when another tree is already open, click the **Open** button in the tree chart toolbar. Select the file in your tree chart directory of files 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**. You can also click the Close button in the upper left corner of the file.
- To close all open Heredis documents, press **(PC)** Ctrl-Q; **(MAC)** 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.

Reopen a genealogy file

Select your genealogy from the **Open Recent** submenu

or double-click the file **(PC)** in Windows Explorer or Desktop, **(MAC)** in the Finder .

Like with any other software, a technical issue may arise. To be prepared for such an event, we advise that you save your work on a regular basis.

How to back up your work:

- Click on the File menu then on (Mac) Save As or (PC) Save a Copy or click on the File menu then Sync via USB
- Make sure you keep this backup on an external hard drive, a cloud, a USB key, or, even better, on the Heredis Online servers (if you have subscribed to Heredis Premium).

Resetting your application preferences might be an easy way to solve potential anomalies. There are two modes you can use to reset your preferences: Simple Mode and Comprehensive Mode.

Reset - Simple Mode:

1. In Windows

- Before opening Heredis, press and hold the CTRL key on your keyboard.
- Click on the Heredis icon to launch the software (still holding the CTRL key down).
- Heredis is launching; once it is open, release the CTRL key and validate Clear Preferences.
- What will be reset:
 - o Columns and window sizes in reports, indexes, ranking of panels/search windows.
 - o Sorting preferences
 - o All connections: Heredis Online and FamilySearch
 - o Default toolbar
 - o Sheets and Books options
 - o All options for the Slideshow
 - o Family Tree Mapping
 - o Dashboard General Options
 - o Heredis theme
 - o License activation

2. On Mac

- Before opening Heredis, press and hold the ALT key on your keyboard.
- Click on the Heredis icon to launch the software (still holding the ALT key down)
- Heredis is launched; once it is open, release the ALT key.
- What will be reset:
 - o Columns and window sizes in reports, indexes, ranking of panels/search windows.
 - o Sorting preferences
 - o All connections: Heredis Online and FamilySearch
 - o Default toolbar (displayed again)
 - o Books and Sheets options
 - o All options for the Slideshow
 - o Family Tree Mapping
 - o Dashboard General Options
 - o Heredis theme

- o Most recent files list
- o License activation

Reinitialize – Comprehensive Mode:

3. In Windows

- Before opening Heredis, press and hold the ALT and SHIFT keys on your keyboard.
- Click on the Heredis icon to launch the software (still holding the CTRL and SHIFT keys down).
- Heredis launches; once it is open, release the CTRL and SHIFT keys and validate the resetting of your preferences.
- What will be reset:
 - o All preferences reset in Simple Mode
 - o Genealogical preferences in term of consistency, data entry...
 - o The license activation
 - o Sync and sharing history

4. On Mac

- Before opening Heredis, press and hold the ALT and SHIFT keys on your keyboard.
- Click on the Heredis icon to launch the software (still holding the CTRL and SHIFT keys down).
- Heredis launches; once it is open, release the ALT and SHIFT keys
- What will be reinitialized:
 - o All preferences reset in Simple Mode
 - o Genealogical preferences in term of consistency, data entry...
 - o The license activation
 - o Sync and sharing history

In case of problems and the reset doesn't work

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

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

Genealogy files

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

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

MAC Display several working windows

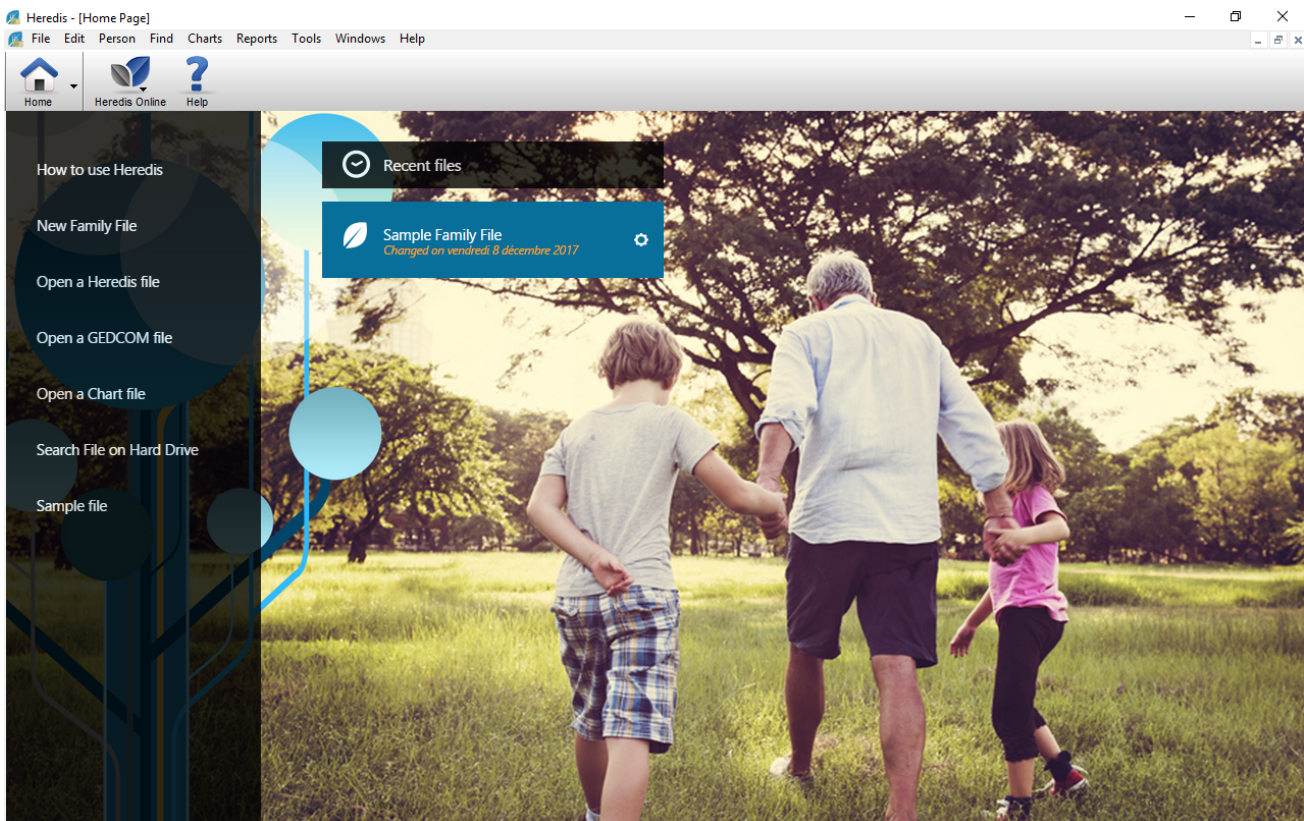
Several views of the same genealogical file may be opened simultaneously: the main navigation screen, tool screens (Indexes, Search for duplicates), tree chart screens, document screens, the Preferences screen...

Display several genealogies simultaneously

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

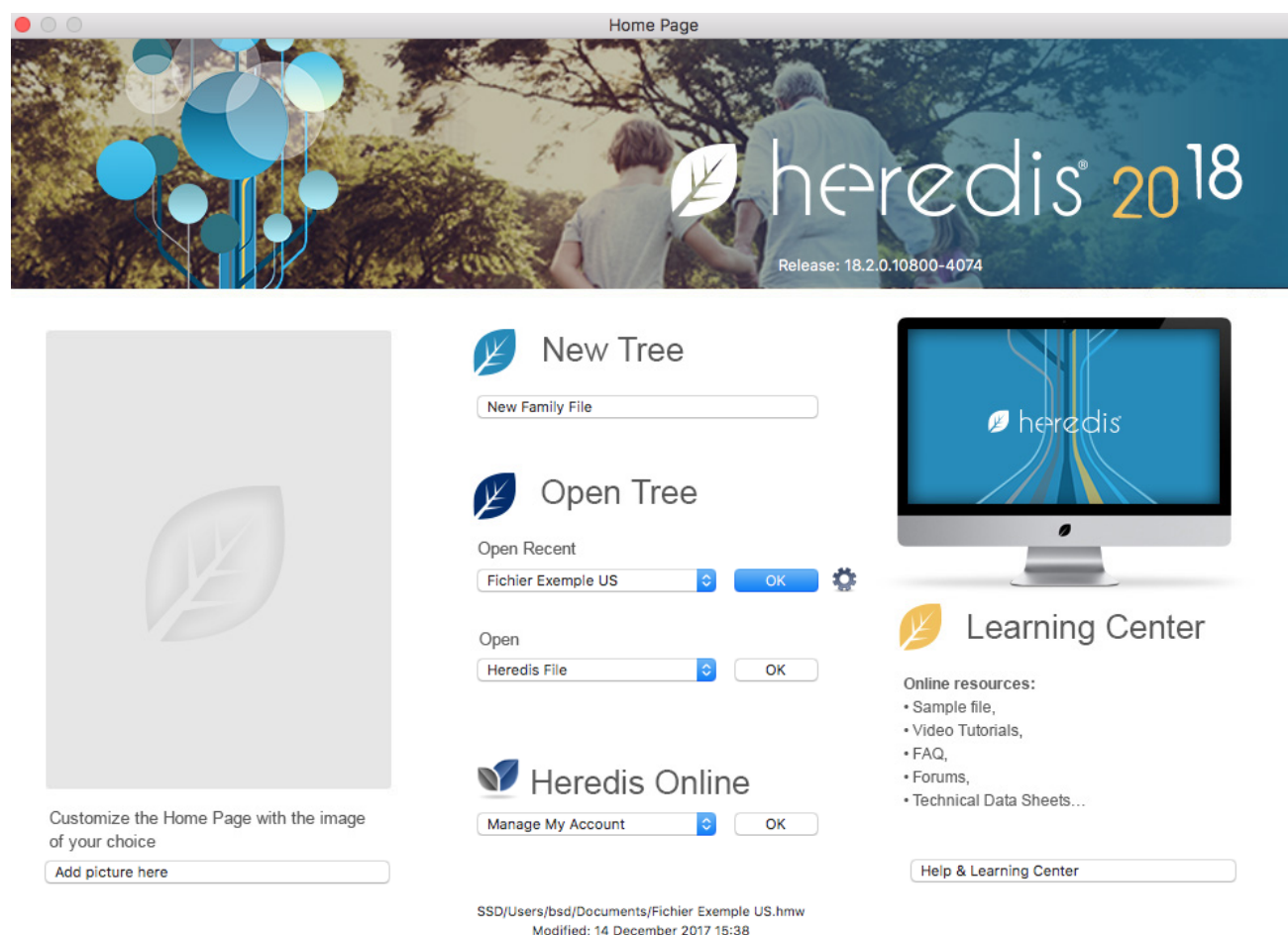
The Home Page


PC's Home Page



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

MAC's Home Page



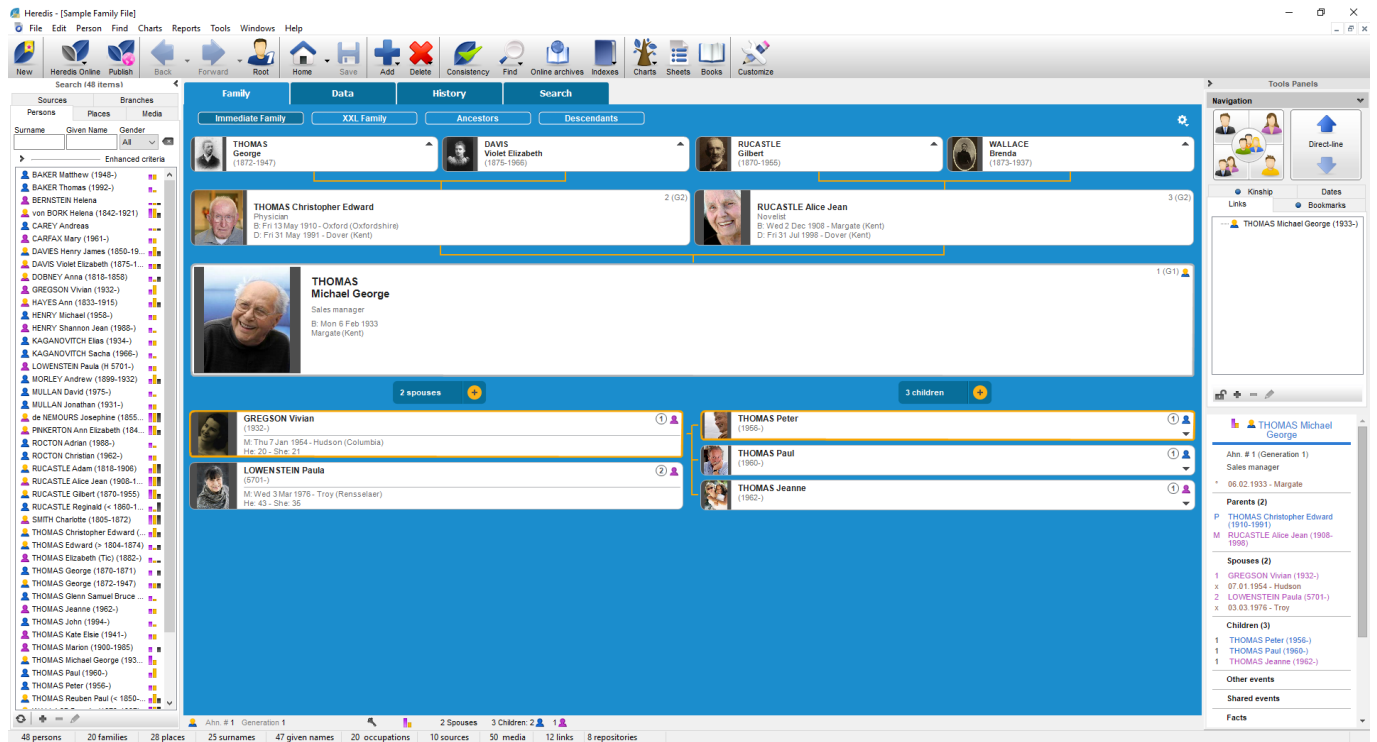
To find again this screen when you are already in a working session, click on the **Home** icon  of the toolbar or choose **File > Home Page**.

The main Screen of Heredis

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

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

The main screen

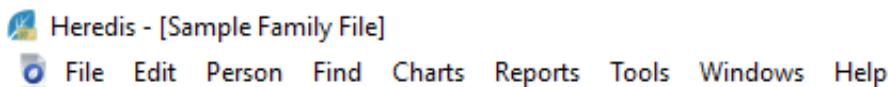


The Menu and Toolbar

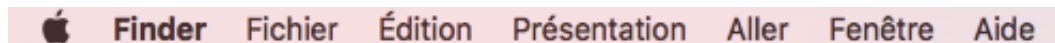
At the top, menus and buttons provide access to all functions of the software. Buttons are different depending on whether you are managing data or building trees.

Menu

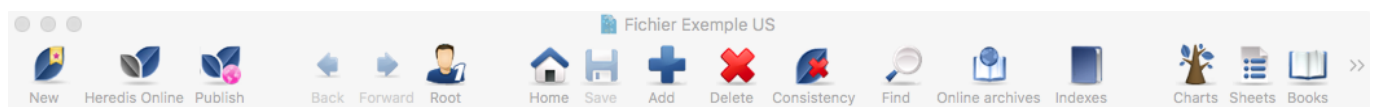
(PC)




(MAC)



Toolbar



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

click **Customize** Toolbar  to add, remove or rearrange buttons on this bar.

(MAC) Drag any new button or extra spaces to the desired location on the Heredis toolbar. Delete buttons by dragging them off the toolbar.

The buttons

See the [Buttons](#) article.

The central part of the screen displays four tabs.

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



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

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

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

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

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

Search and Tool Panel

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

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

Search Panel

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

PC's Search Panel

Search (48 items) <

Sources Branches

Persons Places Media

Surname Given Name Gender

All ▾

> Enhanced criteria

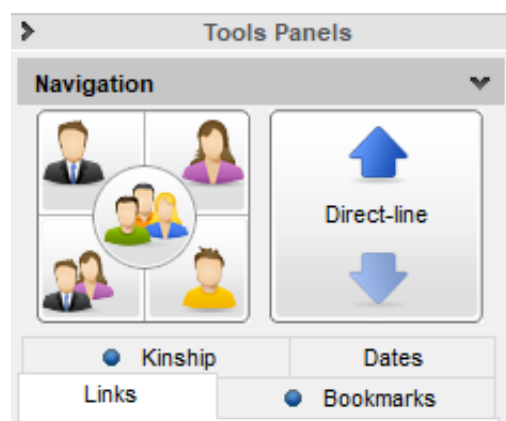
MAC's Search Panel



Tools Panel

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

PC' Tools Panel



MAC's Tools Panel



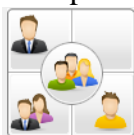
For more details, see [Customize Heredis/Customize the panels](#).

Navigating



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


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


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





Display the **Navigation panel** and use it as a compass. A simple click will navigate to the parent, the spouse, a child or sibling. For a list of spouses, children or siblings, right-click their location on the panel.

Navigate according to [Ahnentafel](#) numbering with the **Next Ancestor**  - **Previous Ancestor**  arrows.

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

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

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

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

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

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

Persons

Every individual mentioned in the genealogy file: ancestor, contemporary, witness, is known as a **Person**.

For each person included in the genealogy file, specify:

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

Relationships

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

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

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


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



For more details, see [Add parents](#), [Add spouses](#), and [Add children](#).

Events

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

- For each event, enter all known details (date, time, place, age stated on the record...) and add a note relating to the event.
- Specify the status of the source of information (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.

For more details, see [Input events](#).

Sources

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

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

For further details, see [Sources](#).

Witnesses or participant

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

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

For more details, see [Add witnesses](#).

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 ((PC) **Links** / (MAC) **Sundry Links**) between Paul and John until you find the information you need to create the kinship.

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

For more details, see [Add linked persons](#).

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 or in the Photo tool.

For more details, see [Media](#) and [Photo Tool](#).

Surnames – Given Names – Occupations – Places

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

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

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

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

For more details see [Indexes](#).

Data memorized

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

Prerecorded data

The application is supplied with databases of places, given names and occupations.

Choose from the propositions as they appear. If no proposition appears or if it is not appropriate, select **New Place**.

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

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

For more details about Indexes, see [Indexes](#).

Preferences

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

For more details on how to personalize Heredis, see [Customize Heredis\Heredis' 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 (PC) **Kinship**; (MAC)**Relations** panel and drop in **Personal Data > Event > Christening** to make this person the godmother.

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

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

(MAC) Correcting spelling

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

Identity fields

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

Surname

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

Prefix



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

Suffix

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

Given Names

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

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

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

Gender

The gender of the person is automatically filled in by Heredis, according to the given name entered. If you want to change it, or if you typed a given name unknown to Heredis or for a multiple given name, type **M** for Male, **F** for Female, or leave **?** for persons whose gender is unknown.

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.

Personal number

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

Signature

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

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

You can choose which option is the default for each new person entered in Heredis > Preferences > Format.

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.

Facts

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

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


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

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


Facts

● Families ● Facts ● Notes Person Sources Alternate Names			
	Fact	Description	N
	Nationality		

+
-
✎
⚙

- To add a **Facts**, click on the **+** button and select the fact to add then write directly in the **Description** area.
- If you wish to complete this fact with other information, a date, a place, a source, a media... click on the pencil  button displayed in the tab.
- To delete a **Fact**, select it and click on the **-** button.

Note: If you confirm a delete, all information linked to this fact will be lost.

- To organize the display of the facts of your genealogy, click on the indented wheel . Select the facts then click on the **Before** and **After** to change the order of this field.

Notes

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

Enter or modify a note


1. Display the note:

- On the menu, 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 navigation or data input screens (input tabs, indexes, media, etc..).

In the **Data** screens, click on the pencil  to access the note.

Info • If the note is not visible on the data input tabs, change the data display mode.

2. Enter the text of the note or paste the contents of the clipboard.
3. Use the formatting tools in the text editor.
4. Tick the **Private Note** box if you wish to keep this note excluded from export of the file, printing or publishing on the Internet.

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

Note: Once a note is filled, the Notes tab is preceded by a blue spot.

For further details, see [Input notes](#).

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


Family tabs




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

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

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

The **Ancestors**' screen presents 4, 5 or 6 generations of ancestors of the primary person. Change the number of generations displayed with the indented wheel  icon or you may start printing the ancestry as it is displayed.

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.

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.

History tabs



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.

Searches tabs



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

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

From this tab, you can also access **Smart Search** which allows you to find data of your genealogy by combining different search criteria such as persons, relations, families, events.


You can also replace and modify data entered in a Persons, Families, or Events section via the **Find/Replace** sub-tab.

You may adapt Heredis to your personal work methods.

Choose your color theme

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

Click **Window(s) Menu > Theme**

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

Select the Toolbar

Click **Customize** button  to select the tools you need.

- Choose an icon and drag it to your toolbar at the desired location or click on the **Add** button. To remove an icon, (**Mac**) drag it out of the toolbar, (**PC**) click on the **Hide** button.
- Drag the icons and place them in the order you want, (**PC**) or click on the **Before** and **After** buttons. You can also add extra spaces between the buttons.
- To display the buttons as they were when Heredis was first launched, drag the default set to the toolbar.

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


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

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

Customize the panels

Display or hide the panels

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

(**PC**) You can hide or display the **Search** and **Tools panels** on one side or the other of the screen. Click the arrow at the top of the panels  to open or close them or choose **Windows > Show/Hide Tools Panels**, or **Show/Hide Search panels**, or **One panel at a time**. You can also swap the panels.

(**Mac**) Use the buttons at the bottom of the screen to change the display of panels. The arrow button to the right or left will show or hide the column or columns of panels. The indented wheel button at bottom right will give you access to any panels which have been removed. A simple click will display the panel again. The procedure for opening the panels may be different for each column. Select **Open one panel at a time** and the panel which is open will automatically close when another panel is opened in the same column. Otherwise the panels will remain open as long as you have not clicked the disclosure triangle.

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

You may reposition a panel in the column or to another column using the mouse. Its new position is

indicated by a blue line and then release the mouse to place it there.

You may alter column width and height of panels if necessary. The cursor will change when placed at the limit of the bar and you may then drag to resize the panel or column.

Resize the panels

(PC) 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.

(Mac) The space allocated to the display of panels may be altered: click the separation line between two panels. The cursor changes to a directional cross and you can extend or shrink the area shown above. Click the separation zone between the panel columns and the file display area to change the space allocated to the panels.

Arrange the panels

(PC) 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.

(Mac) 1. Move the panels by using drag and drop.
2. Click the top bar of the panel and drag to the desired location for the panel in any panel column.
3. When the desired destination is highlighted by a blue line, release the mouse.

Choose **Open One Panel at a Time** by using the **Options** panel button. Heredis automatically closes the displayed panel when you click the display triangle of another panel.

Heredis' Preferences

Define your preferences

In the **(PC) Tools > Preferences > Heredis Preferences** menu, **(Mac) Preferences**, you may define the formats of all the various input fields. Choose how to display the names, places, numbers. Choose the default options for creating events and set inconsistency alerts. Heredis gives you access to advanced configuration options. You must change them only if you are blocked using the default preferences.

- Deactivate Hardware Acceleration: Check this option if you have problems displaying the Online Archive
- Enable file storage: this option optimizes the overall operation of the Heredis software and gives you more fluidity when browsing, optimized search times, faster entries.

Uncheck this option if you notice a marked slowdown in the application when saving your file.

Note: If you change an option, remember to quit and restart Heredis for the new options to take effect.

PC's Heredis Preferences

Heredis Preferences ✕

General Countries Format **Appearance** Consistency Advanced

Name Styles

Surname: Uppercase

Name Order: Surname & Given Names

Numbering Styles

Numbering Method: Ahn. Number

Place Styles

City: Initial Caps

Postal Code: Uppercase

County: Initial Caps

State/Province: Initial Caps

Country: Uppercase

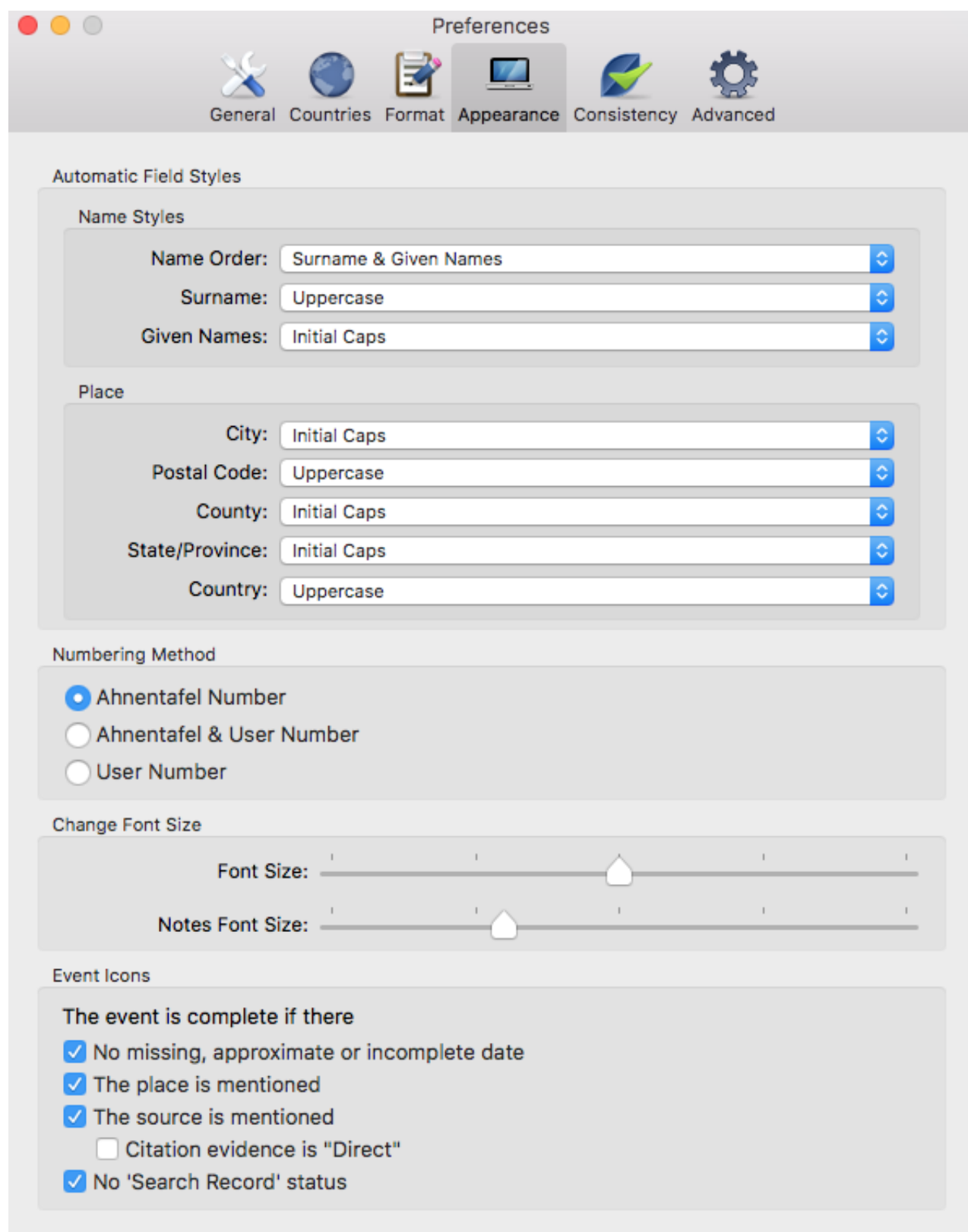
Event Icons

The event is complete if there is:

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

OK Cancel

Mac's Heredis Preferences



Automatic formatting of data

When you enter a surname or given names, you can type them in either uppercase or lowercase. If the **Uppercase** option has been selected in **Preferences** ((PC) you will find it in the **Tools Menu**), 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.

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 **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.

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

Select data entry method



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


Depending on whether or not you have a complete deed or just a mention on a website, you will not need the same input fields. This is why the Heredis data entry fields are modular. There are three data entry modes (**Basic** – **Comprehensive** – **Customized**) that you may use in different ways depending on the data input screen (**Add or Choose...** screen, **Personal Data** tab, **Family Group Data** tab).

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


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.

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.

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.

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

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

Ancestor numbering

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

The three basic rules for [Ahnentafel](#) numbering are:

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

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

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

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

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

Identifying the Ahnentafel lineage

You may identify persons who belong to the Ahnentafel lineage by the symbol preceding their names. Heredis identifies each person with an icon indicating its gender (blue for men, purple for women and green for persons whose gender is unknown). If the person is a direct ancestor of the root person, the head of the icon is yellow.

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

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

Implex (duplicate lines)

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.

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.

Consistency control

Permanent control for duplicates

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

Any input which appears inconsistent will be highlighted by a red cross  in the **Consistency** button on the toolbar. Click the button to be notified of the apparent inconsistency (due to a mistake of date, or the attribution of a link which is not valid) and understand it.

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

To avoid the double entry of a person in your family tree, Heredis will display a list of existing name matches similar to your entry for any new persons you may enter in the **Add** menu screens. Simply select from the list and click **Choose** to choose that person instead of creating a new individual.

For further information, read [\(PC\) Permanent control for duplicates & Merge two persons](#), [\(Mac\)Permanent control for duplicates & Merge two persons](#).

Check all persons in the file

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


1. Open the **Persons** panel.
2. Choose the **(PC) Enhanced Criteria, (MAC) Genealogical Criteria** option.
3. Choose **Inconsistent Data** from the pop-up menu.
4. Double-click each of the persons displayed in the results list to verify their data.

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

No longer consider a person as incoherent

After checking the data of the primary person and to keep the information as it was entered, choose

Person > Check Consistency or press the **Consistency** button  on the toolbar and select the **Mark as Consistent** option.

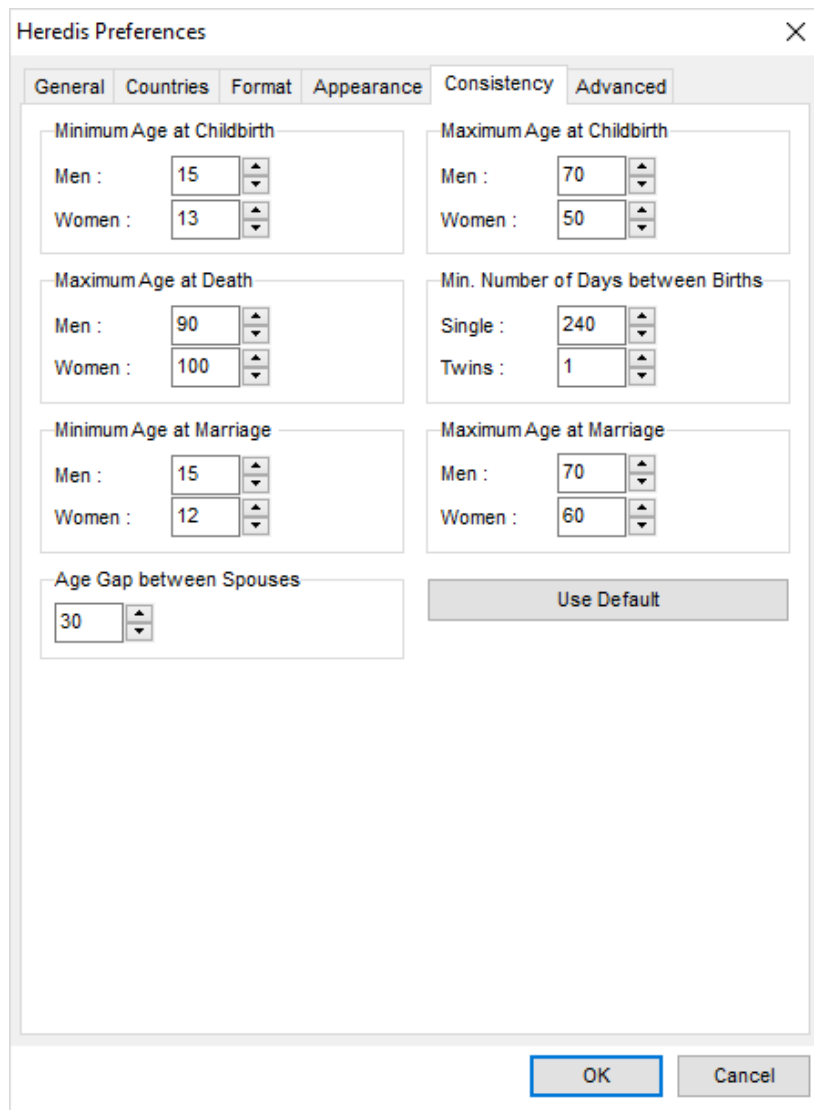
The **Consistency** button changes its appearance and displays a green tick mark . This person will no longer be displayed in the list of a search for inconsistent information.

Change the coherence criteria

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

1. (PC) Choose **Tools > Preference > Heredis Preferences** / (MAC) Choose **Heredis > Preferences**
2. Open the **Consistency** tab.

PC Consistency

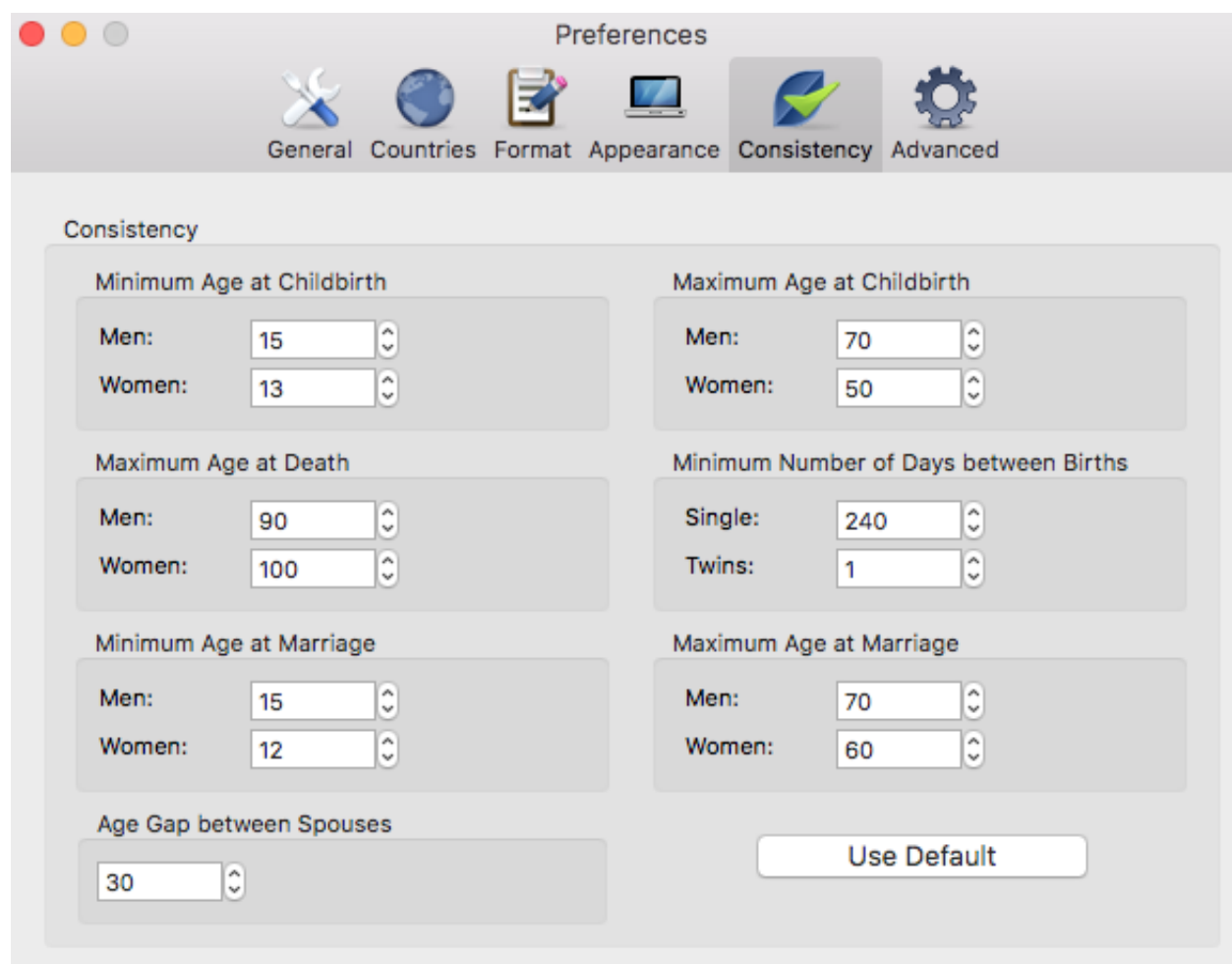


The screenshot shows the 'Heredis Preferences' dialog box with the 'Consistency' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with the following tabs: General, Countries, Format, Appearance, Consistency (active), and Advanced. The 'Consistency' tab contains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

- Minimum Age at Childbirth:** Men: 15, Women: 13
- Maximum Age at Childbirth:** Men: 70, Women: 50
- Maximum Age at Death:** Men: 90, Women: 100
- Min. Number of Days between Births:** Single: 240, Twins: 1
- Minimum Age at Marriage:** Men: 15, Women: 12
- Maximum Age at Marriage:** Men: 70, Women: 60
- Age Gap between Spouses:** 30
- Use Default:** A button located below the 'Age Gap between Spouses' setting.

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

MAC Consistency



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.

Validity Control

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

Dates

Dates should be entered properly.

See Chapter [Dates](#) for possible formats.

Heredis notifies you when you enter an event date which is later than that of the death of such person.

You may fix the date entered if you made a mistake, or confirm a post-mortem event, such as the transfer of ashes or an act concerning the deceased's estate.

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

Links

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

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 (PC)**Add > Unrelated Person**

or (MAC) choose **Person > Add > Add Unrelated Person**

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

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

PC Entering a new person

The screenshot shows the 'Entering New Person' window in Heredis. The window is titled 'Entering New Person' and has a blue background with a decorative graphic of overlapping circles. The window is divided into three main sections: 'Personal Data', 'Birth/Christening', and 'Death/Burial'. Each section contains various input fields, dropdown menus, and buttons. The 'Personal Data' section includes fields for Surname, Given Names, Gender, Occupation, Child Status, and Signature. The 'Birth/Christening' section includes Event Type, Date, Place, Subdivision, and Sources. The 'Death/Burial' section includes Type, Date, Age/Record, Place, Subdivision, and Sources. At the bottom of the window are 'Add' and 'Cancel' buttons.

MAC Entering a new Person

Surname

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

Given Names

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

Gender

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

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

Occupation

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

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

Child status






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

Death

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


Further information

To display further data fields, use the **Choose Data Fields** option . For further details, see [Customize\Select data entry method](#).

Validate the creation of the first person

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

This individual is the starting point of your genealogy, the person called the [Root Person](#) and who will have the [Ahnentafel number](#) 1. Continue your genealogy by clicking on the **Add Father**, **Add Mother**, **Add Spouse** links to complete the immediate family.

Later on, you can access the root person by clicking on the  button or from the menu: **Find > View Root Person**.

See [Add parents](#), [Add spouses](#), [Add children](#).

Change the root person

By default Heredis assigns the first person created as the root person. You can change the root person at any time. Put the person you want to define as the root person as the primary person. Click on the **Person** menu, then choose **Define as the Root Person**. The person becomes the Ahn. n°1.

A GEDCOM file is an exchanging format for genealogy, it was made by Mormons and make it compatible to most genealogy software.

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

The GEDCOM file must have the extension *.ged* to be recognized by Heredis.

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 *.hmv* folder that contains the data file (with the extension *.heredis*) and the folder containing the media.

When you want to save your genealogy or exchange it with someone using Heredis, you can use the Heredis file format.

(PC) You will find it in the *My documents/BSD Concept/Heredis/Heredis files*. It is important that you **DO NOT** change anything inside this folder nor move it. Otherwise, it can compromise your genealogy file.

(MAC) You will find it where you chose when you created your new file. It is important that you **DO NOT** change anything inside this folder nor move it. Otherwise, it can compromise your genealogy file.

Inside this folder, the *.bak* file is the file used for the automatic saves. You can use it if your computer crashed and you didn't save just before the crash.

You have already created a genealogy file or you have been given one created on another application? Importing a GEDCOM file, the recognized standard in the world of genealogy, is very simple.

1. From the Heredis **Home Page**, choose the (PC) **Open a GEDCOM File** ; (Mac) **GEDCOM File** in the **Open** menu and click **OK**.
2. The GEDCOM file must have the extension *.ged* to be recognized by Heredis. Select the file and click (PC) **Done**, (MAC) **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.

Mac Import a GEDCOM

Importing GEDCOM File

Imported file

Fichier Exemple.ged	Persons: 49	<input type="text" value="0"/>	0
	Families: 20	<input type="text" value="0"/>	0
	Sources: 28	<input type="text" value="0"/>	0

Options

Process given names in quotes as: Usual Given Name

Import Pictures

Import Sources

Assign a new source to All events

Title:

Repository:

Document:

Progress

Cancel
Import

PC Import a GEDCOM

Gedcom Import

Gedcom import options

...



Import options:

Import Media

Import Sources

Process given names in quotes as:

Usual Given Name ▾

Back Next Done Cancel

(Mac) then click **Start Import**.

You can now work on your genealogy, add to it, edit anything in it. Heredis records all inputs every time you use the **Save** button, so you can revert to previous versions of your genealogy.

You can exit Heredis at any time. When you reopen the file, it will open your genealogy as it was at when last saved.

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.

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. Then click (PC) **Done**; (MAC) **Import**.
 5. After importing the GEDCOM data, you must create the links that will connect imported persons to those already present in the main file.
-

Importing Heredis data to an existing file allows you to connect a new branch created in a separate file by yourself or by a family member.

1. Choose **File > Import > Heredis File**.
 2. Select the Heredis file. Only files created with the Blue Suite may be merged (Mac file or Windows folder with the extension *.hmv*).
 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.
-

If you wish to submit your genealogy to a correspondent who does not have Heredis you have to export your file in a Gedcom 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.

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.

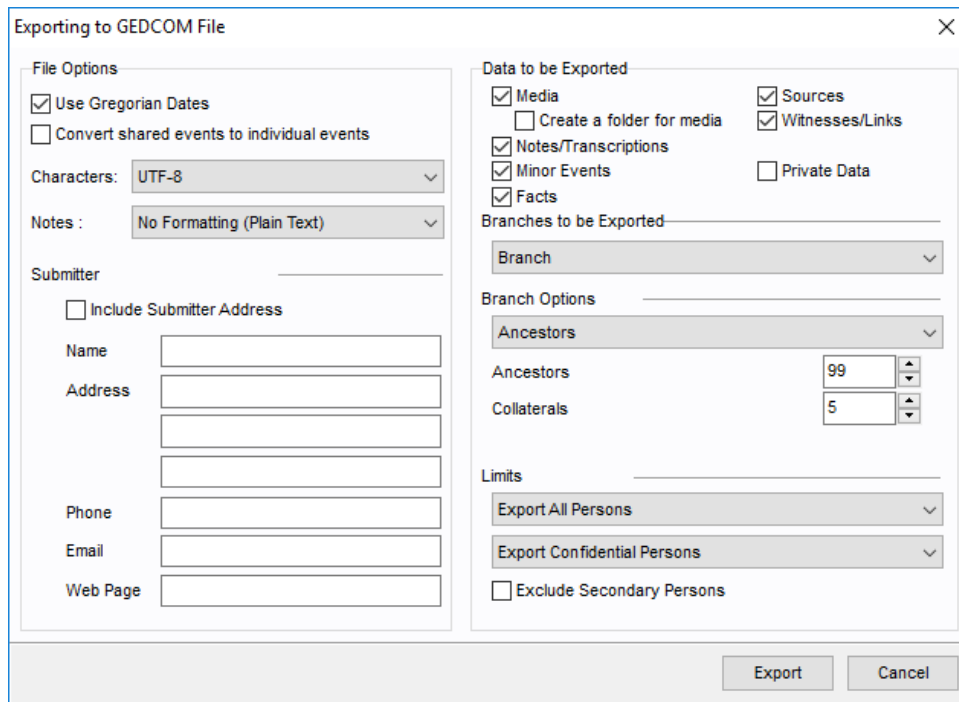
5. Click **Export**.
6. Give a name to the new file and choose where the file should be saved. Heredis proposes the same folder as your genealogy file. To select a different location, choose a location in your file directory. If your file directory is not visible, click the disclosure triangle to the right of the **Save As...** field.

Select the data to be exported

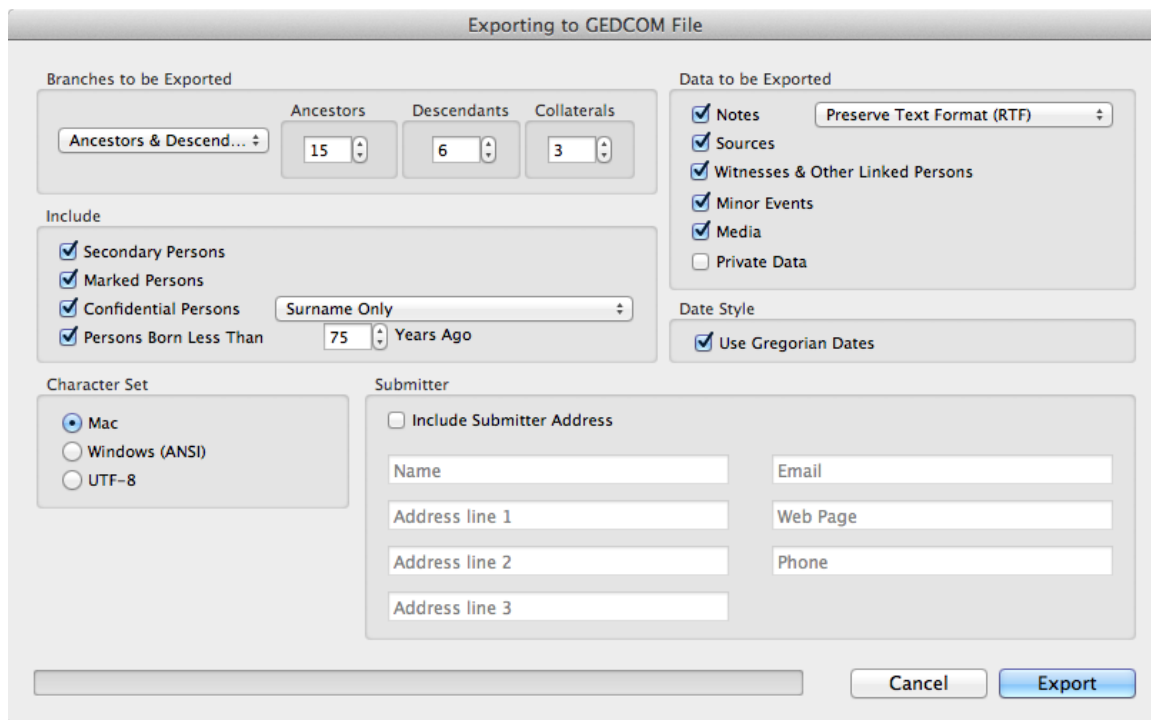
The options for the exported file in GEDCOM or Heredis format are identical. They concern the persons included in the file and the type of data considered.

Select the branches concerned

PC exporting a GEDCOM File



MAC Exporting a GEDCOM file



1. Select branches from the export screen: **All People - Ancestors - Descendants – Ancestors & Descendants.**
2. Choose the number of generations of ancestors, of descendants, or both.
3. Specify the number of collaterals for the ancestor branches. Heredis goes back down the branch line for each direct ancestor to include them in the exported file.

- 0 = only direct ancestors are exported (with spouses).
- 1 = you export the direct ancestors with all their children and their spouses.
- 2 = you export the direct ancestors, their children and grandchildren, along with their spouses.
- 3 = you also add their great-grandchildren, etc.

Info • Remember to check who is the primary person displayed before making a branch export.

Select the persons to be included in an export file

1. Tick all the boxes to include all persons saved in the file.
2. To prevent the export of certain types of people, untick the appropriate boxes.
3. To export data partially, make your selection from the export screen.

Confidential Persons: you may export all the information of confidential persons, or their surname only, or their surname and given names. You can also export all people by hiding the data. The recipient of your file will only know that such a person in a given place in the line existed, without knowing any information about him/her.

Persons Born Less Than ... Years Ago: select the number of years to be considered for export of contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of **Persons Born Less Than ... Years Ago** specify the value and untick the box.

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

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).

You export your data to exchange them.

To share with other users of the Blue Suite or to create branch files for your own use, use the Heredis export. If they are using an older version of Heredis, use the GEDCOM format.

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 branches concerned

PC Export Heredis file

Exporting to Heredis File

Data to be Exported

Media Sources

Notes/Transcriptions Witnesses/Links

Minor Events Private Data

Facts

Branches to be Exported

Branch

Branch Options

Ancestors

Ancestors 99

Collaterals 2

Limits

Export All Persons

Export Confidential Persons

Exclude Secondary Persons

Export Cancel

MAC Export Heredis file

1. Select branches from the export screen: **All People - Ancestors - Descendants – Ancestors & Descendants**.
2. Choose the number of generations of ancestors, of descendants, or both.
3. Specify the number of collaterals for the ancestor branches. Heredis goes back down the branch line for each direct ancestor to include them in the exported file.

- 0 = only direct ancestors are exported (with spouses).
- 1 = you export the direct ancestors with all their children and their spouses.
- 2 = you export the direct ancestors, their children and grandchildren, along with their spouses.
- 3 = you also add their great-grandchildren, etc.

Info • Remember to check who is the primary person displayed before making a branch export.

Select the persons to be included in an export file

1. Tick all the boxes to include all persons saved in the file.
2. To prevent the export of certain types of people, untick the appropriate boxes.
3. To export data partially, make your selection from the export screen.

Confidential Persons: you may export all the information of confidential persons, or their surname only, or their surname and given names. You can also export all people by hiding the data. The recipient of your file will only know that such a person in a given place in the line existed, without knowing any information about him/her.

Persons Born Less Than ... Years Ago: select the number of years to be considered for export of contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of **Persons Born Less Than ... Years Ago** specify the value and untick the box.

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

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.

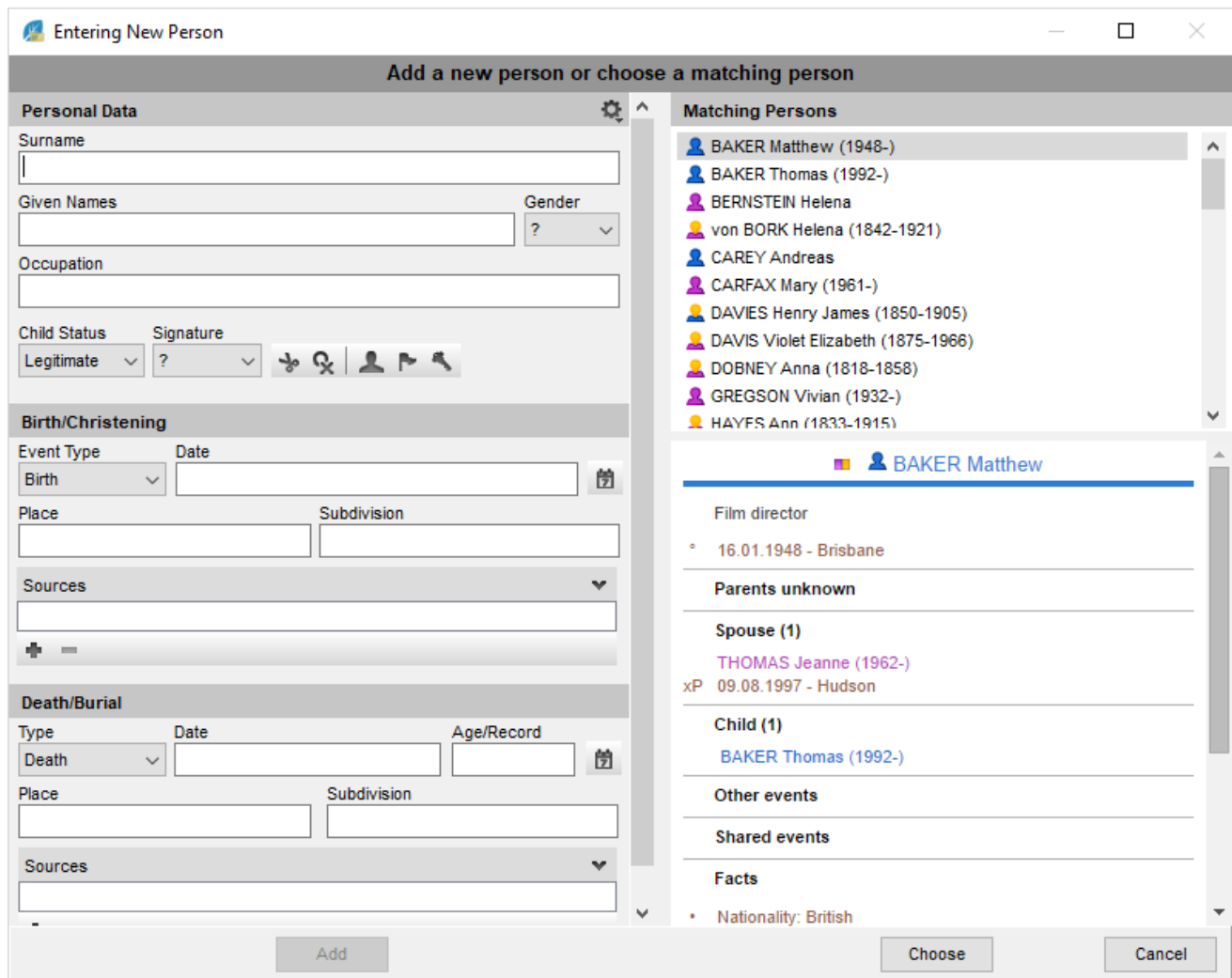
- Preserve Text Format (RTF)
 - No Formatting (Plain Text).
-

A simple click on any empty box on the **Immediate Family** screen will suffice for creating the parents, spouses, children and even 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 individuals 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**.

PC Entering a new Person



MAC Entering a new Person

For more information on duplicates, check the [\(PC\) Permanent control for duplicates & Merge two persons](#), [\(Mac\) Permanent control for duplicates & Merge two persons](#).

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. You can choose the countries you need. See [Customize\Choose the recognized places](#).

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, 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 **XXL Family** tab. Complete or modify known information on the **Personal Data** tab.


You can personalize your entering mode. For more details, see [Customize>Select data entry method](#).

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.

PC Linked Person

Linking a Person

THOMAS Edward (> 1804-1874)
is linked 'Ancestor' to CAREY Andreas



Type of Link
Ancestor/Descendant

Comment

MAC Linked Person

Person Linked to DUCHAMP Alexandre Joseph (1849-1947)

JONGKING Alfred is the son-in-law of DUCHAMP Alexandre Joseph

Type of Link: Father/Son-in-law

Comments:

Heredis allows you to link any individual already in the genealogy file or create a new person with his/her kinship. Access the **Add or Choose...** field by clicking on the **+**, 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**.

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.

PC Automatic filling of a new person

Add or Choose Father of THOMAS Edward (> 1804-1874)

Add a new person or choose a matching person

Personal Data

Surname: THOMAS

Given Names: Edward
 Gender: M

Birth: []

Place: [] Subdivision: []

Sources: []

Death/Burial

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

Place: [] Subdivision: []

Sources: []

Matching Persons

- THOMAS Christopher Edward (1910-1991)
- THOMAS Edward (> 1804-1874)

THOMAS Christopher Edward

Ahn. # 2 (Generation 2)
 Physician

° 13.05.1910 - Oxford
 † 31.05.1991 - Dover - Laureston House

Parents (2)

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

Spouse (1)

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

Children (2)

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

Other events

Buttons: Add, Choose, Cancel




MAC Automatic filling of a new person

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  button on the toolbar then  or choose **Person > Delete Primary Person** to delete the link.
- You can also delete a person from the person tab in the search panel by selecting the person to delete then .

For further details, check [Add parents](#), [Add children](#), [Add spouses](#), [Add witnesses](#), [Add linked persons](#).

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**

- 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, click the **Do not specify gender** lock.

PC Add father


MAC Add father

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

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

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

Family Group Data entry




1. Click the  button at the bottom of the Parents entry field.
2. Choose **Add Father** or **Add Mother**.
3. Continue the data input with the information you have. To validate the new individual, click outside the entry field.

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

Link an existing person

During data entry

- 1 Place the person for whom you want to add parents as the primary person.
 2. Create the link.
- Choose **Person** > **Add Father** or **Add Mother**

- Click the  button on the toolbar and choose **Add Father**  or **Add Mother** .
- Click the links in the empty boxes for the father or the mother on the **Immediate Family** screen.

In the **Add 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, Relations...**), and release on the display area of the screen (Father or Mother box or Parent fields in the **Family Group Data** tab). The parent is then linked.




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

Unlink a person and parents


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

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

All tabs

1. Place the person as the primary person.
2. Remove the link with the parents.
 - Choose **Person > Delete > Father Link** or **Mother Link**.
 - Click the  on the toolbar and choose  **Unlink Father** or  **Unlink Mother**.



Family Group Data tab

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

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

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 **Add Child** in the display screen of the primary person in the **Immediate Family** tab.
 - Choose **Person > Add Child**.
 - Click the  button on the toolbar and choose **Add Child** .
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.

PC Add a Child

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

Add a new person or choose a matching person

<div style="background-color: #f0f0f0; padding: 2px; font-weight: bold;">Personal Data</div> <p>Surname THOMAS</p> <p>Given Names Gender ? ▾</p> <p>Occupation</p> <p>Child Status Signature ? ▾</p> <p>Legitimate ▾ ✂ ✕ 👤 🚩 🗑</p> <div style="background-color: #f0f0f0; padding: 2px; font-weight: bold;">Birth/Christening</div> <p>Event Type Date</p> <p>Birth ▾ <input type="text"/></p> <p>Place Subdivision</p> <p><input type="text"/> <input type="text"/></p> <p>Sources ▾</p> <p><input type="text"/></p> <div style="background-color: #f0f0f0; padding: 2px; font-weight: bold;">Death/Burial</div> <p>Type Date Age/Record</p> <p>Death ▾ <input type="text"/> <input type="text"/></p> <p>Place Subdivision</p> <p><input type="text"/> <input type="text"/></p> <p>Sources ▾</p> <p><input type="text"/></p>	<div style="background-color: #f0f0f0; padding: 2px; font-weight: bold;">Matching Persons</div> <ul style="list-style-type: none"> THOMAS Christopher Edward (1910-1991) THOMAS Edward (> 1804-1874) THOMAS Elizabeth (Tic) (1882-) THOMAS George (1870-1871) THOMAS George (1872-1947) THOMAS Glenn Samuel Bruce (1997-) THOMAS Jeanne (1962-) THOMAS John (1994-) THOMAS Kate Elsie (1941-) THOMAS Marion (1900-1985) THOMAS Michael George (1933-) <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <div style="background-color: #e0e0e0; padding: 2px; font-weight: bold; text-align: center;"> 👤 THOMAS Christopher Edward </div> <p>Ahn. # 2 (Generation 2) Physician</p> <p>° 13.05.1910 - Oxford † 31.05.1991 - Dover - Laureston House</p> <hr/> <p>Parents (2)</p> <p>P THOMAS George (1872-1947) M DAVIS Violet Elizabeth (1875-1966)</p> <hr/> <p>Spouse (1)</p> <p>RUCASTLE Alice Jean (1908-1998) x 22.11.1935 - London - The King's Weigh House Chapel</p> <hr/> <p>Children (2)</p> <p>THOMAS Michael George (1933-) THOMAS Kate Elsie (1941-)</p> <hr/> <p>Other events</p> </div>
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Add
Choose
Cancel

MAC Add a Child

The screenshot shows a window titled "Add or Choose Child of Thomas Edward (> 1804-1874) & Dobney Anna (1818-1858)". The window is divided into two main sections: "Add" and "Choose".


Add Section:

- Personal Data:** Surname: Thomas, Prefix: (empty), Suffix: (empty), Given Names: (empty), Nickname: (empty), Gender: ?, Occupation: (empty), Title: (empty), User #: (empty).
- Child Status:** Legitimate (dropdown).
- Signature:** ? (dropdown) with icons for copy, paste, and search.
- Birth:** Date: (empty), Time: (empty), Place: (empty), Subdivision: (empty).
- Private Event
- No search record (dropdown)

Choose Section:


- Matching Persons:**
 - Thomas Christopher Edward (1910-1...
 - Thomas Edward (> 1804-1874)
 - Thomas Elizabeth (Tic) (1882-)
 - Thomas George (1870-1871)
 - Thomas George (1872-1947)
 - Thomas Glenn Samuel Bruce (1997-)
 - Thomas John (1994-)
 - Thomas Judy (1962-)
 - Thomas Kate Elsie (1941-)
 - Thomas Marion (1900-1985)
 - Thomas Michael George (1933-)
 - Thomas Paul (1862-)
 - Thomas Paul (1960-)
 - Thomas Peter (1956-)
 - Thomas Reuben Paul (< 1850-> 1921)

Buttons at the bottom: Cancel, Add, Choose.

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

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

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.

4. Continue the input with the information you have. The second part of each Child line contains data fields for the spouse of the child. For more information on adding the spouse of a child in the **Family Group Data** tab, see chapter [Input a Family Group](#).

5. 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**.
 - Click the  button on the toolbar and choose **Add Child** .
 - Click the + button **Add Child** in the display screen of the primary person on the **Immediate 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, Relations...**), and release on the display fields of the screen (children display area on the **Immediate Family** tab or **Children on Family Group Data** tab). The child is then linked to both parents (the primary person and the selected spouse).

Order of children

Heredis places children according to their date of birth.

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

Change the order of children

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




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

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  button in the toolbar and choose  **Unlink Selected Child**.
 - If the primary person is a child, choose **Person > Delete > Father Link** or **Mother Link**, or click the  button on the toolbar and choose **Unlink Father** or **Unlink Mother**.



Family Group Data tab

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.

Add a new person

All tabs

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**
 - 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. Gender is prefilled. To change the gender, click the **Do not specify gender** lock.

PC Add a Spouse

MAC Add a Spouse

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


Add Pane:

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

Choose Pane:

- Matching Persons:** A list of potential spouses with names and dates, such as "ACHART François (-< 1767)", "ALLOIS Antoine (-< 1712)", "AMBOCHEUR Antoine ((c) 1689-17...", "ANCELIN Alexandre", "ANCELIN Gérard (1747-1815)", "ANCELIN Pierre", "ANCELIN Pierre Augustin ((c) 1777-)", "ANCELIN Pierre Louis ((c) 1814-)", "ARTIGUE Jean (-< 1765)", "ARTIGUE Jean Mary ((c) 1732-1792)", "ARTIQUE Antoine", "ARTIQUE Emile ((c) 1850-)", "ARTIQUE François "Isidore" (1826-...", "ARTIQUE Hubert (1766-1837)", "ARTIQUE Jean Baptiste "Theophile...", "ARTIQUE Jean Jacques "Rose" (17...", "ARTIQUE Theodule "Edmond" (185...", "ARVATI Tertulien (1860-)", "AUBERT", "AUBERT Antoine", "AUBREVILLE François ((c) 1631-16...", "AUBREVILLE François (1702-1759)".

At the bottom of the window, there are buttons for "Add", "Choose", "Cancel", and "OK".


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

Before you add the spouse, check the right part of the screen to make sure he/she is not already created. Click **Add**.

Enter information about the family.

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

Family Group data tab



1. Click the  button at the bottom of the **Families** entry fields.
2. Choose **Add 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 [Input a Family Group Data](#).

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

Link an existing person

During data entry

1. Place the person for whom you want to add a spouse, as the primary person.
2. Create the link.
 - Choose **Person > Add Spouse**
 - Click the  button on the toolbar and choose **Add Spouse** 
 - Click the + (xx spouse(s)) sign in the display field of the spouse on the **Family** tab.

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

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

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

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

Drag and drop

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, Relations...**), and release on the display area of the screen (display area for spouses on the **Immediate Family** tab or the **Families** fields on the **Personal Data** and **Family Group Data** tabs).

Spouse of same gender

With Heredis, you can add an union for persons of same gender. Proceede like any other union, just change the gender of the spouse.

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 pop-up 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».

PC Family Status

The screenshot shows the 'Family Details' form in the PC version of Heredis. The 'Family Event' is set to 'Marriage'. The 'Date' field is empty. The 'Age/Rec. He' and 'Age/Rec. She' fields are also empty. The 'Place' and 'Subdivision' fields are empty. The 'Sources' field is empty. The 'Family Status' dropdown menu is open, showing the following options: Married (selected), Engaged, Separated, Divorced, Other Marital Link, Cohabitee, and Unknown Status.

MAC Family Status

The screenshot shows the 'Family Details for Bernstein Helena' form in the MAC version of Heredis. The 'Marriage' event is selected. The 'Date' and 'Time' fields are empty. The 'Place' field is empty. The 'Witnesses (0)' table is empty. The 'Status' dropdown menu is open, showing the following options: Married (checked), Engaged, Separated, Divorced, Other Marital Link, Cohabitee, and Unknown Status. The 'Cancel' and 'OK' buttons are visible. The bottom status bar shows '16 (G 5) 1 spouse 1 Child: 1'.

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

Family number

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

Families order

Heredis enters unions based on the date of the main family event.

If you know the sequence of unions without knowing the dates, or if the chronology does not seem exact to you, you can change the families order.

Change the families order

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

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

A blue line indicates the destination position.

Return to the default order

You may cancel a manual order change of families if you have made mistakes or entered new dates. Right-click the list of families and choose the option **Automatically sort spouses...**



Delete a family

Heredis allows you to delete:


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

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


All tabs

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

Personal Data tab

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

Family Group Data tab

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

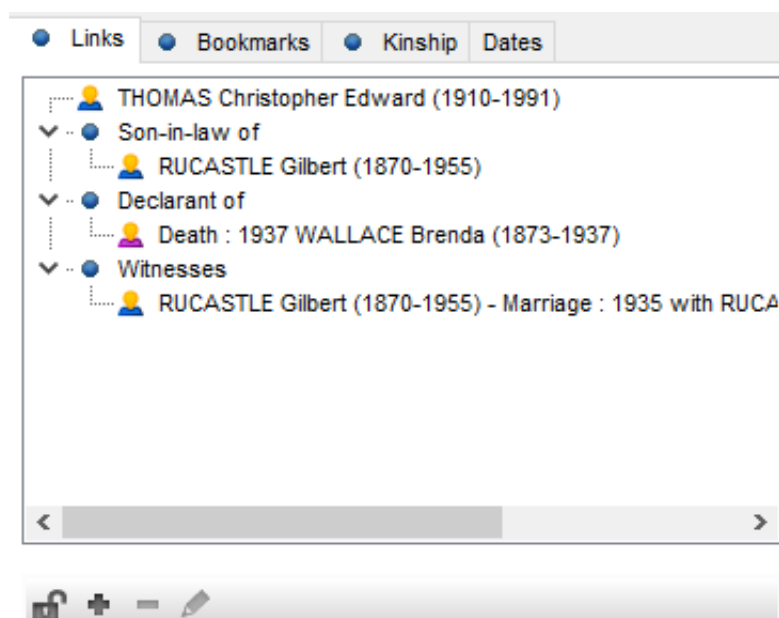
Info • If you select **Delete Spouse and All Links**, you will remove the person from your genealogy file.

The concept of a linked person allows you to specify a link between two persons when:

- The kinship is uncertain. You know that Paul is the uncle of John, but you do not know if he is the paternal or maternal uncle, or the husband of an aunt. Create a personal link between the two individuals until the exact kinship may be determined.
- There are no events to link the two persons. You know that Jane was a friend of Maria. Create a personal link *Friend* between these two persons.

(PC) Linked persons are displayed in the **Links** tabs of the tools panel. You can add, edit or delete them with **+** **✎** **-** buttons. When at least one person is linked, a visual indicator (blue spot) is displayed on the **Links** tab.

PC Linked Persons



(MAC) Linked persons are displayed on the **Personal Data** tab. Click the **Sundry Links** tab to add, edit or delete them with **+** **-** **✎**. When at least one person is linked, a visual indicator (blue spot) is displayed on the **Sundry Links** tab. The personal link appears in the **Personal Data** tab of both related persons.

MAC Linked Persons

• Families Facts Person Sources • Sundry Links Alternate Names		
Name	Role	Comments
Rucastle Gilbert	Father-in-law	
+ - ✎ ↑		

Add a new person

In the **Person** menu / **Add - Another Link**.

or (PC) Click the  **Add** /  **Add Link**

PC Add Linked Person

(MAC) Click the **Sundry Links** tab in the **Personal Data** tab.

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

MAC Add Linked Person

Families Facts Person Sources Sundry Links Alternate Names		
Name	Role	Comments

Linking a Person to Thomas Michael George (1933-)

Sundry Links

Add

Personal Data


Surname:

Given Names:

Gender:

Occupation:

Signature: ↕ ✂ 👤 🚩 🔍



Choose

Matching Persons

- 👤 Baker Matthew (1948-)
- 👤 Baker Thomas (1992-)
- 👤 Bernstein Helena
- 👤 von Bork Helena (1842-1921)
- 👤 Carey Andreas
- 👤 Carfax Mary (1961-)
- 👤 Davies Henry James (1850-1905)
- 👤 Davis Violet Elizabeth (1875-1966)
- 👤 Dobney Anna (1818-1858)
- 👤 Gregson Vivian (1932-)
- 👤 Hayes Ann (1833-1915)
- 👤 Henry Michael Erwin (1958-)
- 👤 Henry Shannon Jean (1988-)
- 👤 Kaganovitch Elias (1934-)
- 👤 Kaganovitch Sacha (1966-)
- 👤 Lowenstein Paula (H 5701-)
- 👤 Morley Andrew (1899-1932)
- 👤 Mullan David (1975-)
- 👤 Mullan Jonathan (1931-)
- 👤 de Nemours Josephine (1855-1920)
- 👤 Pinkerton Ann Elizabeth (1845-1930)
- 👤 Rocton Adrian (1988-)
- 👤 Rocton Christian (1962-)
- 👤 Rucastle Adam (1818-1906)
- 👤 Rucastle Alice Jean (1908-1998)

vents for the primary person

The **Linking a Person to...** screen opens. Enter the information you know about the person. 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 (PC) **Links** tab / (MAC) **Sundry Links** tab.

2. On the button bar at the bottom, click **+** (Add a link to the primary person).
3. The **Linking a Person to...** screen opens. Enter the surname and given name in the **Personal Data** fields and select the individual from the list of **Matching Persons** to the right of the screen. Click the **Choose** button or double-click the name in the list.
4. Complete the information fields for the link and press **OK**.

Drag and drop

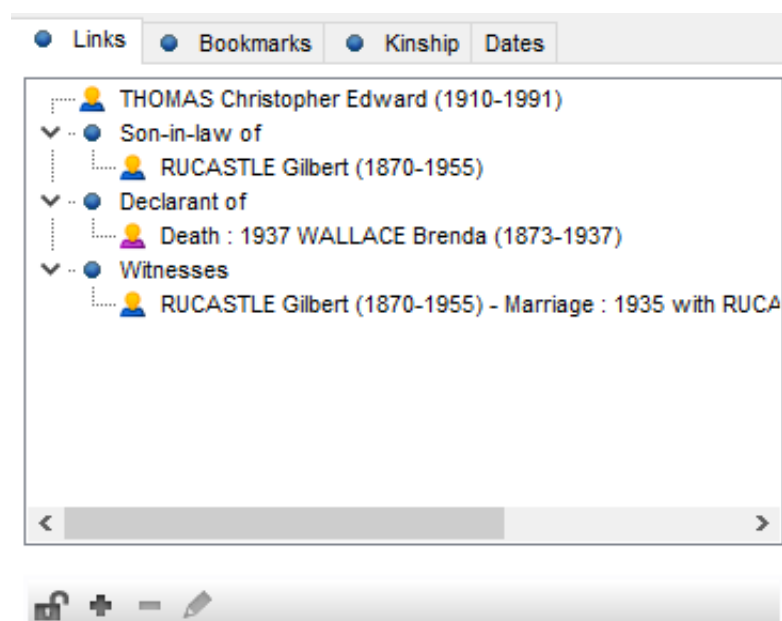
1. Click the (PC) **Links** tab / (MAC) **Sundry Links** tab.
2. Take the person to be linked from one of the side panels (**Persons, Bookmarks, Relations...**), and release on the (PC) **Links** tab / (MAC) **Sundry Links** tab.
3. Complete the information fields on the link and press **OK**.

Change a personal link

Every person in the genealogy file may be linked to one or more individuals by a personal link. Indicate the information known about the nature of the link in the input fields.


Change or supplement the information in the **Personal Data** tab.

PC's Links



MAC's Sundry Links

Families Facts Person Sources Sundry Links Alternate Names		
Name	Role	Comments
DUROUCHET Marie-Louise	Testatrix	Elle fait de son petit-fils son légataire universel.
<div style="text-align: right;"> + - ✎ ↑ </div>		

1. Click the (PC) **Links** tab / (MAC) **Sundry Links** tab.
2. Select the link to edit and click **Edit and modify the selected link** , MAC: or double-click the line.
3. Edit the information concerning the link.

Type of link


Choose the type of link between the two persons from the pop-up menu.


Info • The position of the two persons may be meaningful (Mark is the heir of Peter therefore Peter is the testator of Mark), or non-differentiating (Maya and Brenda are friends).

Meaning of the link

PC Meaning of the link

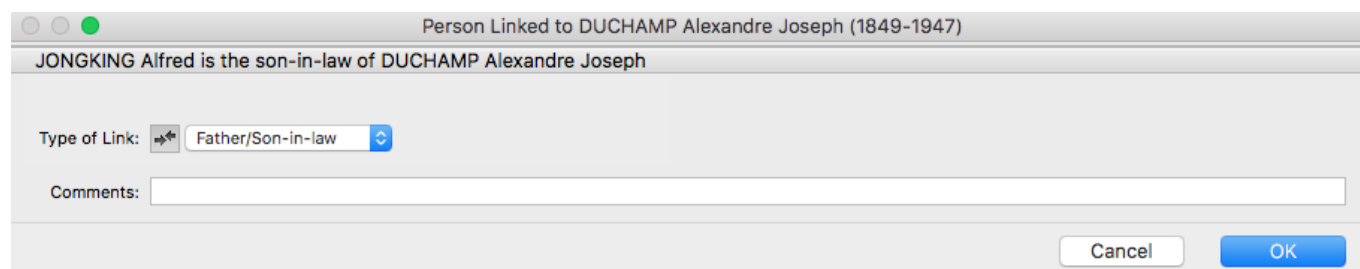
Linking a Person

THOMAS Edward (> 1804-1874)
is linked 'Ancestor' to CAREY Andreas 


Type of Link
 

Comment

MAC Meaning of the link



Check the link in the window title (Is Mark really said to be the heir of Peter, or the testator?).

To change the link, click the **Swap the link** icon .

Comment

Type a comment justifying the link between these two people.


Once you have validated the entry or modification of the linked person, the comment will appear in the list of linked persons.

The appropriate type of link is specified in the (PC) **Links** tab / (MAC) **Sundry Links** tab for each of the two persons and the comment of the link is identical.

Unlink a person

(PC) 1. Click on the **Links** tab of the **Tools panel**.

(MAC) 1. On the **Personal Data** tab, open the **Sundry Links** tab.

2. On the button bar at the bottom, click  (Unlink the selected person).

3. Validate with **OK** and the personal link between these two people no longer exists, but both persons remain available in your genealogy file.

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

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

Add a new person

Add a witness

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

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

Drag and drop

1. Select the event concerned on the **Personal Data** tab.

2. Take the person to be linked from a side panel (**Persons, Bookmarks, Relations...**), and release him/her on the information fields of the event.
3. Complete the link information fields and press **OK**.

Add a new person with his/her witnesses


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

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 **Assign a Witness to...** screen opens. Enter the information you know about the witness and click **Add**. Or select an existing person and click **Choose**.
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 or Participant link

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

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

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

Role

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

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

Age

- Age on record: many deeds indicate the age of the witness on the day of the event. Fill in the field **Age/Record**.
- Effective Age: to help you verify the choice of an existing person as a witness, Heredis calculates and displays their actual age on the day of the event. If it is very different from the age on the record, you have probably selected a homonym. Cancel the link and select another person or check the dates which may be incorrect.


If the witness or participant has no known date of birth, the age on the record allows Heredis to calculate the date of birth automatically.

Comments



Type a comment on the link between the person and the event. In most cases, you will use here references to occupation, residence and kinship as shown on the acts.

Once you have validated the entry or modification of the witness or participant, the comment appears in the list of witnesses or participants.

Unlink a witness or participant and an event

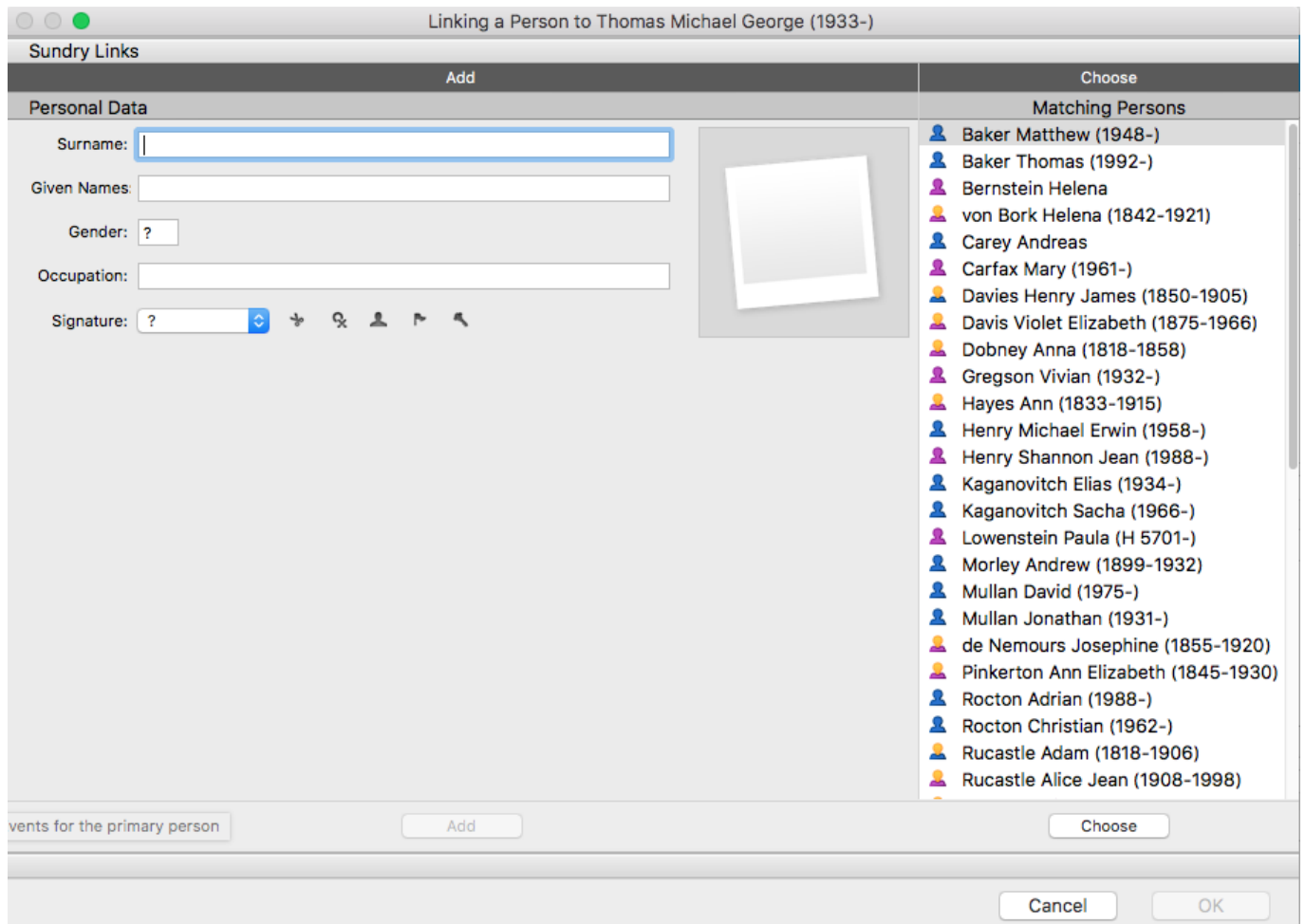
1. On the **Personal Data** tab, select the event and click the **Witnesses** or **Participants** tab.
 2. On the bar at the bottom of the event, click  (Unlink the selected witness or participant from the event).
 3. Press **OK** to validate and the person is detached from the event but remains available in your genealogy file.
-

When you want to create a new person unrelated to the primary person:

Select the  button in the toolbar then  (**Add Unrelated Person...**).

PC Add an Unrelated Person

MAC Add an Unrelated Person



Enter his/her surname and given names.

Make sure that the new person doesn't exist already in your file.

You can click on the name of a person in the list of existing persons to check the **Summary**.

If the unrelated person you want to add is already in your file, simply click on his/her name to select and then click the **Choose** button.

If the unrelated person you want to add is not in your file, enter all the data you know and click **Create**.

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

Family Group Data


Parents (2)								
	Surname	Given Names	B	Birth Date	Birth Place	D	Death D...	Death Place
F	Thomas	George	B	7/4/1872	Oxford	D	8/1/1947	Oxford
M	Davis	Violet Elizabeth	B	1875	Blackpool	D	1966	Oxford

Families (1)					
	Surname	Given Names	x	Marriage Date	Marriage Place
1	Rucastle	Alice Jean	M	11/22/1935	London

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

Click on the **+** button to add parents, a spouse or a child.

Enter the surname and given name. Then type the date and place of the required events (Birth, Death or Marriage).

To avoid duplicates, Heredis will indicate with a red arrow , any existing person who may match the person you are entering. Click the red arrow to see the list of potential duplicates. If you think you have identified the person you wish to add, stop typing and select the person from the list and then click **Choose**.

Family Group Data


Parents (2)					
Families (3)					
#	Surname	Given Names	M	Marriage Date	Marriage Place
1	GREGSON	Vivian	M	07/01/1954	Hudson
2	LOWENSTEIN	Paula	M	03/03/1976	Troy
3	DAVES				

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

Each data input is validated as soon as you click outside the line. Thus, without displaying any other screen, individuals are simply added generation after generation.


Each field of the **Family Group Data** tab is equipped with the same tools as the other input screens (modular input modes, drag and drop input, automatic formatting, real-time duplicate control).

To delete a person from the family data group, simply select it and click on the **-** button.

To modify it use the  button in the selected line.


To add a spouse to a child, use the rings icon.

To display the selected person, click on the  button.

Note: As usual in Heredis, you can display more or less fields by using the  indented wheel and change the entering mode.

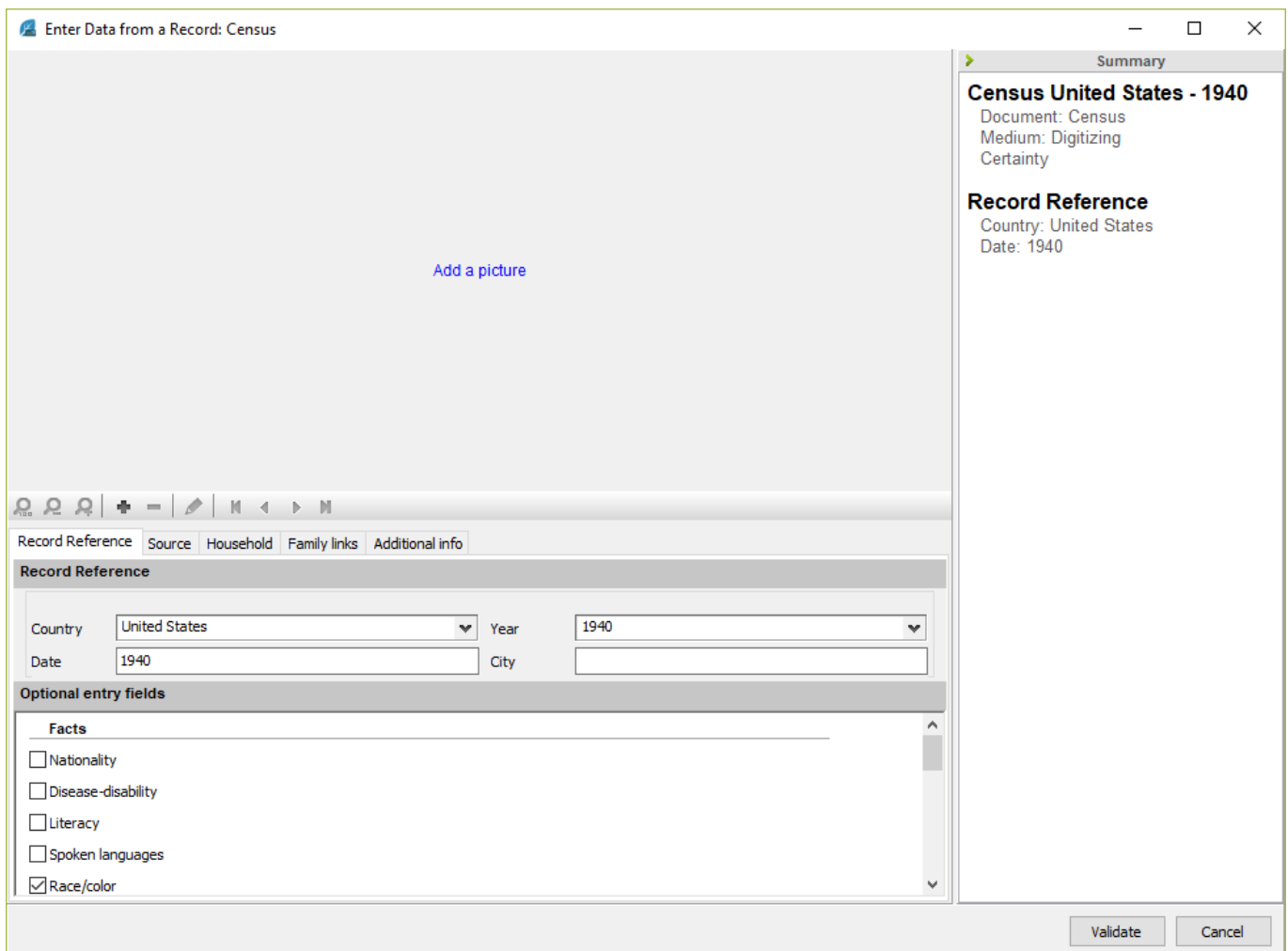
Entering Data from a Census

During your searches, you may need to consult census records. As a matter of fact, such documents can help you narrow down the range of a search period. Imagine you are missing the death date for one of your ancestors. If he/she appears on the records of the 1830 census but is no longer listed on the 1840 one, then you can hypothetically presume that he/she passed away between 1830 and 1840. Moreover, the census will provide data on the household composition, occupations, place of dwelling...

To easily enter data from census records, click on the shortcut  Census of your toolbar or from the menu Person > Census.

A window opens up so you can easily enter the data found on this type of documents. An area is available for you to add a media. Click the + button to add the media from your hard-drive (Disk), from the media index, or from the clipboard.

(PC) Entering data from a census



Enter Data from a Record: Census

Summary

Census United States - 1940
 Document: Census
 Medium: Digitizing
 Certainty

Record Reference
 Country: United States
 Date: 1940

Add a picture

Record Reference Source Household Family links Additional info

Record Reference

Country: United States Year: 1940
 Date: 1940 City:

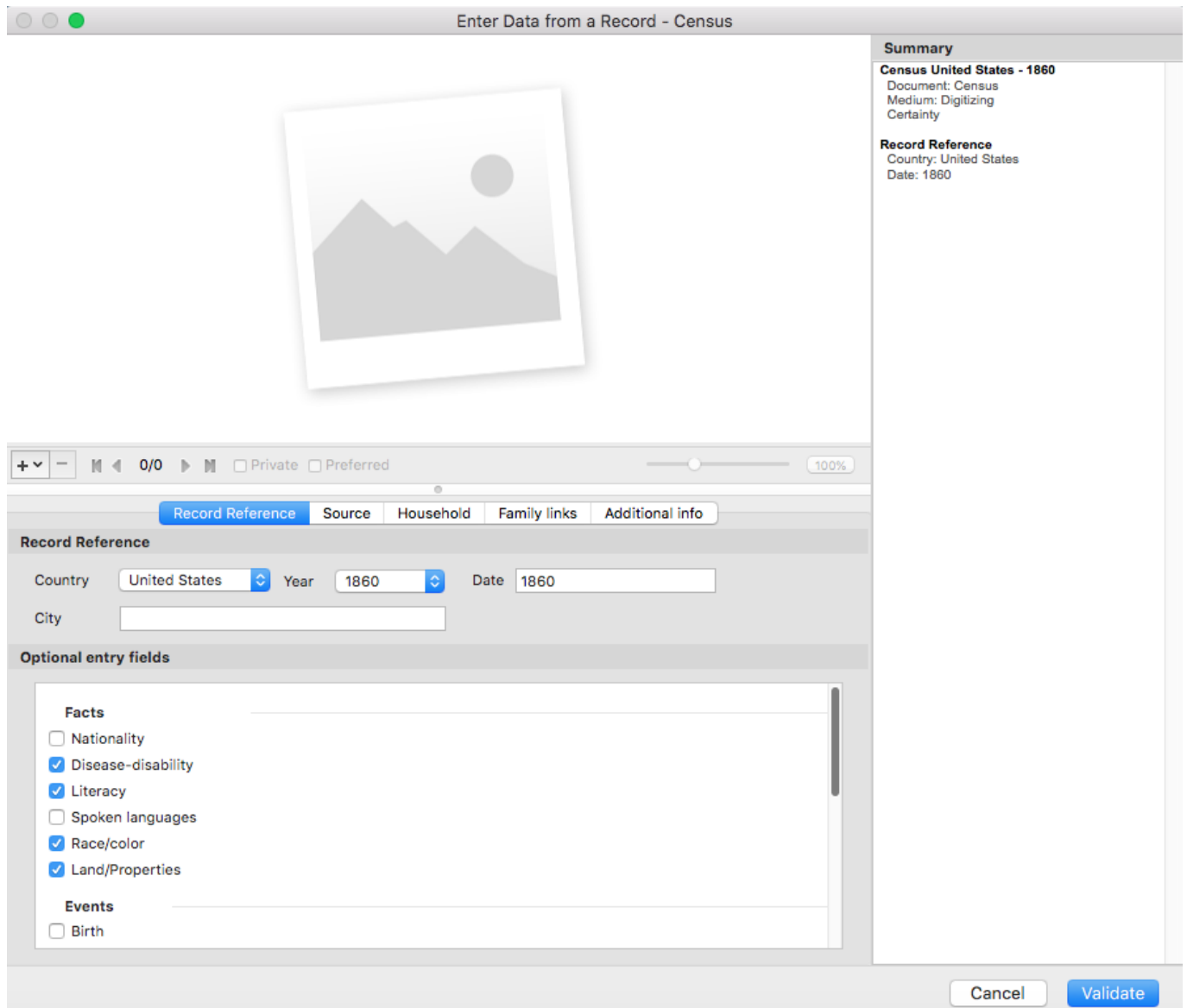
Optional entry fields

Facts

Nationality
 Disease-disability
 Literacy
 Spoken languages
 Race/color

Validate Cancel

(Mac) Entering data from a census



The usual Heredis tools are available so you can zoom in and out, add, delete, or edit a media.

In the lower area, several tabs are available for you to easily enter data from the census.

The Record Reference tab

First, start with the **Record Reference** tab. Select the desired **Country**. If the country is not listed, select **Other** in the scroll-down menu. In the same way, you can modify the year in the **Date** field. Enter the **City**.

You will probably notice that **Optional entry fields** will vary according to the year and country selected. Indeed, Heredis has prerecorded for you the most frequent entry fields for each census, year after year, in the US and in some other countries. You are given the possibility to modify them by selecting or unselecting each entry field according to your needs. Optional entry fields are listed according to the place where the data you enter will be stored. As an example, you will be able to later find the data on

Nationality.

You may then enter the data related to the **Source**. As you will see, fields are partially filled out. You can modify them as you please.

(PC) Record Reference Tab

Record Reference | Source | Household | Family links | Additional info

Record Reference

Country: United States | Year: 1850
 Date: 1850 | City:

Optional entry fields

Facts

- Nationality
- Disease-disability
- Literacy
- Spoken languages
- Race/color

(Mac) Record Reference Tab

Record Reference | Source | Household | Family links | Additional info

Record Reference

Country: United States | Year: 1860 | Date: 1860
 City:

Optional entry fields

Facts

- Nationality
- Disease-disability
- Literacy
- Spoken languages
- Race/color
- Land/Properties

Events

- Birth

Source Tab

You are given the option to enter source details for your census.

(PC) Source Tab

Record Reference Source Household Family links Additional info

Source

Title
Census United States - 1850 Private Source

Origin of the document

Document Census	Medium Digitizing	Quality of Data Certainty
Repository	Call #	Date
Author	Email	Website
Archive		

(Mac) Source Tab

Record Reference Source Household Family links Additional info

Source

Title
Census United States - 1860 Private Source

Origin of the document

Document Census	Medium Digitizing	Quality of Data Certainty
Repository	Call #	Date
Author	Email	Website
Archive		

Household Tab

Under the **Household** tab, enter the **Address** then the household **Composition** - in other words, the number of persons living together under the same roof.

In the **Persons** area, click the + button to add a person; by default, the first person you enter will be considered the Head of Household.

Specify his/her **Surname** and **Given Names**. Just like every time a person is entered in Heredis, the magnifying glass will turn into a red arrow when the person is possibly already in the file.

Specify **Occupation**.

Select this person's **Household Status** by clicking on the pull-down list.

Continue entering data according to the fields available for your census.

(PC) Household Tab

Record Reference Source **Household** Family links Additional info

Household

Address/Place Subdivision

Composition

Persons

THOMAS* - Head of Household

Surname

Given Names Gender ?

Occupation

Household Status

Head of Household

(Mac) Household Tab

Record Reference Source **Household** Family links Additional info

Household

Address/Place Subdivision

Composition

Persons (1)

THOMAS* - Head of Household

Surname

Given Names Gender ?

Occupation

Household Status

Head of House...

Facts

Disease-disability

Literacy

Race/color

Note: If necessary, entry fields can be added at any time by going back to the **Optional Entry Fields**.

Add the other persons. For each one of them, specify his/her **Household Status** in relation to the Head of Household.

Note: The persons who are not already part of your genealogy file are marked with an asterisk and will be created after the census record is validated.

(Mac only) You can drag and drop from the **Persons** panel in order to add a person to a household.

Family Links tab

Under the **Family Links** tab, double check the links between each person and the head of household. When entering data from a census, Heredis will assist you in creating persons and the links between them.

If you do not find the appropriate link, select **Other** and specify, under the **Family Links** tab, the relationship between the two persons.

Heredis allows you to specify the links between two persons, even if they are not blood related. Therefore, no data is lost and you will be able to find them again under the **Links** tab in the Tools Panels (PC) or under **Sundry Links** in the Personal Data tab (Mac).

(PC) Family Links Tab

Record Reference Source Household Family links Additional info

THOMAS John: Head of Household
Click the + button to create a family link. +

von BORK Jeanne: Spouse of THOMAS John
Click the + button to create a family link. +

HALL Edna: Servant
Has a personal link with THOMAS John - +
Other type of link

(Mac) Family Links Tab

Record Reference Source Household Family links Additional info

Household
Address/Place Subdivision
Composition

Persons (3)

- THOMAS John (1854-> 1921) - Head of Household
- von BORK Jeanne (1863-1921) - Spouse
- HALL Edna * - Servant

Surname: HALL +

Given Names: Edna Gender: F

Occupation:

Household Status
Servant

Facts

- Disease-disability: Health Fact - renamed
- Literacy: Instruction Fact - renamed
- Race/color: Physical Description Fact - ...


Note: Pre-existing spouses/parents/children links in your file will not be modified – if necessary, an alert will notify you of a conflict.

The non-existing links will be created for you automatically.

Additional Info tab

Add any extra data you may have under the **Additional Info** tab.

Window Validation

When you are done entering data, click on **Validate**. Double check the data entered under the Persons area. If a  red triangle appears, it means there is a conflict between the new data you have just entered and what was previously recorded in Heredis: choose what suits you best by clicking on the list of suggestions.

(PC) Validation Window

Check data before creating


Matching Persons

THOMAS John: Head of Household

Surname: THOMAS Given Names: John

Gender: M


Birth
Date: May 1854
City: ?

Occupation: clerk US Office engineer - clerk 

von BORK Jeanne: Spouse of THOMAS John


Surname: von BORK Given Names: Jeanne

Gender: F

Birth
Date: December 1862 

Source

Create source
 Do not create a source
 Choose an existing source

 < Choose which events to assign the source to >

Comment

Next Validate **Back**

Summary

Census United States - Alameda - 1900

Document: Census
Medium: Digitizing
Certainty
Repository: National Archives

Record Reference

Country: United States
Date: 1900
City: Alameda

Household

- THOMAS John**
M
Household Status: Head of Household
Occupation: clerk US Office engineer - clerk
Birth - May 1854 - ?
- von BORK Jeanne**
F
Household Status: Spouse
Birth - December 1862

Save in:
Source note

Assign media to:
Source

(Mac) Validation Window

Check data before creating

Persons created	Summary
<div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>▼ HALL Edna *: Servant</p> <p>Gender: F Surname: HALL Given Names: Edna</p> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>Matching Persons</p> <p>▼ THOMAS John: Head of Household</p> <p>Gender: M Surname: THOMAS Given Names: John</p> <p>Occupation: <input type="text" value="clerk US Office engineer - clerk"/> ⚙️ ⚠️</p> </div> <div style="padding: 5px;"> <p>▼ von BORK Jeanne: Spouse of THOMAS John</p> <p>Gender: F Surname: von BORK Given Names: Jeanne</p> </div>	<p>Census United States - 1860 Document: Census Medium: Digitizing Certainty</p> <p>Record Reference Country: United States Date: 1860</p> <p>Household</p> <ul style="list-style-type: none"> • THOMAS John M Household Status: Head of Household Occupation: clerk US Office engineer - clerk • von BORK Jeanne F Household Status: Spouse • HALL Edna * F Household Status: Servant
<p>Source</p> <p><input checked="" type="radio"/> Create Source <input type="radio"/> Do not Create a Source <input type="radio"/> Choose an existing source</p> <p><input type="text" value=" < Choose which events to assign the source to >"/></p> <p>Comments: <input type="text"/></p>	<p>Save in: <input type="text" value="Source note"/></p> <p>Assign media to: <input type="text" value="Source"/></p>
<div style="display: flex; justify-content: flex-end; gap: 10px;"> Back Next Validate </div>	

You are free to create a new source, to use a pre-existing source, or even not to create a source. Remember to assign the source either to the census or to the events and facts related to the census.

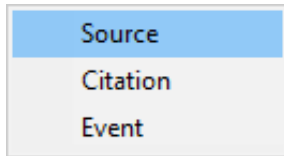
On the right-hand side, you will see the summary of your recent data entry, which you can:

- Save in the source note,
- Save in the source transcription,
- Save in the note or citation transcription if you work in Comprehensive Mode (see the [Sources](#) article),
- Decide not to save.

- Source note
- Source transcription
- Citation Note
- Citation Transcription
- Event Note
- Do not save

You are also given the option to choose where the media should be saved: in the source, in the citation, or

in the event.



Then click on **Validate** once you are certain you are done.

Note: if you have several entries to make from a single census, all you need to do is click on the **Next** button.

You can make a person's data even more complete by adding alternate names (birth name, maiden name...) in your genealogy.

This type of data is displayed in the center of the **Data>Personal Data** screen, in the **Alternate Names** tab.

PC Alternate names

MAC Alternate names

Once an other name has been entered, a blue symbol appears in the **Alternate Names** tab.

To add an alternate name, click on the **+** button.

Enter all the data you possess such as prefix, suffix, given names, nickname and select the corresponding type of name in the pop-up menu.

Note: if none of the existing types corresponds to the data you are entering, choose **Others** to create your own type of data. You can also choose to rename the existing types of names predefined in Heredis.

To delete an alternate name, select it in the list and click on the **-** button.

Note: in the Surnames and Given Names indexes, you will not be able to delete these alternate surnames and given names as long as they are used by a person in your genealogy.


Alternate names associated with individuals in your genealogy are automatically processed when you import and export data in GEDCOM or Heredis formats as well as during merges.

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

Add 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 **Add an event** button to select it from the list of events.

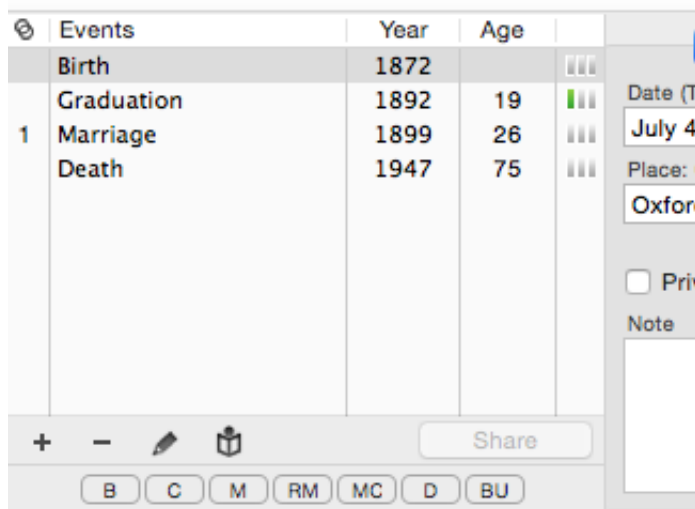
To facilitate your entry, Heredis will first display all the events already in use in your genealogy.

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

Add an event

Add a person event

Add a person event



1. Click on the **+** button on the bar below the list of events. To facilitate the selection of the event, Heredis displays at the top of the list, the 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 **BU** buttons (**B**irth - **C**hristening - **D**eath - **B**urial) 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 **+** 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.

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

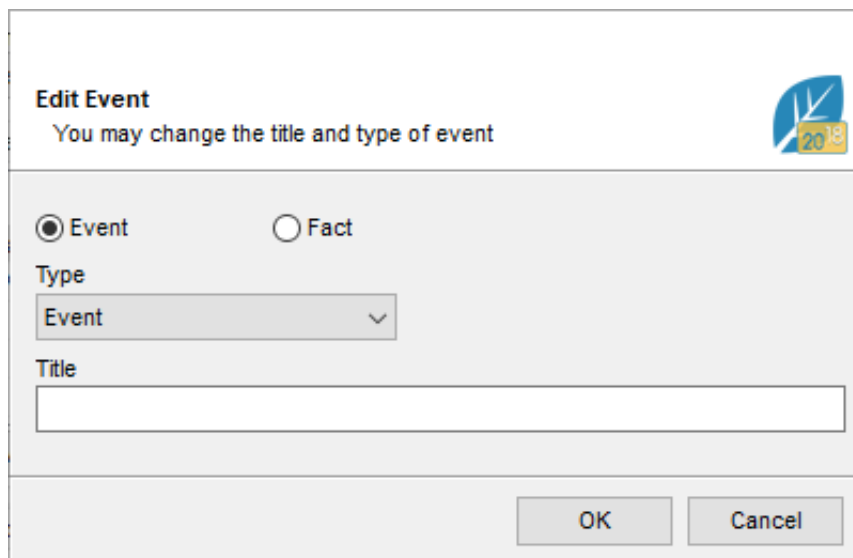
Info • The family events also appear in the input and navigation screens of the spouse.

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 **+** button on the bar below the list of events.
2. Choose **Others**, then the neutral event called **Event**.
3. Double-click on the name **Event** that has appeared in the list of events. A window opens where you can rename the event.

PC Customize event



Edit Event
You may change the title and type of event

Event Fact

Type
Event

Title

OK Cancel

MAC Customize event

4. Enter the new name of the event.

Now this new type of event will automatically appear in the list of events to create. You may choose not to display it by unchecking the **Add to Event Types List**, or you may select it later by managing the list of events.

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

Share a person event

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

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

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

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

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

Customize the display of events

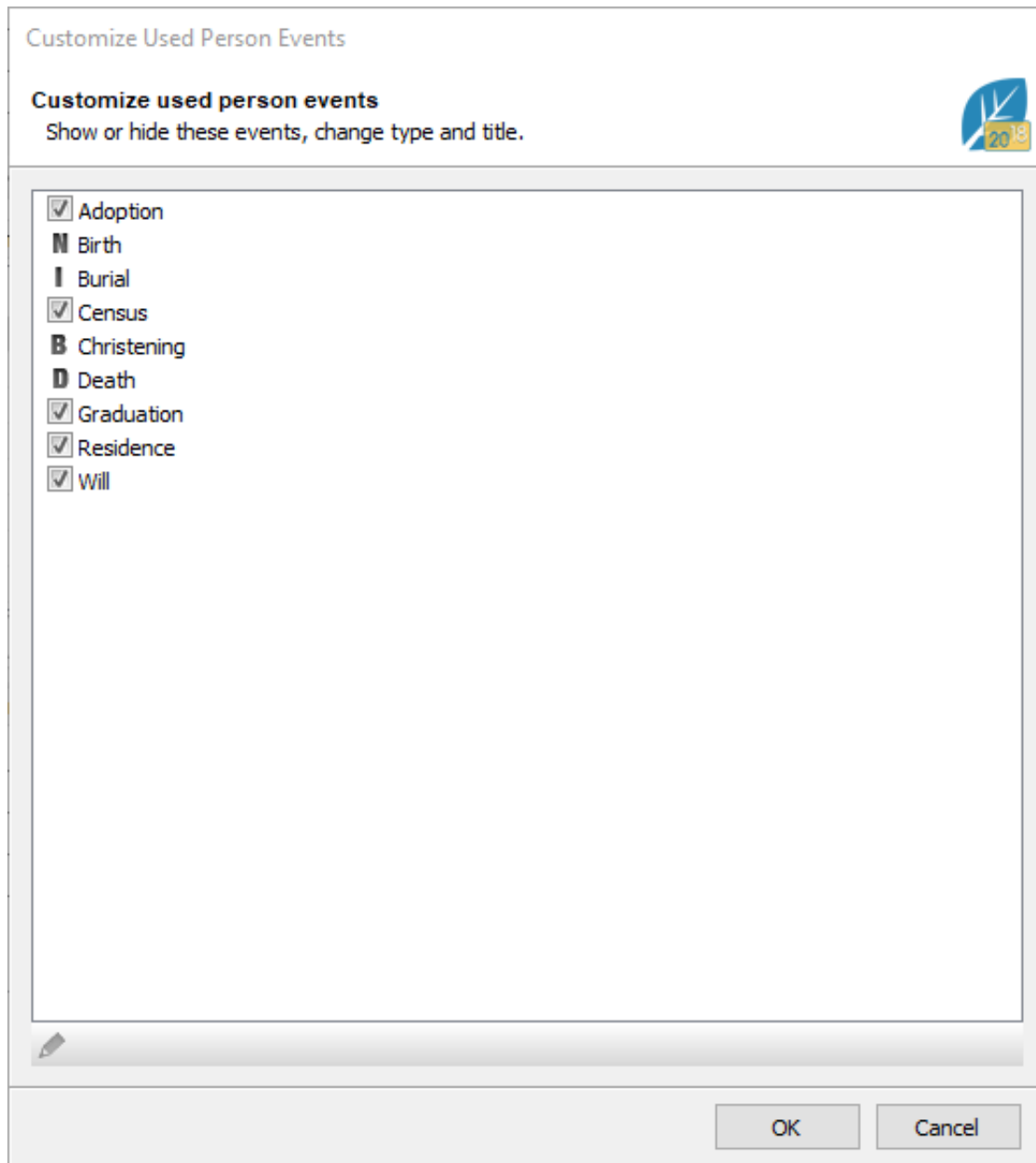
Heredis can present the list of available events according on your work habits. Thus, you will have easy access to the events that you create most often.

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

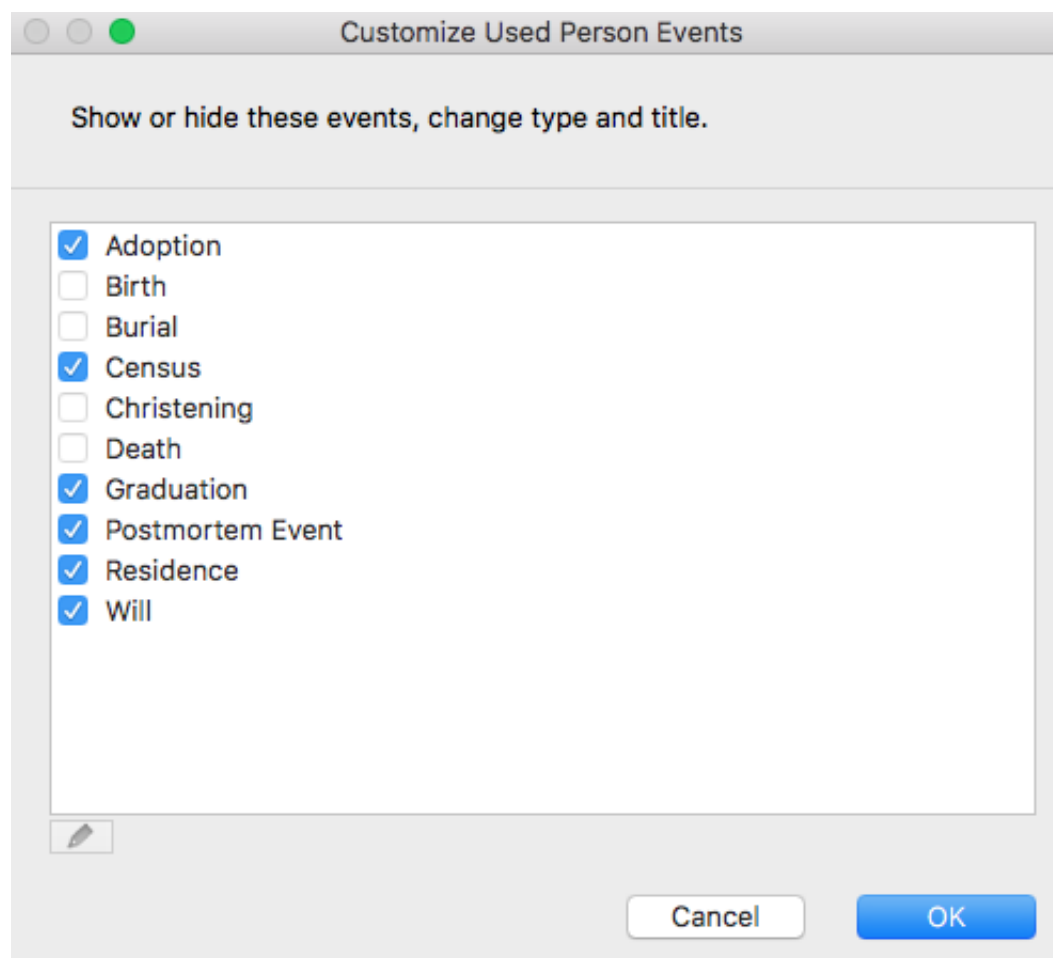
Modify the list of events displayed

1. Click the **+** button on the **Personal Data** tab, in the events list.
2. Choose **Others > Customize...**
3. Untick rare events, those which you rarely use, to lighten the list when creating a new event.

PC Customize Event



MAC Customize 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.

Information of the event

The screenshot shows the 'Details' tab of the Heredis interface. It features a navigation bar with tabs for 'Details', 'Sources', 'Witnesses', 'Media', and 'Map'. Below the navigation bar, there are several input fields: 'Date', 'Time', and 'Age/Rec.'; 'Place' and 'Place subdivision'; and 'Description/Cause'. There is also a checkbox for 'Private Event' and a dropdown menu currently showing 'No Search Record'. A large text area for the 'Description/Cause' field is visible at the bottom, with a scroll bar and a pencil icon on the right side.

Date

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

Time

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

Age on record

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

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

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

Place

Indicate the location where the event took place.

Entering a new place

1. Type the name of the city in the **Place** field, not bothering about upper or lower case. With the first letters, Heredis proposes a list of places that may match your entry.
2. Select a place using the mouse, or use the up and down arrow keys and confirm the location selected by pressing **Enter**.

3. If no proposed location matches, select **New Place** in the list.
4. Complete the information on the new place to be recorded, and press **OK**. The new location will be added to the **Places Index**.

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 pop-up 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 **Heredis > Preferences > Format**.

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

Delete an event

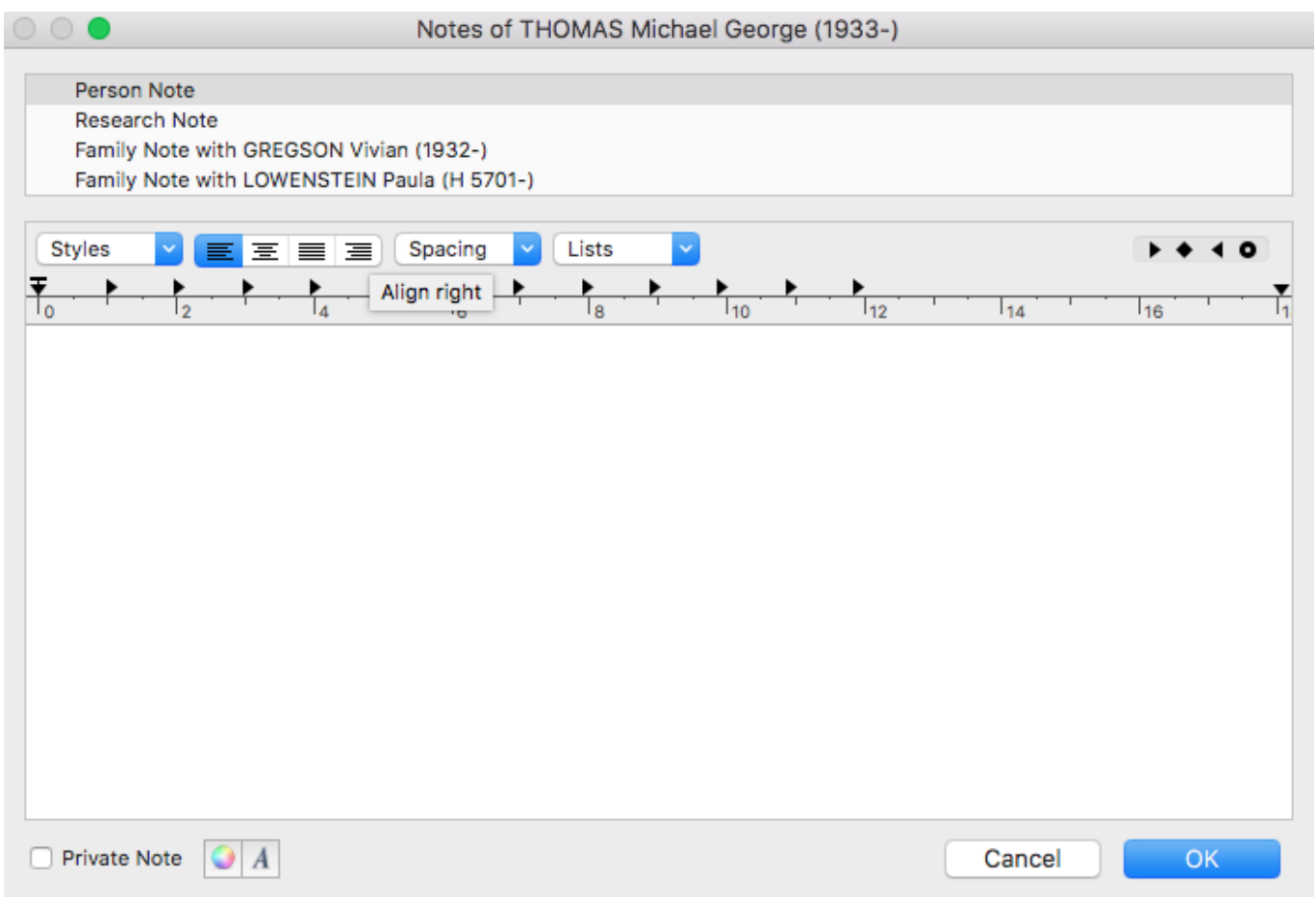
Simply select the event to erase and click on the  button at the bottom of the event list.

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

(PC) Input Notes



(Mac) Input Notes





Info • Notes are separated from each others in the Mac version.


Enter or modify a note

1. Display the note:

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



- Click the  or  button in the toolbar if it is displayed.
- Click directly in the Note field when displayed on the navigation or data input screens (input tabs, indexes, media, etc.).

- In the Data screens, click on the pencil  to access the note.

Info • If the note is not visible on the data input tabs, change the data display mode.

2. Enter the text of the note or paste the contents of the clipboard.
3. Use the formatting tools in the text editor.
4. Tick the **Private Note** box if you wish to keep this note excluded from export of the file, printing or publishing on the Internet.

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

Note of an event

(PC) Note of an event

Details Sources Witnesses Media Map

Date Time Age/Rec.


Place Place subdivision

Private Event No Search Record

Description/Cause

(Mac) Note of an event

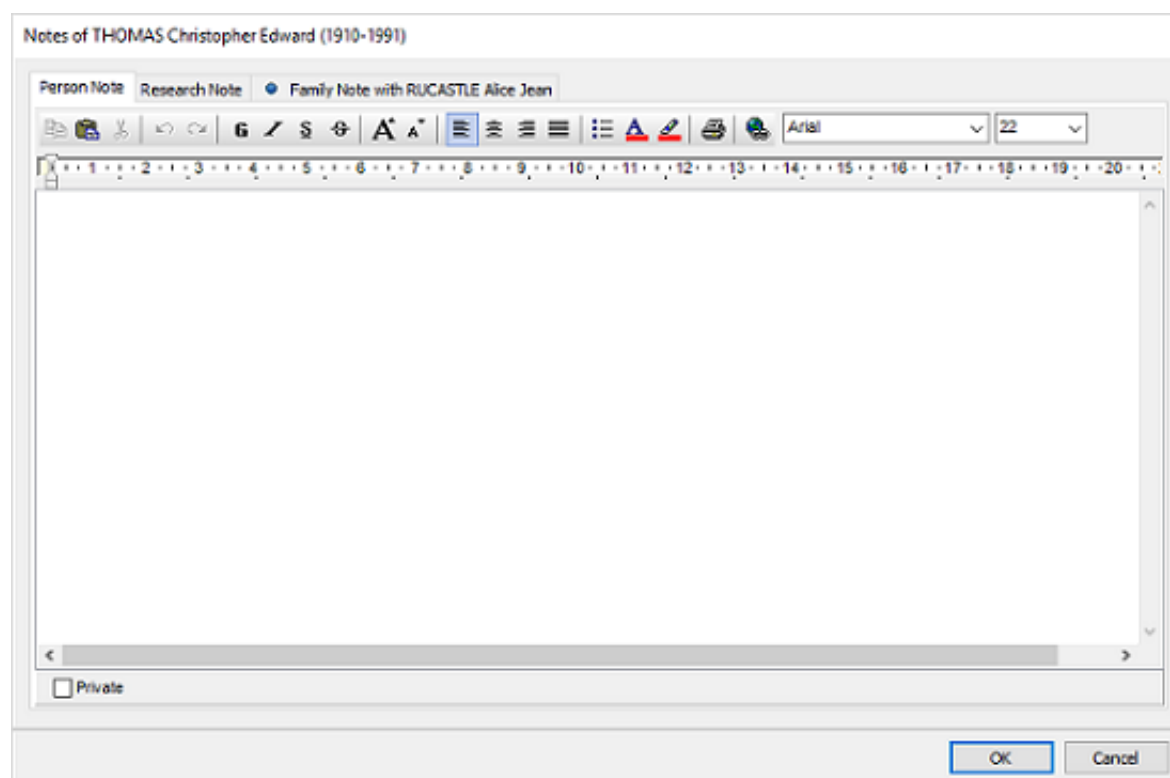
The screenshot shows the Heredis software interface with several tabs: Details (selected), Sources, Witnesses, Media, and Map. The 'Date (Tuesday)' field contains '22 June 1971'. The 'Place' field contains 'London - Greater London - London - ENGLAND' and the 'Place Subdivision' field contains 'London'. The 'Age/Record' field is empty. There is a 'Private' checkbox which is unchecked and a dropdown menu showing 'No search record'. Below this is a 'Note' field with a pencil icon on the right. The note text is 'Lawyer - Hanover Square'.

- Type directly your comment in the text box
- or Click on the pencil  to open the text box in a new window. You can write and modify the format of your note.

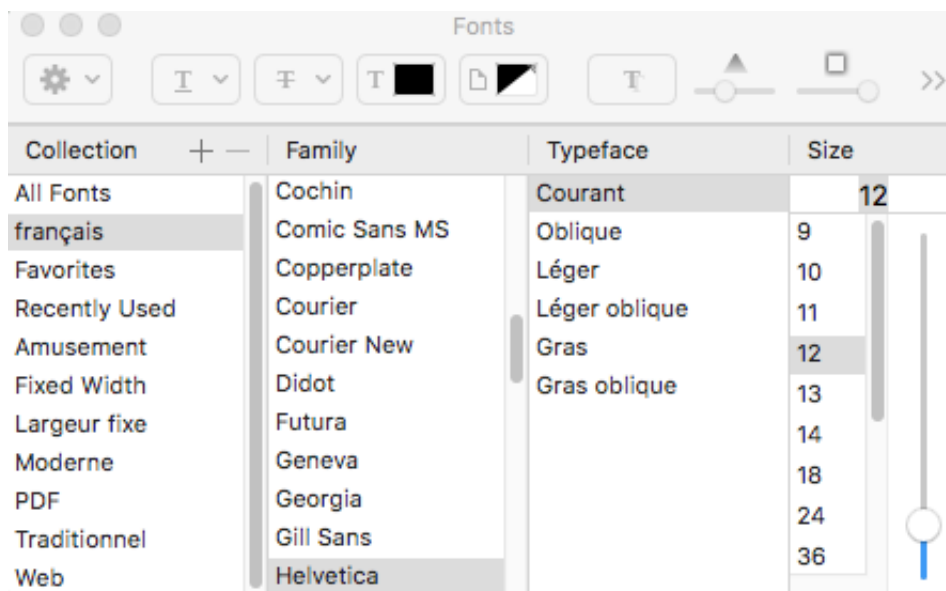
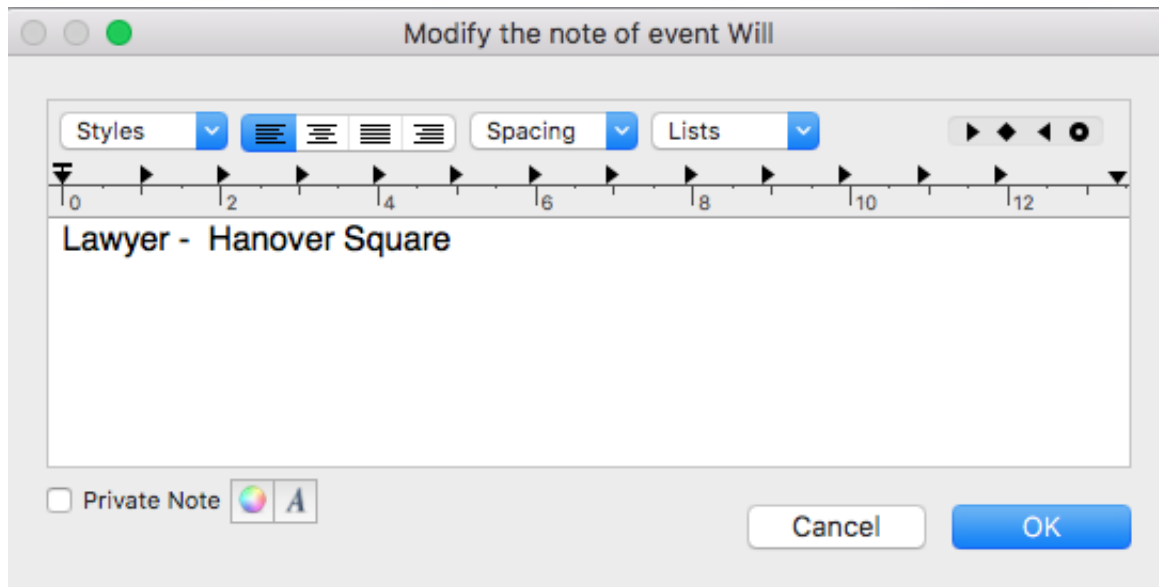
Options of notes

For each notes, you can add a specific format with the text editor:

(PC) Options of notes



(Mac) Options of notes



- Typeface: Bold - Italic - Underline
- Alignment: Align Center - Left - Right - Justify
- Choose the font style and size
- Manage the hypertext link
- Cut - Copy - Paste - Print

You can make your note private by ticking the Private note box so it won't be published.

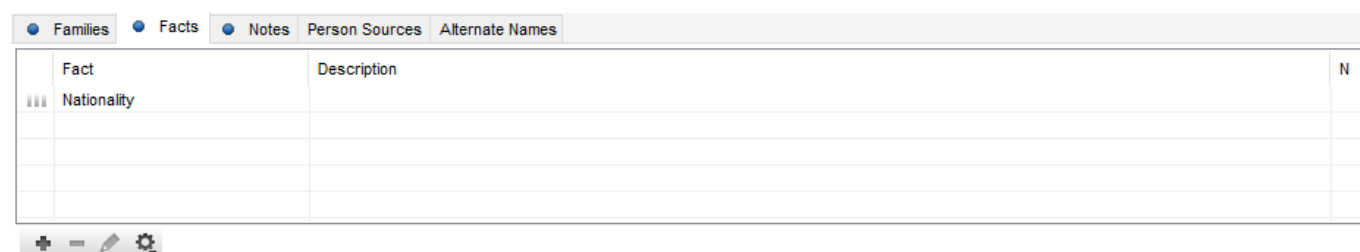
With **Facts**, enrich your genealogy with new data and attach witnesses, places, sources, medias and dates to it.

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


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

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


Facts



Fact	Description	N
Nationality		

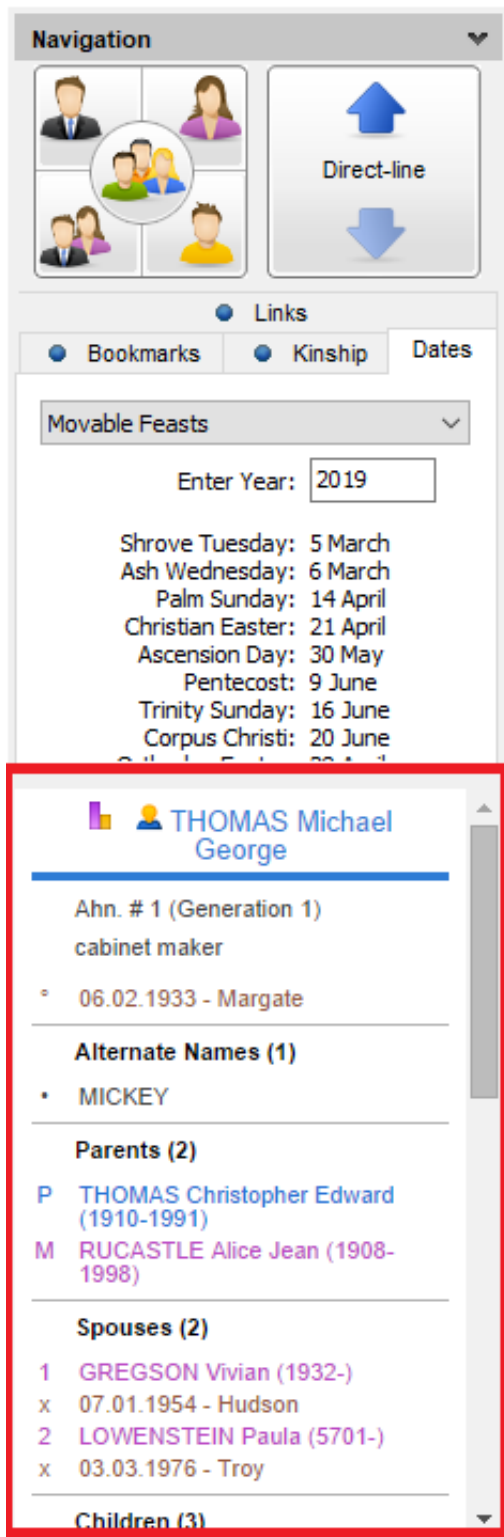
- To add a **Facts**, click on the **+** button and select the fact to add then write directly in the **Description** area.
- If you wish to complete this fact with other information, a date, a place, a source, a media... click on the pencil  button displayed in the tab.
- To delete a **Fact**, select it and click on the **-** button.

Note: If you confirm a delete, all information linked to this fact will be lost.

- To organize the display of the facts of your genealogy, click on the indented wheel . Select the facts then click on the **Before** and **After** to change the order of this field.

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

Summary Heredis PC before 2019's version



Summary Heredis MAC before 2019's version





Since Heredis 2019, improvement of the summaries

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

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

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

New Summary

  **THOMAS Michael George**

Ahn. # 1 (G 1)

cabinet maker

Bi. 02.06.1933 - Margate

▼ Preferred Picture



▼ Alternate Names (1)

- MICKEY
-

▼ Parents

F THOMAS Christopher Edward (1910-1991)

M RUCASTLE Alice Jean (1908-1998)


▼ Spouses (2)

1 GREGSON Vivian (1932-)

M 01.07.1954 - Hudson

2 LOWENSTEIN Paula (H 5701-)

M 03.03.1976 - Troy

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

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

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

What media for your genealogy?

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

- Assign a text file created with (**PC**) any word processor ; (**MAC**) 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.

What data can be illustrated?

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

The 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 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.

Import media to your file

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

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

(MAC) Drag and drop

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

With the Media field buttons

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

Info • To display the toolbar for media management, move the mouse over the display field of the media. Right-clicking on the display field of the media also gives you access to the **Add New Media** option.

- In the **Media** panel or in the **Media Index**:
 1. Click the **+** (Add New Media) button.
 2. Select the media to be imported with the **(PC)** Windows Explorer / **(MAC)** Finder and then click **Open**.

Information on the media

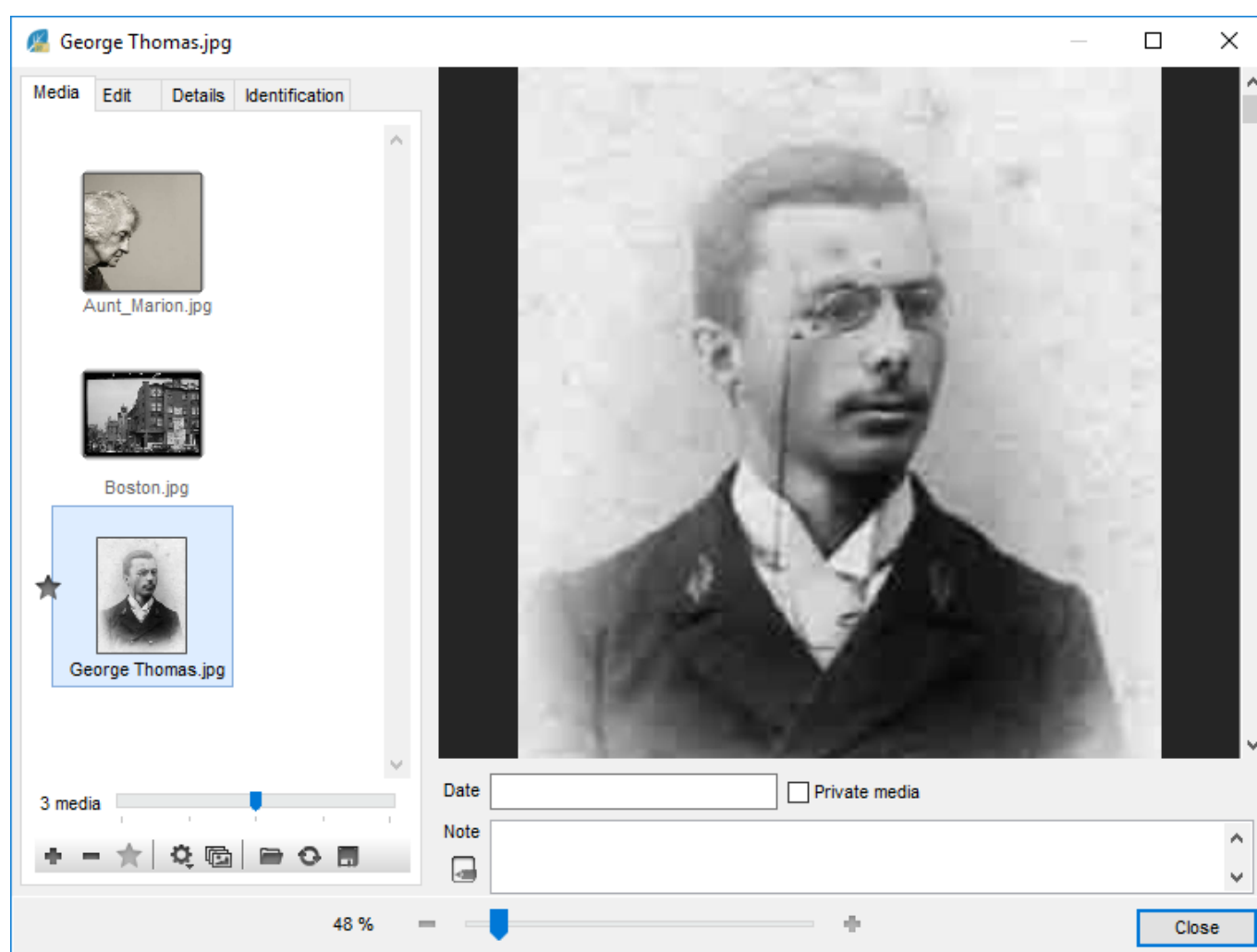
Link between media and data

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

Media details

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

Photo Tool for PC



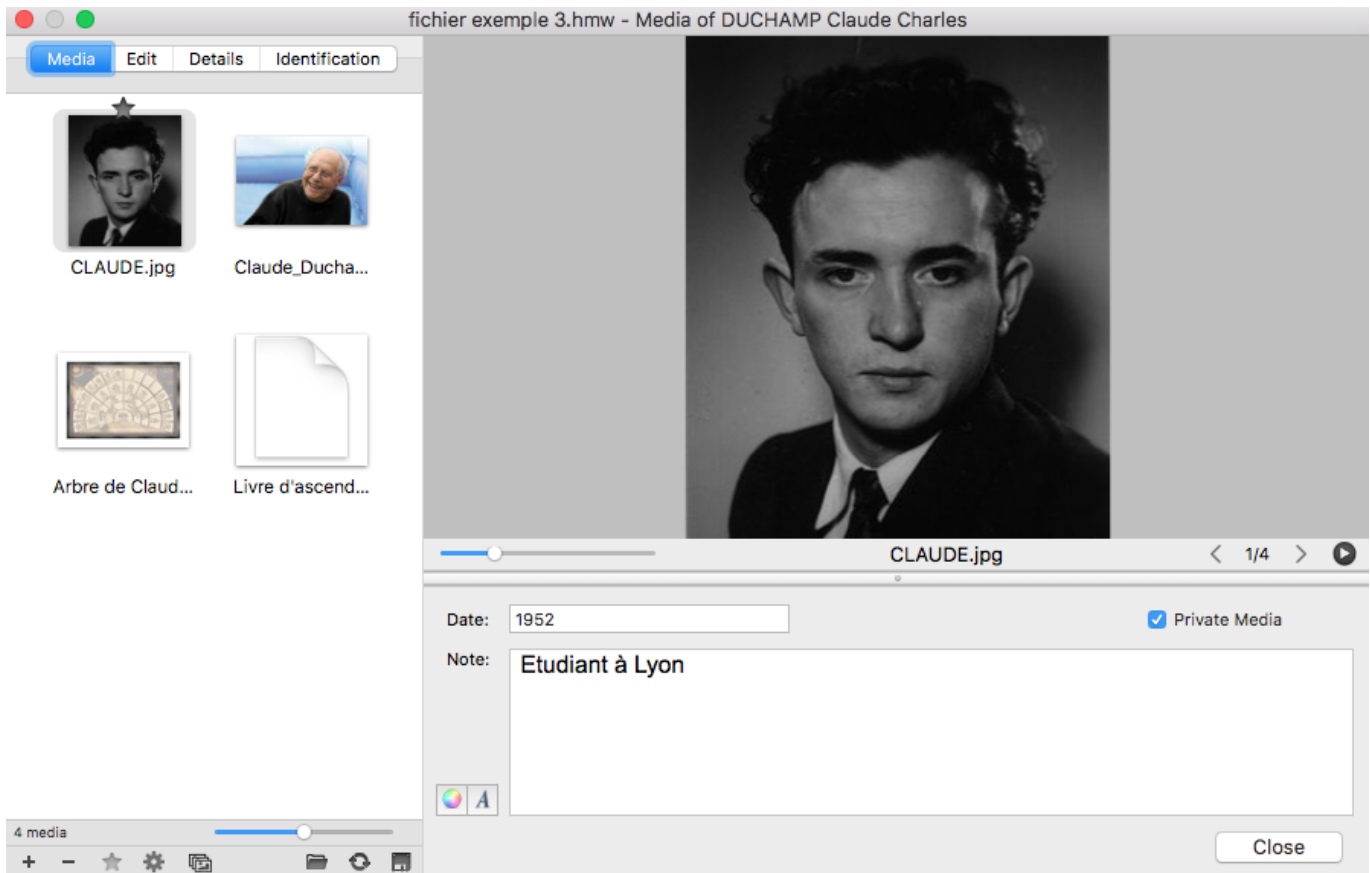
Date: The date of the media is a useful guide to illustrate the lives of ancestors, and allows the classification by date of the various media assigned to a person.

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

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

Preferred Picture: Among all media assigned to the data, select the image that is displayed in the navigation screens and that illustrates the tree charts and printed documents. Tick the **Preferred Picture** box if your choice is not of the first image you have assigned to the data.

Photo Tool for MAC



MAC Info • You may change the **Preferred Picture** in the display field of any given media. Move over the area with the mouse to display the toolbar for media management. 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 ★).

Information: Find in this display field of the selected media its name, its size and original location of the media.

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

Display order of media

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

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

1. Open the multimedia screen of the data.
 - Double-click the media field.
 - (MAC) Click the pencil-shaped bar in the media buttons.

2. Arrange the media.

- Click the **Sort** (⚙ icon) and select **Sort by date** or **Sort by name**.
- **(MAC)** Drag the media with the mouse to position in the desired display order. A blue line indicates where the media will be dropped.


For further details see [Photo Tool](#).

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.

- In the case of a Heredis file in which there was a thumbnail image, the words **original not found** follow the media name in the edit field of the media, but you still see its thumbnail image.
- In the case of a file where there was no thumbnail image, the icon **media not found**  is displayed in the place of the media.

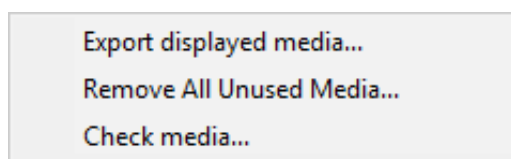
Click on **Choose a folder and update** to find the location of the missing media on your computer.

Find a group of media

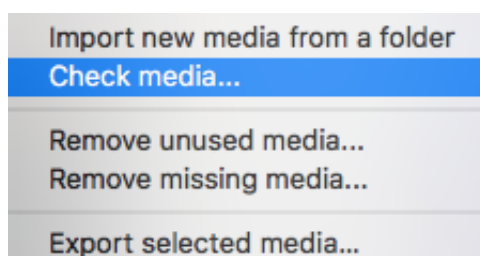
Open the **Media Index**.

1. Click the **(PC) Tools / (MAC) Options** button (indented wheel icon) on the toolbar of the Index.
2. Select **Check media...**

PC Check Media



MAC Check Media



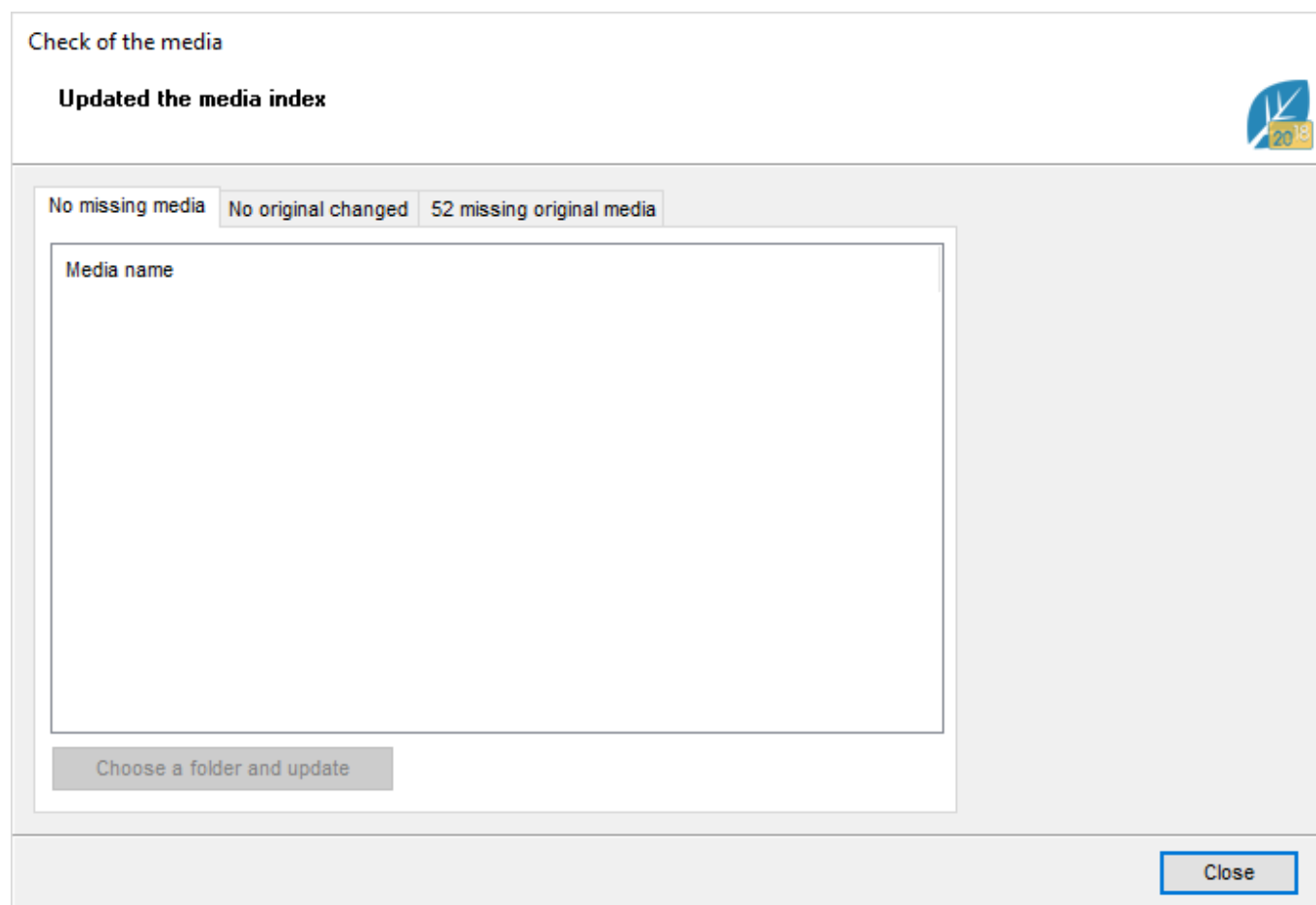
Heredis reviews all the media in your genealogy and detects, if any:

- media not found following deletion from the Media folder managed by Heredis
- media of which the original has been modified by third party software other than Heredis
- and finally, media for which the original has changed location and is no longer present on your computer.

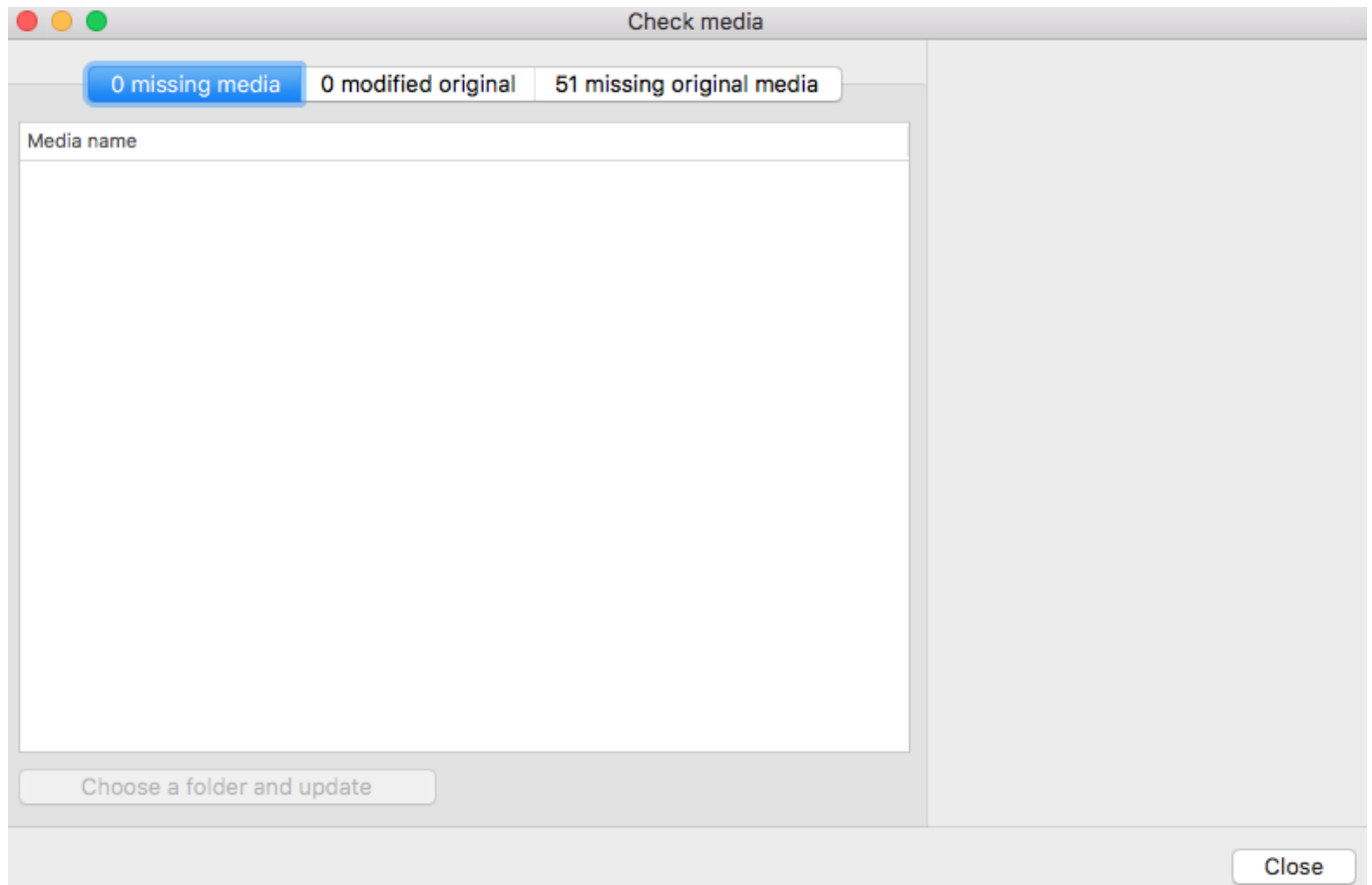
In the **Media check** window, you can:

- in the **Missing Media** tab, designate a folder to search and update these media.
- in the **Original changed** tab, select all or part of the media managed by Heredis to update them from the originals.
- in the **Missing Original Media** tab, specify the folder where your original is located.

PC Media check window



MAC Media check window




Find missing media

Open the **Media Index**.


Scroll down to **Missing Media**.

Unlinking, replacing or deleting media

Unlink media

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

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

- (**PC**) Select the media in the left column, or click the  (Remove Selected Media) button at the bottom of this column.
- (**MAC**) 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.

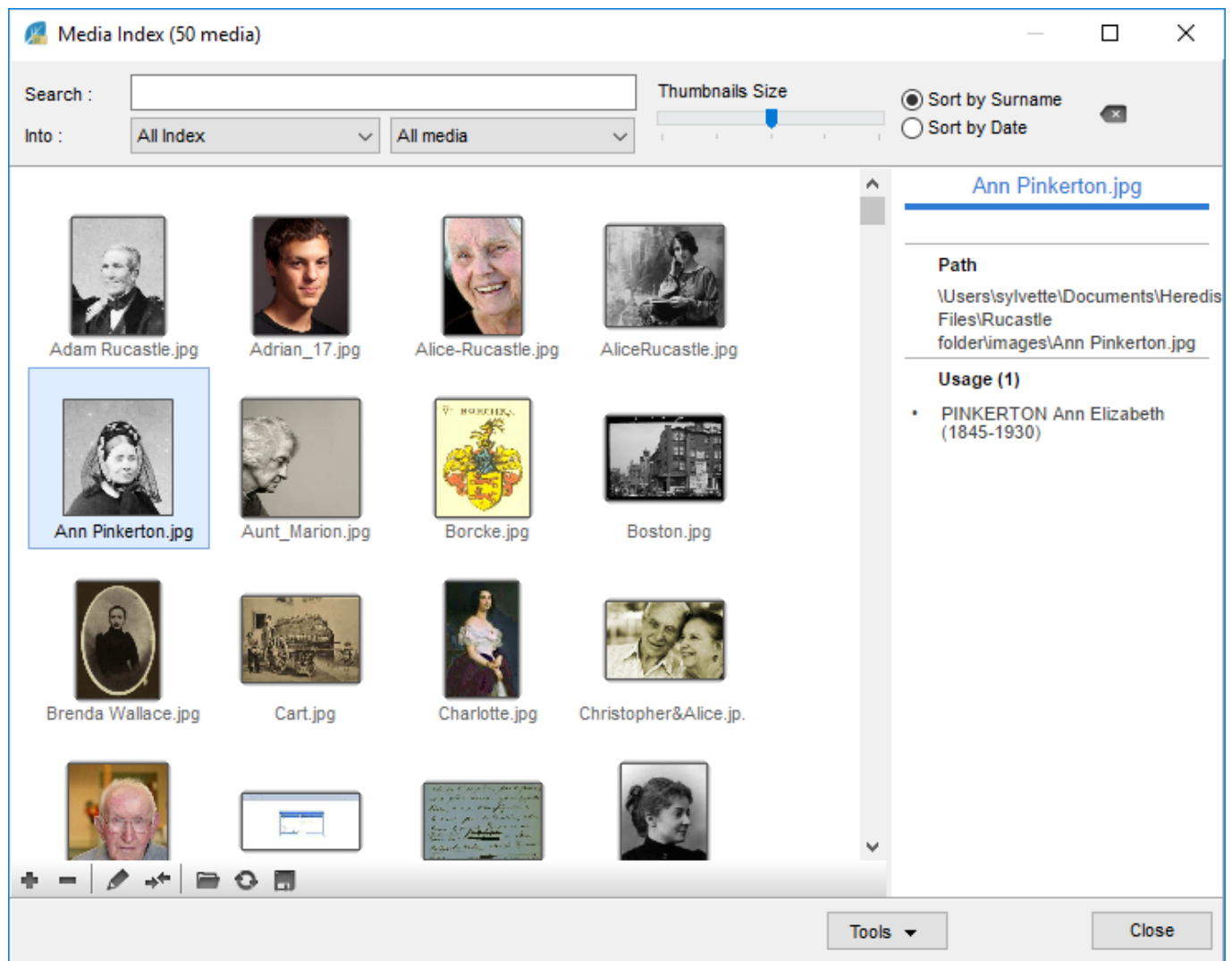
The media is unlinked from the person or data but remains available in the **Media Index** and may be assigned to other.

Replace media with other media

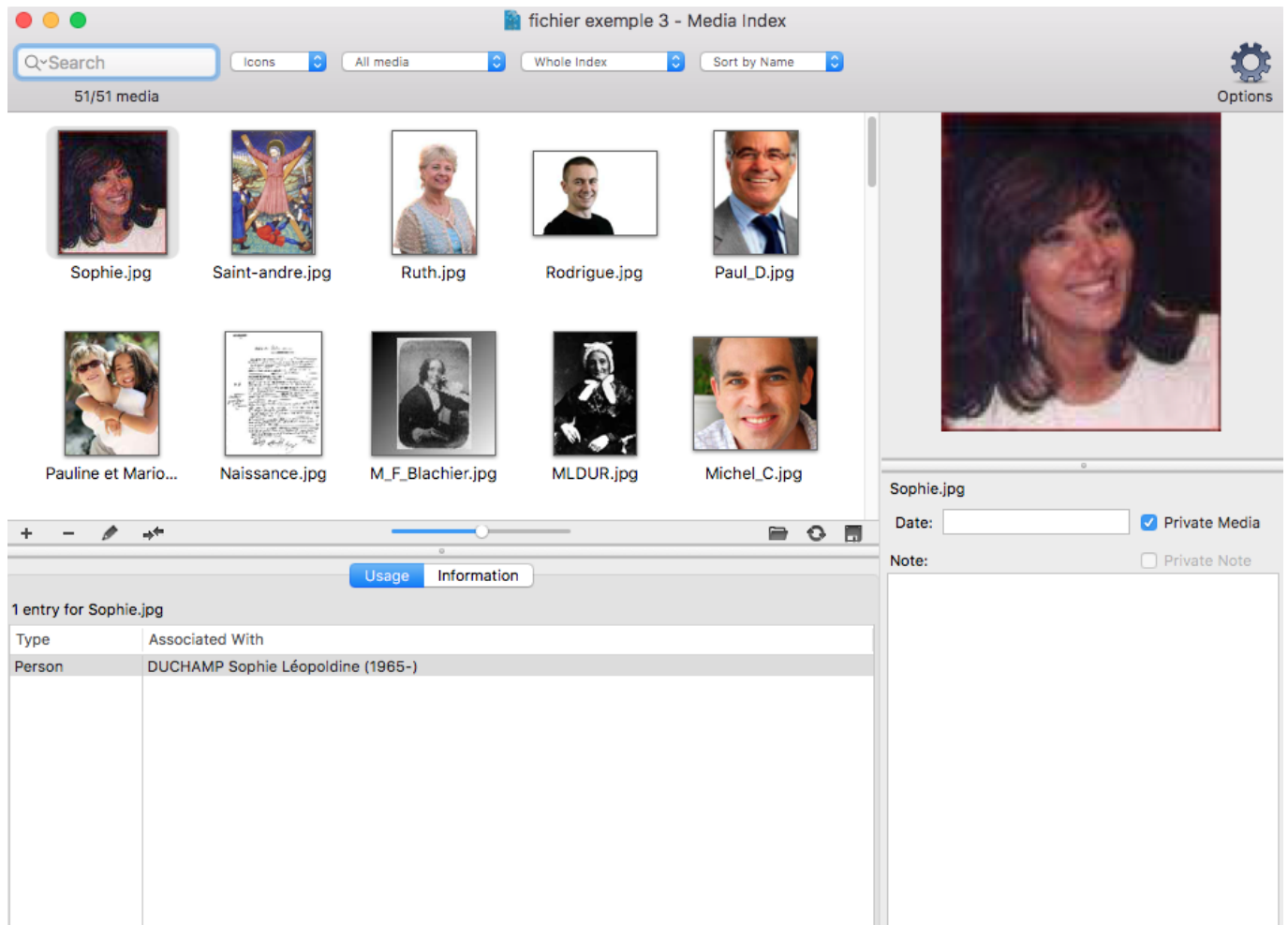
You may have assigned two different media but they were the same (an image of a source saved with two different names, the same image on the selected hard drive and in iPhoto ...). You may only keep one assigned media but use it several times.

1. Open the **Media Index** and select the media to be replaced.

Media Index for PC



Media Index for MAC




2. Click **Replace with another Media from...**  or  on the button bar of the display field and choose

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

The initial media has been replaced by the second for all its uses.

Delete media

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

- Click the  (Remove the selected media) button on the toolbar for media management.

- (MAC) Right-click the media and choose **Remove...**

Confirm the deletion of the media with **OK**.

This will delete the media from your genealogy file. If it had been used, it will no longer appear in the illustrations of data or persons to whom it was assigned.

Sharing media

Export a file containing media


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

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

Export media files

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

- In the edit screen of the media,


1. Choose **Export This Media...**  in the right-click menu on the media.
2. Keep the same name or change it and choose the destination location for the exported media.

- In the **Media Index**,

1. Make a selection of media using the display filters for different types of media or uses. Display for example images used for sources in the submenus.
2. Click the (PC) **Tools** / (MAC) **Options** button on the toolbar of the index and choose **Export Selected Media....**
3. Select the destination folder for the exported media.

Update all media

You have associated with your genealogy Pages or 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**, click the  icon to **Update media files from the originals**.

For further details, see [Media Index](#).

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.

PC Source's Basic Mode

New Source

Type: Record (civil registry, church record, Court...) Quality of Data: 0 / 3 Private Source

Source Name: [] Document: []

Repository: [] Call Nb.: [] Date: [] Medium: Other

Author: [] Email: [] Site WEB (URL): [] Archive: []

Media | Note | Transcription

Add a picture

Save Display Mode OK Cancel

MAC Source's Basic Mode

Entering Source

Type: Record (civil registry, church record, Court...) Private Source

Source Title: Document:

Repository: Author: Medium: Other

Call #: Email: Archive:

Date: Website: Quality of Data:

Media Note Transcription

0/0 Private Preferred 100%

Display Mode Cancel OK

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.

PC Source's Comprehensive Mode

Source citation for 'Birth - THOMAS Michael George (1933-)'

Source

[Choose or create a source](#)

Citation

Details | Media | Note | Transcription

Comments:

Private Citation

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Direct: information in the source plainly states the fact by itself.
Indirect: the source is relevant but needs to be combined with additional information.
Negative: the source is relevant because of the lack of information it should contain.

Display mode | **Cancel** | OK

MAC Source's Comprehensive Mode

Source citation for the Birth event of DUCHAMPS Claude Charles

Source

[Choose or create a source](#)

Citation

Details | Media | Note | Transcription

Comments:

Quality

Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Direct: information in the source plainly states the fact by itself.
Indirect: the source is relevant but needs to be combined with additional information.
Negative: the source is relevant because of the lack of information it should contain.

Private Citation

Display mode | Cancel | OK

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**.

When you attach a source, add a comment to indicate the connection between the event, the facts or person and the source.

You can also register the quality of the proof you have, click on the displayed list and select the appropriate value according to the detained certificates.

Direct: the source responds to the searched question by itself.

Indirect: the source is relevant but needs more information.

Negative: the source is relevant by the lack of information it should contained.

Note: When you add a note to an event, the proof is automatically fixed to direct. You can change this setting in Heredis's preferences. **Preference Menu > Format tab > Evidence**, choose the option that matches best to your work.

Managing citations in comprehensive mode

Heredis allows you to enrich the note associated to the sources in order to make it a full citation.

To switch in comprehensive mode, click **Preferences > Data** tab, check the “**Comprehensive mode**” alternative in the Default source citation options.

New options appear allowing you to register the quality of the source and the information.

Original: the source is in its original form.

Derivative: the source is extracted, transcribed, translated or derived from the original.

Primary: the source comes from a person who did have direct knowledge of the event or person.

Secondary: the source comes from a person who did not have a direct knowledge of the event or person (local history, tradition, family history...).

Source's Preferences

Quality	Source	Information	Evidence
	<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
	<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
	<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
			<input type="radio"/> ?

Original: the source is in its original form.
Derivative: the source is extracted, transcribed, translated or derived from the original.

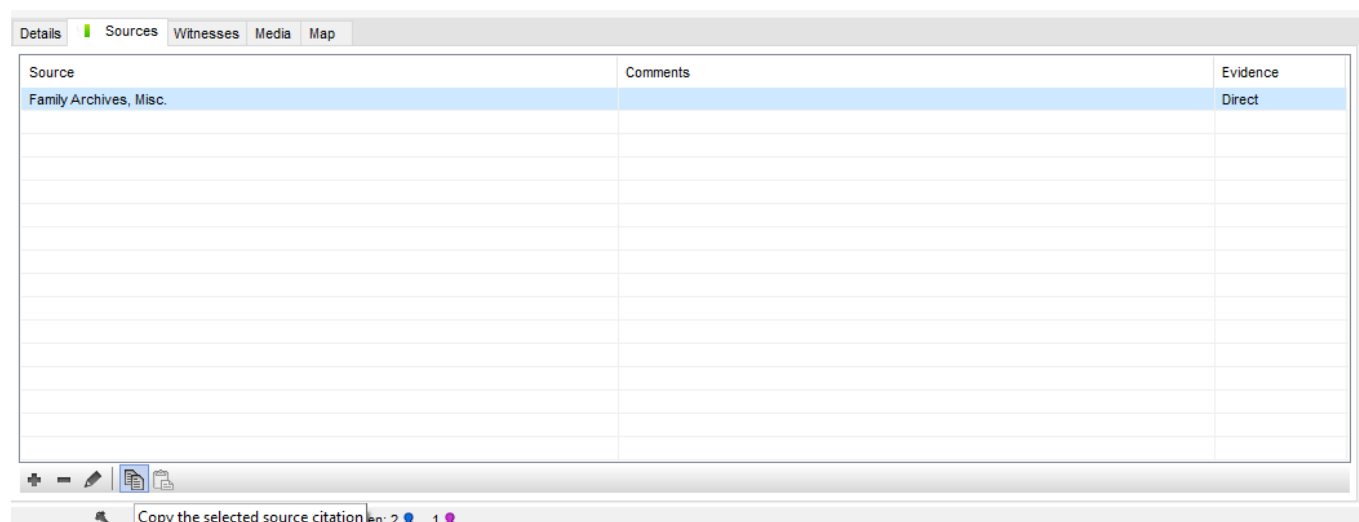
In comprehensive mode, when you want to associate a source to an event, Heredis display a citation windows allowing you to:

- link the citation to a generic source, a specific record for example
- qualify and eventually declare as private citation
- add the certificate that you detain as media of the citation
- transcribe this certificate and add a note

Duplicate a citation of a source

If you want to duplicate the citation and all the elements which compose it in another event, use the copy & paste buttons.

Duplicate a source



Summary the source

In the **Data** screen > **Personal Data**, next to the list of **Events**, click once on any source under the **Sources** tab: a summary of the source – or of the source citation if you have selected the **Comprehensive** mode under the Default Source Citation Options – will be displayed in the **Summary** panel.

Source Citation

Source Citation

Family Archives, Misc.

1 media

Comments

Quality

Source: original

Information: primary

Evidence: direct

Note

No note for this citation

Transcription

No transcription for this citation

Recognized calendars

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

The Gregorian calendar used today in most countries of the world, was 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 French Republican calendar was used only in France and covers the period from September 22, 1792 to January 1, 1806.

Entry of dates

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

A date may be entered in the Gregorian, Julian, Hebrew or Republican calendars. If there is no month name which is characteristic of a Hebrew or French 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 **PC: Tools > Preferences > Heredis Preferences > Format**; **MAC: Heredis > Preferences > Format** and select the order of elements of the date you want Day/Month/Year or Month/Day/Year).

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

Gregorian calendar

- 2 February 1794

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

Julian calendar

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

Hebrew calendar

- 2 ADAR1 5554

French Republican calendar

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

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

Interval of dates and approximate dates

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

Before

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

- before 23 August, 1845
- < 23/8/1845
- /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 word **circa** or the abbreviation **ca** or the symbol ~ followed by a space, then type the full date or not, in numbers or in words.

- about February 1811

- circa 2/1811
- ca 2.1811
- ~2.1811

Between / and

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

- between 11 October 1914 and April 1917
- between 11/10/1914 and 4/1917
- <> 10 November 1914 & 04 1917
- 11.10.1914//4.1917

From to

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

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

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

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

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

Automatic calculation of birth dates

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

For the person living the event

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

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

Witnesses to an event

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

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

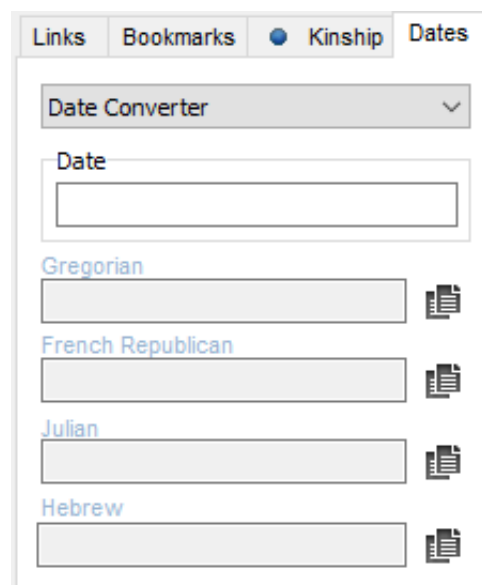
Info • The dates calculated are shown in italics preceded by a (c) in the list of events on the **Personal Data** tab.


Conversion tool for dates

To get the equivalent of a date expressed in a calendar which you are not used to, use the **Dates** panel.

1. Click the **Converter** tab of the **Dates** panel.

Date Converter



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

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. Click the **Movable Feasts** tab of the **Dates** panel.
 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.
-

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.


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

All indexes allows you to research data in your genealogy.

Info • Indexes can remain permanently open.

Accessing Indexes

Indexes are permanently available.

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 beneath the search box. Click the **Search** icon to select search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.
3. Select the desired item from the list and consult all the details you entered.
4. Click the **Statistics** tab to see periods of use of the element.
5. Click the **Usage** tab and check the list of persons for whom you typed the given name, the surname or occupation. (MAC) Double-click the line to display the individual as the primary person.

Exploring the Indexes

You may use the Indexes for finding any data, modify or complete them, and simply navigate throughout your genealogy. Each Index gives you an overview of your data, indicates where they are used and permits you to edit them throughout your genealogy file.

As you enter all data, Heredis will record the details to the right place in the appropriate Indexes: names, occupations, places, sources, media.

Places Index

Sample Family File - Places Index

27/27

Unused Places

V	N	M	City	County	State/Province	Country	Latitude	Longitude	ZIP/P...
			Belleville	Essex	New Jersey	USA	40.793...	-74.15...	
			Blackpool	Lancashire	North West	ENGLAND	53.816...	-3.050...	
		<input type="checkbox"/>	Boston	Suffolk	Massachusetts	USA	42.358...	-71.05...	
			Brisbane		Queensland	AUSTRALIA	-27.46...	153.02...	
			Camberley	Surrey	South East	ENGLAND	51.337...	-0.742...	
			Canterbury	Kent	South East	ENGLAND	51.279...	1.079920	
			Dover	Kent	South East	ENGLAND	51.133...	1.300000	
			Dunfermline	Fife		SCOTLAND	56.071...	-3.458...	
			Edinburgh	City of Edinburgh		SCOTLAND	55.952...	-3.196...	
			Hackney	Greater London		ENGLAND	51.550...	-0.050...	
			Hudson	Columbia	New York	USA	42.252...	-73.79...	
		<input type="checkbox"/>	Hull	East Riding of Yo...	Yorkshire and...	ENGLAND	53.749...	-0.335...	
			Leith	City of Edinburgh		SCOTLAND	55.976...	-3.169...	
			London	Greater London	London	ENGLAND	51.508...	-0.125...	
		<input type="checkbox"/>	Margate	Kent	South East	ENGLAND	51.381...	1.386170	
			Maryport	Cumbria	North West	ENGLAND	54.714...	-3.495...	

City: Margate

Handle Characters Manually

ZIP/Postal Code:

County: Kent

State/Province: South East

Country: ENGLAND

Latitude: 51.381320

Longitude: 1.386170

Note: Private Note

Seaside town in East Kent

Margate

Variants

9 occurrences of Margate - Kent - South East - ENGLAND

Event	Persons	Date	Subdivision
Birth	RUCASTLE Gilbert (1870-1955)	02.03.1870	In the main family bedroom
Death	RUCASTLE Adam (1818-1906)	11.08.1906	
Birth	RUCASTLE Alice Jean (1908-1998)	12.02.1908	
Death	HAYES Ann (1833-1915)	1915	
Civil Marriage	MORLEY Andrew & RUCASTLE Alice Jean	11.03.1928	
Birth	THOMAS Michael George (1933-)	02.06.1933	
Death	WALLACE Brenda (1873-1937)	09.08.1937	
Birth	THOMAS Kate Elsie (1941-)	06.24.1941	
Death	RUCASTLE Gilbert (1870-1955)	06.02.1955	Fort Crescent

You may consult the list of assignments for every item of data and the relevant statistics by period.

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 deed, which you may then consult in each event where the source is assigned. Import folders of photos to the **Media Index** so that you have them to hand for associating by a simple drag and drop.

Indexes allow you to apply overall treatment for any data of the same type: spelling, specific formatting, associating of variants, notes, illustrations, replacement by another given item of data.

Search for an element in an index

Each Index has a search field at the top left of the screen. Enter the word or phrase to be searched. The search is performed in real time and the displayed list is updated.

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

You also have display filters to refine your search. You can exclude items that are not used in your genealogy by ticking the **Unused...** box.

In the **Media Index**, choose from the pop-up menu to display media type (Image - Video - Missing...) and use (Sources - Persons...).

Only results that match your search criteria are displayed.

The counter below the search box indicates the number of results compared with the total number of elements in the Index.

Manage the displayed results

You can sort the list of elements in the Index according to the type of information.

Click the column header to rank sites by county, to classify sources by type, classify occupations according to the presence of a note, classify media according to their private character...

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

Display all the elements of an index

To see the complete list of all items in an index, make sure you have no active search criteria or filters.

To cancel a search, click the **Delete** icon to the right of the search field.

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

Consulting usage

You can easily visualize the various occurrences of a specific item in your genealogy and conveniently navigate from the indexes.

1. Open the index you are interested in.
 2. Select the line corresponding to the item you want to research.
 3. **(PC)** In the bottom part, the number of occurrences (Usage) will be displayed either directly or under a tab, depending on the index you are using. In the right end column or at the bottom, depending on the index, you will see the variants, attached media and/or notes; **(Mac)** Click on the **Usage** tab in the lower part of the window.
 4. **(PC)** Some indexes allow you to click on **Details** in order to find out where the information has been attached; **(Mac)** Double-click on the person's name to display the person's data.
- Each item of the index is analyzed so you can improve your knowledge of your genealogy.


(Mac) Click on the **Statistics** tab to consult usage stats on the item you selected. Heredis will display a graph showing the number of occurrences over a time period.

(Mac) The index window will remain open until you close it. You can go back to it at any time to switch to another usage or to do another search.

Modifying data throughout the file

You have mistakenly added the occupation «Lawyer» instead of «Solicitor»? You want the given name of «LaToya» to be written with a capital T? You realize that you have entered two different sources for the same document?

No need to spend time editing each person in your genealogy. By using the Indexes, you manage globally Surnames, Given Names, Occupations, Places, Sources and Media, and any change is automatically applied wherever the element is used in your file.

1. Select the item to be modified. If necessary run a search or sort to find it easily.
2. Edit the item:
 - by entering directly on the right of the Index screen,
 - by double-clicking on the line,
 - by clicking the **Edit and modify...** button  on the toolbar of the list to open the editing screen.

Modify upper or lower case

Most data managed in the indexes are automatically formatted when entered. The automatic formatting is defined in (PC) **Tools > Preferences > Appearance**; (MAC) **Heredis > Preferences**. You can choose to display the surnames, given names and places in uppercase, or with only the first letter in capitals.


However Heredis allows you to change the formatting for a single item and then apply the changes to all uses of this element.

You want to make an exception for a surname, a given name or a place where the spelling is unusual.

1. Open the index and find the item in question to be changed.
2. Open the editing screen and tick **Handle Characters Manually**.
3. Edit the item. You may type upper and lower case wherever you want for the word. The automatic formatting will not apply to this element that will keep the format that you have chosen.

Replace an element with another

After many data entries, you may have created duplicates: this source is identical to another, such an occupation was spelled in two different ways. Tidy up in the index in question by using the **Replace...** function.

1. Open the index and find the item in question to be replaced.
2. Click the **Replace...**  on the toolbar of the list.
3. Select the replacement item in the list. Click **Choose** to confirm the replacement.

The element is replaced in the Index, and therefore wherever it has been used in your genealogy. The Index now contains one element less than before.


Info: An element with variants can't be replaced. You first have to unlink the variants.

Manage variants

The notion of a variant allows you to assign several elements to an Index entry. You can define variants of Surnames, Given Names, Occupations and Places.


Place names have sometimes changed over the centuries. As part of your genealogical research, you may find a number of variants for the same place. «New Amsterdam» was renamed «New York» in 1665, «Philipstown (Leinster)» became «Daingean» in 1929. Similarly, you may encounter a name spelled differently depending on the date of the certificate found: the «Taylor» family is sometimes noted with the spelling «Taylour» or «Tayler».

Specify the variants


1. Open the index in question.
2. Select the surname, given name, occupation or place you choose as the standard version.
3. In the **variants** field at the bottom right of the 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.

Choose the main variant

You can choose the main variant for a surname, given name, or occupation. Select the variant you wish to see as the main and click on the  button. The main variant appears with a grey star and its variants with a white one.

Unlink variants

To unlink a variant, select **Variants** in the screen and click the  (Unlink the selected variant) button.

To remove all variants of a group: click the indented wheel icon in the **Variants** field, and choose **Remove this group of variants**.

To remove all variants from your genealogy file, click the **Options** button on the toolbar and choose **Unlink All Variants...**



Info • Deleting a variant does not remove the item from the index. Only the link of the element in the index is deleted.

Delete unused data from an Index

You can delete at one go all the elements that are not used in your genealogy file.

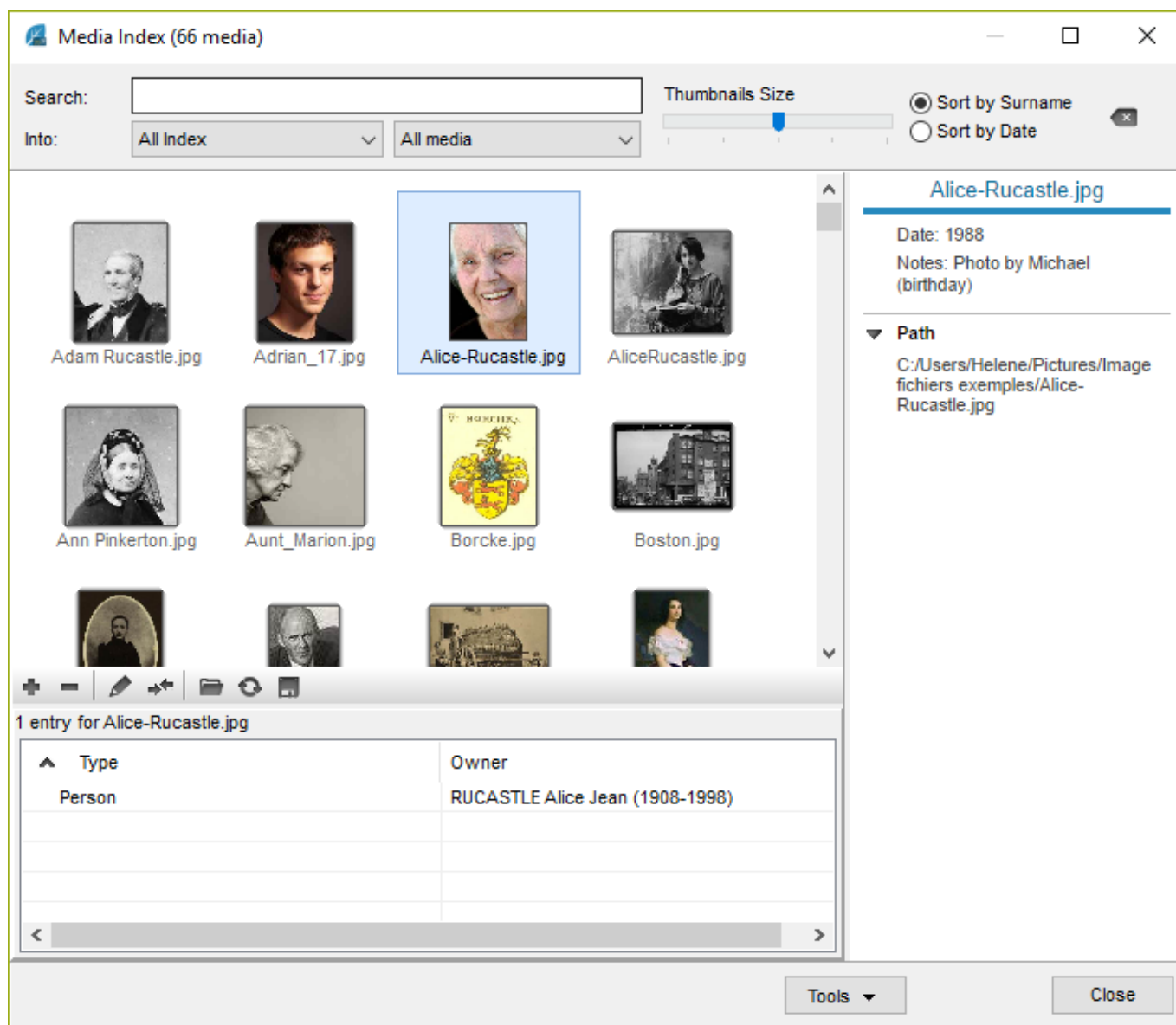
As a precaution, review first the list of unused data by ticking the **Unused...** box in the search field.

1. Click the (PC) **Tools** / (MAC) **Options** button on the toolbar of the Index and select **Remove All Unused...**
2. Confirm the deletion by clicking **OK**.

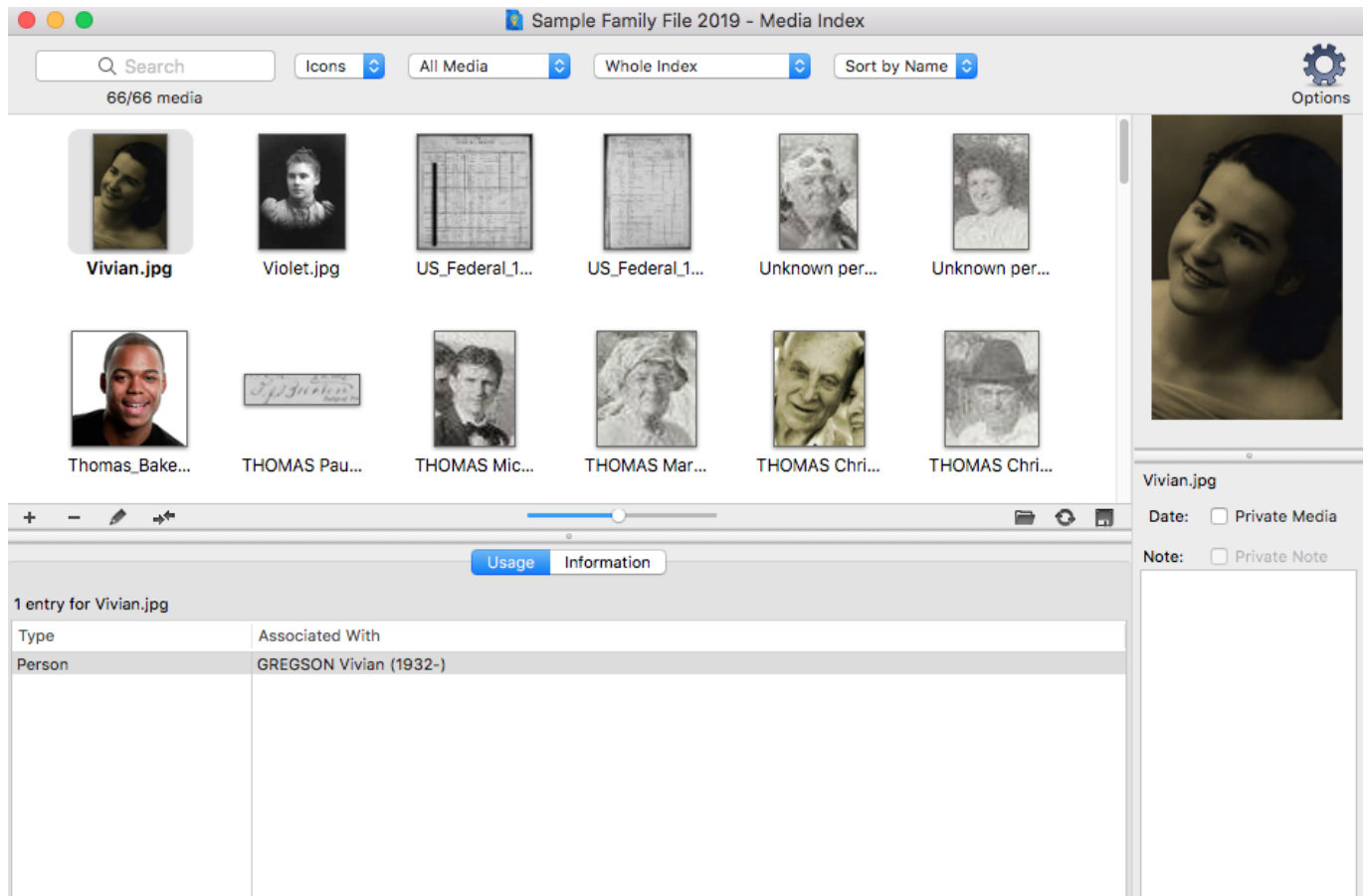
Open the **Media Index** from the **Tools** menu, from the toolbar , (Mac) or by clicking the  **Index** button in the **Media** panel toolbar.

- In the **Search** section, type in the name (or part of the name) of the media you are looking for. The number of items matching your search is displayed right underneath the **Search** section.

(PC) Media Index



(Mac) Media Index



(Mac) Click the **Magnifying Glass** icon to select the search mode: “Search Starts With” or “Search Contains” the letters typed in.

In order to delete or replace the searched word, click on the **(PC)** or **(Mac)**, which appears in the input area.

- The search can be limited to a single type of media by selecting it from the first pull-down menu: **Image files, Audio files, Video files, Other types, Missing Media, Private**.
- Filter your search according to the type of data the media is assigned to by selecting in the second pull-down menu: **Persons, Families, Sources, Events, Surnames, Given Names, Places, Unused Media**, etc.

To better identify the selected media:

- Sort the list or icons according to the name of the media or to the date you have entered.
- Change the media display mode – List or Icons – by clicking on the related buttons. You can also enlarge the icons using the zoom cursor.

Info • The results displayed as a list can be sorted according to the presence of a Note (N), of a Private media (P), or according to their name, by simply clicking on the column header.

If a media is selected on the list, you can consult the data it is related to by clicking the Usage tab. Double-click the data you are interested in and it will be displayed in a new window.

For more details, please consult the [Media](#) article.

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.

MAC Info • You may consult the list of all sources in your genealogy in the Sources panel or in the Sources Index.

Source Index for PC

Sources Index (10 sources)

Search: Unused Sources Only Private Sources Only

N	T	M	P	Title	Type	Repository	Document	Call #	Medium	Archive	Quality
				Marriage...	Record	City of Westmin...	M.Cert. A....	D 22...	Internet		3
				Death R...	Record	Parish records		1947	Other		0
				Alice's will	Record	Simons & Tapply	Will		Copy		3
				Family A...	Private Do...		Misc.		Original		3
				Diary	Private Do...	Family archives	Journal	1947	Original		3
				1841 UK...	Namelist	National Archives	Census		Internet		2
				Statutor...	Namelist	ScotlandsPeople	Births-Mar...		Internet		2
				Old Pari...	Namelist	ScotlandsPeople	Baptisms-...		Internet		2
				Bachelo...	Namelist	University archi...	Pass list	Year ...	Digiti...		2
				Newspa...	Publication	British Newspa...	Caledonia...		Internet		0

1 entries for Marriage certificate - City of Westminster, M.Cert. A.P. (10)

Type	Sourc...	Date	Place	Place ...	Comm...	Evide...
Ev...	Marri...	22 N...	Lond...	The ...		Direct

Tools Print Close

Source Index for MAC

The screenshot displays the Heredis software interface. On the left, a search bar and a list of sources are visible. The main area shows a table of sources with columns for Title, Document, Repository, Type, Author, Call #, Archive, Medium, and Quality. A specific source is selected, and its details are shown in a panel on the right. The details panel includes fields for Type, Title, Document, Repository, Call #, Author, Date, Email, Website, Medium, Archive, and Quality. A 'Private Source' checkbox is checked. Below the details panel, there is a 'Note' and 'Transcription' button. At the bottom of the interface, a table shows the assignment of the source to an event.

T	N	M	P	Title	Document	Repository	Type	Author	Call #	Archive	Medium	Quality
			<input checked="" type="checkbox"/>	acte de B. BLAC...	acte de baptême	A.D.07 à Privat	Record	paroisse...			Digitizing	3
			<input type="checkbox"/>	Acte de Bapt. M...	Registre parois...	Paroisse de S...	Record		4E 2805/8	Curé de S...	Other	3
			<input type="checkbox"/>	Acte de Décès...	Registre des dé...	AD Ardèche...	Record			B&S - cla...	Internet	3
			<input type="checkbox"/>	Acte de Mariage...	registre des ma...	E C Saint-Vall...	Record			Claude	Copy	3
			<input type="checkbox"/>	acte de N de LO...		A.D.69	Record	mairie de...			Digitizing	3
			<input type="checkbox"/>	Acte de Naiss....	Registre des nai...	AD Ardèche...	Record		4E 128/16		Internet	3
			<input checked="" type="checkbox"/>	Acte Décès Alex...	Extrait	AD Rhône	Record		1947	Classeur D	Copy	3
			<input type="checkbox"/>	Acte Mariage D...	Acte de mariage	A.D. Isère	Record			Claude	Copy	3
			<input type="checkbox"/>	Bapt. A. J. Duch...	Livret de famille...	Archives fami...	Private Doc...			Claude	Original	3
			<input checked="" type="checkbox"/>	Bapt. Clarisse D...	Photographie d...	Archives fami...	Media	Eric Duch...		Eric	Original	1
			<input type="checkbox"/>	Carte A. J. Duch...	carte de transp...	Archives fami...	Official Doc...			Claude	Original	3
			<input type="checkbox"/>	Contrat x Ducha...	Contrat de mari...	Archives not...	Record			Claude	Copy	3
			<input type="checkbox"/>	Diplôme médiéci...	Liste des reçus	Archives univ...	Nameslist		année 1872	classeur D	Copy	0
			<input type="checkbox"/>	Inhumation Mari...	Faire-part	Archives fami...	Correspond...			chez Hug...	Original	0
			<input checked="" type="checkbox"/>	Interview d'Alice...	Témoignage	Archives fami...	Media	Claude D...		DD d'Eric	Digitizing	2
			<input type="checkbox"/>	Lettres d'Alexan...	Correspondances	Archives fami...	Correspond...			Claude	Original	1

1 entry for acte de B. BLANCHIER de LA CHAUX Jean - A.D.07 à Privat, acte de baptême

Type	Source Owner	Date	Place	Place Subdivision	Comment	Evidence
Event	Christening - BLANCHIER...	04.01.1737	Satillieu	église St-Roch		Direct

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** panel to assign the source to a series of events.

From the Sources tab of the event

1. Click the **+** (Link a source) on the button bar to open the **Entering source...** screen.
2. Select the source from the list then validate by clicking **OK**. The source is assigned to the event.

Create a new source and assign it to an event

Source tab

Source	Comments	Evidence
Family Archives, Misc.		Direct

1. Select the event from the **Personal Data** tab.
2. Click the **Sources** tab.
3. Click the **+** (Link a source) button.
4. Click the **New Source** button in the **Entering source...** screen.
5. Enter the information for the source and press **OK**. The new source is assigned to the event.

Create Person Sources

You can link sources directly to a person, click on the **Person Sources** tab in the middle of the screen **Data > Personal Data**.

The association of a person source works exactly as the association of a source for an event.

Create a new source and assign it later

1. Display the **Sources** 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	Record (civil registry, church record, Court...)			Quality of Data	0	3	<input type="checkbox"/> Private Source
Source Name	Ario E Bernstein in household of Fred Bernstein, "United States Census, 1930"			Document	"United States Census, 1930," database with images, <i>FamilySear		
Repository	Call Nb.	Date	Medium				
			Internet				
Author	Email	Site WEB (URL)	Archive				
		https://familysearch.org/ark:/61903/					

Type

Specify the type of information that allows you to advance in your genealogy. Is it a deed? A family document? A historical work? Etc.

Source Name

Type a pertinent title for recognizing the document. The title of the source appears in the **Sources** panel and in the **Sources** tab of events, as well as in the genealogy documents you may print.

Document

Specify the type of deed (death certificate, marriage contract, etc.) or what document, official or private, which contains the information (census, invitation, family book, etc.).

Repository

Indicate where the original source is archived or the body where you found the information.

Call Number

If the document is from an archive or library and is listed, enter this here. Specify the volume and page number if it is a published book.

Date

Enter the date of the document that allowed you to find the information. Indicate the date of publication for a book, the date of dispatch for correspondence.

Info • Remember to specify the date of the source if it differs from the date of the event to which it relates (date of birth certificate issued 20 years after the event).

Author

Enter the author of the document that allowed you to find information.

The author of the source can be very different depending on the source. Quote a journalist for an article in a magazine, an amateur genealogist for a GEDCOM file, a ministry department or local authority for an

administrative document, a parent who took a photo...

Email

Note the email of the person or organization that holds the information.

URL

Specify the address (URL) of the Internet website where you found the information.

Medium

Select the medium where you store information or where you saw it.

Do you have the original family book? Do you have a copy of the original or do you have a scanned image of the deed? Have you seen the information by consulting a microfilm? Have you found the information in an online genealogy?

Archive

This section concerns only you and allows you to specify where the document is in your personal archives: in a specific file, in a specific folder of your hard disk, etc.

Quality of Data

To qualify the validity of the information, set the certainty of the source by using the cursor, from 0 (not sure) to 3 (completely certain).


Note

In the **Note and transcription** field, enter the information on the source: the details of the 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** 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 .

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).

The different mode for Sources & Citations

The information gathered about your ancestors will be more or less reliable depending on their origin. Assign one or more sources to each event in order to justify the information recorded.

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**.

When you attach a source, add a comment to indicate the connection between the event, the facts or person and the source.

You can also register the quality of the proof you have, click on the displayed list and select the appropriate value according to the detained certificates.

Direct: the source responds to the searched question by itself.

Indirect: the source is relevant but needs more information.

Negative: the source is relevant by the lack of information it should contained.

Note: When you add a note to an event, the proof is automatically fixed to direct. You can change this setting in Heredis's preferences. **Preference Menu > Format tab > Evidence**, choose the option that matches best to your work.

Managing citations in comprehensive mode

Heredis allows you to enrich the note associated to the sources in order to make it a full citation.

To switch in comprehensive mode, click **Preferences > Data tab**, check the "**Comprehensive mode**"

alternative in the Default source citation options.

New options appear allowing you to register the quality of the source and the information.

Original: the source is in its original form.

Derivative: the source is extracted, transcribed, translated or derived from the original.

Primary: the source comes from a person who did have direct knowledge of the event or person.

Secondary: the source comes from a person who did not have a direct knowledge of the event or person (local history, tradition, family history...).

Source's Preferences

Quality		
Source	Information	Evidence
<input checked="" type="radio"/> Original	<input checked="" type="radio"/> Primary	<input checked="" type="radio"/> Direct
<input type="radio"/> Derivative	<input type="radio"/> Secondary	<input type="radio"/> Indirect
<input type="radio"/> ?	<input type="radio"/> ?	<input type="radio"/> Negative
		<input type="radio"/> ?

Original: the source is in its original form.
Derivative: the source is extracted, transcribed, translated or derived from the original.

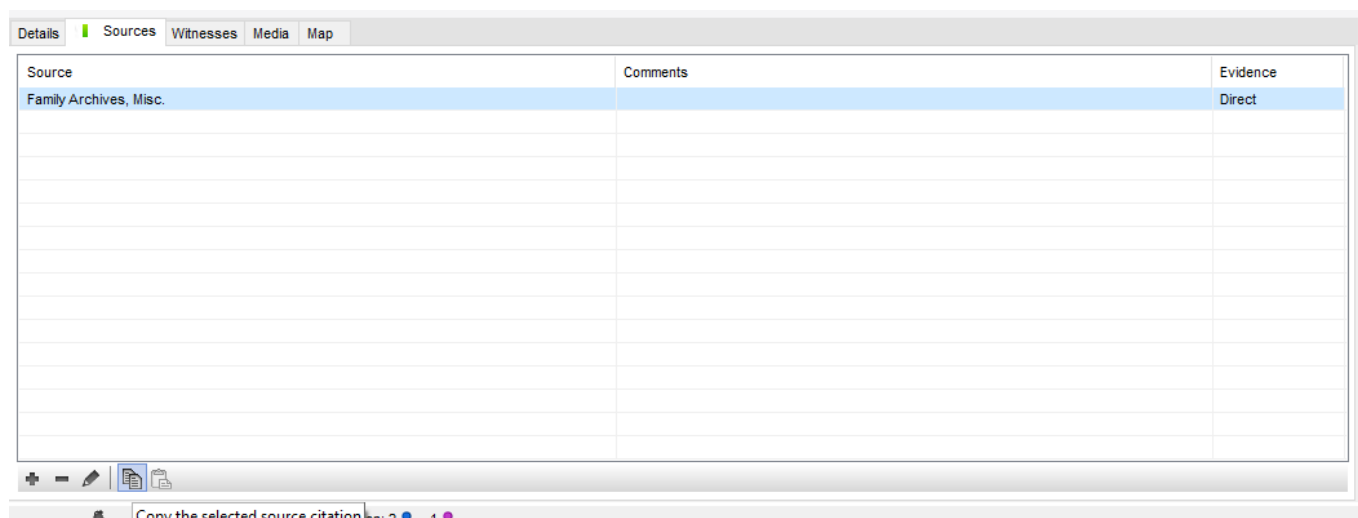
In comprehensive mode, when you want to associate a source to an event, Heredis display a citation windows allowing you to:

- link the citation to a generic source, a specific record for example
- qualify and eventually declare as private citation
- add the certificate that you detain as media of the citation
- transcribe this certificate and add a note

Duplicate a citation of a source

If you want to duplicate the citation and all the elements which compose it in another event, use the copy & paste buttons.

Duplicate a source



Source	Comments	Evidence
Family Archives, Misc.		Direct

Summary the source

In the **Data** screen > **Personal Data**, next to the list of **Events**, click once on any source under the **Sources** tab: a summary of the source – or of the source citation if you have selected the **Comprehensive** mode under the Default Source Citation Options – will be displayed in the **Summary** panel.

Source Citation

Source Citation

Family Archives, Misc.
[1 media](#)

Comments

Quality
Source: original
Information: primary
Evidence: direct

Note
No note for this citation

Transcription
No transcription for this citation

In Comprehensive mode

Choose the origin of the source, if the information is **primary**, **secondary** or **?** If you do not know. Choose the level of the evidence. You can also tick the **Private citation** box.

Media and definition 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. Open the input screen for the source.
2. Assign the media to the source
 - Click the **+** (Add a media) button in the display field of the media.
 - Drag and drop the selected media from the Media panel (**MAC**: or from the Finder).

Info • The right-click menu in the display field of the media provides access to the **Add New Media** Option.

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.

Click the **Horizontal Display** button to visualize the entire width of the scanned document, even if you have zoomed the image. You may enter text below the displayed lines.

Click the **Vertical Display** button to visualize the document as a whole, including marginal notes. You may enter text to the right of the displayed image.

Create a new source from an existing source

Some sources have many sections in common: they sometimes come from the same records, same repository...

To save time, you can duplicate an existing source to create a new one.

- Select the source to copy in the source index.
- Click on the **+** button. An identical source is added to the source index.
- Double-click on the new source to open and modify
- Click **OK** to confirm the update of the new source.


Merge two sources

You may have saved, in the sources index, many sources corresponding to the same references: for example you created a source with a digitized record and you have created another one where is the transcription.

You can create a single and same source that will replace the two sources already existing in the index.

- Select the **A** source to erase
- Click on the **→←** button
- Select the **B** source, to maintain
- Heredis indicates the number of replacement that will be done.
- Confirm the replacement of the A source by the B source by clicking the **Yes** button. All events attached to the A source will be changed.

Delete a source

- Select the source in the source index.
- Click on the  button

Heredis will let you know when the source is used. If you confirm the delete, the source will not be present in the source list of events previously used.

Multi-selection

To take care of more than one source at the same time:

- **(PC)** Press the Maj or Ctrl key / **(MAC)** Press the cmd or Maj key and, while holding this key down, click on the different sources you wish to select.
- Then choose the appropriate function, erase or replace

Advanced functions

Swap

This function allows you to easily share the data of two sections of a source.

- Select one or more sources with multi-selection
- Click on the **(PC)** Tools button / **(MAC)** Indented wheel > **Swap**, then choose the 2 sections to swap


Change the value

To change the value contained in a section by another possible value:

- Select one or more sources with multi-selection
- Click on the **(PC)** Tools button / **(MAC)** indented wheel > change the value > select the section > choose the new value for the section.

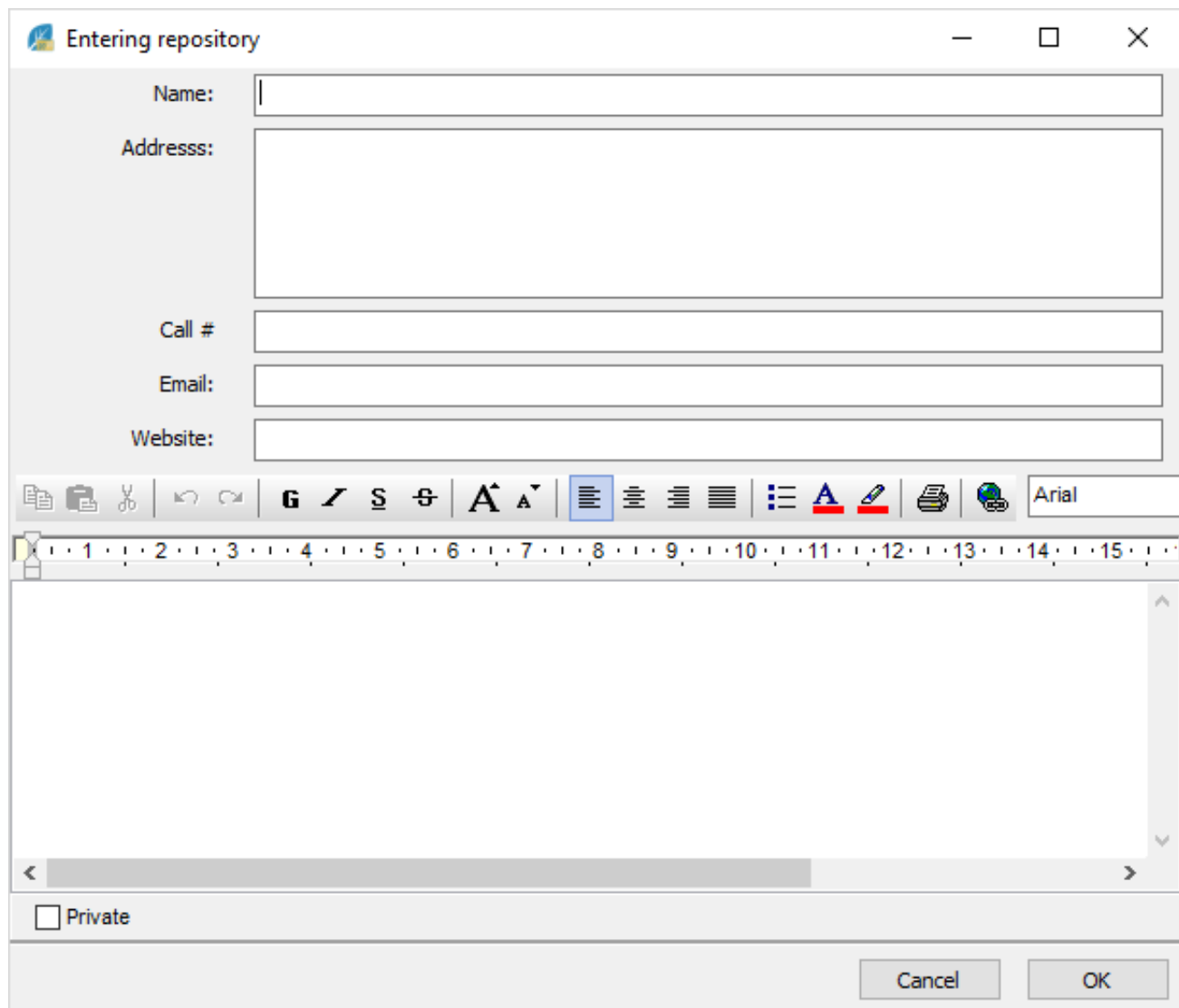
Note: Before to make the modifications, Heredis shows a confirmation message indicating the number of the impacted sources. Click **Yes** or **No** to implement or not the modifications.

Heredis verify every data in the repository section. Every new entry is inserted in the **Repository Index**. To manage all repositories registered in your genealogy file, select the **Tools Menu > Repositories Index**; or directly from the **Sources index**, click on **(PC) Tools button / (MAC) Option** (indented wheel)

button then select **Repositories Index**; or from the toolbar click on the  button.

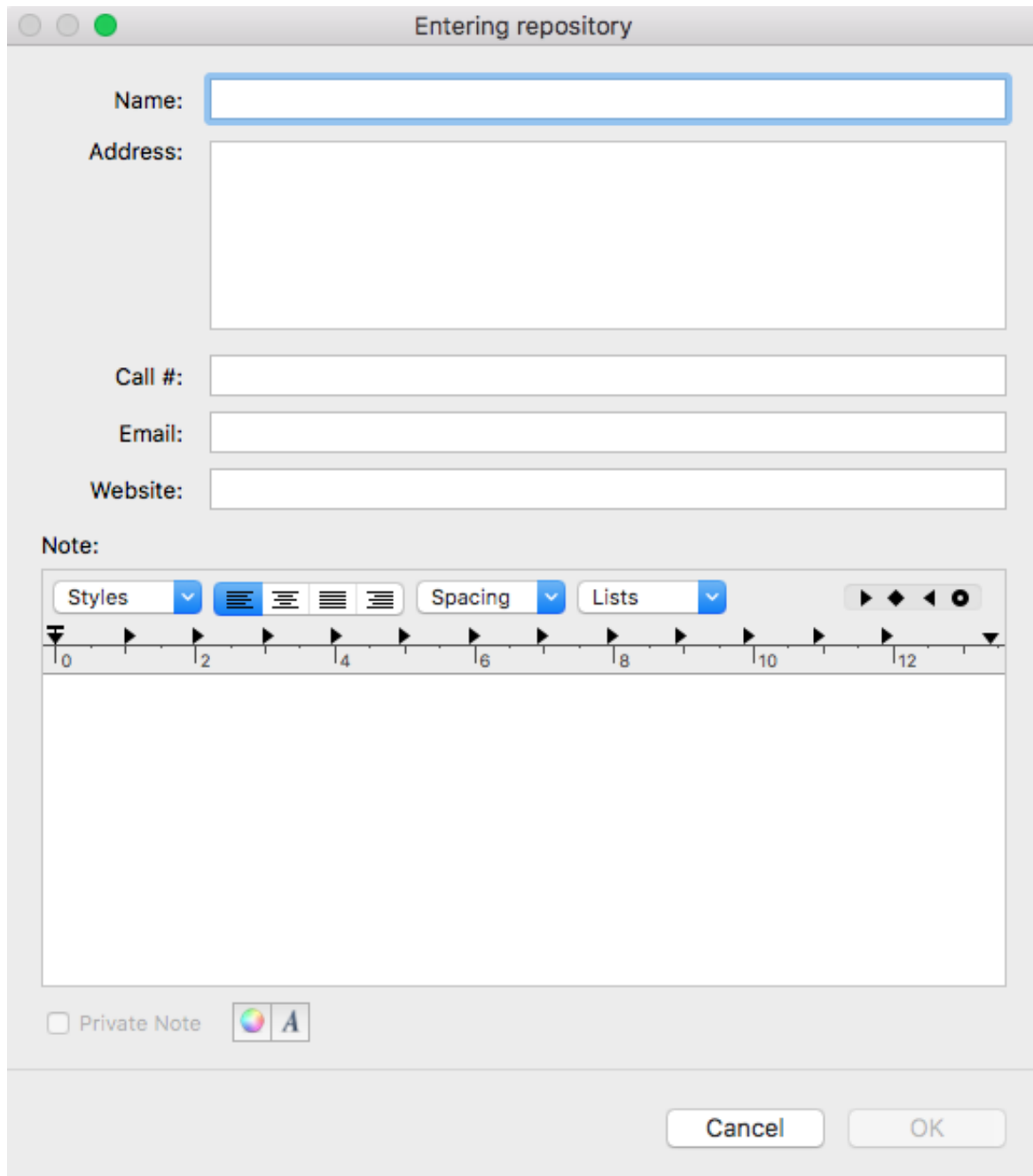
Create a new repository

PC Entering Repository



The screenshot shows a dialog box titled "Entering repository". It features a title bar with standard window controls (minimize, maximize, close). The main area contains several input fields: "Name:", "Addresss:", "Call #", "Email:", and "Website:". Below these fields is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, font size, text color, background color, bulleted list, numbered list, indent, and outdent. The text editor has a ruler at the top showing line numbers 1 through 15. At the bottom of the dialog, there is a "Private" checkbox and "Cancel" and "OK" buttons.

MAC Entering Repository



- Click on the **+** button to enter a new repository.
- Write all the data you dispose of on the new repository in the sections: name, address, call #, email, website.

You can also add a note: write directly in the word pressing, and use the toolbar if you wish to edit. Check the **Private Note** box to exclude this note from file exports and publishing.

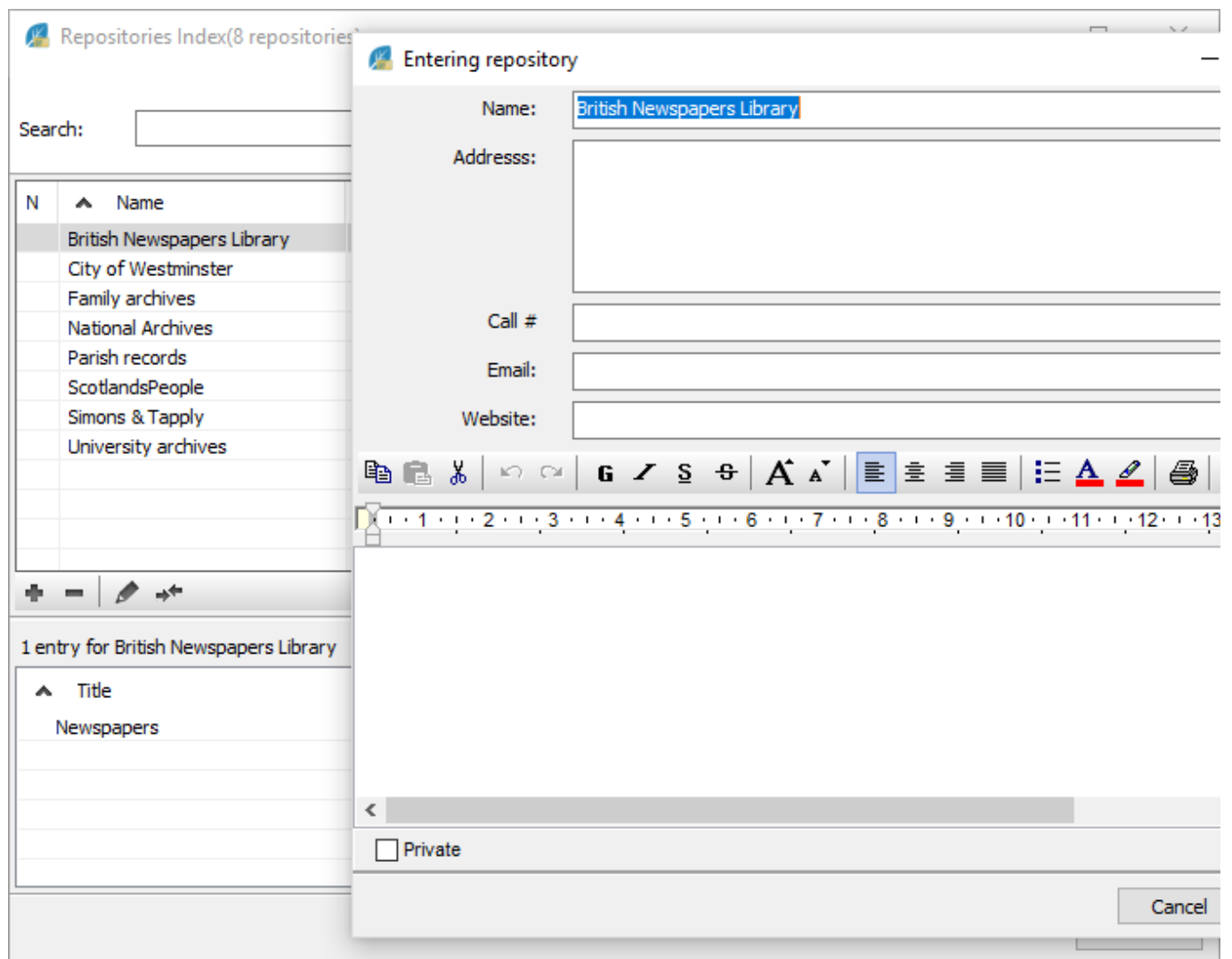
Access to a repository

Click directly in the repository in the displayed list.
or Press the arrow touch of your keyboard to access it.

or Enter the first letters of the repository in the search bar. You can reduce the repository list by ticking the box “unused repositories” to see only the unused repositories and eventually delete them. When you select a repository in the list, find directly to the right the entered information: name, address, call #, email, website and note. All sections displayed can be modify from this screen. The sources using the repository are displayed under the repositories index. Double-click on one of the use to display directly the detail of the concerned source.

Modify a repository

PC Modify a repository



MAC Modify a repository

Entering repository

Name:

Address:

Call #:

Email:

Website:


Note:

Styles Spacing Lists

0 2 4 6 8 10 12

Private Note

Heredis allows you to modify a repository at any time.

Select the repository to modify then click on the pencil  button.

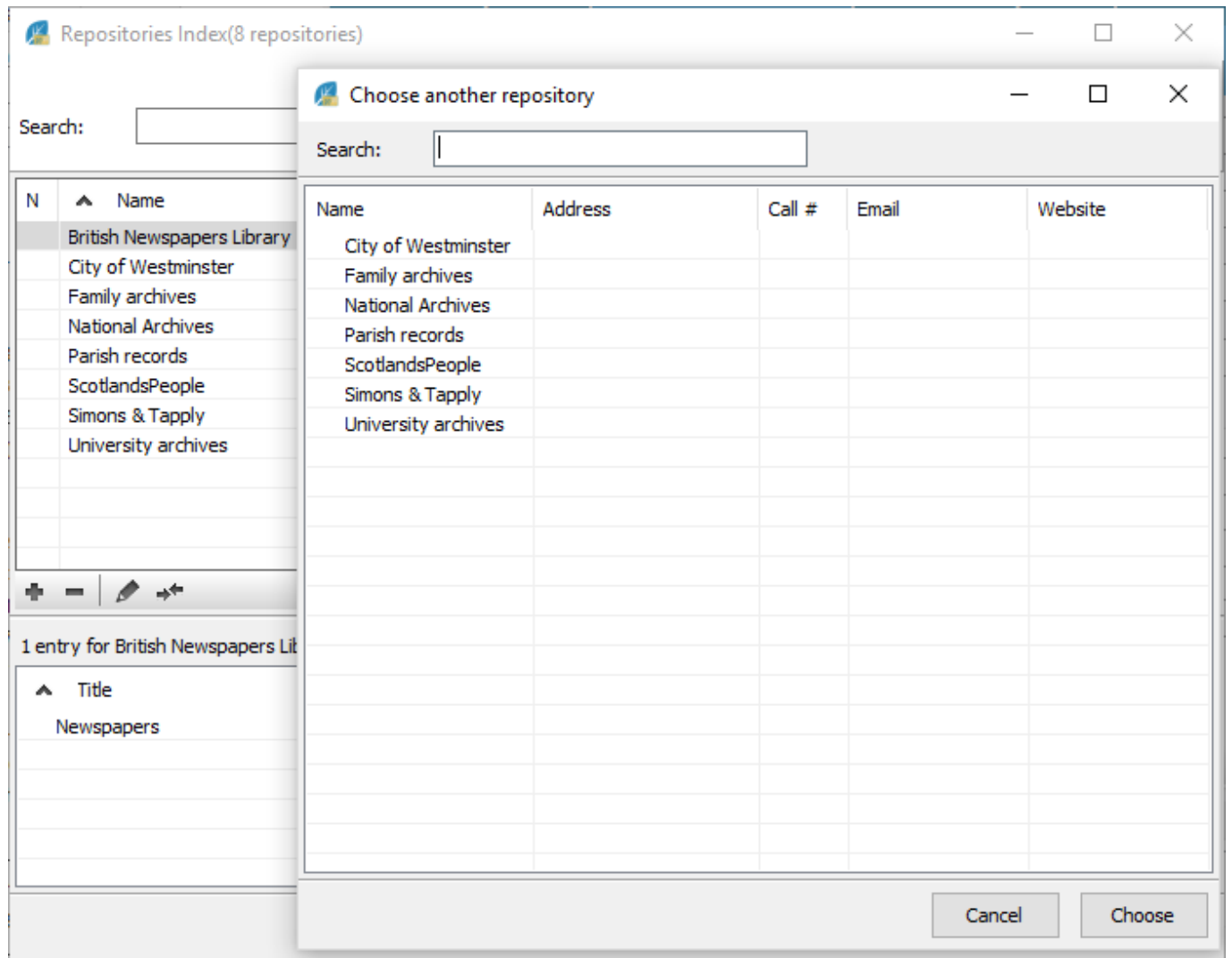
Or double click on the displayed repository in the list.

Modify directly the sections you want. If you change the name of the repository, Heredis will impact this modification on every source linked to this repository.

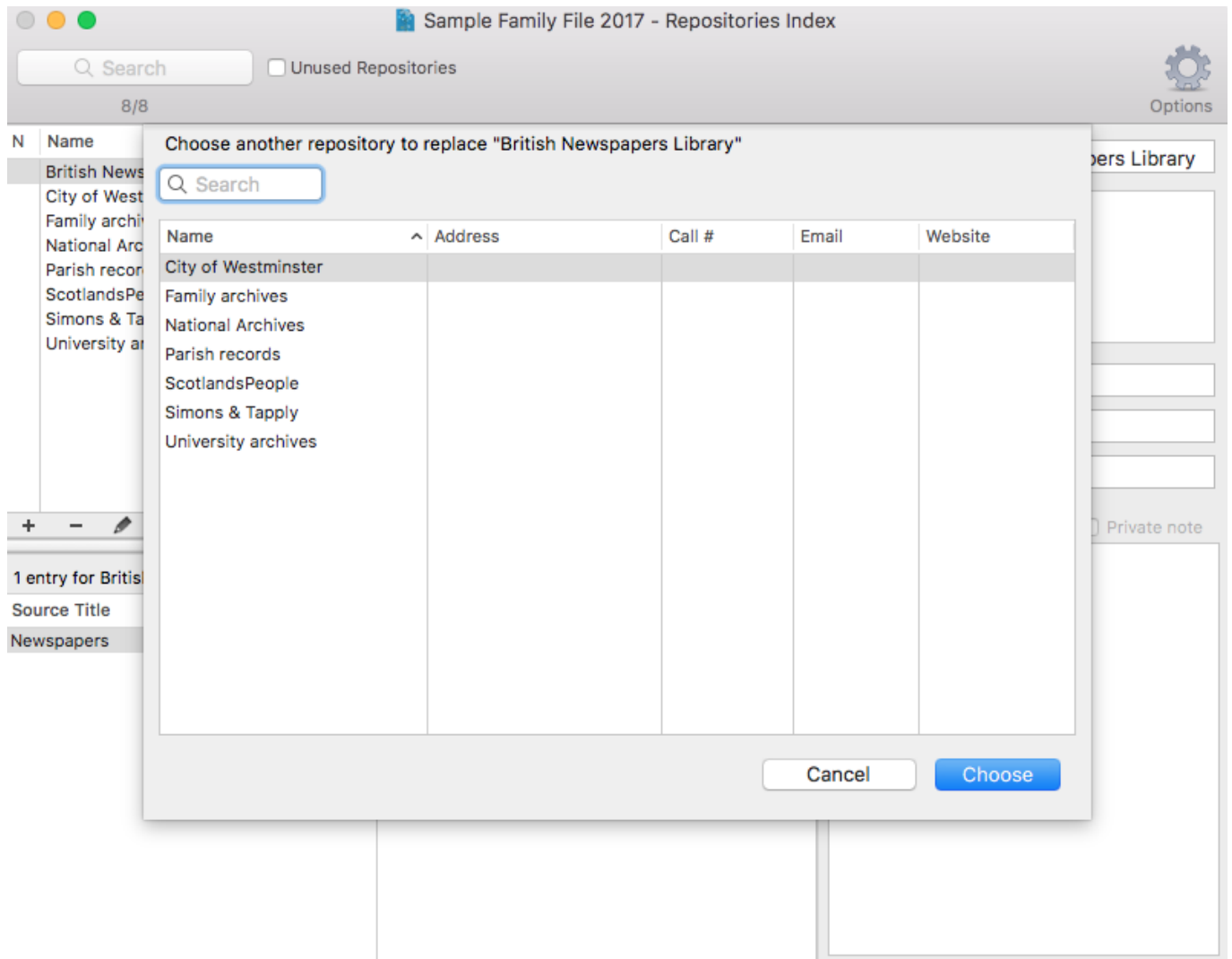
Merge 2 repositories


You may have save duplicates in the **Repositories Index**, merge them to keep only one in the **Index**.

PC Merge 2 repositories



MAC Merge 2 repositories



- Select the **A** repository to erase
- Click on the  button
- Select the **B** repository to keep
- Click on the **Choose** button
- Heredis indicates the number of replacement that will be done
- Confirm the replacement of the **A** repository to the **B** repository by clicking on the **Yes** button. All sources attached to the **A** repository will be modified.

Erase a repository

- Select the repository to delete
- Click on the  button. If you erase a used repository, it will also be erased from the linked source.

Multi-Selection

To treat multiple repositories at the same time:

- Press the **(PC)** Ctrl or Maj / **(MAC)** Cmd or Maj key and, while holding this key down, click on

the different repositories you wish to select.

- Then choose the appropriate action, erasing or replacement.
-

Heredis attaches considerable importance to the places where your ancestors lived. By its structured data entry, it identifies places in many countries and views them on an inter-active map. You get closer to the lives of your ancestors by discovering their geographical environment. Did they live in a forest, near a river, in a large city or small village?

Info • You were using a software that did not have a defined structure for places? Heredis studies your GEDCOM file and identifies the largest possible number of locations, offering you this essential feature for effective knowledge of your past.

Places assigned to events are displayed in the **Personal Data** screen by selecting each event. You can consult the list of all places in your genealogy in the **Places** panel or in the **Places Index**. Places referring to immediate family members appear in the **History > Migrations** tab as well as in the **Search** tab.

Assign an existing place to an event

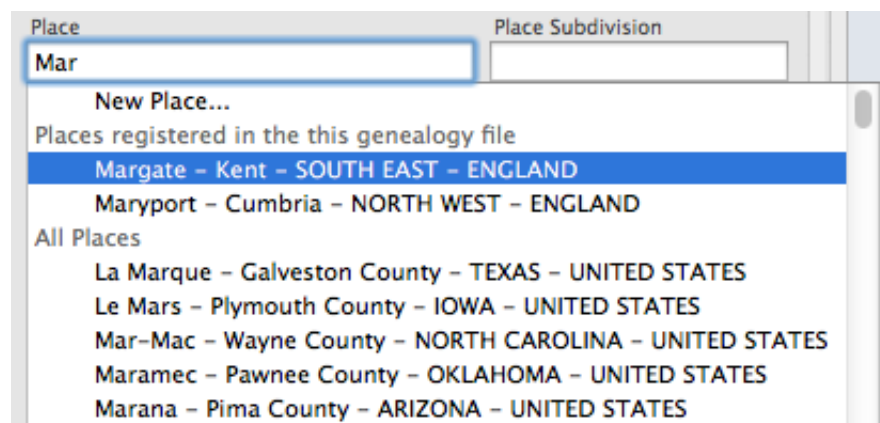
Drag and drop

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 in grey below 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, select **New Place** at the top of the list. 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.
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 Notes field, an assigned media field, a display field for a map, and a field reserved for geolocation if it is not known.

Input fields for the place

Each administrative item has a separate input field. This organization method allows you to edit documents by town, region, country and facilitates the geolocation of the place where your ancestors lived.

Complete the fields **City – Postal Code – County – State/Province – Country**.

If you know them, you may also complete the **Latitude** and **Longitude** fields. However they will be filled automatically when the geolocation of the town will be done.

For further details on automatic filling of places, see [Heredis' Preferences\Choose the recognized places](#).

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:

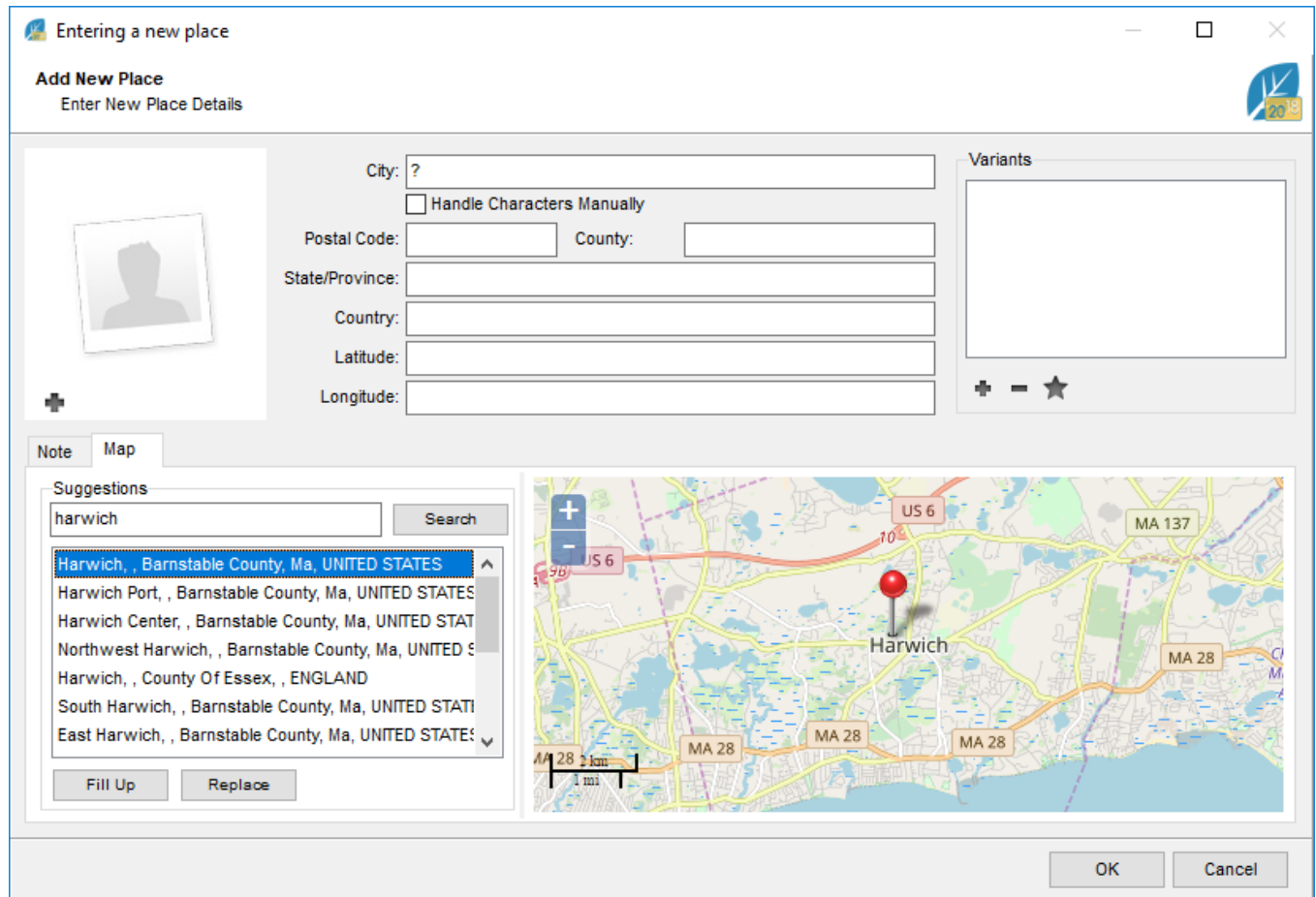
- Click the **+** (Add a Media) button in the display field of the media.
- Drag and release the media selected from **Media** panel (MAC: or from the Finder)

MAC Info • The right-click menu in the display field of the media provides access to the **Add New Media** option.

Geolocate a place


When the place is recognized by Heredis, it is geolocated. In this case, the latitude and longitude are inserted automatically and the map of the location may be displayed.

(PC) Entering a new place



(MAC) Entering a new place

Info • View places not geolocated in the **Places Index** by clicking on the **Latitude** or **Longitude** fields. If these fields are empty, you will have to create the geolocation manually.

1. Double-click the place in the **Places Index** or click the pencil  icon (Edit and modify the selected place) to open the enter/modify screen of the selected place.
2. Click the **Search** button in the geolocation field. Heredis will consult various databases of global importance to find the place you entered.

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

3. Click each of the proposals and observe the map that is displayed to clearly define which corresponds to the place you entered. As you check the different proposals, the empty input fields (especially the longitude and latitude fields) will be simulated in blue.
4. Edit 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.




For further details see [Geolocation](#).

Delete a place

- Select the place to delete
- Click on the  button

Heredis checks if the place is used, if so you won't be able to erase.

Variants

As for surname, given names and occupation, you can add variants to a place. Just double-click on the place you want to add a variant then use the  button in the variant area to choose a variant. Don't forget to choose the main variant by clicking on the  button. To delete a variant click on the  button.


Permanent control for duplicates

When adding a new person to your genealogy, you may risk creating a duplicate, that is to say, create two distinct persons for the same ancestor. Heredis provides a tool, available in all entry fields for individuals, to avoid creating a person already saved in your file. Heredis will control for duplicates at all times during the entry of data; but the importing of data from other genealogists, or a moment of inattention may create duplicates. This powerful tool is essential for maintaining an impeccable genealogy file. Research and verification is carried out in one click. The results are clearly displayed and indicate the probability of duplication.

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.

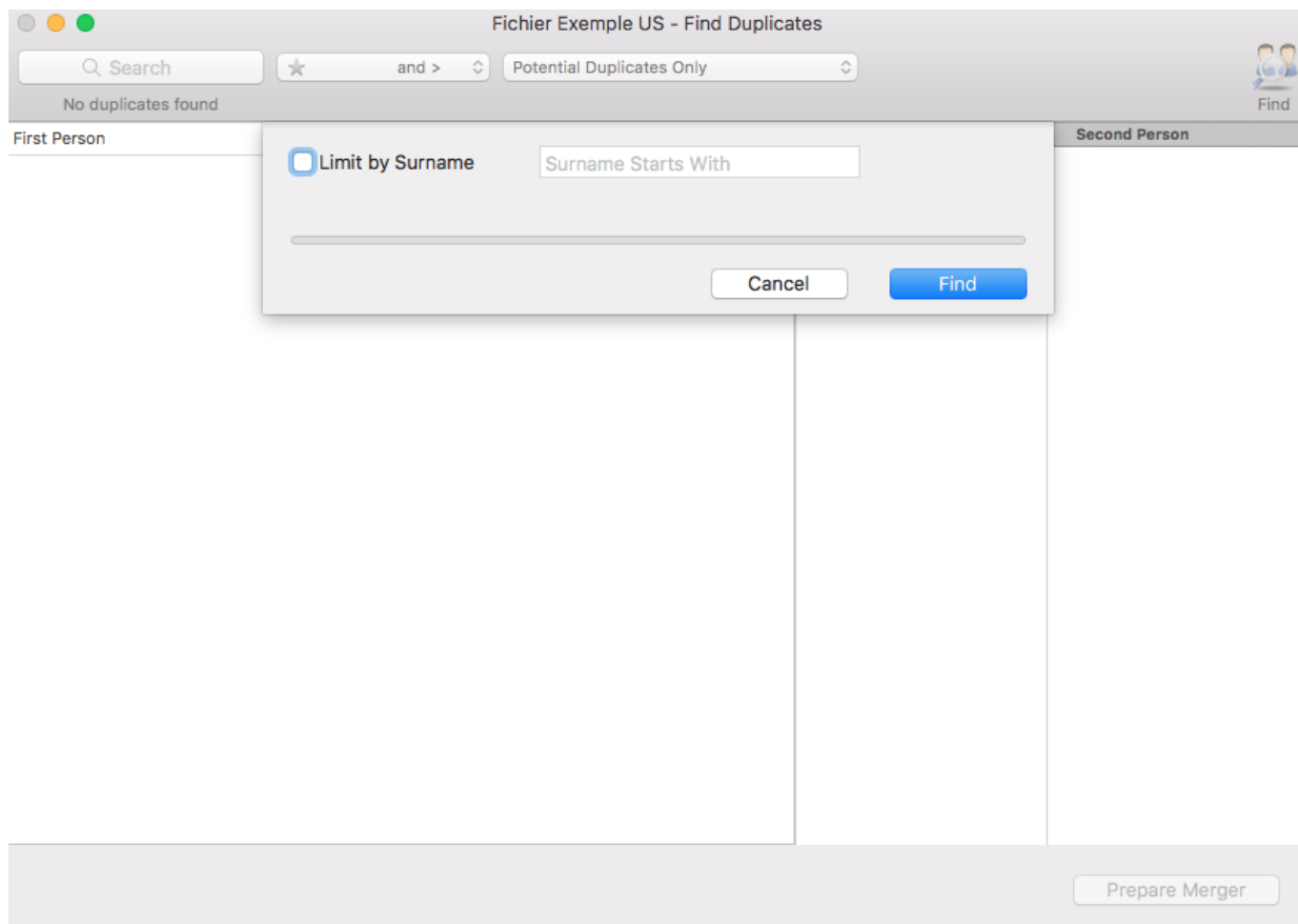
Search for duplicates in the file

The search for duplicate identifies persons entered several times in the genealogy file. The permanent control indicates possible duplicates as you tip but duplicates can be made because of an import file or an unguarded moment.

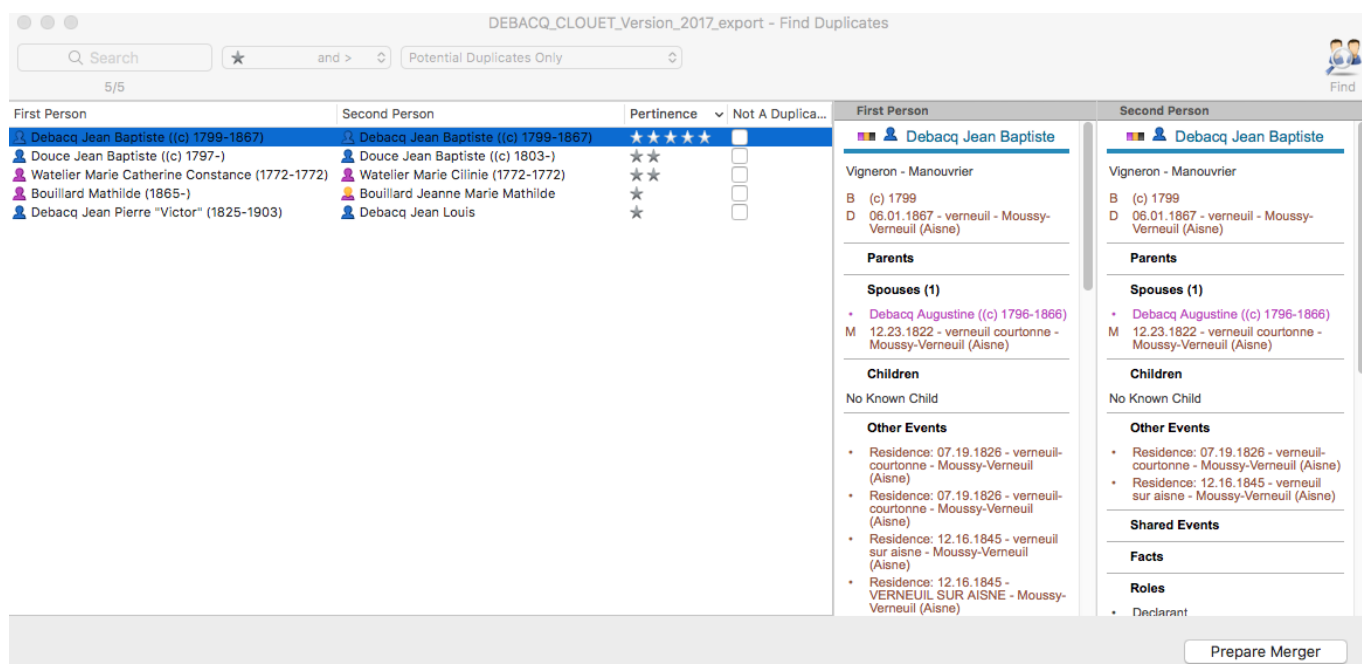
1. Choose **Find** > **Find Duplicates...** or click **Duplicates**  on the toolbar.
2. Enter a full or partial name or just the first letter, to limit the search for duplicates to only a part of the persons in your genealogy and shorten the search time.
3. Click **Find**

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

Search for duplicates



- Click the headers of the **First Person** or **Second Person** columns to sort out their names.
- Click the header of the **Pertinence** column to sort duplicates in ascending/descending order.
- Click the header of the **Not a Duplicate** column to group proposals you have rejected.

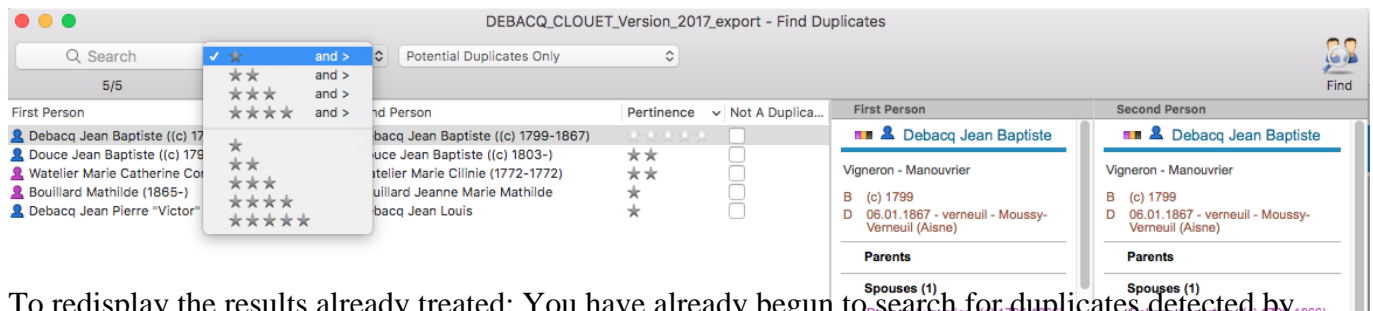


4. Refine the search result.

Use the filters offered to narrow the list of potential duplicates displayed by relevance or by type. Check the number of results displayed in the toolbar after filtering.

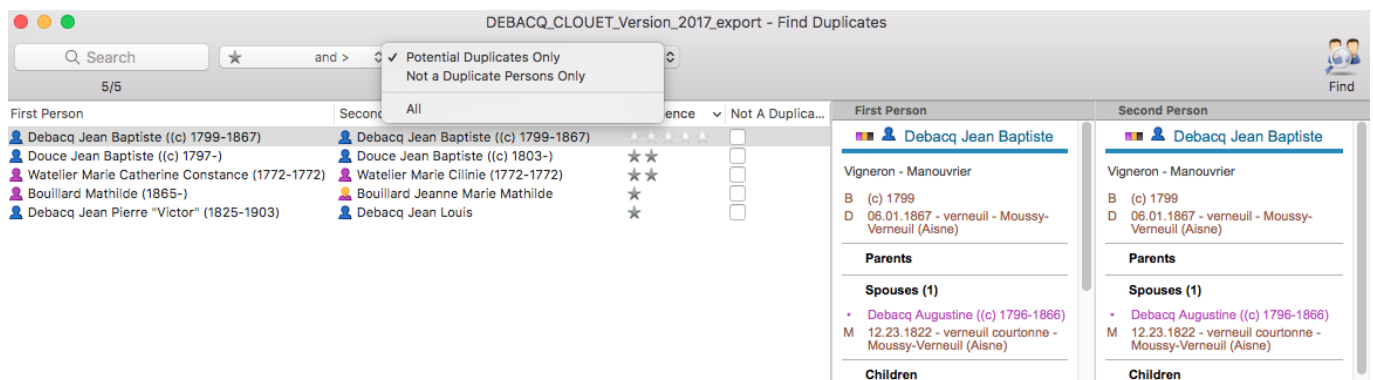
To locate a person in the list: enter the surname or given name, in whole or in part, in the search field. Heredis will display all relevant persons, either in column **A** or column **B**.

To view the results by pertinence: Choose the number of stars assigned to the results from the pop-up menu. To display all the persons, select **1* and +**; to show only results with a high probability, select **4* and +**.



To redisplay the results already treated: You have already begun to search for duplicates detected by Heredis? If you ticked a couple of persons as not being duplicates, you can redisplay them if you change your mind.

Select **Not a Duplicate Persons Only** in the menu, or select **All** and click the header of the **Not A Duplicate** column.



In the Add or Choose... screen

With the first letters typed in the **Surname** or **Given Names** fields, you see, in the **Matching Persons** column, the list of individuals already entered who may match the person. Step by step, as you enter new letters, the list of duplicates is updated.

In the Family Group Data tab

When you type in one of the fields of this screen, the full name of a person already entered, the **Enter New Data** icon (gray arrow) turns red . Click this icon to see a list of individuals who may correspond

to the person.

Family Group Data

Parents (2)						
Families (3)						
#	Surname	Given Names	M	Marriage Date	Marriage Place	
1	GREGSON	Vivian	M	07/01/1954	Hudson	
2	LOWENSTEIN	Paula	M	03/03/1976	Troy	
3	DAVIES	<input type="text"/>				

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.

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.

Results of search for duplicates

testshden - Find Duplicates

Search and > Potential Duplicates Only

5/5

First Person	Second Person	Pertinence	Not A Duplica...
DEBACQ Jean Baptiste ((c) 1796-1866)	DEBACQ Jean Baptiste ((c) 1796-1866)	★★★★★	<input checked="" type="checkbox"/>
DOUCE Jean Baptiste ((c) 1796-1866)	DOUCE Jean Baptiste ((c) 1796-1866)	★★	<input type="checkbox"/>
WATELIER Marie Catherine Co...	WATELIER Marie Cilinie...	★★	<input type="checkbox"/>
BOUILLARD Mathilde (1865-)	BOUILLARD Jeanne Ma...	★	<input type="checkbox"/>
DEBACQ Jean Pierre "Victor" (...)	DEBACQ Jean Louis	★	<input type="checkbox"/>

DEBACQ Jean Baptiste

Vigneron - Manouvrier

B (c) 1799
D 01.06.1867 - verneuil - Moussy-Verneuil (Aisne)

Parents

Spouses (1)

- DEBACQ Augustine ((c) 1796-1866)

M 23.12.1822 - verneuil courtonne - Moussy-Verneuil (Aisne)

Children

No Known Child

Other Events

- Residence: 19.07.1826 - verneuil-courtonne - Moussy-Verneuil (Aisne)
- Residence: 19.07.1826 - verneuil-courtonne - Moussy-Verneuil (Aisne)
- Residence: 16.12.1845 - verneuil sur aisne - Moussy-Verneuil (Aisne)

DEBACQ Jean Baptiste

Vigneron - Manouvrier

B (c) 1799
D 01.06.1867 - verneuil - Moussy-Verneuil (Aisne)

Parents

Spouses (1)

- DEBACQ Augustine ((c) 1796-1866)

M 23.12.1822 - verneuil courtonne - Moussy-Verneuil (Aisne)

Children

No Known Child

Other Events

- Residence: 19.07.1826 - verneuil-courtonne - Moussy-Verneuil (Aisne)
- Residence: 16.12.1845 - verneuil sur aisne - Moussy-Verneuil (Aisne)

Shared Events

Facts

Roles

Prepare Merger

3. Select one of the potential duplicates proposed by Heredis.

If there are no duplicates proposed by the software,

- pull down the menu and select **All Persons**
- enter a surname and/or a given name to search for corresponding persons throughout your genealogy file.

4. Click **Prepare Merger**.

Merge as a result of a search for duplicates

1. Start a search for all duplicates in the file.
2. Select the pair of individuals that are obvious duplicates in the list of potential 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 **Fields Column**, one column for each of the two duplicates, the **Merged Person** column presenting the data to be stored.

Move the columns by clicking on the headers and dragging with the mouse to the desired location.

Select the data to be retained

Review carefully the **Merged Person** column.

The orange fields require your arbitration. To indicate what data should be saved, click the item to keep. Heredis automatically transfers to the merged individual the identical data or data that is contained in one only of two individuals. This data is displayed in green.

When data is not to be saved, it is displayed in red. You can click again on the heading to select it for transfer to the merged person.

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.

Certain other items 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.

Merging duplicates

Merging Persons

Fields	DEBACQ Jean Baptiste ((c) 1799...	Merged Person	DEBACQ Jean Baptiste ((c) 17...
PERSONAL DATA			
Surname	DEBACQ	DEBACQ	DEBACQ
Given Names	Jean Baptiste	Jean Baptiste	Jean Baptiste
Gender	M	M	M
Occupation	Vigneron - Manouvrier	Vigneron - Manouvrier	Vigneron - Manouvrier
PERSON EVENTS			
Birth	Deselect All Event		Deselect All Event
Date	calculated 1799	calculated 1799	calculated 1799
Search Record	Search Record	Search Record	Search Record
Residence	Deselect All Event		
Date	19 July 1826	19 July 1826	
Place	Moussy-Verneuil (02160) - Aisn...	Moussy-Verneuil (02160) - Aisne - Ha...	
Place Subdivision	verneuil-courtonne	verneuil-courtonne	
Participant	DEBACQ Jean Baptiste	DEBACQ Jean Baptiste	
Residence	Deselect All Event		
Date	19 July 1826		
Place	Moussy-Verneuil (02160) - Aisn...		
Place Subdivision	verneuil-courtonne		
Participant	DEBACQ Jean Baptiste		
Residence			Deselect All Event
Date		19 July 1826	19 July 1826
Age/Record		27	27
Place		Moussy-Verneuil (02160) - Aisne - Ha...	Moussy-Verneuil (02160) ...
Place Subdivision		verneuil-courtonne	verneuil-courtonne
Participant		DEBACQ Jean Baptiste	DEBACQ Jean Baptiste
Residence	Deselect All Event		
Date	16 December 1845	16 December 1845	
Place	Moussy-Verneuil (02160) - Aisn...	Moussy-Verneuil (02160) - Aisne - Ha...	
Place Subdivision	verneuil sur aisne	verneuil sur aisne	
Participant	DEBACQ Jean Baptiste	DEBACQ Jean Baptiste	
Residence	Deselect All Event		
Date	16 December 1845	16 December 1845	
Place	Moussy-Verneuil (02160) - Aisn...	Moussy-Verneuil (02160) - Aisne - Ha...	

- Orange = Heredis was unable to arbitrate, click one of the two persons to specify what data to keep.
- Green = The data will be stored in the merged person.
- Red = 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**.


Permanent control for duplicates

When adding a new person to your genealogy, you may risk creating a duplicate, that is to say, create two distinct persons for the same ancestor. Heredis provides a tool, available in all entry fields for individuals, to avoid creating a person already saved in your file. Heredis will control for duplicates at all times during the entry of data; but the importing of data from other genealogists, or a moment of inattention may create duplicates. This powerful tool is essential for maintaining an impeccable genealogy file. Research and verification is carried out in one click. The results are clearly displayed and indicate the probability of duplication.

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.

Search for duplicates in the file

The search for duplicate identifies persons entered several times in the genealogy file. The permanent control indicates possible duplicates as you tip but duplicates can be made because of an import file or an unguarded moment.

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

Search for duplicates

Search for duplicates

Search Options Results

Search Method for Given Names

At least one of the Given Names is identical

One Given Name of One Parent is Identical

Search Method for Events

Dates Strictly Identical

Margin of Error in Years 20

Search Method for Surnames

Limit to a surname and its variants

Select a Surname

Start Search

Close

2. Select your search criteria:

- for comparing the given name:
 - **Ignore:** the search will consider only surnames,
 - **At least one of the Given Names is identical:** a person whose given names are all included in the given names of another individual with the same surname will be considered as a potential duplicate,
 - The **First Given Name is identical:** an individual with the same surname and the same given name as another individual will be considered as a potential duplicate,
 - Tick the box **One Given Name of One parent is identical:** a person whose given names are all included in the given names of another individual with the same surname will be considered as a potential duplicate.

Search for duplicates

Search Options Results

Search Method for Given Names

Ignore

Ignore

At least one of the Given Names is identical

The first Given Name is identical

Dates Strictly Identical

Margin of Error in Years 20

Search Method for Surnames

Limit to a surname and its variants

Select a Surname

Start Search

Close

- 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.

Search for duplicates

Search Options Results

Search Method for Given Names

Ignore

One Given Name of One Parent is Identical

Search Method for Events

Dates Strictly Identical

Ignore Events

Dates Strictly Identical

Years Strictly Identical

Define a Range of Years

Search Method for Surnames

Limit to a surname and its variants

Select a Surname

Start Search

Close

- for comparing surnames: Tick the box **Limit to a surname and its variants** to limit the search integrating this criterion. Click then on the magnifying glass to select the required surname.

3. Click **Start Search**

The list of all potential duplicates identified in your genealogy is displayed. 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. By clicking on one of them, you display opposing summaries of the two selected persons.

You can use the following options for dealing with duplicates:

Search Options Results

Search completed: 2 potential duplicates found

Merge: With:

BERNSTEIN Grace E (1916-)

BERNSTEIN Arlo E (1922-)

BERNSTEIN Arlo E (1922-)

Delete

BERNSTEIN Grace E

FamilySearch # L2R3-XQM

° 1916 - Oldham

Parents (2)

P BERNSTEIN Fritz (1886-)

M BECKER Helena S (1900-)

Spouse (1)

HARMS Hiram Willie (1914-)

x 23 09 1933 - Mccook

BERNSTEIN Arlo E

FamilySearch # L2R3-NH9

° 1922 - Oldham

Parents (2)

P BERNSTEIN Fritz (1886-)

M BECKER Helena S (1900-)

No Known Spouse

No Known Child

Mark Duplicates
Edit Duplicates Report
Prepare Merger...

- **Delete** a person: it removes the selected individual in the left column of the screen if you consider that the duplicate is adequate and you do not need to merge them to obtain additional information.
- **Mark Duplicates**: all the supposed duplicates matching your criteria for comparison are marked. Then just check and delete the marked individuals if you wish.
- **Edit Duplicates Report**: all the supposed duplicates matching your criteria for comparison are printed in the form of an alphabetical list. Just check this list to delete all required individuals.

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


You may check it out in the summary of the information about the persons concerned to check the information. If there is indeed a duplicate, merge the two individuals by selecting the most appropriate information on the **Find Duplicates** screen. If the two individuals are distinct, Heredis allows you to tick the **Not a duplicate** check box so they no longer may appear as potential duplicates at a later moment.

In the Add or Choose... screen

With the first letters typed in the **Surname** or **Given Names** fields, you see, in the **Matching Persons**

column, the list of individuals already entered who may match the person. Step by step, as you enter new letters, the list of duplicates is updated.

In the Family Group Data tab

When you type in one of the fields of this screen, the full name of a person already entered, the **Enter New Data** icon (gray arrow) turns red . Click this icon to see a list of individuals who may correspond to the person.

Family Group Data

#	Surname	Given Names	M	Marriage Date	Marriage Place
1	GREGSON	Vivian	M	07/01/1954	Hudson
2	LOWENSTEIN	Paula	M	03/03/1976	Troy
3	DAVIES				

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.

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.

Results of search for duplicates

Search for duplicates

Search Options Results

Search completed: 17 potential duplicates found

Merge: With:

CLOUET Marie Eugenie Blanche (1885-1972)

CLOUET Arthemise Marie Georgette (1881-1949)

CLOUET Marguerite Blanche Augustine (1903-1...)

CURY Jean "Nicolas" (1808-1856)

CURY Jean Baptiste ((c) 1803-)

DEBACQ Eugène Charles (1858-1939)

DEBACQ Charles Léon (1863-)

DEBACQ Jean Pierre "Victor" (1825-1903)

Delete

CLOUET Arthemise Marie Georgette

18.05.1881 - Parfondeval (02360)

08.01.1949 - Iviers (02360)

Parents (2)

P CLOUET Joseph "Raphael" (1858-1927)

M BLANCHE Marie Adolphine Adele (1854-1886)

Spouse (1)

RASSEMONT Jules Anatole Emile (1881-)

CLOUET Marie Eugenie Blanche

16.02.1885 - Parfondeval (02360)

26.11.1972 - Rozoy-sur-Serre (02360)

Parents (2)

P CLOUET Joseph "Raphael" (1858-1927)

M BLANCHE Marie Adolphine Adele (1854-1886)

Spouse (1)

RASSEMONT Jules Anatole Emile (1881-)

Mark Duplicates Edit Duplicates Report Prepare Merger...

Close

3. Select one of the potential duplicates proposed by Heredis.

If there are no duplicates proposed by the software,

- pull down the menu and select **Choose another Person**
- enter a surname and/or a given name to search for corresponding persons throughout your genealogy file.

4. Click **Prepare Merger**.

Merge as a result of a search for duplicates

1. Start a search for all duplicates in the file.
2. Select the pair of individuals that are obvious duplicates in the list of potential 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.

Merging duplicates

	Select all		Select all
PERSONAL DATA			
Surname	GREGSON	=	GREGSON
Given Names	Vivian	+	Viviane
Occupation	Editorial manager		
Signature	Can sign		Sign perhaps
Child Status	Legitimate	=	Legitimate
Media	Vivian.jpg		
EVENTS			
Birth	Deselect Whole Event		
Date	11 July 1932		
Place	Boston - Suffolk - Massachusetts - USA		
SPOUSES			
THOMAS Michael G...	Deselect Spouse		
Family Status	Divorced		
Marriage	Deselect Whole Event		
Date	7 January 1954		
Place	Hudson - Columbia - New York - USA		
Sources	Family Archives, Misc.		
Divorce	Deselect Whole Event		
Date	1974		
Child	THOMAS Peter		
Child	THOMAS Paul		

- Pink = Heredis was unable to arbitrate, click one of the two persons to specify what data to keep and the data will be lost.
- Blue = The data will be stored in the merged person.


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.

With Heredis, the slideshow scrolls through the life of your ancestors in images. This tool presents your photos in a family album, composed of different chapters resuming life of the primary person and his/her immediate family.

To launch it, click the **Slideshow**  button under the screen of the primary person from the immediate family tab, or the person's data entry tab.

Let the pages of the photo album scroll through and enjoy your work. Click the **Pause**  button on the top right of the screen to stop on a picture and read the comments on the photo, for example.

Click the **Chapters** menu to display all the chapters of your album. By clicking on one of the chapters, you navigate directly to the selected chapter and you can then restart the slideshow by clicking the **Play**  button at the top right.


By default, the slideshow appears with the **Retro** theme but you can change it according to your tastes. Click the **Themes** menu and choose another theme from the selection.

By default, all pictures of the primary person and close relatives are displayed.

Slideshow




Filter the images of the slideshow


Click on the indented wheel  and choose the images you want to see for the primary person, his/her children, his/her spouse and unions, the other persons (brothers, sisters...) etc.

Note: appendices images are those attached to places, surnames, given names, occupations, sources, and linked to the primary person.


A box to tick allows you to exclude from this slideshow all private images of your genealogy.

At the bottom of the screen, you have an audio player for playing music. As you watch this family slideshow, the photos parade with the music. Click the **Sound**  icon to cut the sound.

Export the slideshow

Now you wish to share this slideshow, click on the **Export**  button. Heredis creates, in the location of your choice, a folder with the photo album of the primary person, the way you set it. Share this folder with your relatives: they can play it by simply clicking the HTML page created in **The photo album of [...].html** and even if they do not have the Heredis software.

You can also copy the folder to a USB key or an external hard-drive and plug it to your TV, computer or any other USB outlet... to visualize the slideshow with your family.

To exit the slideshow, simply click the **Exit**  button at the top right.

Heredis offers an ideal tool for enriching your Genealogy. Very simple to use, it allows for example, for all genealogists to identify persons in a group photo or in an act and capture faces or signatures.

If the pictures or captures of acts are not perfect, you may correct them with the photo editing tool.

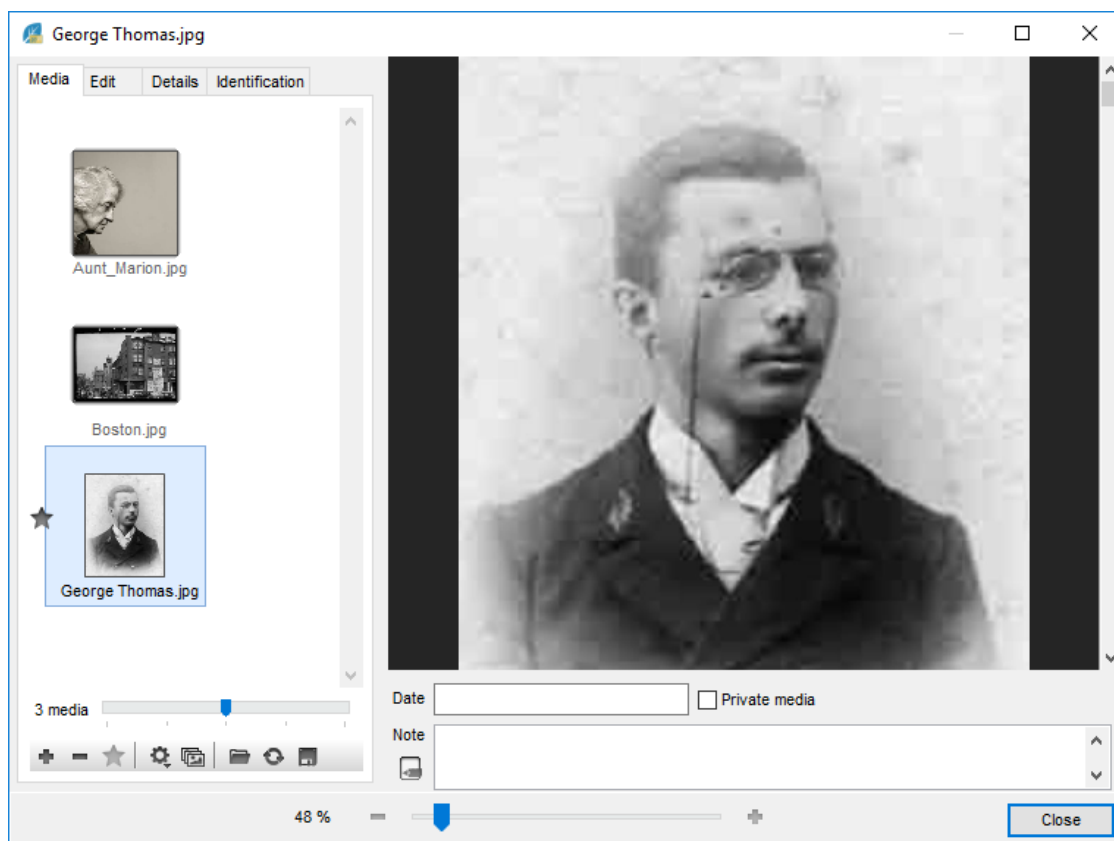
The photo tool is available in your software from the **Immediate Family**, **XXL Family**, **Personal Data** and **Family Group Data** tabs but also from the **Media research** panel and from the various indexes.

Select for example the **Immediate Family** in the **Family** tab and double-click on the media of the primary person

or click the button  if it is in your toolbar

or click on the **Tool Menu > Photo Tool**

Photo Tool



This tool consists of four tabs, **Media**, **Edit**, **Details** and **Identification**, a display area for the image and input fields to complete media information.

You have information concerning a photo: enter in the input fields the date and notes to clarify the context and thus complement your genealogical data.

If necessary, indicate that this is a private media. Thus, you can avoid transmitting it when exporting or publishing your file: tick the **Private Media** box.

The Media tab



A list of media appears in this tab in the form of photo thumbnails. This list will depend on the context of launching of the photo tool.



For example, if you run the tool from the thumbnail of the Primary Person in the **Immediate Family**, the media displayed will be those of the Primary Person.


If you run the tool from a picture of the union in the Immediate Family, Heredis will only list the media for that union.

A zoom slider at the bottom of the tab to the right of media counter allows you to adjust the size of the thumbnail displayed.





You have a series of buttons to act on the media displayed:

- Button : You can add a media from the hard disk, the index or the clipboard.
- Button : press this button to detach the media of the Primary Person without removing it from the Media index.


Info •  and  buttons are not displayed if you launch the photo tool from the Media index.

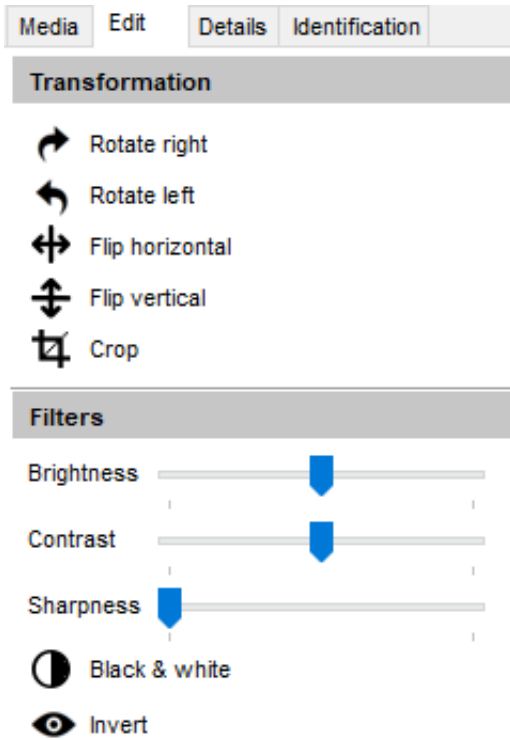
- Button : the star symbol identifies the photo you have selected as a favorite. It is this photo which will illustrate the person in question in all documents. Select a thumbnail from the list and click this button to place it as the favorite.
- **Show all media linked to primary person** button: this button will display all the media concerning the person and you will see the wedding picture or pictures of the Primary Person, as well as those associated with his or her name...





Info • the Star and All Media buttons only appear when you display the media of the Primary Person.

-  button: to find a media more easily in the displayed miniatures, you can sort them by name or date.
-  button: if you have made a mistake in adding a media, click this button to replace it with another media on your computer.
-  button: you have made changes to a photo which do not suit you and you want to go back to the original version of this photo: click the Reload button. Heredis will automatically reload the original picture saved on the computer.
-  button: You can save a copy of the displayed picture to the **Photo tool** on your computer.



The Edit tab

If your photo is not perfect, you can easily modify it. For example, crop the image to remove unwanted parts with the **Crop**  button. When you click the button, a selection box appears on your capture. Adjust the dimension with your mouse cursor by stretching or narrowing one of the 4 corners of the selection area. The cursor changes shape when you position it on the dotted lines of the selection area: hold down the left click and drag the window to move it. When the selection area is adjusted, click **Crop**. Your image is now well framed.



If you want to orientate your photo in any other way, rotate the image in the right direction by using the orientation buttons **Rotate Left**  Button, **Rotate Right**  button. You may flip the image horizontally with the **Horizontal Flip**  button but also vertically with the **Vertical Flip**  button.

With Heredis, you do not need any other software to embellish your photos. You can adjust **brightness**, **contrast**, or **definition to sharpen** an image to its true value.

You can also change a color photo to black and white by clicking the button  but also reverse the colors of the photo by clicking on the button .

Do not hesitate to try different changes, because you can always return to the original photo with the **Cancel** button.

Once your image is satisfactory, you may confirm the changes by clicking the **Apply** button.

The Details tab

With this tab, Heredis informs you of the different uses of the image displayed and shows you where the original is located on your computer. If you click on the displayed path, **(PC)** Windows Explorer / **(MAC)** Finder will open.

The Identification tab

From this tab, you can identify persons in a group photo or persons named in an act by cutting out their


photos or signatures. If you then navigate through your software, you will see that the cut portraits or signatures illustrate persons with whom they are associated.


Using your mouse, enclose the people on the picture in the display area. Position the mouse cursor over a person, hold down the left mouse button and draw a cut-out frame around the person. When you release the left click, Heredis instantly offers to search the index of persons of your genealogy for the person in question.

If you know this person, type in the given name or surname or both. Immediately Heredis displays the list of persons with this name and forename or variations in your file. Select the person from the list and click **Choose**.

Identification




If you know this person, but he is not present in your genealogy, click the  **Create Person** button to create the person directly from this screen.

If you do not recognize this person, click the  **Unknown Person** button to indicate that this person is an unknown person. Should you publish this group photo at a later date, an internet user may identify this person and communicate the information to you.

A frame appears around the person. You can always adjust this frame at any moment.

When you place the mouse pointer on the contours of the frame, it changes its appearance. By holding down your mouse, you can move the frame. By touching the corners of the frame, you can enlarge it or reduce its size to make it fit perfectly.

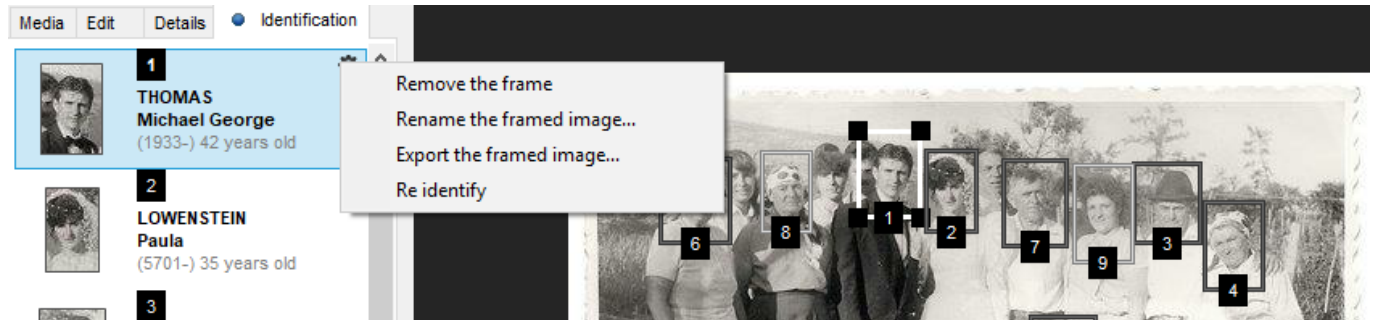
To the left of the photo, the list of numbered frames appears progressively as you identify the different persons in the photo.


An indented wheel  appears when you move your mouse over the media in the list. If you click this button, you have access to the following functions:

- **Remove the Frame:** you have made a mistake, select this menu to simply remove it. Note that all the frames are automatically renumbered.
- **Rename the framed picture :** Heredis automatically assigns a name to the media which you have just created and if the name does not suit you, you can change it.

- **Re-Identify:** if you have identified a person as unknown or you have made a mistake concerning the person, you can always assign to this frame the right person in your genealogy file.
- **Export the framed image:** You can save the newly created image managed by Heredis to your computer.

All images are stored directly in the Media Index. They are also assigned automatically to the media of the identified person.



Click the  **Hide Frames** button at the bottom of this tab to display only the frames numbers in the display area of the image.

You can print the picture as displayed in the image display area by clicking the **Print** button. Specify the print options and click **OK**. The document opens in your usual word processor.

Take this printed document along with you during visits to your family: the people around you will enjoy your work and perhaps identify unknown persons in the group photo.

Once you have identified all persons in a group photo, share it in your online photo album on Heredis Online through the  **Publish** button.

Info • When you browse and launch the photo tool for a person with whom you have associated a signature for example, Heredis indicates above the display area of the image that the media selected has been cut from another picture. If you click the **Display the Original** link, it will be displayed in the image display area. If you want to hide it, click the **Hide Original** link.

You cannot recut a picture that has already been cut out.

Some editing functions are not available for a group photo if you have already identified persons in this picture.

If you close your genealogy file without saving, all edits, cut-out photos and signatures... will be lost.

Consulting Places maps

Heredis does everything for you to visualize the places where your ancestors lived.

The **Places Index** will display an interactive map for the selected place. If Heredis has been unable to identify the place, you can yourself indicate where it is by using the geolocation tool.

Visualize the map

Map

The screenshot shows the 'Entering Place' dialog box. At the top, it says 'Entering Place' and 'Editing Place Boston'. Below this, there are several input fields: 'City: Boston', 'Postal Code:', 'County: Suffolk', 'State/Province: Massachusetts', 'Country: USA', 'Latitude: 42.358430', and 'Longitude: -71.059770'. There is a checkbox for 'Handle Characters Manually'. To the right, there is a 'Variants' section which is currently empty. Below the input fields, there are 'Note' and 'Map' tabs. The 'Map' tab is active, showing a map of Boston with a red pin. A 'Suggestions' box is also visible below the 'Note' tab. At the bottom right, there are 'OK' and 'Cancel' buttons.

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 reduce 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.


Info • You may also access the map of the place in the **History > Migrations** tab, in the **Search** tab and

in the **Data > Personal Data** tab. Click the **Map** tab for each event provided that a place has been entered.

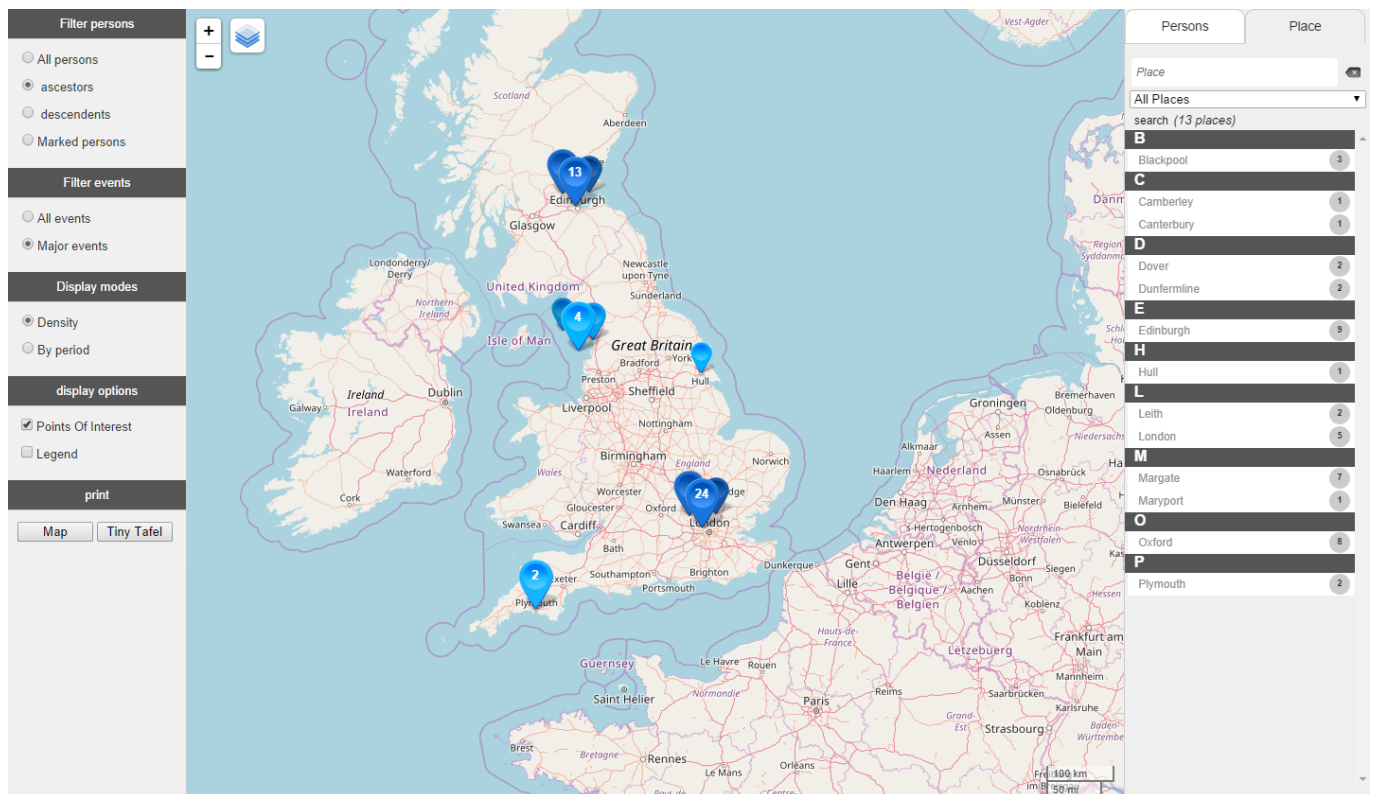
Family Tree Mapping

Heredis helps you to understand better the lives of your ancestors, their geographical distribution and their migrations.

Select the **Tools Menu > Family Tree Mapping**.

or click the button  to display the events of the persons of your genealogy on interactive maps. Maps may be displayed at multiple zoom levels and may be presented as a slideshow to view the geographic mobility of persons in your family tree through time and generations. At the first opening, Heredis defaults to the major events of the ascendants of the primary person.

Family Tree Mapping



The screenshot displays the Heredis Family Tree Mapping interface. On the left, there are three filter sections: 'Filter persons' (All persons, ascendants, descendants, Marked persons), 'Filter events' (All events, Major events), and 'Display modes' (Density, By period). Below these are 'display options' (Points Of Interest, Legend) and a 'print' section (Map, Tiny Tafel). The central map shows Europe with several blue heart-shaped markers indicating locations. On the right, there is a 'Persons' and 'Place' sidebar. The 'Place' sidebar shows a search bar and a list of 13 places with their respective counts:

Place	Count
Blackpool	3
Camberley	1
Canterbury	1
Dover	2
Dunfermline	2
Edinburgh	9
Hull	1
Leith	2
London	5
Margate	7
Maryport	1
Oxford	8
Plymouth	2


Filters and display options

You can change the filters at any time on the left side of the screen, to view all the persons in your file, only the descendants of the primary person or persons that you have previously marked in your genealogy.

By default, Heredis pre-selects the mode of representation by **Density** to display your data. If you want a glimpse of the mobility of persons in your family tree, select the mode of representation **By period**. You

will see a timeline above the map whose limits correspond to the extreme dates of your file. Click the **Play** button to scroll through the events on the map according to the selected period.

Info • the display and playback of the timeline are calculated automatically based on the extreme dates of your file.

If you want to study a particular period in detail, move the pink  sliders to the start and the end of the required period. The events displayed on the map only concern this period.

Heredis also offers a mode of representation **By generation**, the operating principle of which is the same as for the method of representation **By period**. On the timeline displayed above the map, the dates are replaced by generation numbers.

Map display

With regard to the display of the map, different themes are available: the Heredis theme, a Grey theme and a Black and White theme.


Choose the one that will make the best of the map information, by clicking on the  button.


You can easily change the zoom level of the displayed map by clicking on the + or - buttons or by using the mouse wheel. Thus, you can examine a geographical area in detail or conversely, return to an overall view of the displayed map by zooming out.


To move on the map, hold the click on your mouse (left, right or click on the mouse wheel), and drag the mouse in the desired direction to center your map on a different area.

You will note that markers of different colors and shapes are pinned to the map. The caption displayed at the bottom left of the screen allows you to easily understand to what they correspond.

Three shades of blue allow you to identify the markers from 1 to 9 events , from 10 to 99 events 

and those that represent more than 100 events . Using these markers, you appreciate the concentration of ancestors in a particular area by the intensity of the blue color.

The form of the markers gives you an indication of the number of places. The simple marker 

indicates the presence of events in a single place and the multiple marker , the presence of events in a group of places. When you click on a multiple marker, Heredis zooms automatically to display a more detailed level of the map.

The number of events in a place or group of places is displayed on the markers. When nothing is specified, there is only one event for the place in question.

If you click on a single marker, a summary is displayed on the right part of the map, with the list of

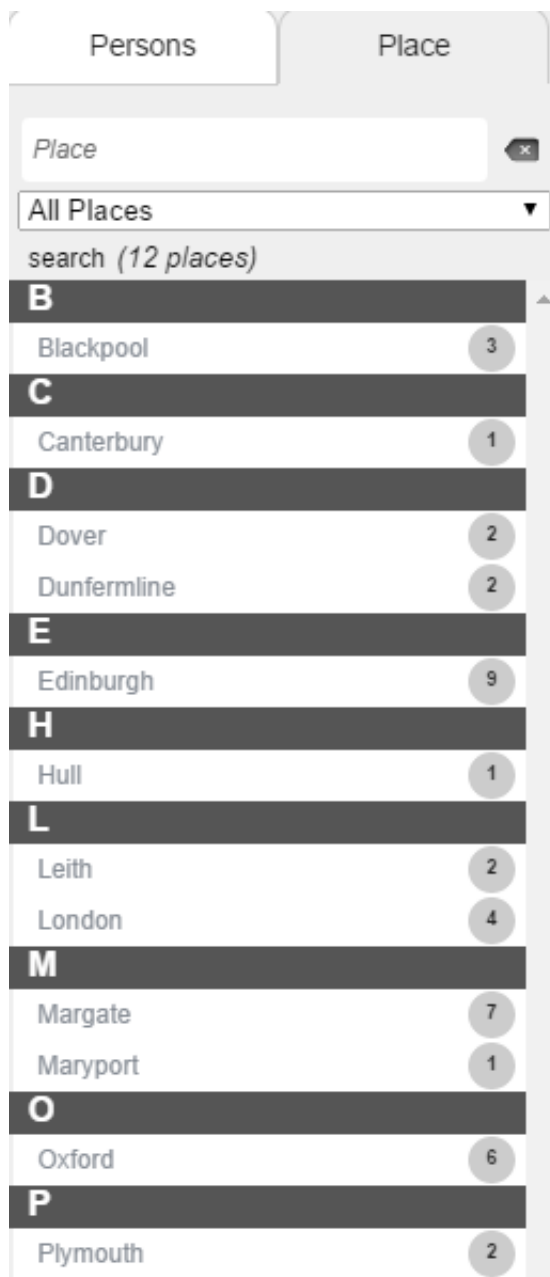
persons who have events for this location.



At a certain focus level, places of interest (or POI) will start appearing. Heredis will display churches, cemetery, castles of the selected geographical area. You can hide them by unticking the Point of Interest option in the left part of the screen. Indeed, in some areas, there are so many points of interest, it would affect the readability of the map.

Research lists

Research list



The research lists placed on the right of the screen allow you to carry out searches on places or persons.

In these lists, Heredis indicates the number of events found, to the right of the person's name or the place.

Select the **Places** or **Persons** tab and enter a name in the search box to obtain a selective list of matching places or people. The list is automatically updated as you type.

On the **Places** tab, if you click on one of the names in the list, Heredis refocuses the map on this place and displays the events associated with it in the summary.


On the **Persons** tab, the same action refocuses the map on the places for the selected person and displays the events in the summary.

On the **Places** tab, you also have search filters. By default, Heredis pre-selects the **All places** filter. You can change it by displaying the drop-down list and choosing the available options:

- **Most represented** places: the list is displayed in descending order of the number of events found by place.
 - **Non-geolocated** places: the places displayed in this list are not precise enough to be mapped (to complete these places, see above the paragraph Geolocate an unlocated place).
 - **Visible places**: this list displays only the places visible on the map on the screen.
-

You can edit individual or couple sheets.

Creating sheets

1. Choose **Documents** > **Sheets** or click the **Sheets**  button in the toolbar.
2. Select the document type from the list on the left.
3. Select the appropriate graphic theme in the viewer
4. Click on the different tabs to choose the appropriate construction parameters for your document.
5. Click **Edit**.

The sheet for the primary person is displayed in your word processor. If you want to use it differently, you can export it to a particular file format by clicking **Export** instead of Edit.

Note: If you do not want to create sheets from the primary person but all your file, then you can choose to create sheets from Marked Persons. Thus, you will have to mark all the persons of your genealogy file to include them all. In order to mark all the persons of your file at the same time, you have to use the Smart Search and search for Persons > all persons > yes, then Search. Click the "marked" button (below the results of the search) and Declare marked.

Composing a sheet

PC Sheet's Layout

Sheet Layout — □ ×

Choose a sheet
Choose the type of sheet to be edited and its presentation

Person Sheet


- Detailed
- Summary

Family Sheet


- Detailed
- Summary

Narrative Documents


- Biography



White



Classical



Elegant

Structure | **Persons** | Events | Style | Page

Sections

- Parents
- Siblings
- Spouses & Children
- Sundry Links
- Timeline
- Notes
- Photo Album

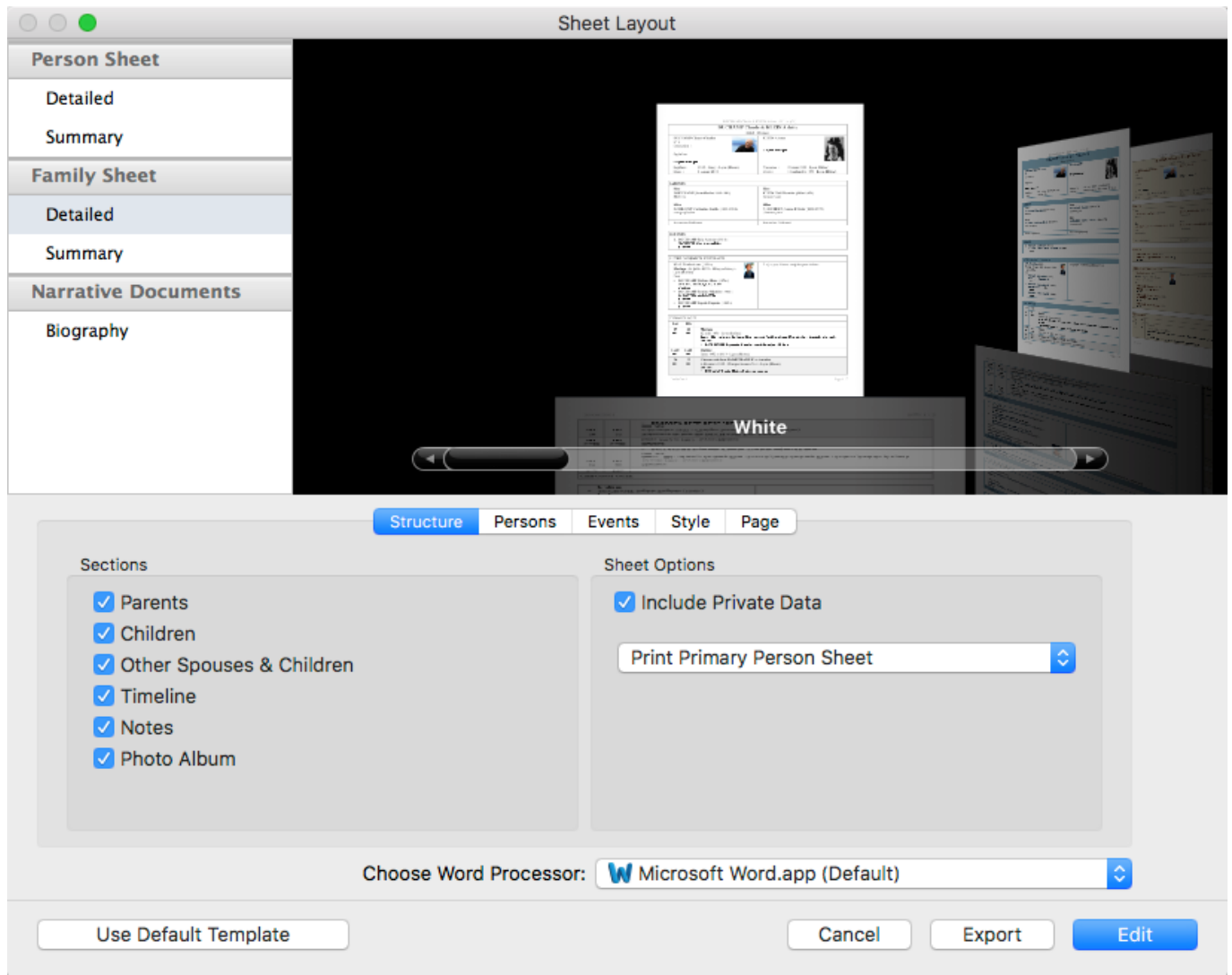
Sheet Options

- Include Private Data

Print Primary Person Sheet ▾

Use Default TemplateExportEditCancel

MAC Sheet's layout



The presentation and content options can be selected from the various tabs. Changes made to a theme are memorized for future use of the same theme.

1. Click on the **Structure** tab and check the information to be included in the form: different family members, photo album, etc.
2. Click the **Persons** tab.
 - Choose the surname and given name formats. Check the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered these fields.
 - Check the boxes to include the information in the sheet: images, number, child status, signature, flags (confidential, childless ...), user fields, etc.
 - Children options: Include in the document the spouses of each child and whether or not they have descendants.
3. Click the **Events** tab to select which events to include: minor events (other than birth, death and marriage event), cross-events (events in which the person participated as a witness, for example).
 - Choose the format of date and place of events. Check the **Dates in Gregorian calendar** box to display all dates in this calendar, regardless of the calendar in which they were entered. Choose the place style

from the drop-down menu. Select which elements of the places you want to display in the document from the ones you have entered. Check the box **With subdivision** to give more precision to the place.

- For each event, specify witnesses, sources, and notes.
- If you selected the **Biography** document, check **Show Missing Data** to have your family complete it.

4. Click the **Style** tab and choose the formatting of the form: font, text size and color, specific colors for men, women and numbers, colors of the titles and title background of the document.

5. Click the **Page** tab and set your print options: text to include in headers and footers, paper size and orientation, and document margins. **(MAC)** Select the word processor with which you want to edit the document. Heredis shows you all programs that enable editing and are installed on your computer.

6. Click **Edit** to start the word processor.

Save a Sheet


A sheet edited in your word processor becomes an independent document from the Heredis software. This document can be saved for later reprinting or modifying. To keep the document displayed in your word processor, use the saving feature of your software. It is generally found in the **File** menu.

To change the name proposed by Heredis for the document, or the location of the file, choose **File > Save As**. These commands are generally the same in all word processors.

Print Sheets

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

Choose **Documents > Sheets**

or click on the **Sheets**  button and make your choice from the options in the Template Chooser window. Define the information you want in the sheet (I do not use the notes) and the format of the data (I want to show the full names of the persons mentioned in the sheet).

(MAC) Select your word processor.

Click on the **Edit** button. You can make more changes (format, presentation) or print like any other document using a word processor.

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. They are prepared in the same way as the sheets.

You can edit Filiatus written books to tell your genealogy. From the information you have gathered in your file, Heredis generates a complete book in written form and automatically adapts the vocabulary to the data type. This book includes cover page, dedication, acknowledgments, preface and introduction.

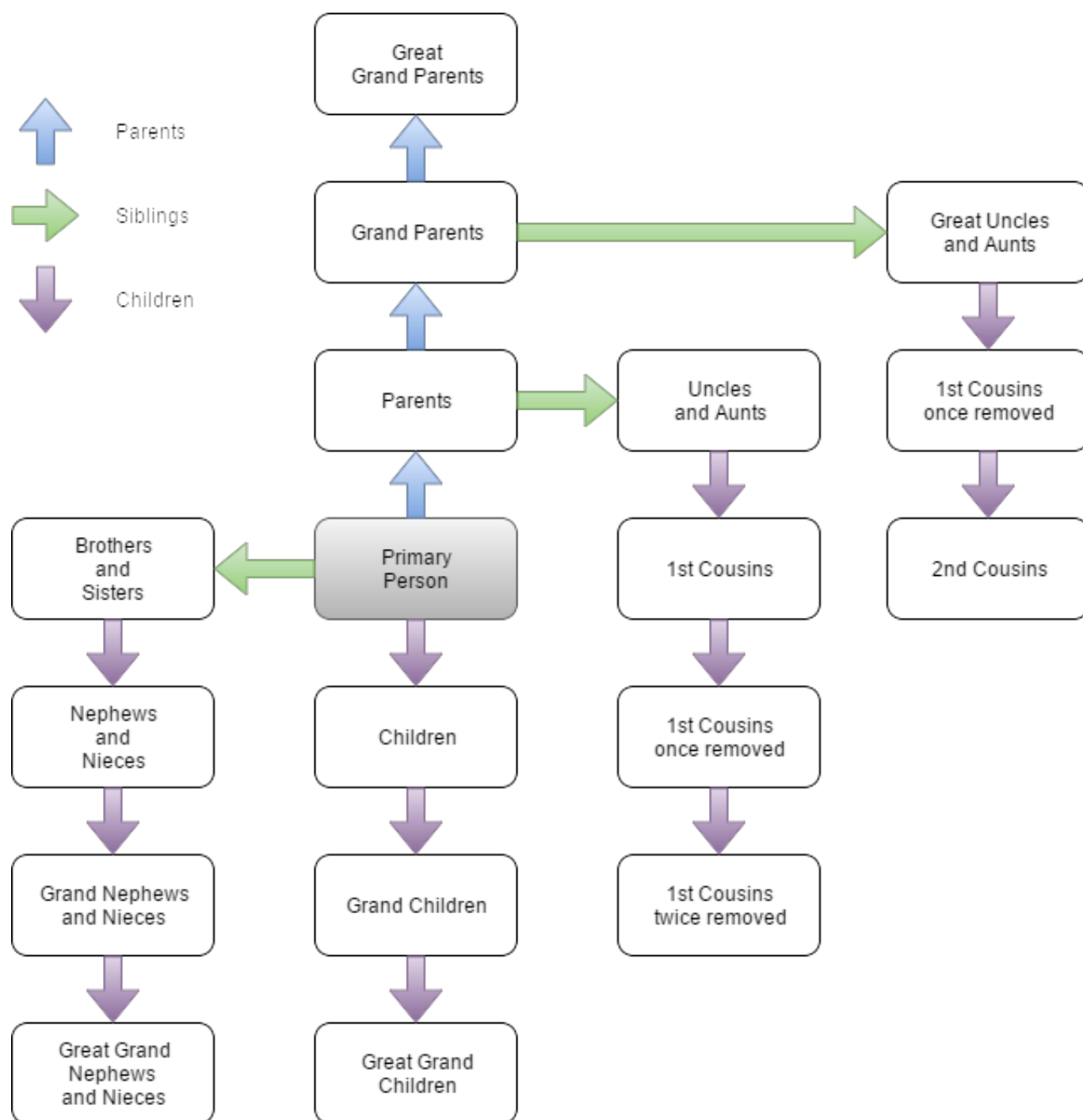
The written books offered in Heredis are elaborated according to the recommendations of the author of the Filiatus software. The presentation and the writing are particularly careful. Written in the style of the genealogy dictionaries of olden times (Father Anselme or Dictionary of the nobility), their presentation is nevertheless friendly and comprehensible by all, even neophytes on the subject.

The ancestors of each character are analyzed in all seams, to detect possible cousinings and to create the branches and sub-branches corresponding to the family structure studied.

Heredis puts two types of book at your disposal, books written from the primary person and books of the type «dictionary» based on all your genealogy.

The books written from the primary person

- Ancestors by generation
- Descendants by branch
- Clan: in this document, Heredis builds up the close family around the primary person: spouses, parents, uncles and aunts, grandparents, brothers and sisters, cousins, children, grandchildren ...

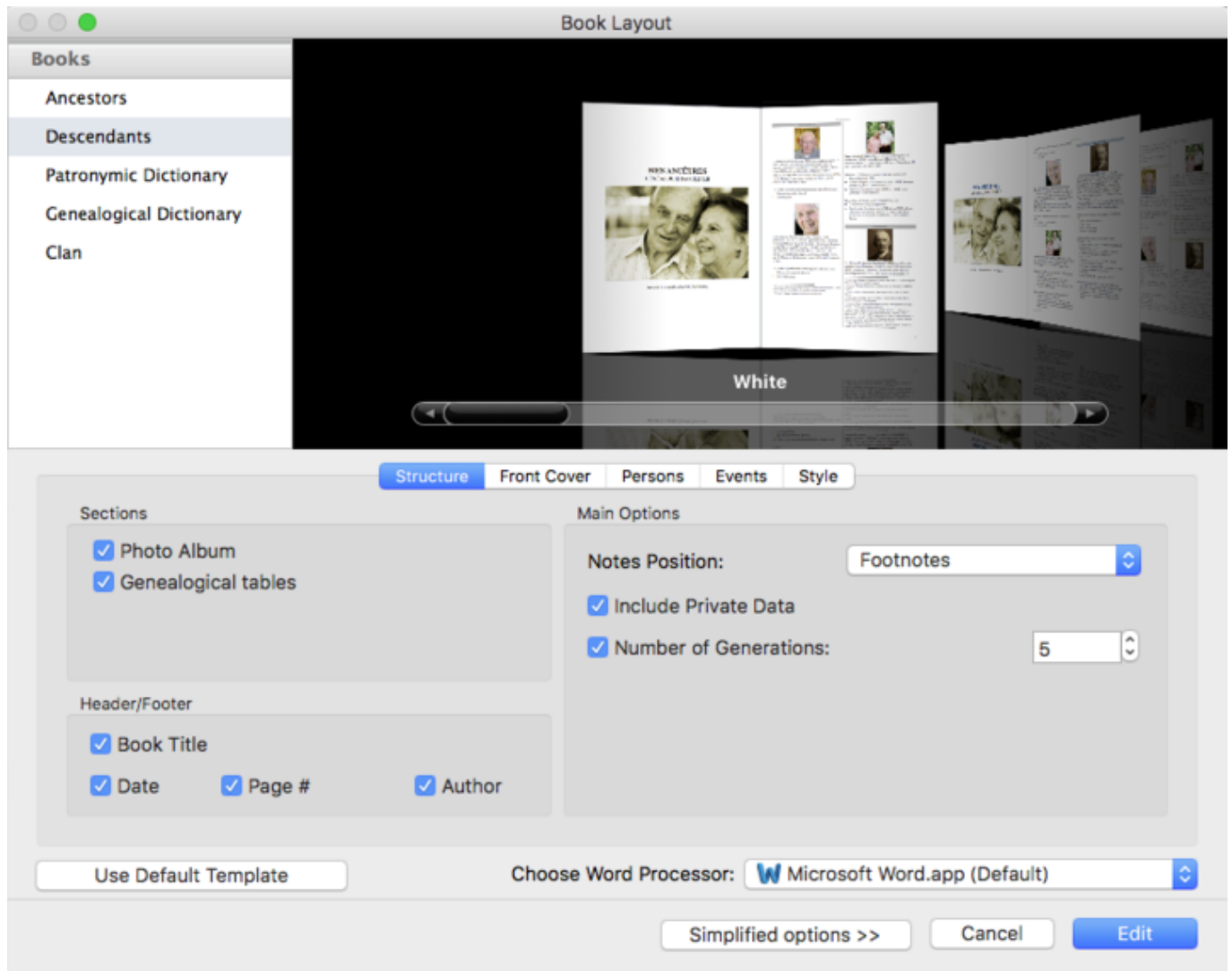



The “dictionary” type books

- **Patronymic dictionary:** Heredis searches all men at the beginning of branches, classifies them by surname and generates their patronymic descent (this dictionary is inspired by René Jetté’s «Genealogical Dictionary of Families»).
- **Genealogical dictionary:** Heredis takes all individuals from your genealogy file, sorted alphabetically. You can attach to these books, genealogical tables and a complete index of individuals, professions and places mentioned.

Creating a Book

Book Layout



1. Choose (PC) **Reports > Books**; (MAC) **Documents > Books**; or click the **Books**  button in the toolbar.
2. Select the document type from the list on the left.
3. Select the appropriate graphic theme in the viewer.
4. Click on the different tabs to choose the appropriate construction parameters for your document.
5. Click **Edit**.

The generated book is displayed in your word processor.

Composing a Book

The presentation and content options can be selected from the various tabs. Changes made to a theme are memorized for future use of the same theme.

By default, the book construction screen opens in simplified mode. Only the most common options are displayed. To view all available options, click the **Detailed Options** button at the bottom of this screen.

Note: In detailed mode, the label of this button changes to **Simplified Options**, allowing you to return to simple mode at any time.

1. Click the **Structure** tab.

- Check the information to be included: photo album, header and footer data, private data.
- Choose where to place notes, at the bottom of the page, at the end of the section or in the text.
- Limit your document. Indicate the number of generations desired, limit to a surname, place, edit your document in several volumes.

Note: Depending on the type of document selected, some of the options mentioned above do not appear.

PC Customize your Book

The screenshot shows the 'Structure' dialog box for PC. It has tabs for 'Structure', 'Front Cover', 'Persons', 'Events', and 'Style'. The 'Structure' tab is selected. On the left, there are two sections: 'Sections' and 'Header/Footer'. In 'Sections', 'Photo Album' and 'Genealogical tables' are checked. In 'Header/Footer', 'Page #' is checked, while 'Book Title' and 'Author' are unchecked. On the right, 'Main Options' includes 'Notes Position' (Footnotes), 'Sources' (Quoting sources), 'Include Private Data' (checked), and 'Number of Generations' (3).

MAC Customize your Book

The screenshot shows the 'Structure' dialog box for MAC. It has tabs for 'Structure', 'Front Cover', 'Persons', 'Events', and 'Style'. The 'Structure' tab is selected. On the left, there are two sections: 'Sections' and 'Header/Footer'. In 'Sections', 'Photo Album' and 'Genealogical tables' are checked. In 'Header/Footer', 'Page #' is checked, while 'Book Title' and 'Author' are unchecked. On the right, 'Main Options' includes 'Notes Position' (Footnotes), 'Sources' (Quoting sources), 'Include Private Data' (checked), and 'Number of Generations' (3). At the bottom, there is a 'Use Default Template' button, a 'Choose Word Processor' dropdown set to 'LibreOffice.app (Default)', and 'Simplified options >>', 'Cancel', and 'Edit' buttons.

2. Click the **Front Cover** tab.

- Check the boxes for the information to be included on the cover. Modify the title, add a subtitle, indicate who is the author, insert a picture to customize the cover.

3. Click the **Persons** tab.

- Choose the surname and given name formats. Check the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered these fields.
- Check the boxes to include the following information: pictures, child status, signature, notes, user fields, sundry links, calculated data, etc.
- Children options: Include in the document the spouses of each child and whether or not they have descendants.

4. Click the **Events** tab to select which events to include: minor events (other than birth, death and marriage event), cross-events (in which the person participated as a witness, for example).

- Choose the date and the place format of events. Check the **Dates in Gregorian** calendar box to display all dates in this calendar, regardless of the calendar in which they were entered. Choose the place style from the drop-down menu. Select which elements of the places you want to display in the document from the ones you have entered. Check the box **Include subdivision** to give more precision to the place.
- For each event, specify witnesses, sources, and notes.
- Check the option **Show Missing Data** to have it completed by your family.

5. Click the **Style** tab and choose the formatting of the book: font, text size and color, specific colors for men, women and numbers, colors of titles and title background of the document. **MAC**: Select the word processor with which you want to edit the document. Heredis offers you all programs that enable editing and installed on your computer.


6. Click **Edit** to start the word processor.

Info • Indexes are not directly integrated with books because each word processor handles them in a specific way. However, index entries are marked so that you can generate an index after the document is created and opened in your word processor. Put the cursor where you want and generate the index:

- in Word, menu Insert > Tables and Index or References> Insert Index
- in LibreOffice, menu Insert > Indexes and Tables

MAC Note: The text editor Page doesn't manage index.

Print Books

To print a book, choose **Documents > Books** or click the **Books**  button and select the options which suit you (as previously described).

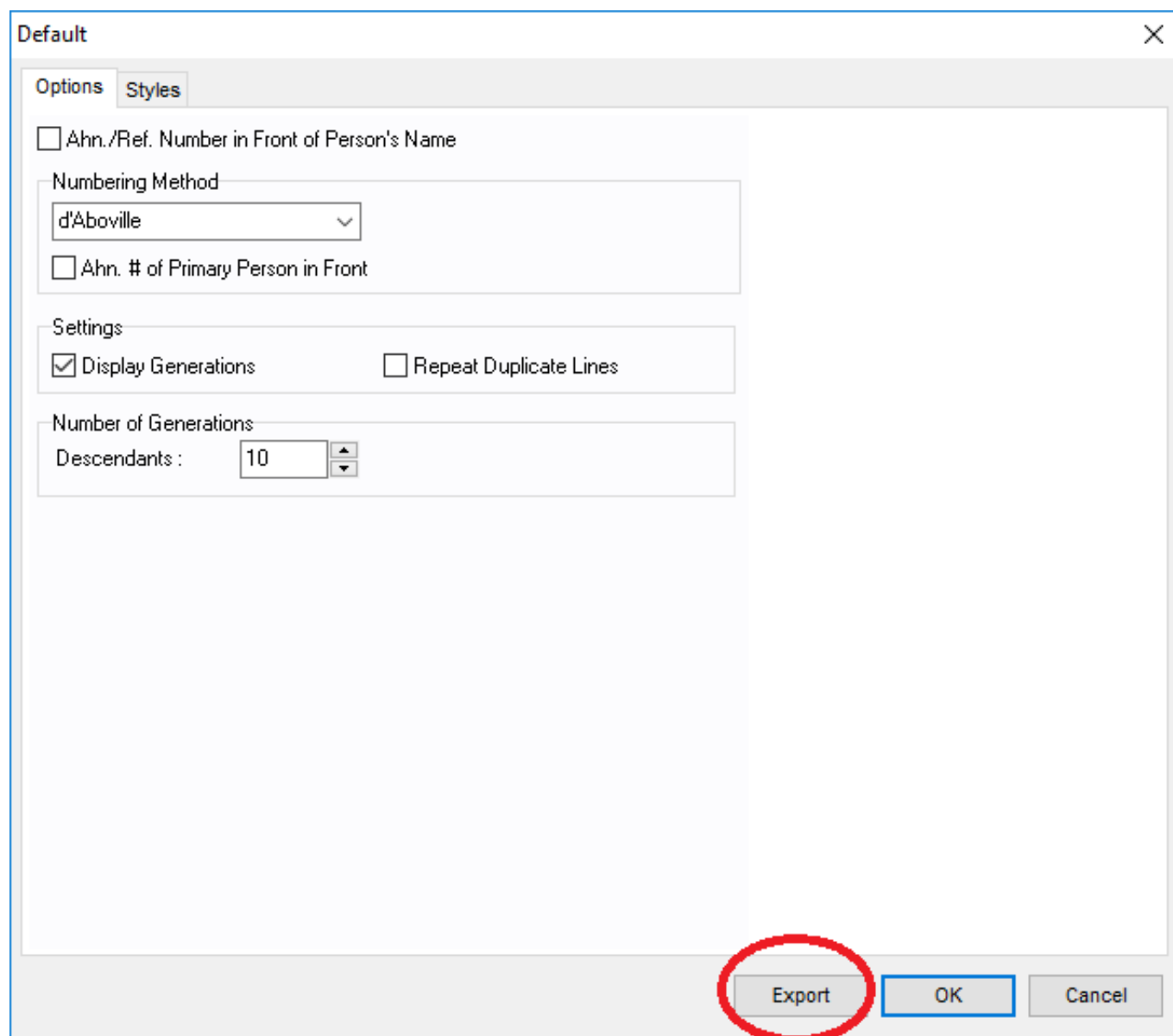
Then print like any other document using a word processor.

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.

Export a document requiring further treatment

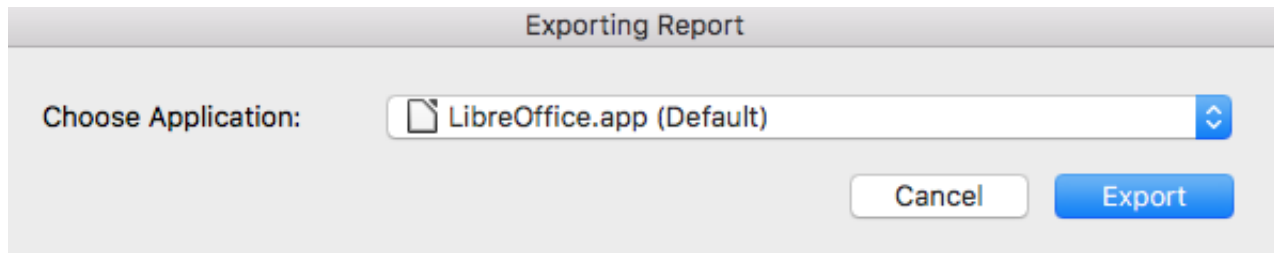
1. (PC) Click the **Export** button in the layout screen of the sheet or the book.

PC Export a document



(MAC) or Choose **Report > Export** or click the **Export** button in the toolbar of the report.

MAC Export a document



2. The sheets and books are directly exported in plain text format and are opened in your favorite word processor.

(MAC) When you export a report, select the software that you will use for reworking the document in the **Choose Word Processor** pop-up menu.

- **Export as Plain Text File:** the document can be read by all text editor software. Export in plain text format removes the formatting of the document, and the images are not exported.
- **Microsoft Excel.app:** the document can be opened with Microsoft Excel on either a Mac or Windows computer.
- **Other Applications:** the document can be opened with other commonly used spreadsheet programs such as Numbers or OpenOffice on Mac or Windows.

3. Select the destination software and click **Export**.

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

Export a document to share it

1. From your word processor, launch the print. Choose **File > Print**. These commands are generally the same in all word processors.
2. Click the **PDF** pop-up menu and select **Save as PDF....**
3. Choose the location where the PDF document is to be saved. If your file directory is not visible, click the disclosure triangle to the right of the **Save As** field.
4. Click **Save**.

The generated document is very convenient for exchange. It can be easily transmitted by email and opened on any computer.

Heredis can edit standard reports provided with the software and create your own report templates. Each report displayed can be changed simply. You can also save or print it directly.

Create a report

1. Scroll down the **Documents** menu and select one of the standard reports supplied by Heredis. Some reports are constructed from the primary person displayed on the navigation screen (ancestors, descendants), others treat all people saved in the file regardless of their family links or their role (alphabetical, anniversaries, events, families...).

2. Once you have selected, click the report for it to be constructed.

Info • Hold the mouse over the name of a person to see an informative box on this individual. Double-click a line from the report to access all information on the person presented on the **Immediate Family** tab or any other data entry tab.

Compose a report

When you display a report, the menus and buttons are different, the toolbar indicating the changes you can make (Options - Styles - Data). You will also find two buttons for processing the modified report (**Export** and **Edit**).

Move each column by drag and drop. Sort the columns with a click in the column header; an arrow appears in the header of the column. If the column is not sortable, Heredis alerts you.

Custozime a report

Desc #	Surname	Birth Date	Birth Place	Death Date	Death Place	Spouse	Marriage...	Marriage Place	Children
Generation 1									
	Jean-Marie DUCHAMP	° 4/26/1899	Saint-Vallier	† 3/26/1993	Lyon	Catherine Émilie...	x 10/12/...	Lyon	2
Generation 2									
1	Claude Charles DUCHA... <i>Family 2</i>	° 2/3/1931	Lyon			Arlette KLEIN	x 8/12/...	Lyon	4
2	Paul André DUCHAMP	° H 2/3/5695	Lyon			Marie-Amélie VIAL	x 7/16/...	Lyon	0
						Paula LIBENSTEIN	x 10/8/...	Villeurbanne	0
Generation 3									
1.1a	Eric Antoine Bernard D...	° 12/6/1952	Lyon			Alice Marie Sylvet...	x 6/29/...	Sainte-Foy-lès-...	1
1.2b	Jérôme Marceau DUCH...	° 10/8/1956	Lyon			Annie Marguerite...	x 5/10/...	Annecy-le-Vieux	1
1.3b	Pauline Philippine DUC... <i>Family 2</i>	° 5/18/1960	Paris			Pierre DUBOIS	x 1974		3
1.4b	Sophie Léopoldine DUC...	° 8/25/1965	Lyon			Michel CARPENTI...	x 2/3/2...	Manas-Bastano...	1
Generation 4									
1.1a.1	Clarisse Adèle DUCHA...	° 11/6/1983	Lyon						0
1.2b.1	Aurélien Lucas DUCHA...	° 4/23/1982	Paris			Anabelle MANSUY	x 7/9/2...	Annecy-le-Vieux	0
1.3b.1a	Maxime Cédric DUBOIS	° 6/1/1980	Paris						0
1.3b.2	Matrim Melchior DUCH...	° 5/18/1989	Ivry-en-Montagne						0
1.3b.3b	Marion Chloé CARPENT...	° 1/8/1992	Condom						0
1.4b.1	Rodrigue DUCHAMP	° 5/1991	Port-au-Prince						0

Resize columns


1. Move the mouse cursor to the edge line between two columns until it changes to a double arrow.
2. Hold the mouse button down and drag it to change the column width in the desired direction.

Rearrange the columns

1. Click the header of the column to be moved.
2. Hold the mouse button down and drag it to the new location.

Modify the order of data in the columns

Click the column header. If the column is sortable, an arrow will indicate the sort direction. When data are grouped in the columns, sorting is applied within each group.

Info • Access to adding or deleting columns is done with the  Data button. You can create as many columns as you like within the space available for printing.

Select the Report options

The options are different for each type of report. They modify the data displayed in the report.

1. Click the **Options** button or choose **Template > Options**.


2. Indicate the types of data to be displayed.

- **Ancestors or Descendants Report:** choose between a full or partial report (**Males Only – Females Only – Name Holders Only**) from the pop-up menu. Specify the number of generations to be treated and the type of numbering. Indicate the types of persons for inclusion in the report.
- **Persons Reports:** Select the method of grouping the data into the report with the pop-up menu (**By Name** or **By Date**). Choose from a complete or partial report (**Males Only – Females Only**) in the pop-up menu. Indicate the types of persons for inclusion in the report.
- **Families Report:** Select the method of grouping the data in the report with the pop-up menu (grouping by Family status, Places or Dates). Limitations are applied to the data displayed by ticking **Limit by Period of Observation** or **Limit Places** and select the values you want.
- **Events Reports:** Select the method of grouping the data in the report with the pop-up menu (group **By Event Types, By Persons, By Places** or **By Dates**). Limitations apply to the data displayed by ticking **Period of Observation** or **Limit Places** and select the values you want. Indicate the types of persons for inclusion in the report and the types of events to be processed. Limit the report of events to holders of a particular name.
- **Tiny Tafel Reports:** Select the method of grouping the data in the report with the pop-up menu. Limitations apply to the data displayed by clicking the **Limit by Period of Observation** or **Limit Places** boxes and select the values you want.

Click **OK** to confirm your choice of options and return to the report.

Select the format of the reports

Customize the presentation of each report with your color preferences and data format.

1. Click the  button or choose **Template > Styles**.

2. Use the menus to define the format of data displayed.

- **Given names:** choose to display **All Given Names**, **Only First Given Name**, **Only Usual Given Name** (in the absence of a usual given name, Heredis takes the first given name), **First Given Name** and **Initials of Others**.

Tick the **Include Nickname** box to add it after the given names.

- **Name order:** choose the order for surname and given names. Tick the **Include Prefix** and **Include Suffix** boxes to add before or after the name if they exist.

- **Dates:** Select the date format. Tick **Use Gregorian Dates**, to display this format regardless of the calendar in which they were entered. Tick the **Show Headings** box for each date to be preceded by the symbol corresponding to the event.

- **Places:** select the **Places** format. Select any combination of items among those entered for each location. Tick the **Include Subdivision** box to add it to each location displayed when it had been entered.

3. Click the color boxes and select a color to modify the colors for **Males**, **Females** and **Numbers**.

4. Click **OK** to confirm your choice of format and return to the report.

Select the items to be included in the report

The number of columns displayed in the report depends on the items selected. Each item is displayed in a separate column.



1. Click the **Data** button or choose **Template > Data**.

2. Click the item to be added from the pop-up menu, and it is now ticked and appears in a new column, to the right of the last column of the document.

3. Move the column containing the new item to the desired position on the report.

To delete a column, reopen the **Data** pop-up menu and click again on the item to be deleted. The document will no longer contain this column.

Info • Remember to adjust the width of the other columns according to the available space left by the deleted column.

Print Reports

For example, choose **Documents > Person Reports > By Name** (Alphabetical report). Click **Edit** and select the word processor on your Mac to which you wish to send it. Changes to the presentation may be made in the word processor that you are familiar with and then you may start printing.

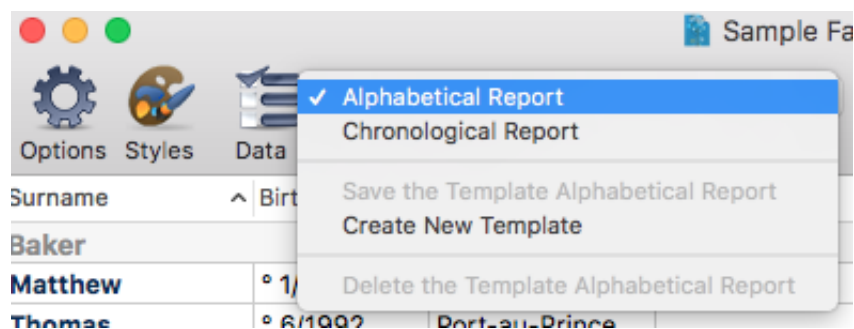
You can modify the list displayed by Heredis before printing.

As previously explained, click **Options** to improve the presentation of the list, by choosing **Classify by Surnames**, or change the contents by selecting **Men Only**.

Add or remove a column by clicking **Template**. Select **Age at death**. The column order can be changed by simply dragging with the mouse: place the new column next to **Death Place**.

If the presentation is how you want it and you want to keep it? Choose **Create New Template** from the pop-up menu and give it a name: «My list alphabetically.» It will then be available in the list of reports.

Choose in the pop-up menu



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.

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.

Report Options

The screenshot shows a dialog box titled "Families Report" with a close button (X) in the top right corner. It has two tabs: "Options" (which is selected and circled in red) and "Styles". The "Options" tab contains several settings:

- Date Limits:** A checkbox for "Limit by Date" is unchecked.
- Place Limits:** A checkbox for "Limit by Place" is unchecked.
- Direct-line Ancestors Only:** A checkbox is checked.
- Sort by Type:** Three radio buttons are present: "By Male Spouse" (selected), "By Female Spouse" (unselected), and "Chronological" (unselected).

At the bottom of the dialog, there are three buttons: "Export", "OK" (highlighted with a blue border), and "Cancel".

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.

Report Style

The screenshot shows the 'Families Report' dialog box with the 'Styles' tab selected. The 'Styles' tab is circled in red. The dialog is organized into several sections:

- Field Styles:**
 - Given Names: All Given Names (dropdown), Include Nickname
 - Name Order: William of HATFIELD (dropdown), Include Suffix, Include Prefix
 - Dates: 30.9.1984 (dropdown), Use Gregorian Dates, Show Headings
 - Places: City (dropdown)
- Colors:**
 - Males: Blue (dropdown)
 - Females: Red (dropdown)
 - Ahn. #: Green (dropdown)
 - Duplicate Line #: Magenta (dropdown)
- Font:** Arial (dropdown), Size: 9 (dropdown)
- Page:** Print Grid, Print Setup button, A4 - 21.0 x 29.7 cm (Portrait)
- Header:** Title: Families Report (text field), Number of Items, File Name, Date, Page #
- Margins:** Top: 1,50 cm, Bottom: 1,50 cm, Left: 1,50 cm, Right: 1,50 cm (all with up/down arrows)

At the bottom of the dialog are three buttons: 'Export', 'OK', and 'Cancel'.

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.

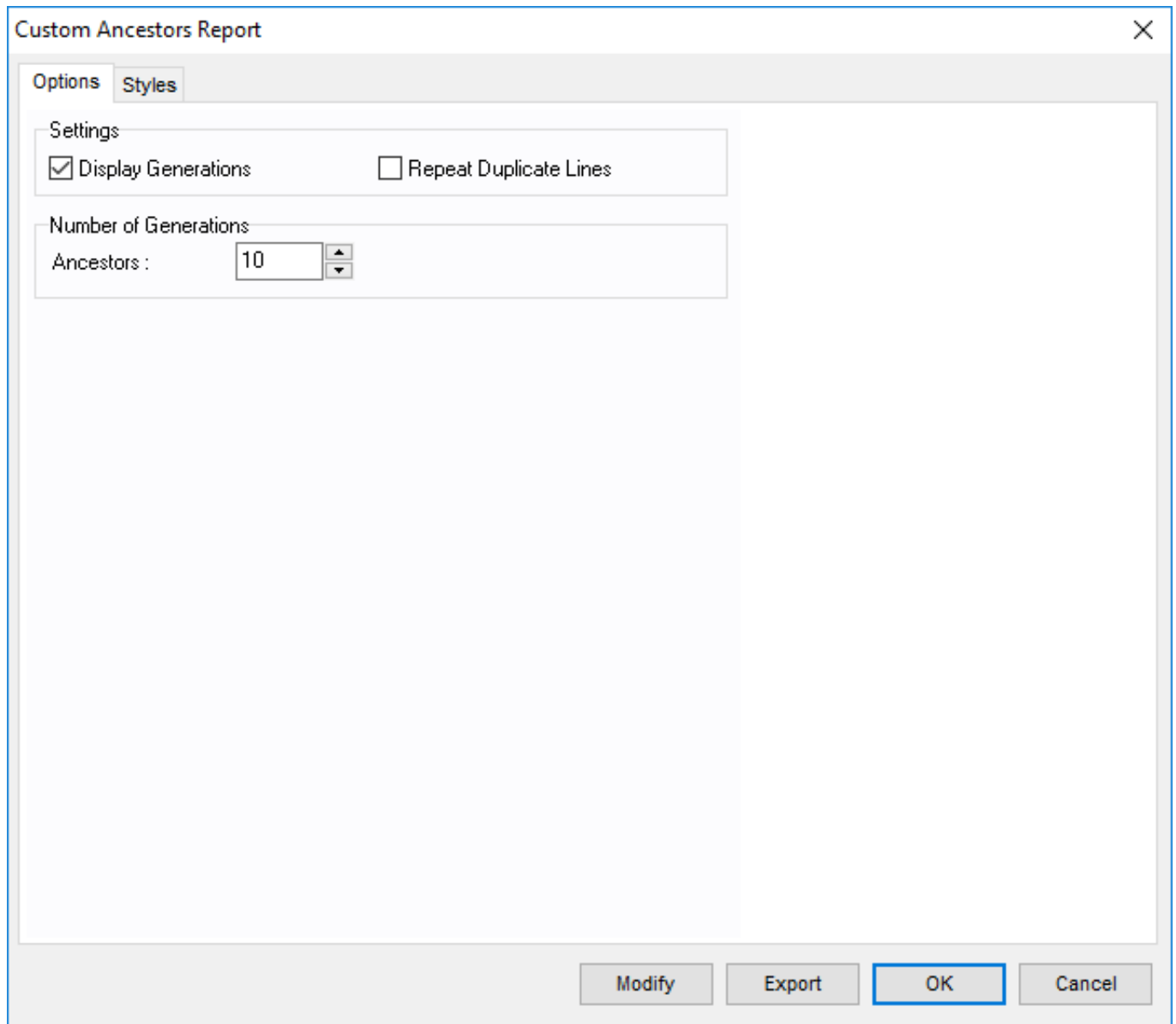
5. Click **OK**.

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 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.

Modify Report



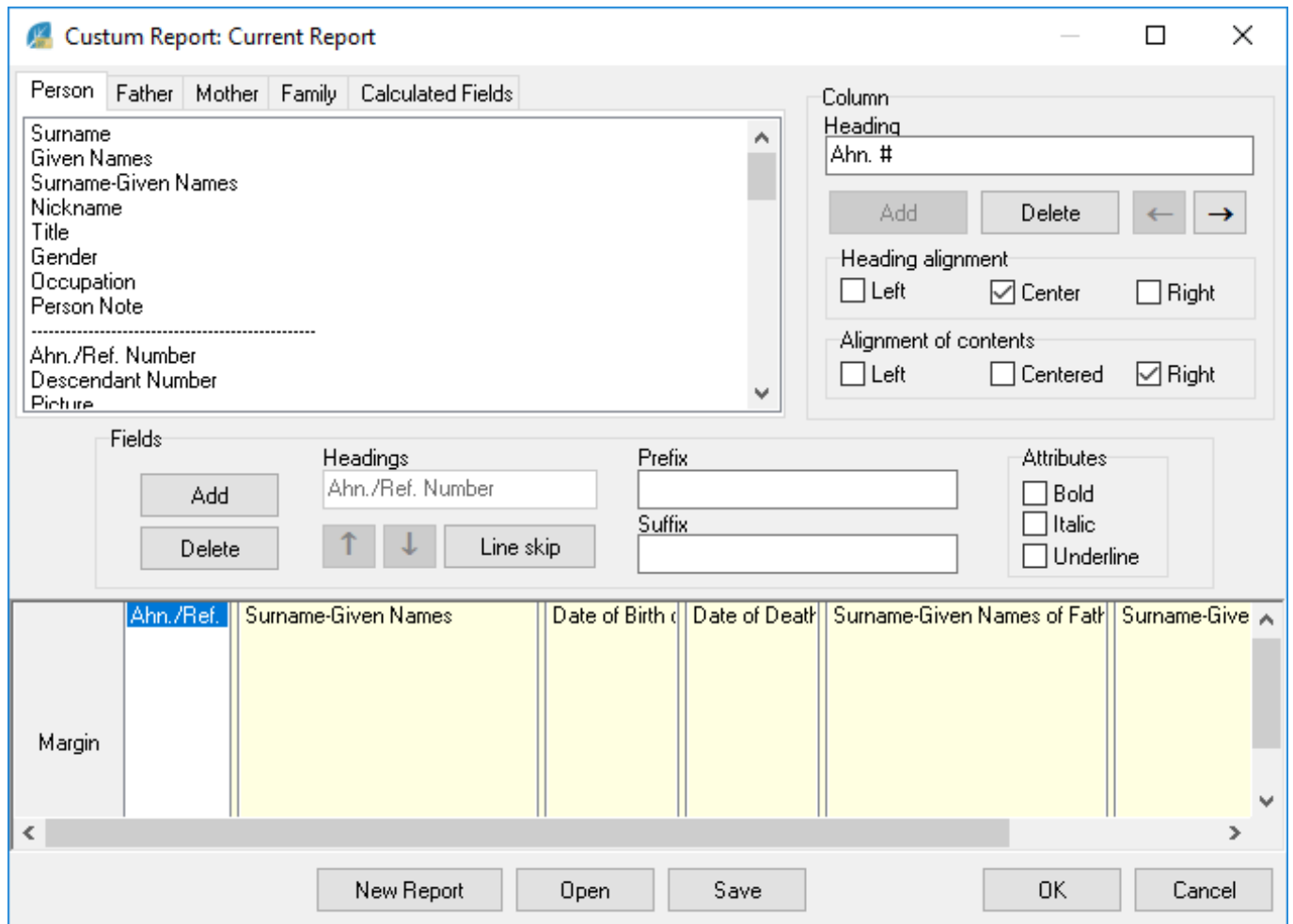
To build a custom report, you have the following options:

- **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.

Customize a report



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.

Save a Report

A report 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.

Printing a report

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

1. Choose **File > Print**. 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.

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

This feature offers various reports models that can be fully customized according to your needs.

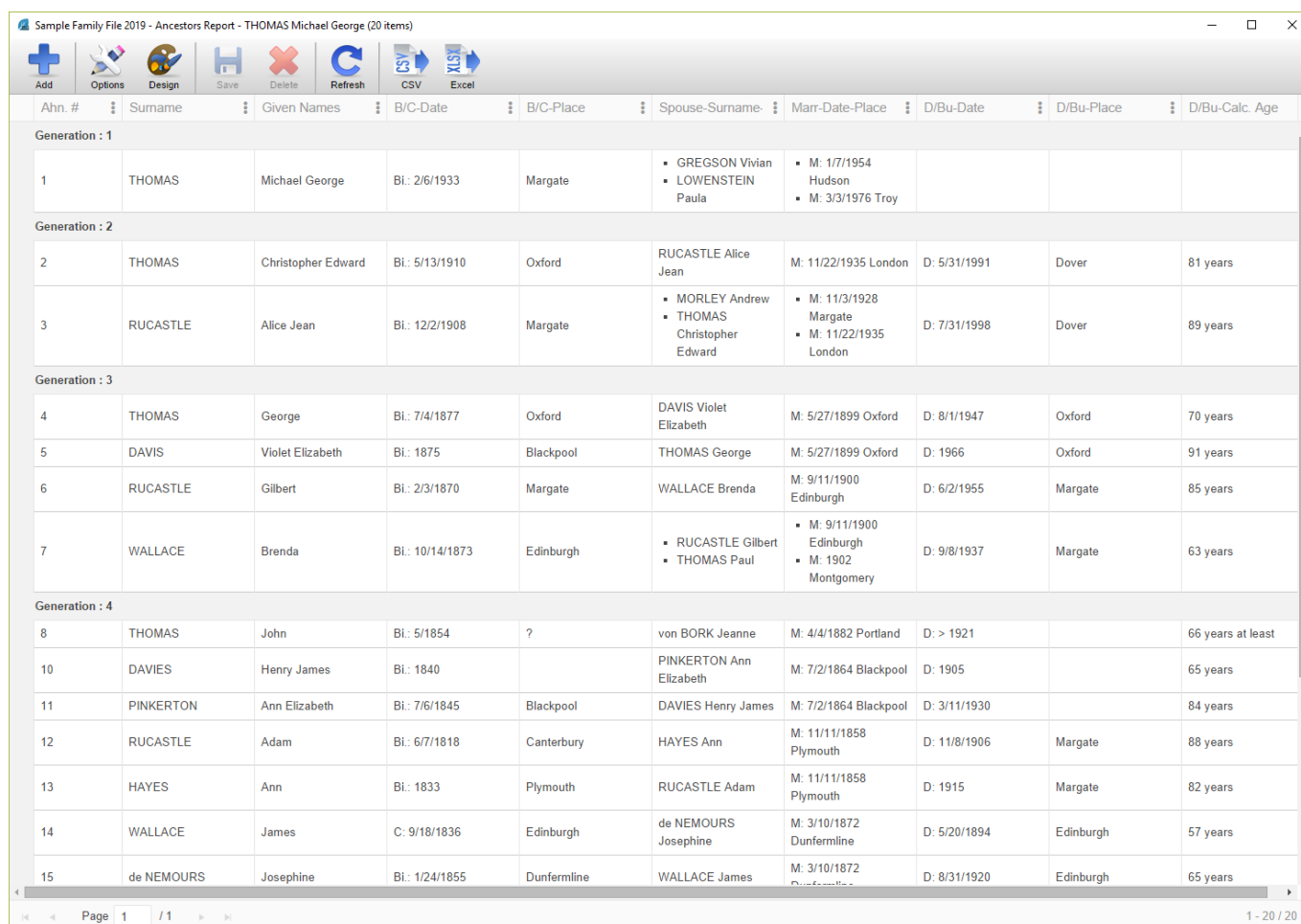
Click on the menu **Reports > Custom Reports** and select the type of report you are interested in among the default models included in the application: Ancestors, Descendants, Persons, Events.

You can also use the  shortcut in the toolbar.

The selected report opens up in a new Heredis window, which allows you to consult the data in your file while continuing to work on your genealogy.

Note: you can also open several custom reports at the same time if you wish to.

Ancestors Custom Report



Ahn. #	Surname	Given Names	B/C-Date	B/C-Place	Spouse-Surname	Marr-Date-Place	D/Bu-Date	D/Bu-Place	D/Bu-Calc. Age
Generation : 1									
1	THOMAS	Michael George	Bi.: 2/6/1933	Margate	<ul style="list-style-type: none"> GREGSON Vivian LOWENSTEIN Paula 	<ul style="list-style-type: none"> M: 1/7/1954 Hudson M: 3/3/1976 Troy 			
Generation : 2									
2	THOMAS	Christopher Edward	Bi.: 5/13/1910	Oxford	RUCASTLE Alice Jean	M: 11/22/1935 London	D: 5/31/1991	Dover	81 years
3	RUCASTLE	Alice Jean	Bi.: 12/2/1908	Margate	<ul style="list-style-type: none"> MORLEY Andrew THOMAS Christopher Edward 	<ul style="list-style-type: none"> M: 11/3/1928 Margate M: 11/22/1935 London 	D: 7/31/1998	Dover	89 years
Generation : 3									
4	THOMAS	George	Bi.: 7/4/1877	Oxford	DAVIS Violet Elizabeth	M: 5/27/1899 Oxford	D: 8/1/1947	Oxford	70 years
5	DAVIS	Violet Elizabeth	Bi.: 1875	Blackpool	THOMAS George	M: 5/27/1899 Oxford	D: 1966	Oxford	91 years
6	RUCASTLE	Gilbert	Bi.: 2/3/1870	Margate	WALLACE Brenda	M: 9/11/1900 Edinburgh	D: 6/2/1955	Margate	85 years
7	WALLACE	Brenda	Bi.: 10/14/1873	Edinburgh	<ul style="list-style-type: none"> RUCASTLE Gilbert THOMAS Paul 	<ul style="list-style-type: none"> M: 9/11/1900 Edinburgh M: 1902 Montgomery 	D: 9/8/1937	Margate	63 years
Generation : 4									
8	THOMAS	John	Bi.: 5/1854	?	von BORK Jeanne	M: 4/4/1882 Portland	D: > 1921		66 years at least
10	DAVIES	Henry James	Bi.: 1840		PINKERTON Ann Elizabeth	M: 7/2/1864 Blackpool	D: 1905		65 years
11	PINKERTON	Ann Elizabeth	Bi.: 7/6/1845	Blackpool	DAVIES Henry James	M: 7/2/1864 Blackpool	D: 3/11/1930		84 years
12	RUCASTLE	Adam	Bi.: 6/7/1818	Canterbury	HAYES Ann	M: 11/11/1858 Plymouth	D: 11/8/1906	Margate	88 years
13	HAYES	Ann	Bi.: 1833	Plymouth	RUCASTLE Adam	M: 11/11/1858 Plymouth	D: 1915	Margate	82 years
14	WALLACE	James	C: 9/18/1836	Edinburgh	de NEMOURS Josephine	M: 3/10/1872 Dunfermline	D: 5/20/1894	Edinburgh	57 years
15	de NEMOURS	Josephine	Bi.: 1/24/1855	Dunfermline	WALLACE James	M: 3/10/1872 Dunfermline	D: 8/31/1920	Edinburgh	65 years

The data thus displayed depend on the type of default report selected:

- the **Persons Report** allows you to display all the persons in your genealogy
- the **Ancestors Report** displays the primary person and his/her ancestors, grouped by generation
- the **Descendants Report** displays the primary person and his/her descendants, grouped by generation
- the **Events Report** allows you to display all the events saved in your genealogy

Each report includes the following elements:

- a toolbar
- a data table
- a status bar

The Toolbar



Add Button:

Select the information you want to add to your report by clicking on the different sections available (Personal Data, Media, ...)

You can select one or more fields among those suggested. If you click the OK button, additional columns are automatically added to your report to let you view the data you deem relevant and important.

Note: You can also group multiple fields into a single column. Select the desired fields and check the “Group in a single column” box. Validate your selection and do the same thing again for each column in which you want to group several fields. For instance, “Birth Date” and “Place of Birth”.



Options Button:

Based on the type of report, you are given several options, grouping, and filters to refine the displayed report.

– *Persons Report:*

This report is built based on all the persons saved in your genealogy. If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.

Heredis is defaulted not to apply any grouping of persons in this report but you can set up your own display of data: classify by Name or Birth.

You can also choose to display Males or Women Only, and to list Direct-line Ancestors only.

– *Ancestors Report:*

This report is built based on the primary person displayed on the navigation screen.

If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.

Heredis is defaulted to supply a complete list of your ancestors over 10 generations in this report but you can modify these options to display a report by Male Ancestors (agnatic) or Female Ancestors (cognatic). You can also increase or decrease the Number of Generations to be displayed.

– *Descendants Report:*

This report is built based on the primary person displayed on the navigation screen.

If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.

Heredis is defaulted to supply a complete list of your descendants over 10 generations in this report but you can modify these options to display a report showing Name Holders Only. You can also increase or decrease the Number of Generations to be displayed and choose the type of Numbering Method to display in your custom report (d’Aboville or Lettered).

– *Events Report:*

This report is built based on all the events saved in your genealogy.

If you wish to display or hide marked, secondary, confidential, contemporary persons or private data,

check or uncheck the corresponding boxes.

Heredis is defaulted not to apply any grouping of events in this report but you can create your own way of displaying data: classify by Dates, Persons, Type of events, or Places.

The screenshot shows a configuration dialog box for Heredis reports. It is divided into several sections:

- Classify Events:** A dropdown menu set to "None".
- Date Limits:** Includes checkboxes for "Known Dates Only" and "Limit by Date". Below are "Start Year" (1900) and "End Year" (2000) spinners.
- Place Limits:** Includes checkboxes for "Known Places Only" and "Limit by Place". Below is a "City" dropdown and a "Begins With:" text input field.
- Persons to Include:** A list of checkboxes: "Marked Persons", "Secondary Persons", "Confidential Persons", and "Persons born less than:" (with a "75 years" spinner). A "Show all" dropdown is also present.
- Private Data:** A checkbox for "Private Data".
- Verified Events:** A grid of checkboxes for "Families", "Other Events", "Births/Christenings", and "Death/Burial".
- Limitation on surnames:** A checkbox for "Limit to a surname and its variants" and an "Enter Name" text input field.

At the bottom right, there are "OK" and "Cancel" buttons.



Layout Button

You are given layout options for the following:

- Surnames, Given Names, Dates
- Font size displayed in the report
- Major events

The screenshot shows a configuration dialog box for report layout. It is divided into two main sections:

- Field Styles:** Includes dropdowns for "Given Names" (set to "All"), "Surnames" (set to "of HATFIELD"), and "Dates" (set to "8/2/1954"). Below are checkboxes for "Use Gregorian Dates" and "Display initials of major events".
- Text:** A "Font size:" dropdown menu set to "10 pt".

At the bottom right, there are "OK" and "Cancel" buttons.



Save Button

Click the **Save** button and name your report so it is saved with your custom options and preferences. Find it again later in the menu **Reports > Custom Reports**, right underneath the default model supplied by Heredis.

Delete Button

From the menu: **Reports > Custom Reports**, open the model you do not wish to keep, click the **Delete** button, and confirm you want to delete the model.

Refresh Button

Custom reports open in an independent Heredis window so you can continue working on your file while leaving a custom report open. If you make modifications or additions to your genealogy, all you need to do is click the Refresh button to update the content of the report displayed.


CSV / XLSX Buttons

You can export the data from your report to a **CSV** or **Excel** format so you can use them later outside of the Heredis environment. The file will become independent from Heredis and you will be able to work on the data from your usual spreadsheet software.

Data Table

The various reports provide data presented in a multiple-column table ; content varies according to the type of model you choose.

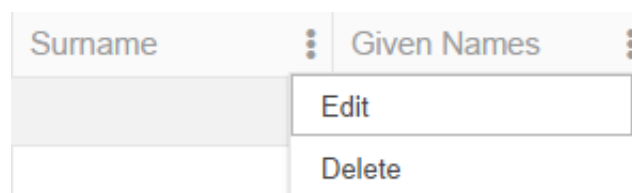
You can sort data by clicking on a column header. An arrow displayed next to the header title indicates the type of sorting that has been applied: ascending, descending, or no sorting if no arrow is displayed.

 **Note:** some columns cannot be sorted; this is the case, for instance, of columns in which several types of data have been aggregated. A message in red will inform you that the column cannot be sorted.

You can also:

- Reorganize the way data is displayed by moving columns, for example: Click the header of a column and hold the click down while moving the column to the desired location, then release the mouse click.
- Delete a column: Click on the 3 dots displayed on the column header and select the Delete option.
- Modify the content of a column: Click on the 3 dots displayed on the column header and select the Edit option. An Edit Column window opens up, it allows you to:
 - modify the column title
 - add/modify/delete fields in this column
 - add and customize column data separators to display between 2 column fields

Edit or Delete a Column



Status Bar

In the status bar, Heredis shows the total number of pages for the report being displayed, as well as the range in which the current page is located (the indicator is displayed in the bottom right). Easily navigate through the different pages of a report by clicking on the **First / Last Page, Previous Page / Next Page** arrows. You can also move directly to a given page by entering its number.



Custom Reports and Smart Search

Custom reports are also accessible directly from Smart Search.


- From the Search tab > Smart Search, launch a search.
- In the Results area, select the Persons or Events tab you are interested in.
- In the Processing area, click the Edit button > Custom Report and select the report model you want to use to display the results from your search.

(attention, H el ene, dans la version PC que j'ai – pas dans la version mac – je vois « customizable reports » au lieu de custom report ; ce n'est pas faux du tout comme traduction mais  a ne colle pas avec le reste ;  a v erifier partout pour la coh erence)

(PC) Smart Search and Custom Report

(Mac) Smart Search and Custom Report

The Heredis dashboard is a tool that allows you to control your family tree on a daily basis. The different available indicators, whether quantitative or qualitative, give you a global vision of your genealogical data and also inform you about the progress of your work.

The dashboard can be accessed from the **Tools > My Dashboard** menu. You can also add the  button to your toolbar if customized. (See [Customize Heredis\Select the toolbar](#))


It consists of four tabs: **My Dashboard**, **File Info**, **Statistics** and **Search Tracking** in which Heredis displays indicators, also called widgets, presenting the current state of your family tree.

My Dashboard Tab

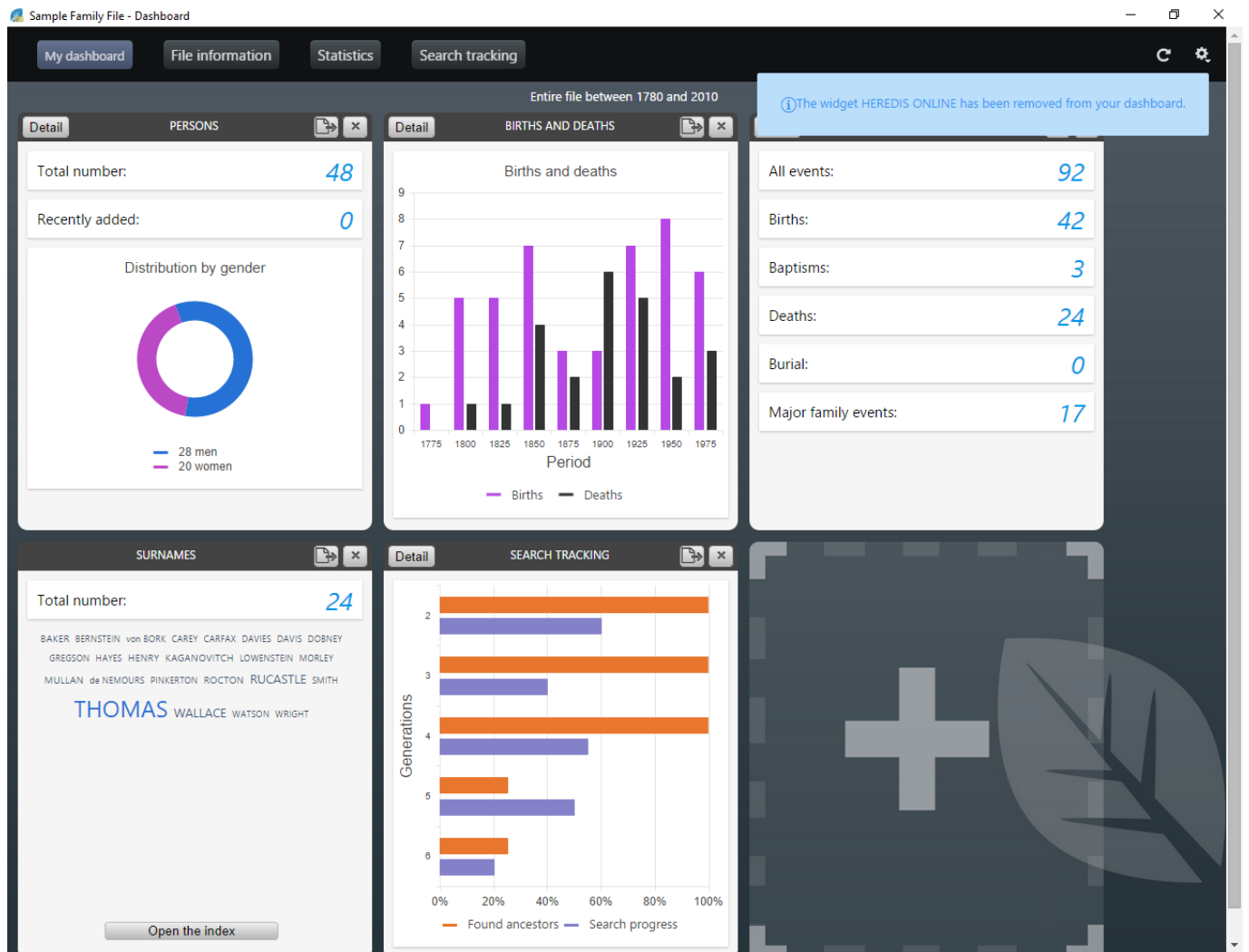
When you access the dashboard, it opens directly on the **My Dashboard** tab.

This tab is customizable, you can add widgets of your choice, delete those that do not interest you or reorganize them.



To add one or more widgets:



- Click the  button.
- Click on the widget you're interested in
- Click **add**

My dashboard



The widgets are added after those already on your **dashboard**.

To remove a widget, click the  button in the title of the widget. A notification informs you instantly that you have removed the widget from the tab. To see it again, just click the  button to display the widget.


Note: You can also add or remove a widget from the other tabs of the dashboard. You can choose your favorite widget. Click on the grey star  to add the widget. The star is now yellow , if you click again, it will be removed.

To rearrange the widgets to suit you, click on the widget banner and without releasing the mouse, drag it to the desired location and then release the mouse.

Heredis automatically reorganize your dashboard space even if you resize the window. If you wish to, you can display all widgets in the **Dashboard** tab.

The information displayed in the dashboard is by default your entire file, such as the title at the top of the

page, as well as the data added today (see example, in the PERSONS widget, the indication «Recently Added»).

To change these options, click the indented wheel button  at the top right of the page and select the filters that best fit your way of working:

- Filters showing recent additions: Today / Less than a week ago / There is less than one Month / Less than a year ago.
- Filters on persons: Entire file / Direct line ancestors/ Ancestry.

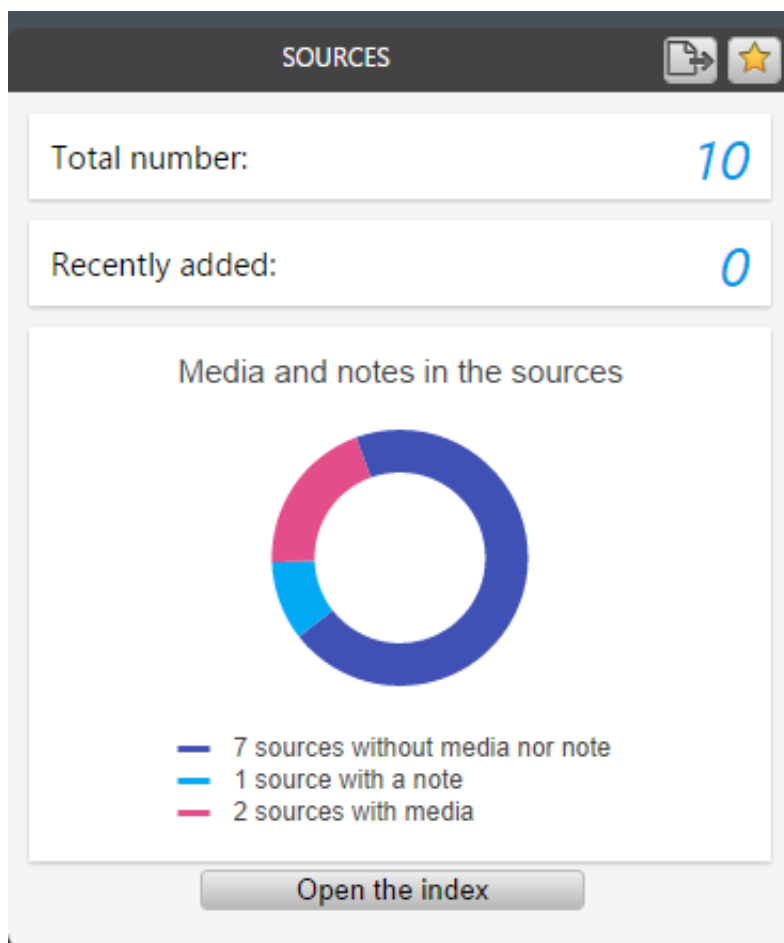
Then click on the **Validate** button, all widgets in the dashboard are updated based on the options you have chosen.


The widgets have a simple view and a detailed view. From the simple view, click the **Detail** button at the top left to display the detail view. From the detail view, to return to the simple mode, click the **Back** button on the top left.

Some widgets like NAMES or SOURCES do not have a detailed view. However, you can directly access their respective indexes by clicking the **Open the index** button. This allows you to easily find additional information.

Simple widgets

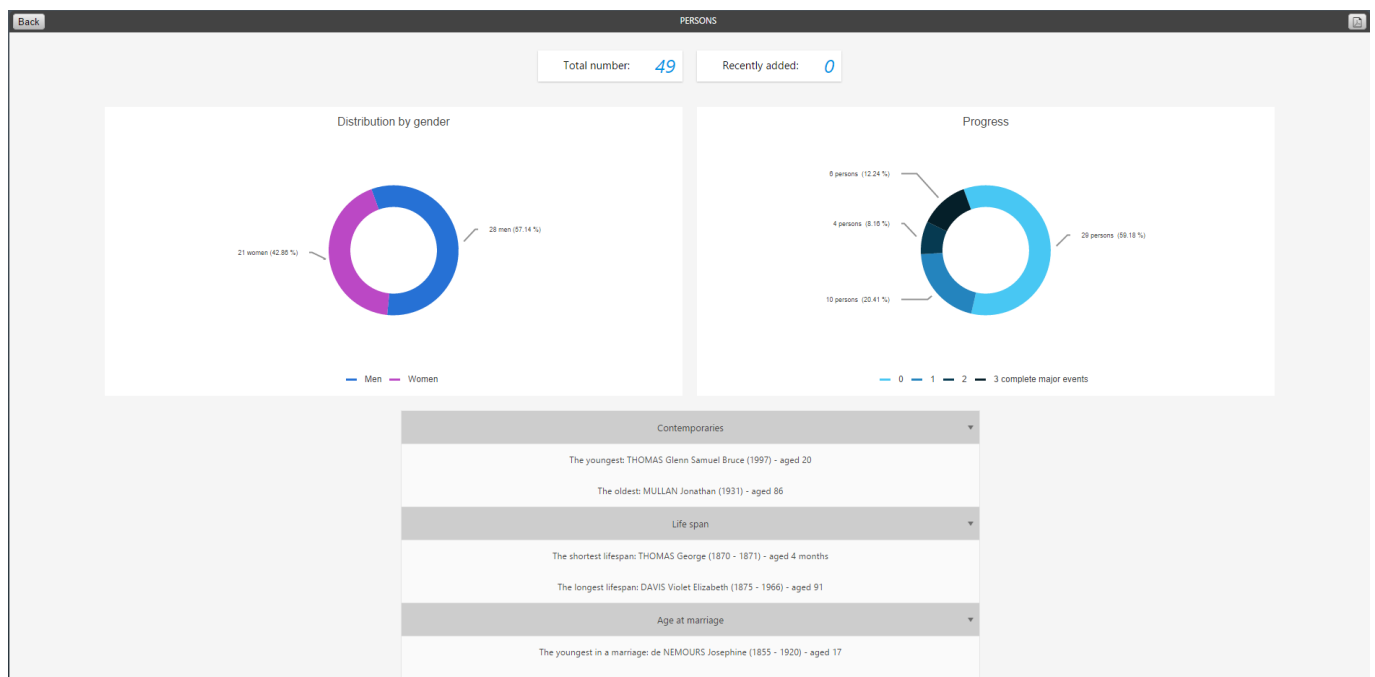
Simple view of the Source widget




Widgets in simple view display a limited amount of information. Their size is variable based on what you display. They feature a button  to export the contents of the widget displayed in PDF or PNG format. **Info** • Note that as you hover over certain widgets, you have more accurate information. For the widget NAMES for example, when you pass the mouse over a surname, it immediately displays the number of times it has been used in your family tree.

Detailed widgets


Detailed view of the Person's widget



The detailed version of a widget displays additional information about the current status of your family tree.

Each detailed version widget can be exported to PDF through the PDF button . You can then print or transmit it very easily.


If you are working with a large screen or with two screens, you can keep the dashboard open constantly in order to control the progress of your family tree in real time.

When you add a data, click the refresh button  to update your dashboard and have the latest information entered in your file.


File Information Tab

From this tab, you have an overview of persons, events, sources, places, surnames, given names, occupations, media of your file as well as your Heredis Online data. This general view allows you to know how far you are in your work.

To access this page from the dashboard, click the **File Information** button or select the menu **Documents**

> **File Information** or, if you personalized your toolbar, click directly on the **File Info** button  .

HEREDIS ONLINE Widget

To view the content of this widget, you must be logged in to your account. If you already have an account, click on **Connection** 

button and enter your username and password otherwise, create one.

(see the article "Heredis Online")

Once connected to your account, this widget displays the date of the last publication of your file. You can access it directly by clicking the link "**show website**".

You can see it has been a while since the last publication? You can publish at any time from the dashboard by clicking the **Publish** button .

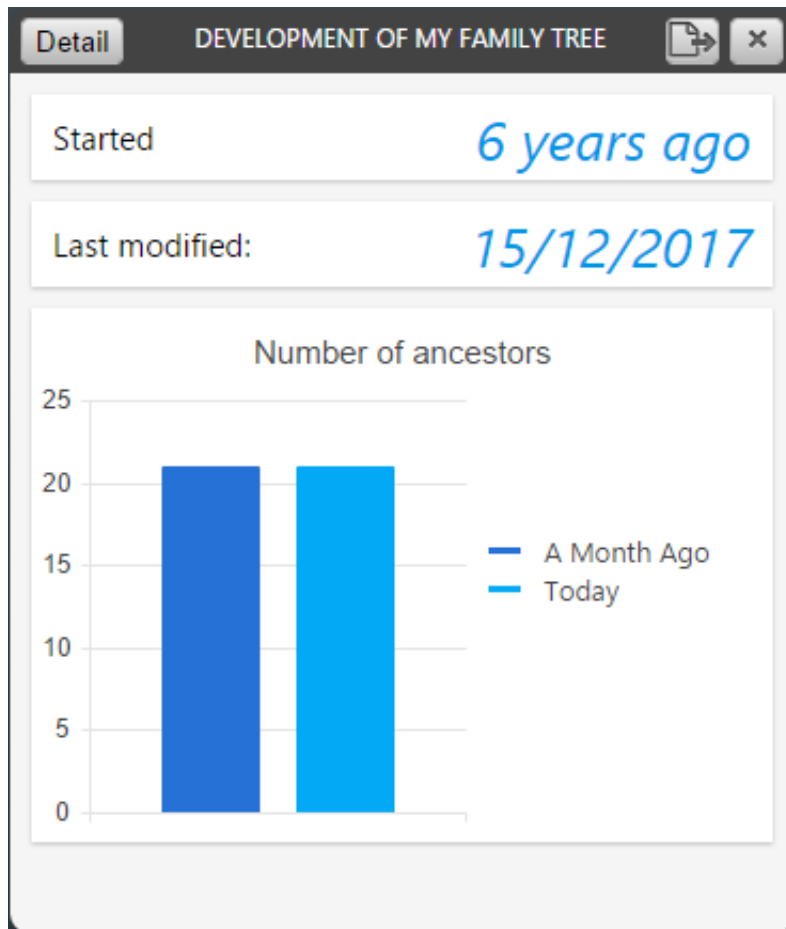
The detailed view shows you some new information. The first section shows you what you have recently be done on the open file: the last time you published it, the number of persons, of unions, of sources it contains.

All sections are foldable, just click on the title banner of the section to hide or display it.

If you work on multiple genealogies, the next section lists the other publications and the online photo albums with a preview of published pictures.

DEVELOPMENT OF MY FAMILY TREE widget

Simple view of Development of my family tree



This widget shows you the evolution of your file in time:

- The date when you started your work, referring to the first person you created or imported in Heredis.
- The date of the last modification
- The number of ancestors (direct line) and persons found.

In the detailed view, a first chart shows the evolution of the number of ancestors and persons on a fixed time scale. The second chart shows the same data but on a variable time scale based on the date of the establishment of the persons in your file.

You can also check in this view 2 lists of persons, the list of the 10 last persons you added, and the one of the 10 last persons modified.

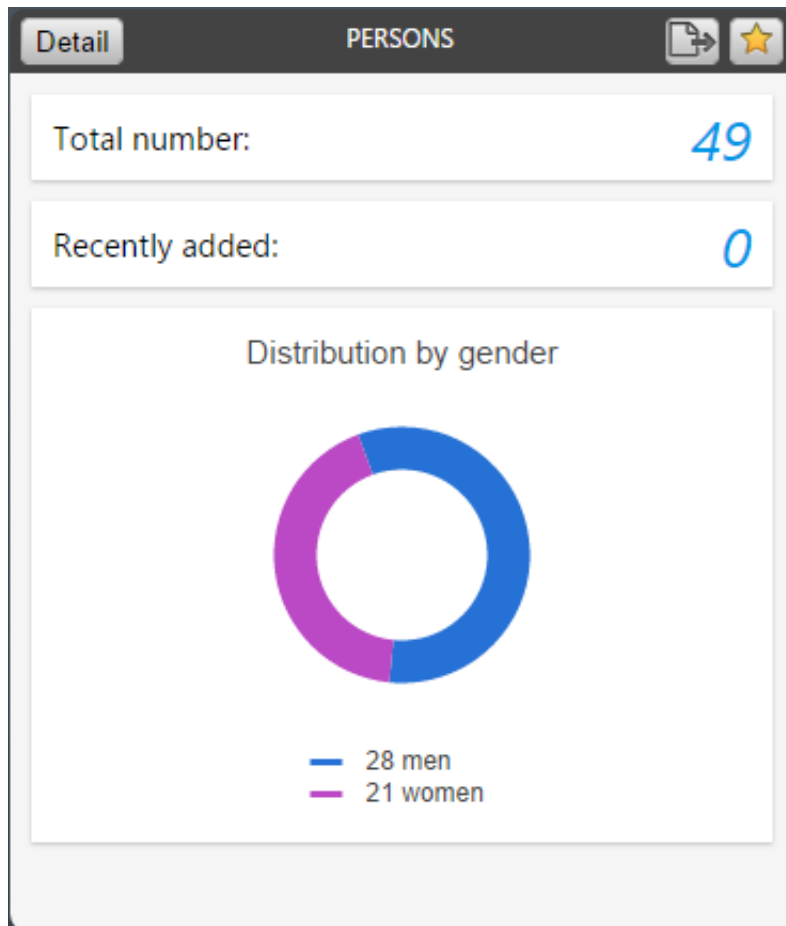
By clicking on these persons, you navigate on them in the Immediate Family.

PERSONS widget

This widget shows the total number of persons in your file and those added recently.

In the simple display, a graph shows the distribution of persons by gender.

Simple view of the Persons' widget



By entering the detailed mode, you can access:

- The «**Progress**» chart, which informs you about the quality of your family tree and in particular on the percentage of complete persons.
“3” is for the persons with the 3 main events completed, meaning you found the birth, marriage and death dates.
“2” is for persons with only 2 main events completed
“1” is for the persons for whom you completed 1 main event
“0” is for the person for whom you have not found any event

The notion of complete is directly related to Heredis’ preferences. From the menu **Heredis>Preferences> Appearance**, define what a complete event is for you. Heredis will then take these parameters into the «**Progress**» chart to determine if an event is complete or not.

- To the general information that will allow you to easily answer questions on your family history: who is the oldest person or the youngest among your contemporaries? Who had the longest or shortest life? Who was the youngest or the oldest when they got married? Which couple had the largest family...

Every section is foldable, just click on the title banner of the section to hide or display it.

EVENTS widget

Simple view of Event's

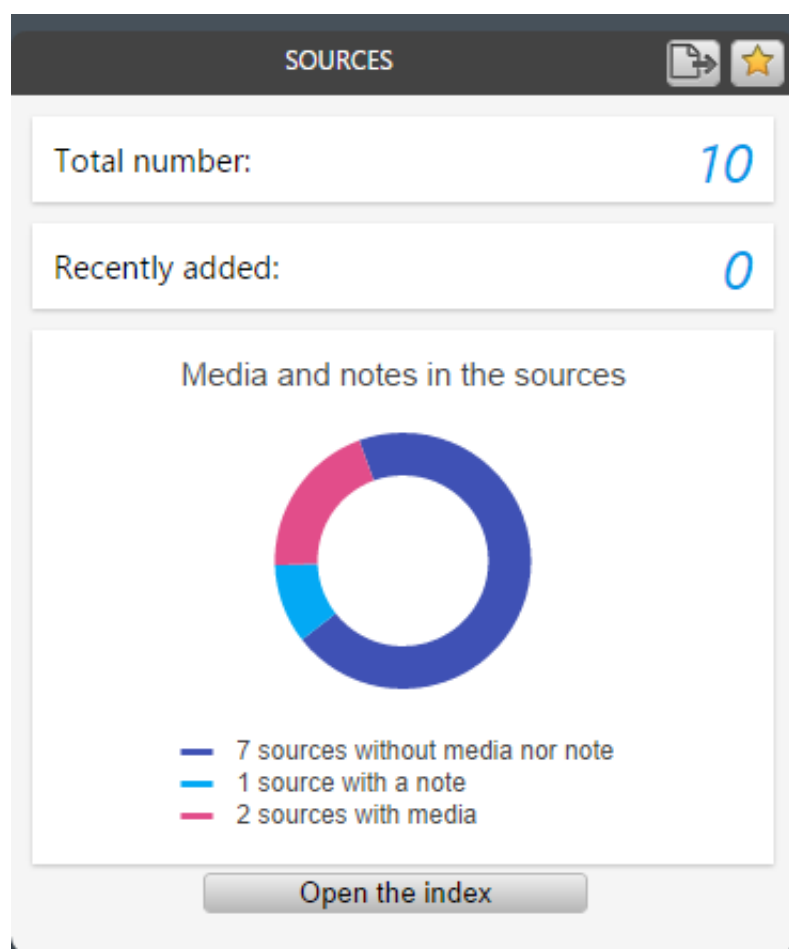
The simple version displays the total number of events, the total number of major events and the total number of family events.

The detailed version offers a zoom on the major events and displays in addition to the total number, the oldest event and the most recent event. For each event you can browse the person concerned with a single click.

SOURCES widget

The Simple Source Widget presents, in addition to the total number of sources and those recently added, a ring graph that allows you to analyze the quality of your sources.

Simple view of Sources' widget



In this graph, we distinguish sources without media nor note, sources having only a note, sources with only media, and sources with a note and media.

To access the list of all your sources, click the button **Open the index**.

PLACES Widget

In this widgets, the frequency is shown by a word cloud. In this type of representation, the most commonly used places, for example, are displayed with a font size which varies according to the number of uses. When hovering with the mouse, an info bubble indicates the number of uses.

Places widget

PLACES

Total number: **28**

Belleville Blackpool Boston Brisbane Camberley Canterbury
Dover Dunfermline **Edinburgh** Hackney
Hudson Hull Leith **London** Margate
Maryport Mexico City New York **Oxford** Pargolovo Paris
Plymouth Port-au-Prince Portland Québec Seattle Troy
Vancouver

Percentage of geolocated places

— 28 geolocated

Open the index

If you click on a place, Heredis opens the Index with this selected place and displays all information on it. The Place widget also indicates the total number of places in your file and the places that were not geolocated (places without latitude and longitude information).

You can directly access the dictionaries by clicking on the button **Open the index**.

NAMES, GIVEN NAMES, OCCUPATIONS and MEDIA widgets

These widgets indicate the frequency of given names and occupations, as well as the number of uses in the genealogy file.

Names, Given names and Occupations' widget

SURNAMES

Total number: **24**

BAKER BERNSTEIN von BORK CAREY CARFAX DAVIES DAVIS
DOBNEY GREGSON HAYES HENRY KAGANOVITCH LOWENSTEIN
MORLEY MULLAN de NEMOURS PINKERTON ROCTON RUCASTLE
SMITH **THOMAS** WALLACE WATSON WRIGHT

Open the index

GIVEN NAMES

Total number: **47**

Adam Adrian Alice Andreas Andrew Angelina **Ann** Anna Brenda
Bruce Charlotte Christian Christopher David Edward Elias
Elizabeth Elsie **George** Gilbert Glenn Helena Henry
James Jean Jeanne John Jonathan Josephine Kate Kristen
Marion Mary Matthew Michael Paul Paula Peter Reginald
Reuben Sacha Samuel Shannon Thomas Violet Vivian William

Open the index

OCCUPATIONS

Total number: **20**

Anesthetist Bookseller Chemist Clerk Developer Doctor
Editorial manager **Film director** General practitioner Journalist
Notary **Novelist** Office manager Physician Physicist
Post office worker Sales manager School teacher Violonist
Wine merchant

Open the index

For the Names, Given Names, and Occupations widget, the frequency is represented by a word cloud, just like for Places.

The Media widget is a ring-shaped chart indicating used and unused media. For all of these widgets, you can directly access the indexes by clicking on the **Open the index** button.

Statistics tab

In this tab, Heredis offers various genealogical and demographic analysis.

Statistics' tab




To access this function, from the dashboard, click the **Statistics** button or select the **Documents > Statistics** menu or click on the statistics button  directly from the toolbar, if you personalized it.

The different analysis available are grouped into four widgets, **Births and Deaths**, **Surnames and Given names**, **Families** and **Generation count**...



In the simple version, these widgets present a simplified graph on births / deaths, the most common

surnames, the average age at the first union and the ancestors count of the root person or the central person of your file.

You can easily export each chart displayed in PDF or PNG format by clicking on button  located in the title bar, to share it or document your genealogical work.

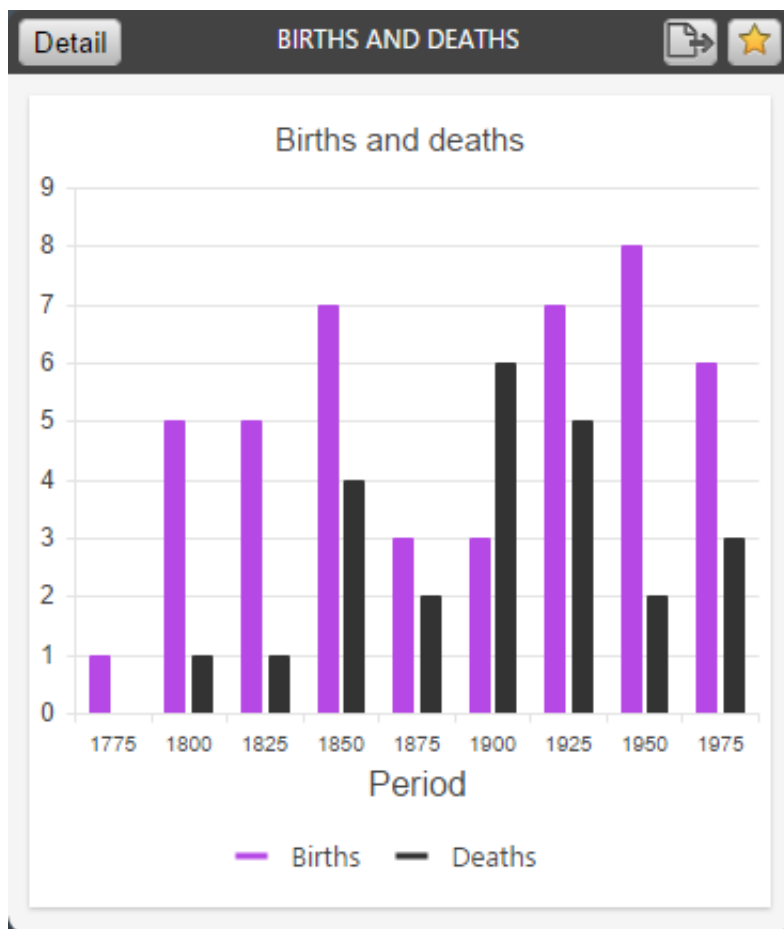
In the detailed version, each widget gathers different analyzes and displays the graphs and data tables associated with them.

In order to use this data outside Heredis you can:

- export all the charts and data tables of the widget by clicking on the button , located in the title bar of the widget. Heredis displays an overview of the widget you can save to PDF.
- export a specific data table by clicking Details then on the button  in the title bar of the data table. Heredis suggests that you save this data in Excel format on your computer. You can then analyze them using your spreadsheet.

BIRTHS and DEATHS widget

Births and Deaths' widget



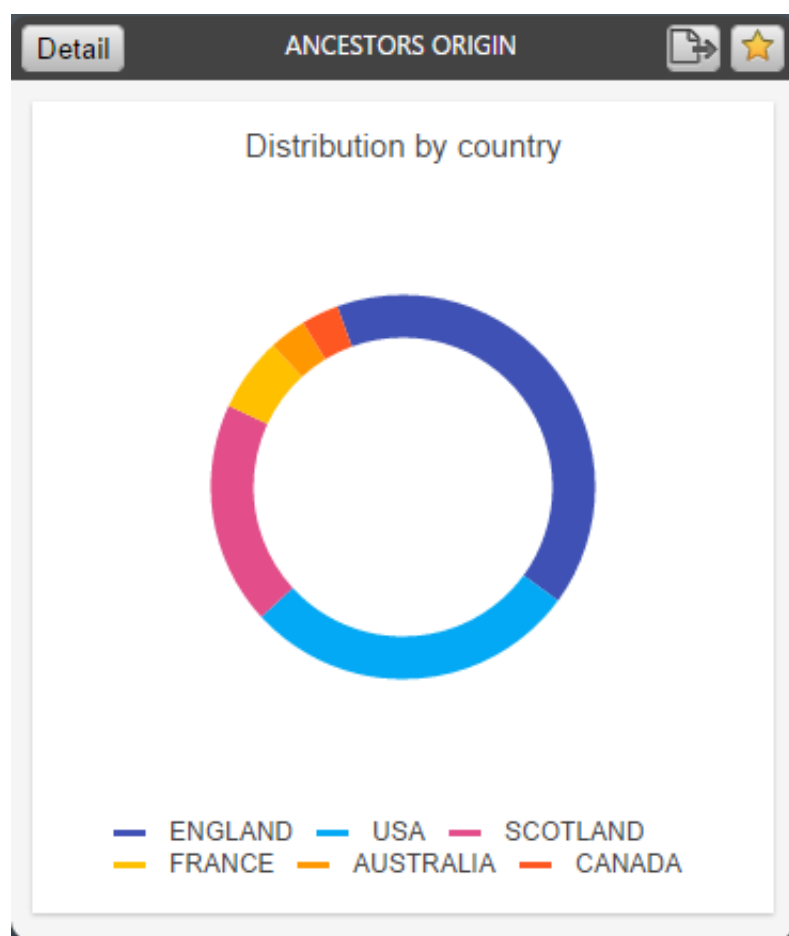
This widget contains the following analyses: distribution of births and deaths, life span and census.

You can choose between one display per period with different possible intervals or one display by month according to what you want to highlight from your analysis.

In the Census widget, Heredis displays the number of persons who have lived in each period, based on their main events of birth and death on the one hand and the maximum age at death of the general preferences of Heredis on the other.

ANCESTORS ORIGIN widget

Ancestors Origin's widget



This widget allows you to visualize the distribution by country, state/province, and county of the persons in your genealogy.

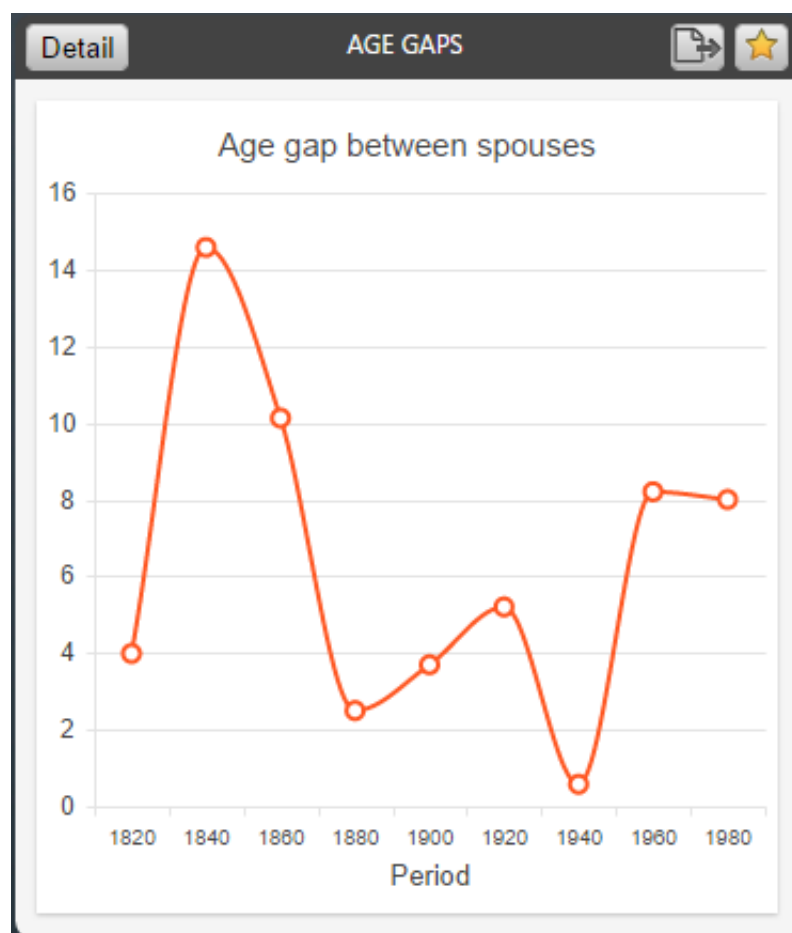
If you have selected **Entire File** as the Scope, the analysis will include every single person in your file. You can choose to narrow it down to the ancestors of the root person or of the primary person in your genealogy by setting the Scope to **Direct-line Ancestors** or **Ancestors**. To modify this option, click on the indented wheel in the upper right corner.

In the simple view widget, Heredis groups the persons according to their place of birth and displays a ring graph showing the most representative data by country, state/province or county.

If you click on the **Detail** button, Heredis will provide a full analysis by country, state/province and county along with a table indicating the number of persons found and the start/end years for the Period of appearance.

AGE GAPS widget

Age Gaps' widget



This statistical analysis focuses on the age difference between spouses and on the age gap between siblings in your genealogy. Just like in the previous widget, the scope of persons included in this analysis is set by you in the General Options of the dashboard.

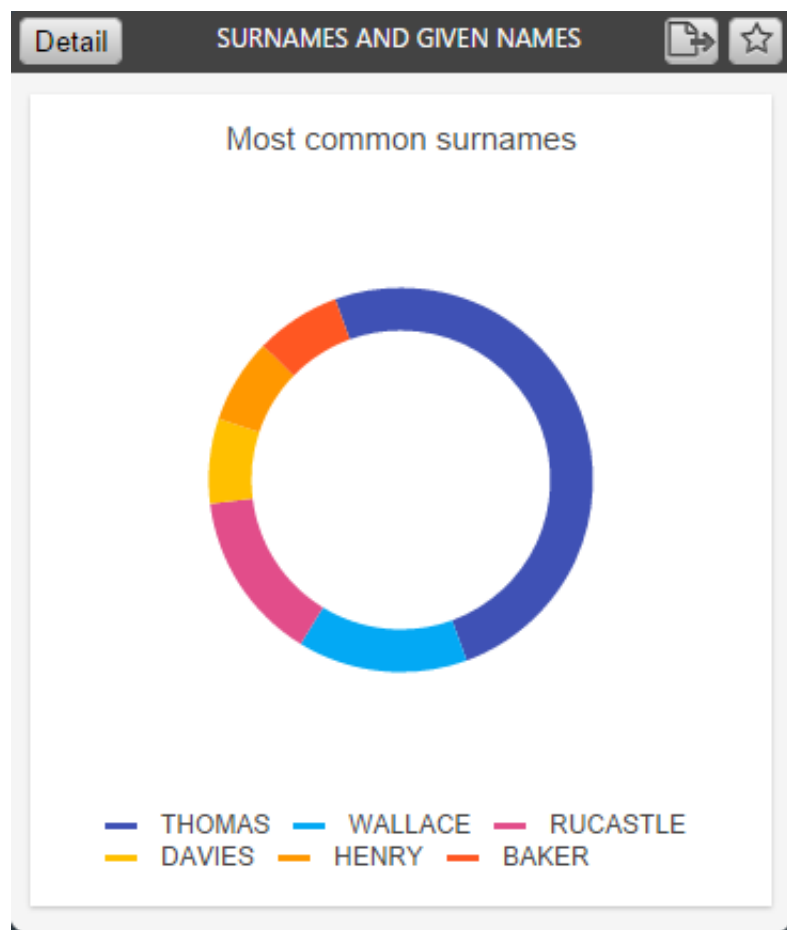
In Simple view, Heredis displays a line chart showing the average age difference between spouses. In Detail view, this same line chart is displayed along with a table filled with matching data and with another chart showing the average age gap between the first and last born among siblings.

Note: These charts only include couples with a minimum of one union entered with a date (Marriage, Religious Marriage, or other type of official marriage) and marital unions with at least two children properly entered with a date of Birth or Christening.

The default analysis interval is set to 50 years but you are free to modify this interval if you wish to adjust the data displayed in the charts and tables.

SURNAMES and GIVEN NAMES widget

Surnames and given names' widget

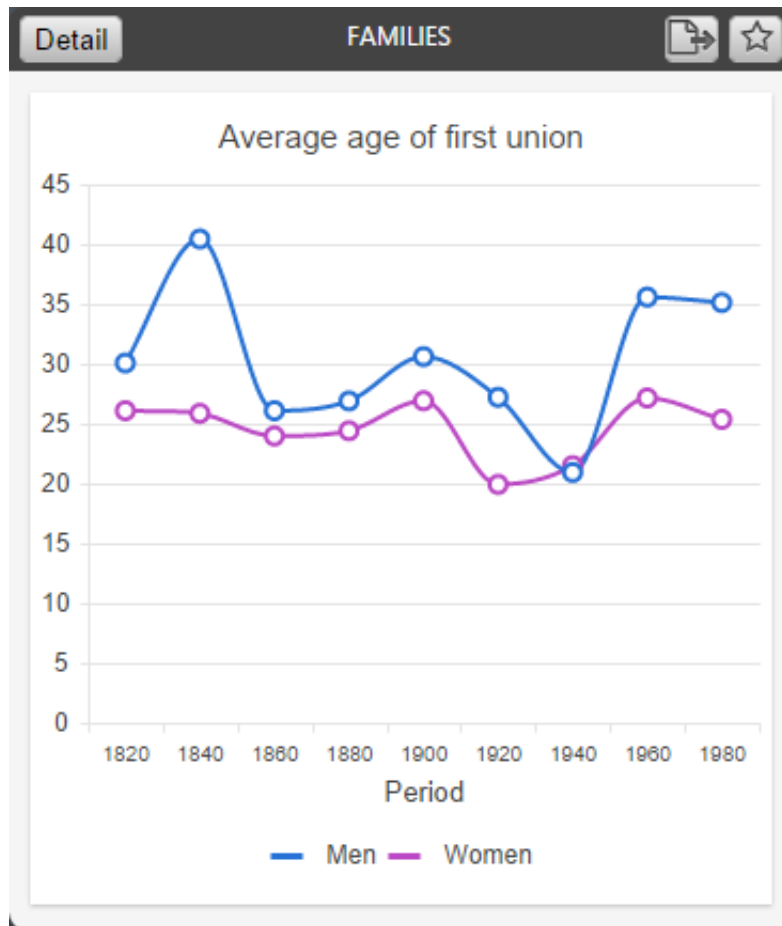


This widget provides you with a distribution of the most common surnames and given names of your genealogy that you can filter by gender.

On the graph, Heredis displays a selection of surnames, the most common given names and regroups all the others in the category «Other». For each surname / given name we specify on the graph, the number of holders and the percentage that it represents on the total names or given names of the file.

FAMILIES widget

Families' widget

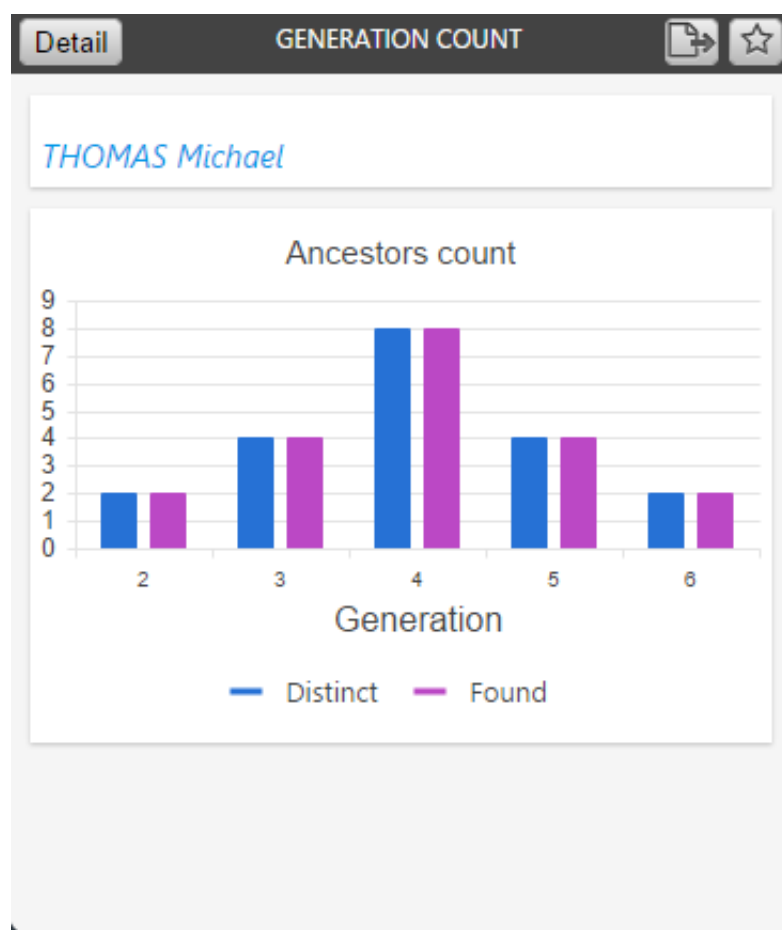


This widget contains the following analyses: average age at first union, number of children per family and the number of families.

You can choose between one display per period with different possible intervals or one display by month according to what you want to highlight from your analyses.

GENERATION COUNT widget

Generation Count widget



In this widget, Heredis offers to analyze the direct ancestors and descendants of root person of your file, if you selected «Entire File» or «Direct ancestor line» in the options of the dashboard, if not then the ascendants and descendants of the primary person if you selected «Ancestors».

The display, by generation, of the number of ancestors and descendants, found and distinct, makes it possible to highlight duplicate lines in your family tree.

What is a duplicate line? Everyone, in their family tree, has a real number of ascendants that is lower than the theoretical number of ascendants because we descend several times from a same person because of marriages between more or less close cousins, we are then in the presence of a case of duplicate lines. Hence the importance of putting forward the distinct ancestors or descendants: when they are inferior to the found ancestors or descendants, it is because there is a duplicate line.

Note: Changing the period and the analysis interval applies to all charts of the widget. All events with a calculated date are excluded from statistical analysis.

Search Tracking Tab

Heredis displays, by generation, indicators of progress concerning the persons found and the level of completion of their major events, birth, union and death.


To display the Search Tracking, from the dashboard, click on the Search Tracking page , or select **Tools**

menu > **Search Tracking**, or from Heredis' toolbar click on the  button.

Search Tracking Tab

Ancestors of THOMAS Michael G. (06.02.1933 -)													
G2		Ancestors found: 2, findable: 2		Search progress		Found ancestors							
Ahn. #	Surname	Filiation	Birth			Family			Death			Note	Modified
			Date	Place	Source	Date	Place	Source	Date	Place	Source		
2	THOMAS Christopher E.		13.05.1910	Oxford (Oxfordshire)		22.11.1935	London (Greater London)		31.05.1991	Dover (Kent)			07.12.2017
3	RUCASTLE Alice J.		02.12.1908	Margate (Kent)		22.11.1935	London (Greater London)		31.07.1998	Dover (Kent)			10.05.2012
G3		Ancestors found: 4, findable: 4		Search progress		Found ancestors							
G4		Ancestors found: 8, findable: 8		Search progress		Found ancestors							
G5		Ancestors found: 4, findable: 16		Search progress		Found ancestors							
G6		Ancestors found: 2, findable: 8		Search progress		Found ancestors							

If you selected «**Entire file**» or «**Direct line ancestors**», in the general options of the Dashboard, Heredis lists the ancestry by generation of the root person of your file if not then the ancestry of the primary person if you selected «**Ancestors**».

Each generation has a synthetic view and a more detailed one. You can switch from one to the other by clicking on the arrow on the left .

On each generation, the following information is displayed:

- the number of the generation, G2 for generation number 2 for example
- the number of ancestors you found
- the number of ancestors that can be found. You found only half of the findable ancestors in generation 4, ie 4 ancestors out of the theoretical 8; therefore, you will be able to find only the parents of these 4 ancestors: either 8 potentially findable ancestors instead of the 16 theoretical. If, during your research, you find additional ancestors at generation 4, Heredis will automatically update your calculation.
- the duplicate lines (implex) of the generation, if there are any. Heredis shows here the number of persons appearing several times in the generation (shown in red in the detail view).
- the progression in the search for major events of persons. The orange progress bar **Search progress** allows you to see the progress of your research by making a report of the information you hold about the major events of found ancestors in all of the information you should collect on these found ancestors for them to be considered complete. Heredis takes into account your preferences.

Event Icons


The event is complete if there is:


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

• the percentage of ancestors found. A purple progress bar **Found Ancestors** indicates the percentage of ancestors found in relation to findable ancestors.



At a given generation, if you notice that the number of found ancestors is less than the number of findable ancestors, unfold the previous generation and locate the gray filiations icons. They tell you about individuals with no parents, who are therefore not found and which will not figure in the next generation.

When you click on a generation to display its **detailed view**, Heredis lists all ancestors ordered by Ahnentafel number. If you selected «Ancestors» as the scope in the dashboard options, this number may not be entered. Other information displayed in detailed mode are:

- The surname and given name of the person. In the case of a duplicate line, they are displayed in red.
- The filiation icon  indicating the presence or not of the parents of the person.
- Dates, places and sources for major birth, union and death events
- The note icon which indicates the presence or absence of a search note. By clicking on this icon you can view, edit or add a search note.
- The date of the last modification of the person. Click on the header of this column for it to be sorted in descending order, you will thereby know on which individual you worked recently. Heredis automatically colors the boxes of so-called complete events based on the preferences you have defined in the software.

Note: Remember to refresh the information of this page by clicking the  button, so the changes you just made are included.


Heredis helps you to visualize distinctly and quickly the events considered as complete from those incomplete, based on the preferences you defined on the software. Heredis colors automatically the events boxes so called complete.

Note: You know you will never find the information you need on a person and you declared it complete (**Search Tab**> **Search Help**> **Button** ), it will appear visually as complete in the search tracking with this button  displayed in front of the name of the person to report that you have forced his status to complete. This person will also be counted in the percentage of completion.

A Common-Law Union is considered by Heredis as a complete union event.

The last column indicates the last time you updated that person. This information is useful to know what was the latest ancestor you worked on. You can sort out the column by decreasing date to have the latest date first.

Heredis proposes by default in the preferences a maximum age at death fixed at 90 years for men and 100 years for women. If one of your male ancestors is still alive after 90 years, it will not be considered complete. Your **Search Tracking** will indicate that it is missing the date of death. Simply change this in «**Preferences - Consistency**» to increase maximum age at death for your entire file.

The table «**Search Tracking**» can be exported in Excel format: click on the button . Of course, the data in this Excel table will not automatically update.

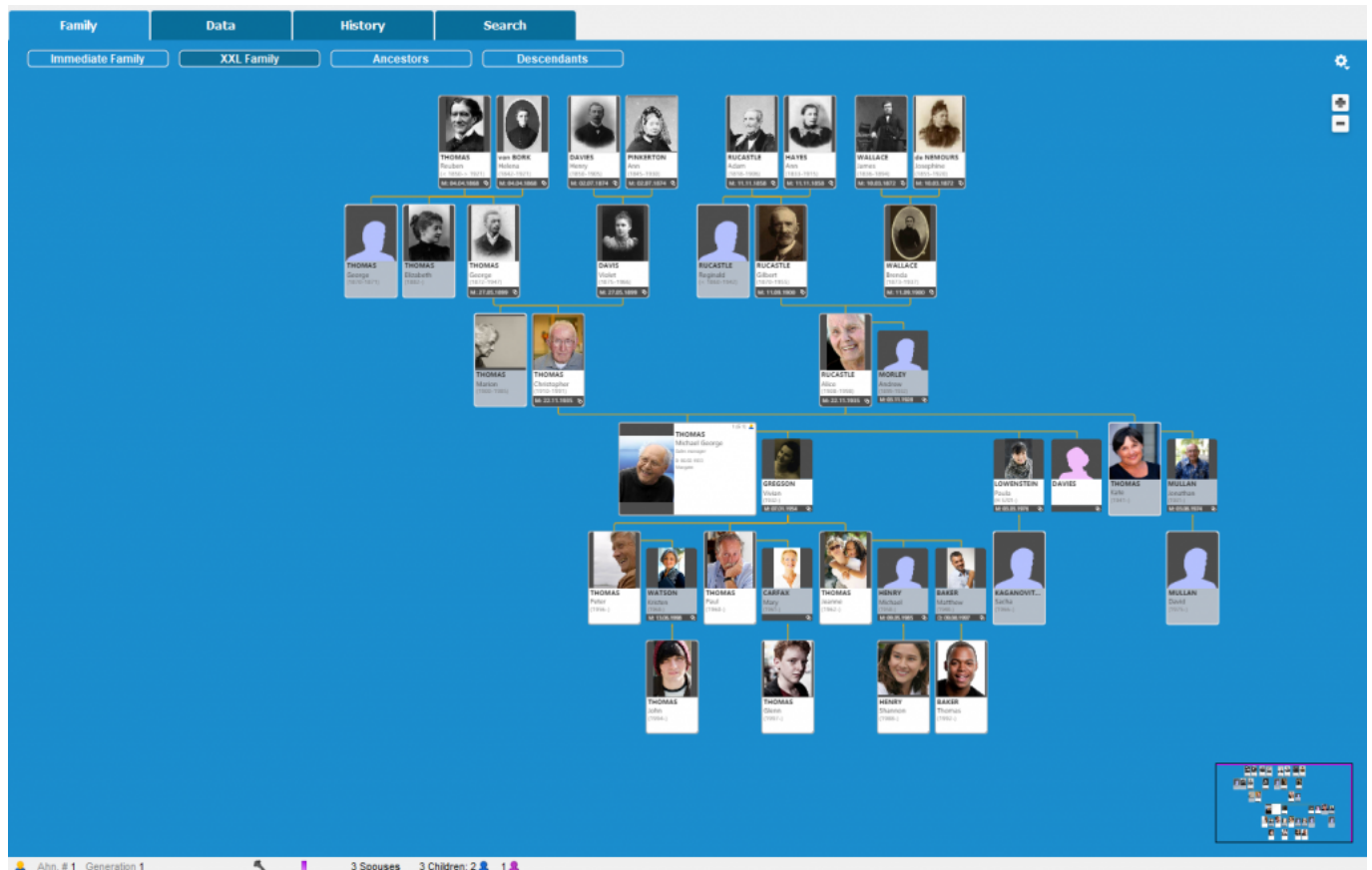
This function has a simplified view in the **My Dashboard** page, where you can display a progress graph of search progress and ancestors found limited to the first 15 generations.

Click the  button to export this chart to PDF or PNG.

Not only can you visualize the primary person's family – parents, grandparents, great-grandparents, spouses, children – but also all the relatives that might have been around him/her: you'll get to display a true XXL view!

Persons displayed

XXL Family View




Around the primary person, you will see, generation by generation:

- In ascendance:
 - his/her great-grandparents
 - his/her grandparents, their brothers and sisters (great-uncles and aunts of the primary person), their other spouses
 - his/her parents, their brothers and sisters (uncles and aunts of the primary person), their other spouses (father-in-law, mother-in-law of the primary person)

Note: sometimes the siblings will not be displayed chronologically, unlike in other parts of the tree, because a parent's sibling(s) cannot be inserted between the two parents - otherwise the tree chart would not be legible.

- In descendance:
 - his/her children, children from another union, his/her nephews and nieces


his/her grandchildren, those of his/her brothers and sisters, half-brothers and half-sisters and cousins, from the  2019 version his/her great grand children

Note: You can also display the descendants of other spouses, grandparents and great-grandparents.

- Concerning generation of the primary person:
his/her spouses, brothers and sisters, half-brothers and half-sisters, stepbrothers and stepsisters, and cousins
All persons are always displayed clearly distinguishing their affiliation or not to the main line. The primary person has a bigger box, centered on your screen. Background colors of the boxes change according to the affiliation or not of the person to the main line of the primary person.

You can fold the left or right panels to gain more space and reveal the XXL Family.

If one of the ancestors of the primary person had multiple spouses, his/her box and his/her spouses's are marked with a colored banner.

The revealed tree includes persons you do not want to see appear? Click on the indented wheel  button to hide some persons: the great-grandparents, relatives, children unrelated to the primary person's bloodline, the descendants of cousins or grandchildren.

Available information

"Focus" or "unfocus" in this dynamic tree for more or less details for each displayed person. In order to do that, use the mouse wheel, press the + or – button on your keyboard or click on the + and – buttons in the upper right corner of the window.

According to the focus level, Heredis display every person:

- his/her main media
- his/her surnames and given names
- his/her occupation
- his/her birthdate, birthplace, deathdate and deathplace and age at the death.
- the icon indicating if the person is part of the [Ahnentafel](#) line

If the displayed person is an additional spouse that you found, the information on the main union event will be displayed in the banner at the bottom of the box.

Note: Heredis memorizes all your settings to allow you to display the XXL Family format that satisfies you the most.

Navigation

From **XXL Family**, a simple click on a displayed person allows you to put this person as the primary person or to navigate to his/her relatives.

As everywhere in the software, you can also navigate from a person to another thanks to the **Navigation**


panel or from the **Person's** index by double-clicking on one of them.

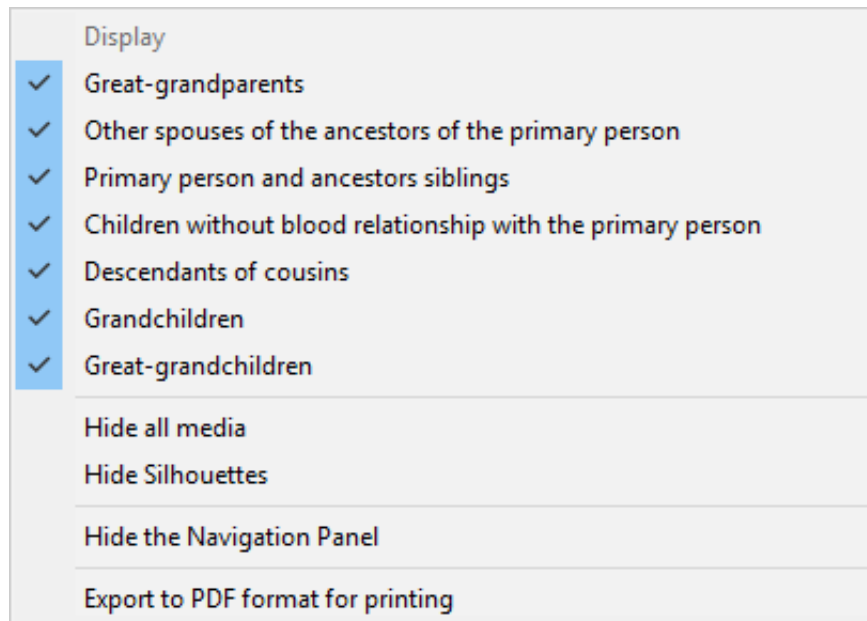
If all family members are not shown on the screen, you can navigate in the tree by pressing and holding down the left mouse button and by moving the cursor to the right or the left, up or down, then let go of the mouse button.

You can also move in that tree thanks to the preview displayed at the right bottom of the navigation thumbnail. Select the pink frame with the left mouse button, by moving it, you navigate in the tree.



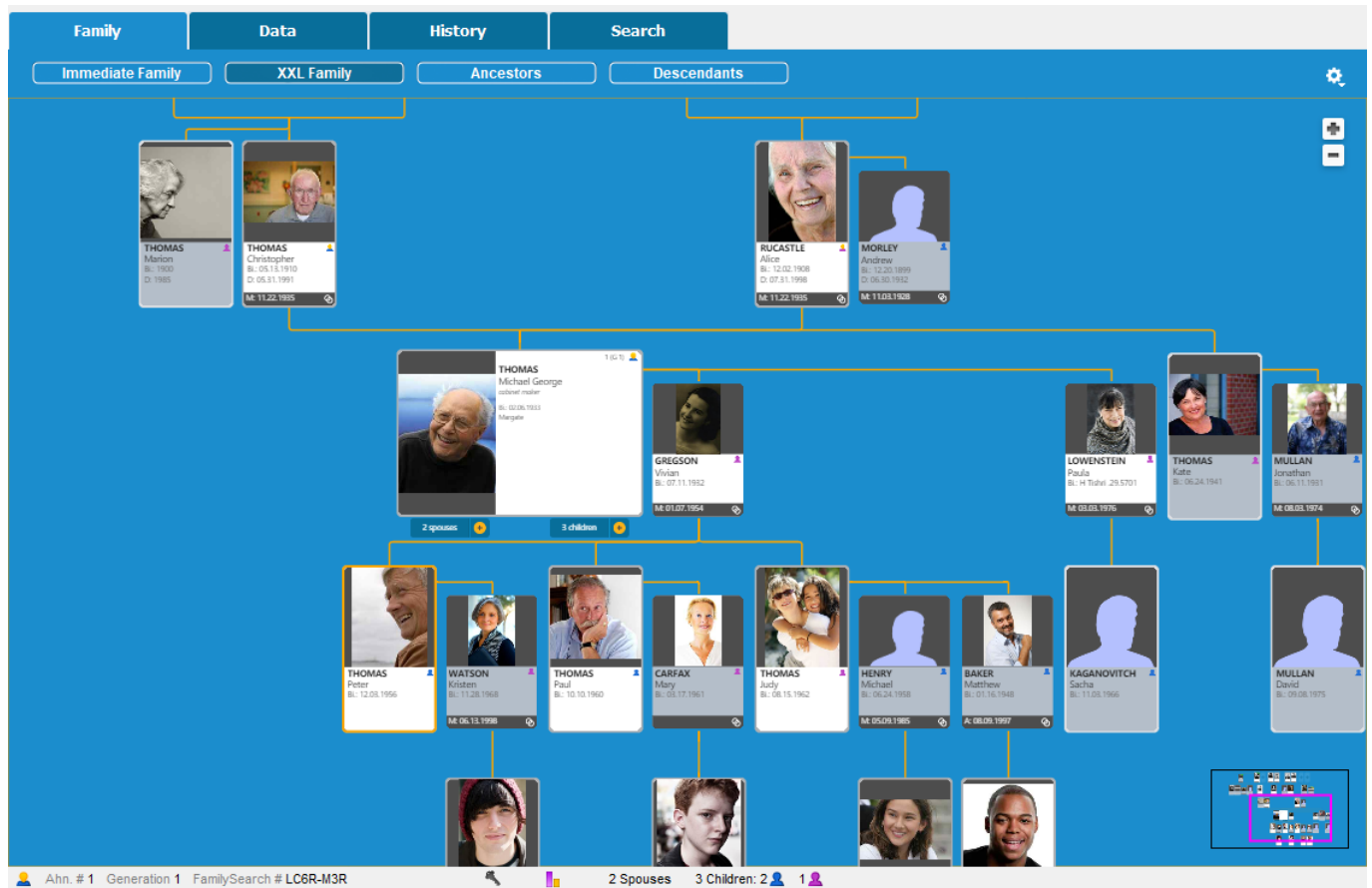
2019 version : Hide or display media and silhouettes

The XXL Family displays the main media for each person in the tree. You can decide to hide the media by clicking on the indented wheel button , then **Hide** all media. If some persons are without a media, Heredis is defaulted to display a silhouette instead. You can choose to hide them or to display them again at any time from the indented wheel by clicking on **Display/Hide Silhouettes**.



2019 version : Adding spouses and children to the primary person

Heredis allows you to add spouses and children to the primary person directly from the XXL Family view. To do so, click on the + sign located below the primary person's box.



The other actions in the contextual menu


When you click the right button on a person, you can also:

- print his/her individual sheet
- define him/her as the Root person
- add him/her as a favorite in the bookmarks

To add membership at this family, click on the add button from the toolbar or directly in the tree, or click on the **+** button displayed in this view, to complete the direct ascendance.

Export and import XXL Family

Your tree is ready. You hid the persons that you do not wish to show. You applied the focus level that convinces you in order to display the information you believe are essential, export this tree so you can print it.

- Click the indented wheel 
- Choose to **Hide the Navigation Panel**
- Click **Export to PDF format for printing**

A new window opens to preview your tree. You can access to the regular printing settings such as the

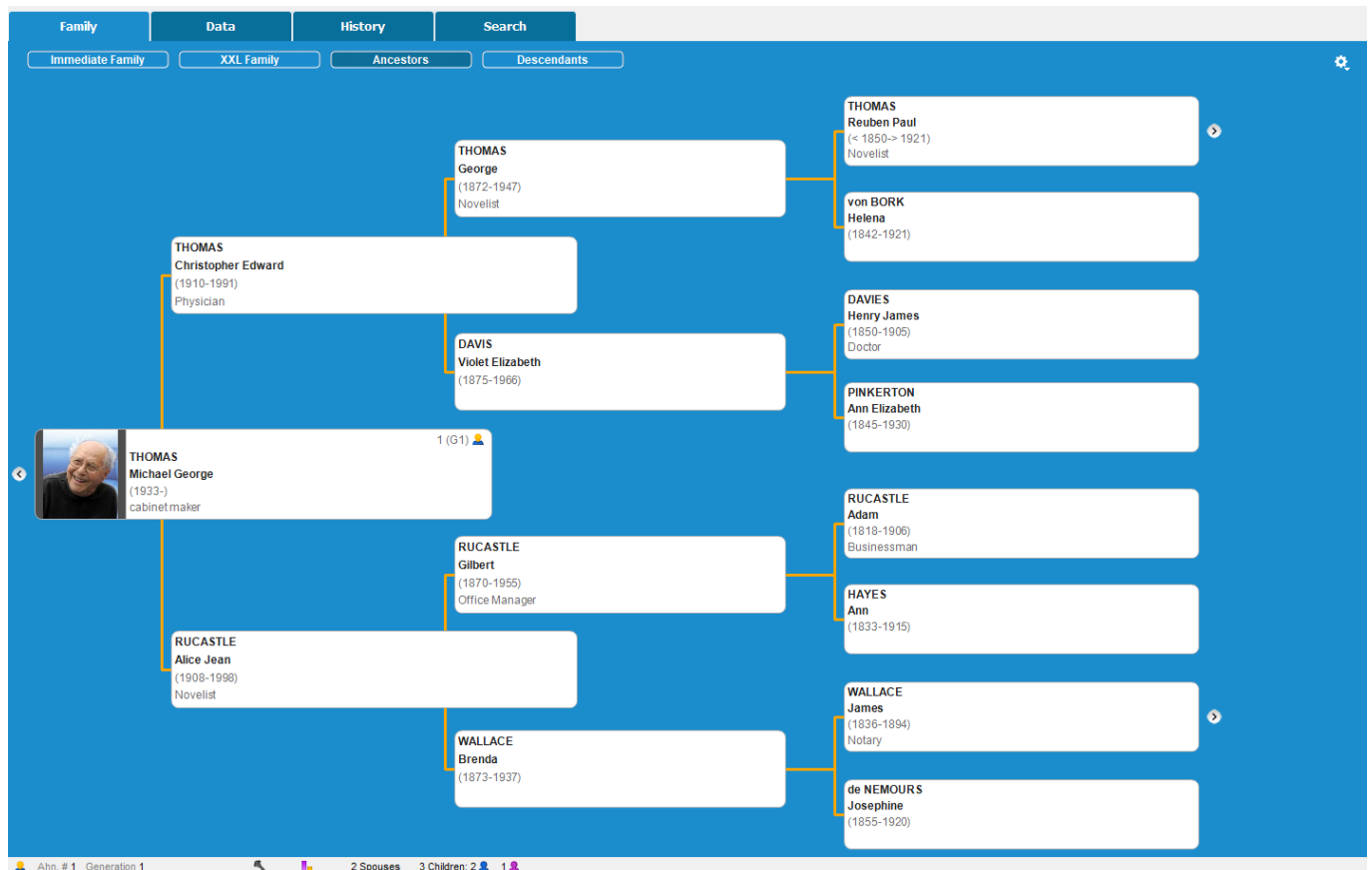
pages' display or the recovery, the choosing printing format, orientation of pages or the possibility to change the height and width of the pages.



Finally, click on the **PDF file** button, and you can save the file at PDF format to print it from home or with a professional's.

Under the **Ancestors** dynamic view, Heredis will automatically color code the banner of each box in the family tree, based on the place of birth of the persons displayed. Heredis will also let you see the criteria on which the color coding is based, that is either the persons' City, County, State/Region, or Country of birth.

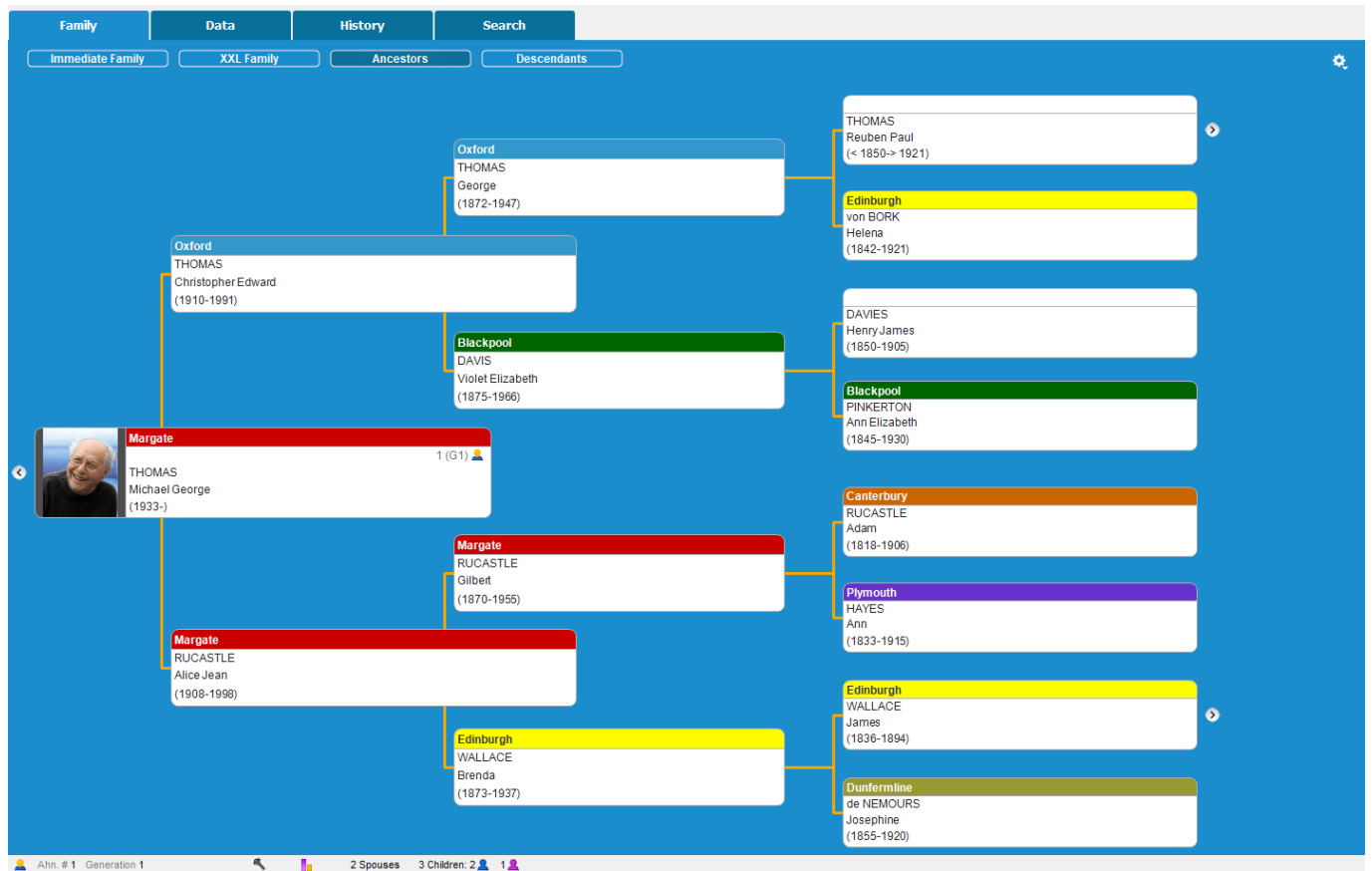
How to display the Location Tree

Standard Ancestors Tree Chart




- Click on the **Family** tab > **Ancestors**, then on the indented wheel .
- You can now select **Location Tree**. Heredis is defaulted to color code each banner based on each person's City of birth but you can, if you wish to, switch to another option such as **County**, **State/Region**, or **Country** of birth by clicking on the indented wheel  in the upper right corner of the screen and selecting > Location Tree.


The New Location Tree



Note: When no data has been entered for the person’s place of birth, his/her banner is displayed on a white background.

You can choose to increase or decrease the number of generations displayed in this Location Tree by clicking on the wheel  and selecting the desired option.

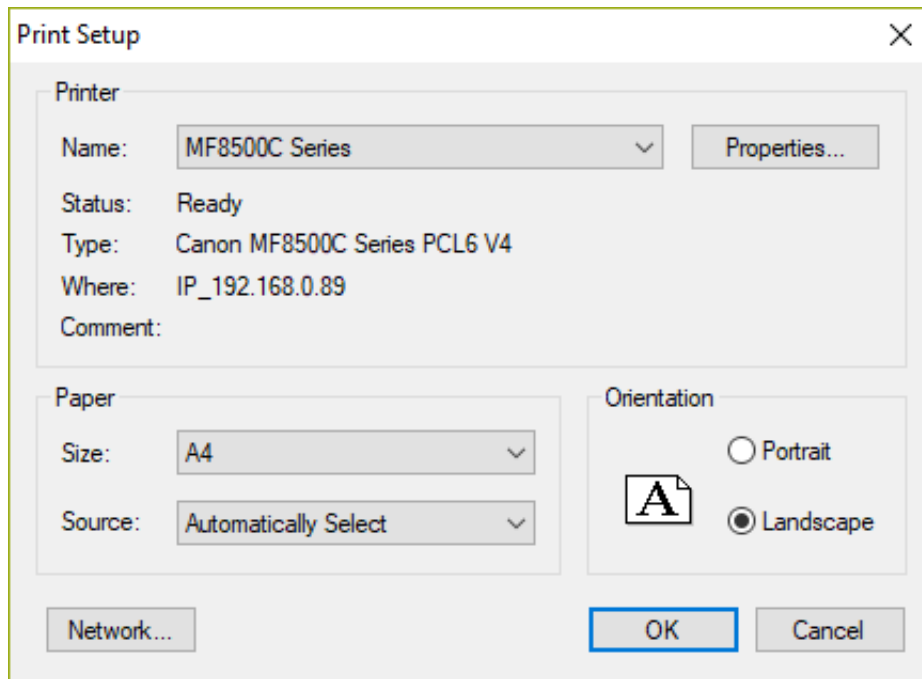
Printing the Location Tree

You can also choose to print the Location Tree by clicking again on the indented wheel  and then on Print.

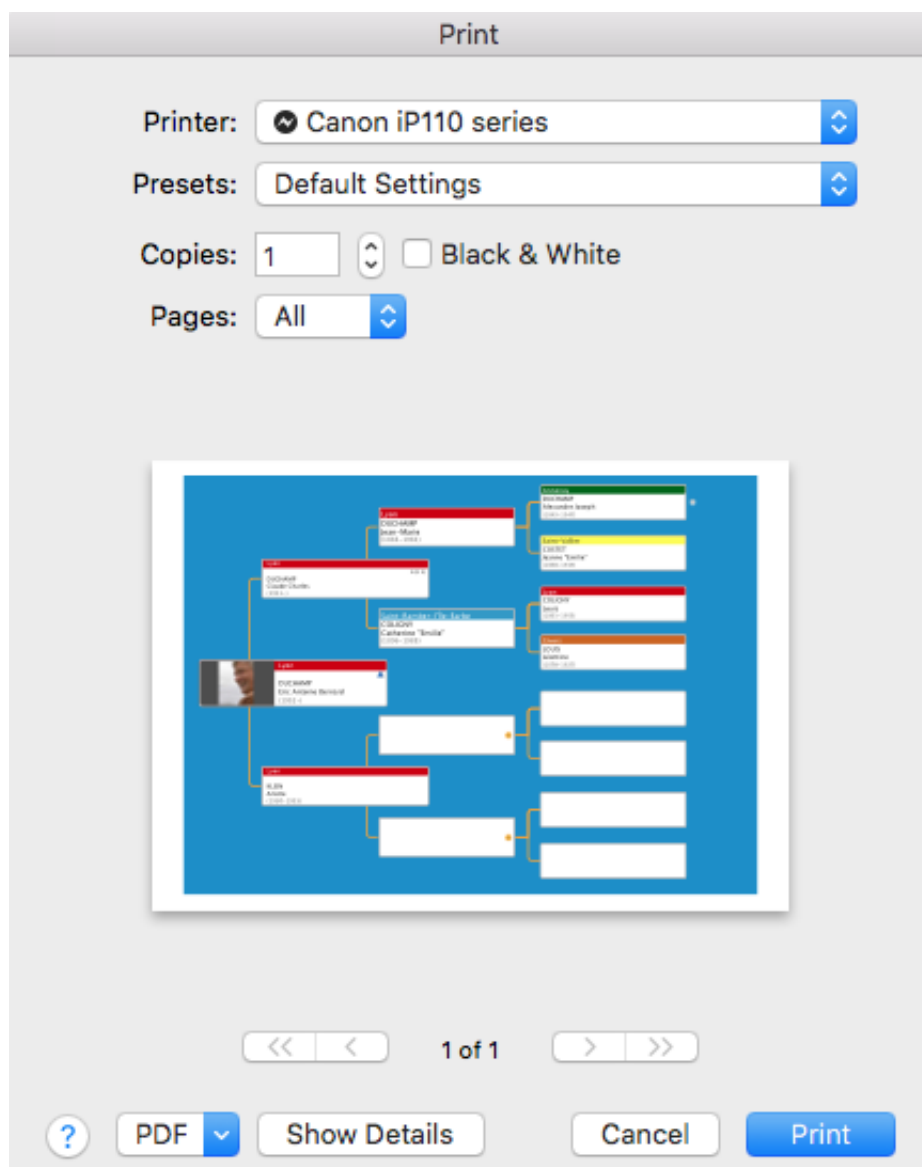
(Mac only) The printing format will depend on the size of your screen.

The Print window of your operating system pops up.

(PC) Print window



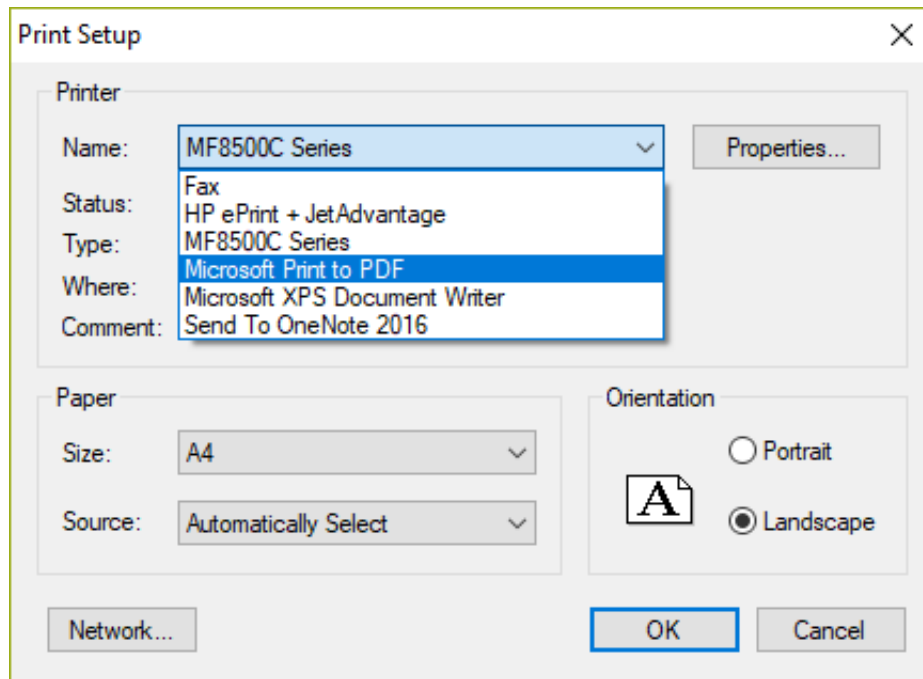
(Mac) Print window



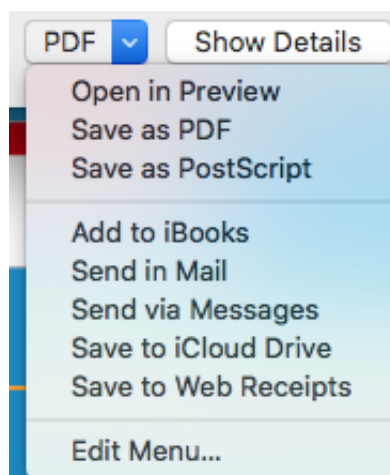
Export to PDF

(PC) If you wish to export to PDF, instead of choosing your printer, select Print-to-PDF or any other PDF add-on installed on your computer.

(PC) Export to PDF



(Mac) Click the **PDF** button in the lower left corner of the Print window then select **Save as PDF**.



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.

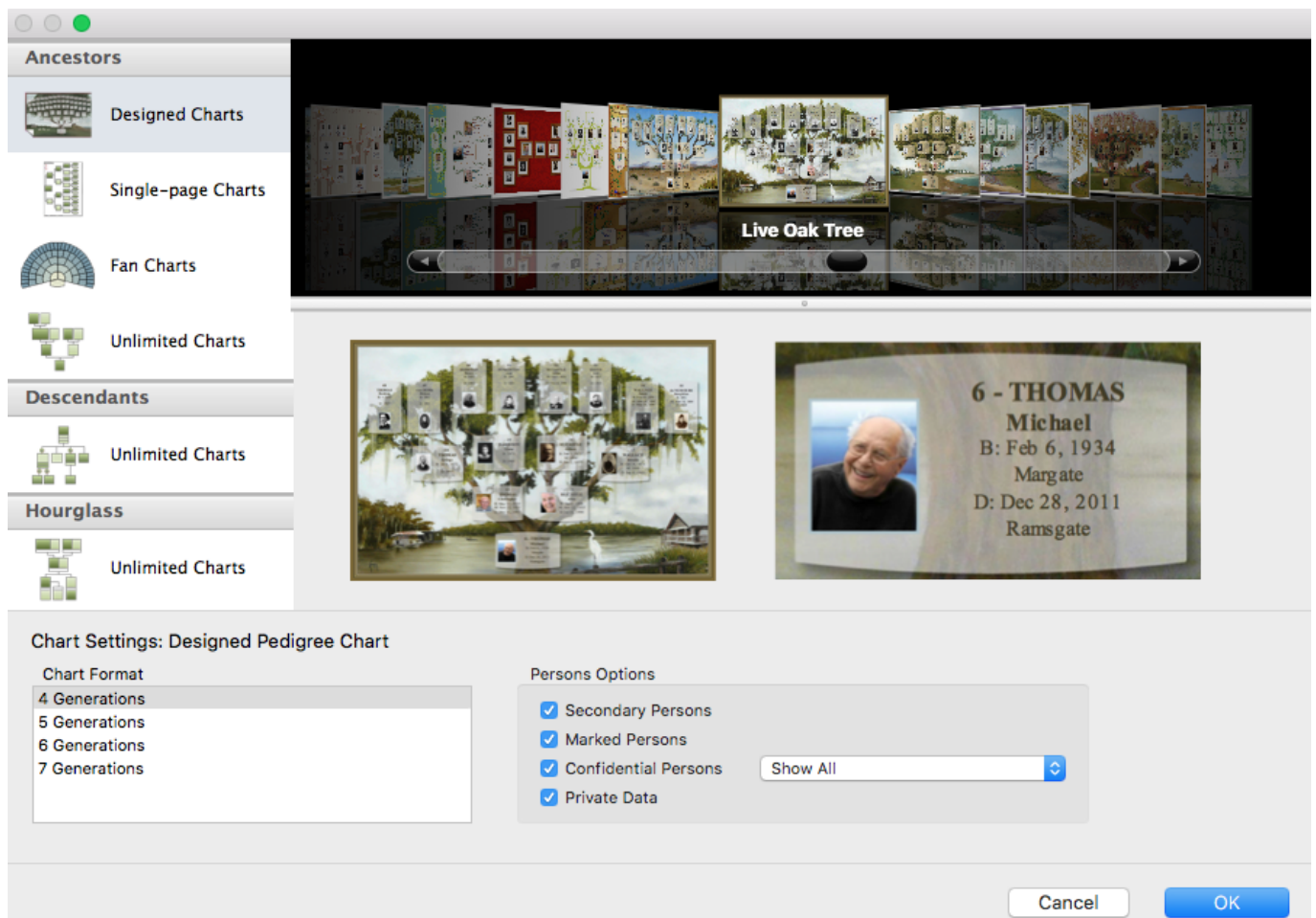
Choose **Documents > Charts...** or click **Charts**  on the toolbar to visually select the tree charts proposed by Heredis.

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.

Choice of tree chart

Choose your tree chart and the theme



In the displayed selection screen, choose the type of tree to build from the list.

Heredis proposes various types of tree charts, the size of which is predefined (from A4 to A0 or Letter to Quad demy). 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 coverflow. To facilitate your choice, Heredis displays an overall preview of the tree to be edited with this theme and a preview of a box. Scroll through the different themes by pressing the arrow keys.

The last used themes are preset for each type of tree chart.

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.

Note: Predefined tree charts are the artwork of artists so they can't be fully personalized.





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 form of removable panels specific to the various tree charts.

Toolbars and Menus

When the tree chart is displayed, the menus and buttons are different from those for data management.

Use the  **New** –  **Open** –  **Save** – **Page Setup** –  **Print** buttons for normal actions.

Display the buttons you most often use by choosing right click on the toolbar then **Customize toolbar**.

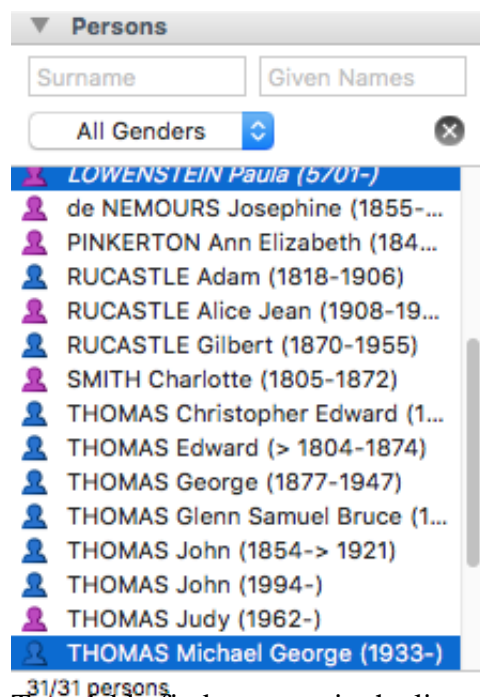


Use the tree chart menus to manage also the layout of the screen or the selection of people on the tree chart.

Info • You can create a new tree chart while an existing tree chart is already on the screen. Click the New button on the chart toolbar and select a new type of tree chart and a new theme, or choose File > New.

Persons Panel

The **Persons** panel of the tree chart contains a list of all individuals 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 and/or one or more given names. Refine the search by selecting from the pop-up menu, the gender of the person sought if the name is multiple.

The **Data** panel shows you a summary of the person whose box is selected. All information displayed here may appear in the box according to the type of content selected.

The **Preview** panel shows 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.

▼ **Persons**

Surname Given Names

All Genders ⌵ ✕

- BERNSTEIN Helena (1899-)*
- von BORK Jeanne (1863-1921)
- DOBNEY Anna (1818-1858)
- HAYES Ann (1833-1915)
- HAYES Ann (1833-1915)**
- RUCASTLE Adam (1818-1906)
- RUCASTLE John
- RUCASTLE Reginald (< 1860-1942)
- THOMAS Edward (> 1804-1874)
- THOMAS Elizabeth (Tic) (1882-)
- THOMAS John (1854-> 1921)

11/11 persons

▼ **Data**

Personal Data
Surname: HAYES
Given Name: Ann

Birth
Date: 1833
Place: Plymouth (Devon, SOUTH WEST, ENGLAND)

Death

▼ **Preview**

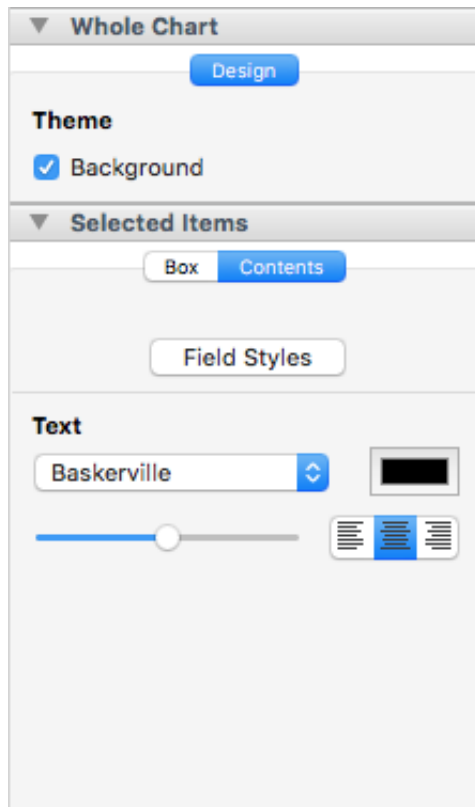
13 - HAYES
Ann

Birth: 1833
Plymouth (Devon)

Marriage: November 11, 1858
Plymouth (Devon)

Death: 1915
Margate (Kent)

Settings Panels



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 visual environment is not editable.


These panels allow either changes to be applied to the whole tree chart or changes to a given selection (one or more boxes).

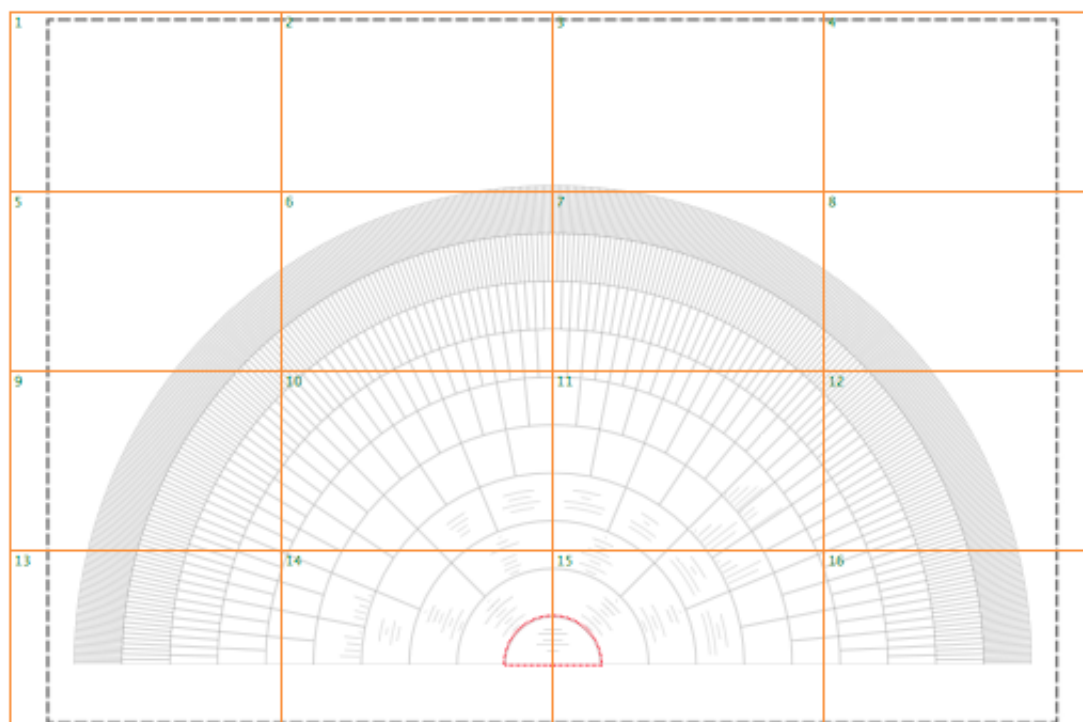
Display screen

The central area of the screen shows all the boxes of the tree chart, the background image and the frame of the tree chart.

To help you check and estimate the size of your tree chart, materialize the pages on the screen.

Unfold the **Print Setup** panel and select **Show Page Breaks** or choose **View > Show 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 or choose **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 **View > Zoom > Increase Magnification** or **View > Zoom > Decrease Magnification**. To return to the actual size of the tree, choose **View > Zoom > Actual Size**.

You may also select different levels of zoom on the bottom bar of the tree chart screen.

- Select a value from the pop-up menu or use the slider to change the zoom level. Heredis indicates the factor used to reduce or enlarge to the right of the cursor.
- Click the **100%** button to return to the real size of the tree.
- Hold down the **Option** (⌘) key and the cursor takes the form of a magnifying glass. With a left click, the tree chart grows, with a right click, the tree chart is reduced. You may also drag the mouse around a group of boxes to increase their size or use the mouse wheel up or down to enlarge or reduce.

Info • Remember to display the tree chart in full screen mode to have as much room as possible: click the **Full Screen** icon (green) on the screen bar of the tree chart.

Selection

Before making changes to a tree chart, first select the boxes to which they will apply. Depending on the type of change to be made, make individual selections or selections of a genealogical order.

- To select all boxes of the tree chart, choose **Select > Select All**. From anywhere in the tree chart, you can right-click the mouse and choose **Select All**.
- To select one or more boxes of the tree chart, drag the mouse cursor over the boxes to be selected.
- To select more boxes that are not contiguous, select the first box, and then, holding down the

Command (⌘) key, the additional box or boxes.

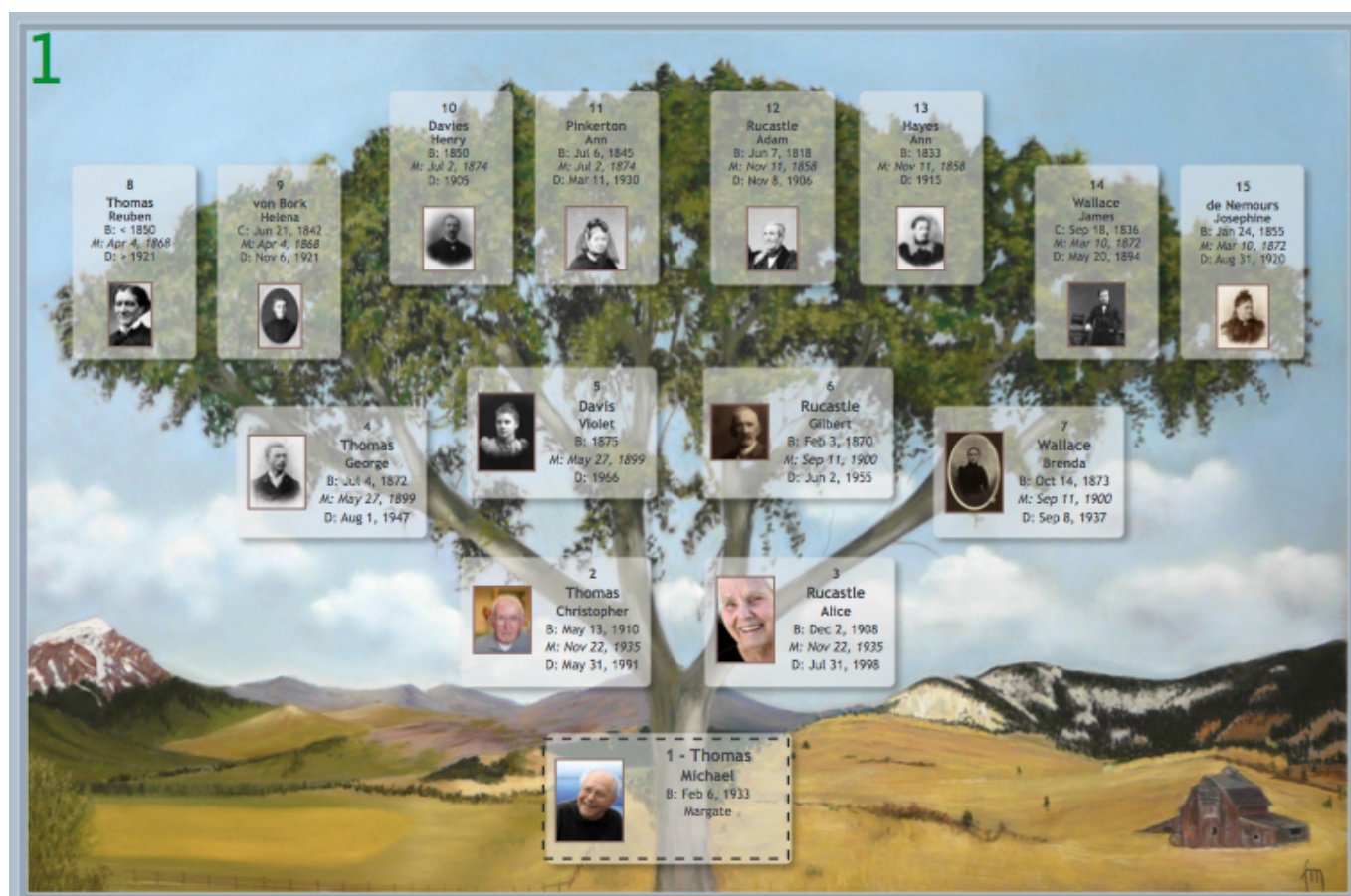
- To make genealogical selections from any box in the tree, right-click the mouse and choose **Select Men Only** (or **Women Only**, or **Person and All Ancestors**, or **Person and All Descendants** or **Generation**).

Info • Persons corresponding to the selected boxes are also selected in the **Persons** panel.

Format the tree chart

To make changes, display the tree chart panel column and the **Whole Chart** and **Selected Items** by clicking the disclosure triangle.

Designed Chart



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

Change the text formatting


1. Without delay, change the font, size, color and text alignment with the pop-up menu, the cursor and the buttons.

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.

2. Tick the **Picture** box to add the photo for the persons in all the selected boxes and format the photos (not available for fan tree charts)

Select the position of the picture relative to box text by clicking the buttons. Change the size of the picture with the cursor. Select the type of border for the picture.

- **No Border**: the image is displayed as you scanned it.
- **Border Style**: click the color box to choose a color for the border. Change its width with the cursor.
- **Frame Style**: click the **Modify** button () to select another frame image for the photo. In the panel which appears, use the arrow keys to display the various frames proposed. Click **OK** to apply.

Modify the fan tree charts

The fan tree charts propose the feature of being able to highlight a branch by shifting the alignment of generations.

1. Select the box at the base of the branch you want to highlight, starting from the second generation.
2. Click the **Box** tab in the **Selected** Items panel.
3. Tick the **Move Branch Forward** box.
4. To cancel the move of the branch, click any other box of the branch that was moved and untick the **Move Branch Forward** box.

Changes made to the chart are displayed immediately.

You can also consult our articles [\(Mac\) Print a tree chart](#), [\(Mac\) Save a tree chart](#), and [\(Mac\) Export a tree chart](#).

You can create as many graphical representations of your genealogy as you wish. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

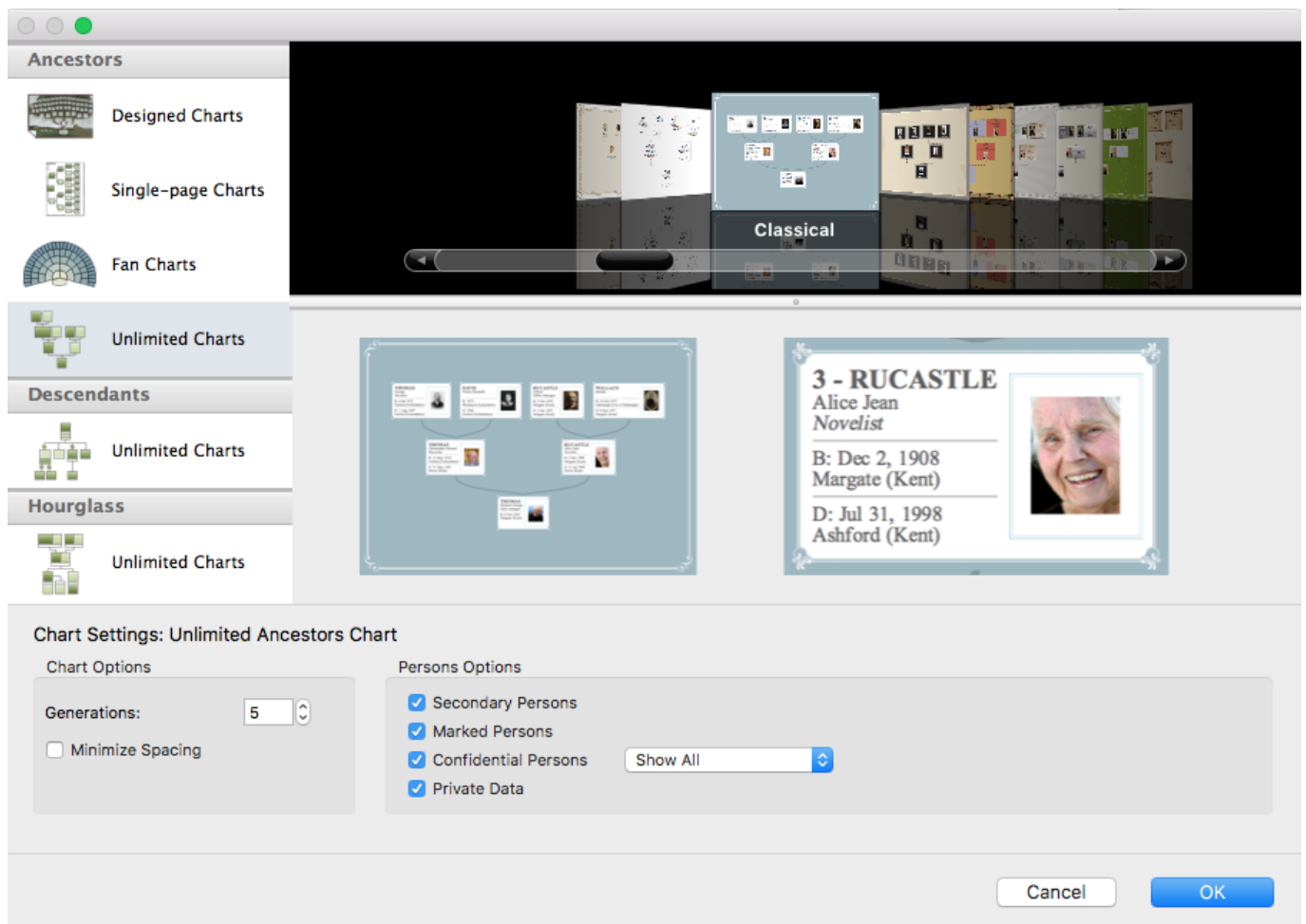
Choose **Documents > Charts...** or click **Charts**  on the toolbar to visually select the tree charts proposed by Heredis.

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

Choose your tree chart and the theme



In the displayed selection screen, choose the type of tree to build from the list.

Heredis proposes various types of tree charts of unlimited size. Whatever the type of tree chart selected, you can print it or have it printed over several pages or a single long strip of paper.

When a tree exceeds the size of your printer, each page is printed with an overlap to facilitate mounting of the chart.

Choice of theme

Click a theme in the coverflow. To facilitate your choice, Heredis displays an overall preview of the tree to be edited with this theme and a preview of a box. Scroll through the different themes by pressing the arrow keys.

The last used themes are preset for each type of tree chart.

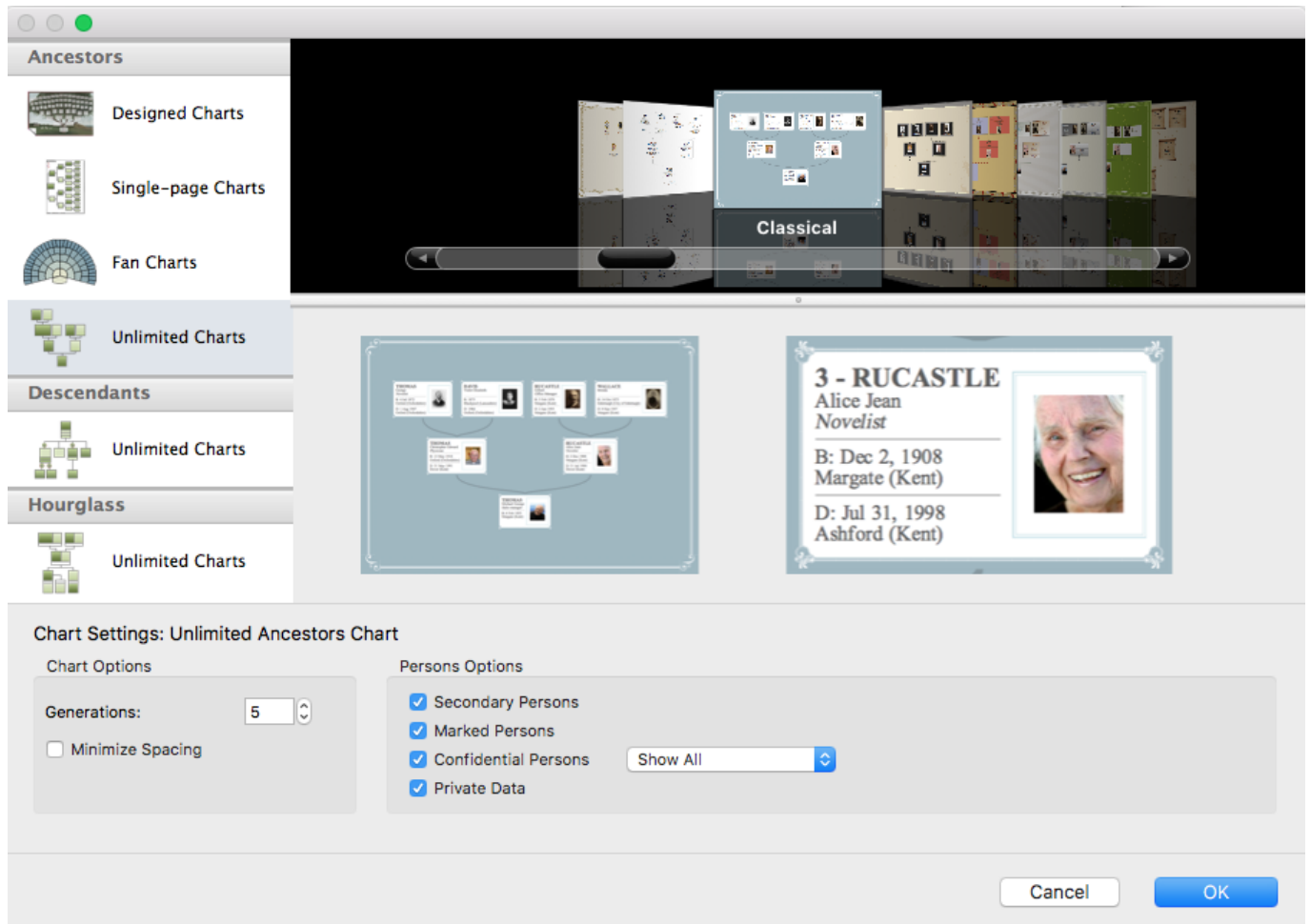
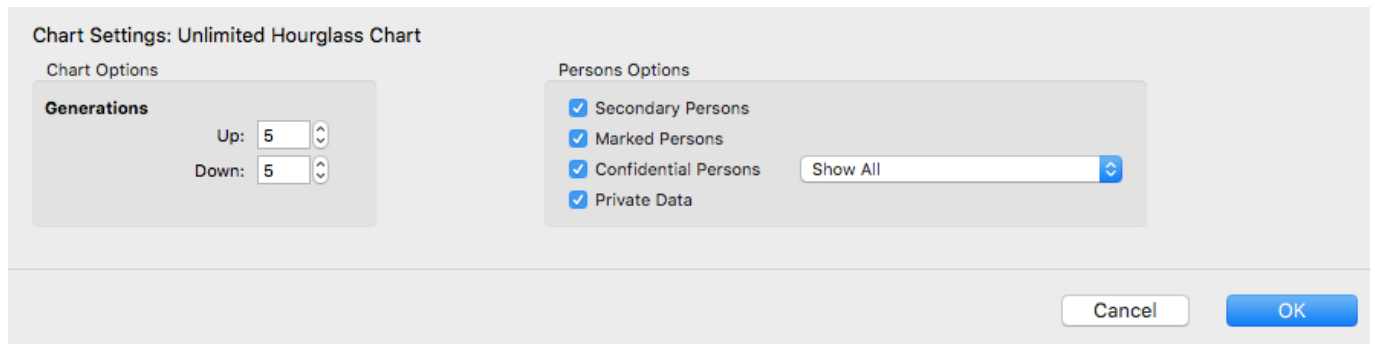


Chart Settings

Specify the construction parameters that suit you for the selected theme: number of generations, people to be displayed or not on the tree chart.

1. Indicate the number of generations. It may go up to 99 for ancestors as well as descendants.
2. Select **Minimize Spacing** for nesting boxes and rearranging space for the tree chart. If you do not tick this box, persons are drawn with respect to the axis of their parentage: those who are not direct relatives are never drawn one below the other.
3. 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.).








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 form of removable panels specific to the various tree charts.

Toolbars and Menus


When the tree chart is displayed, the menus and buttons are different from those for data management.

Use the  **New** –  **Open** –  **Save** –  **Page Setup** –  **Print** buttons for normal actions.

Display the buttons you most often use by choosing right click on the toolbar then **Customize toolbar**.

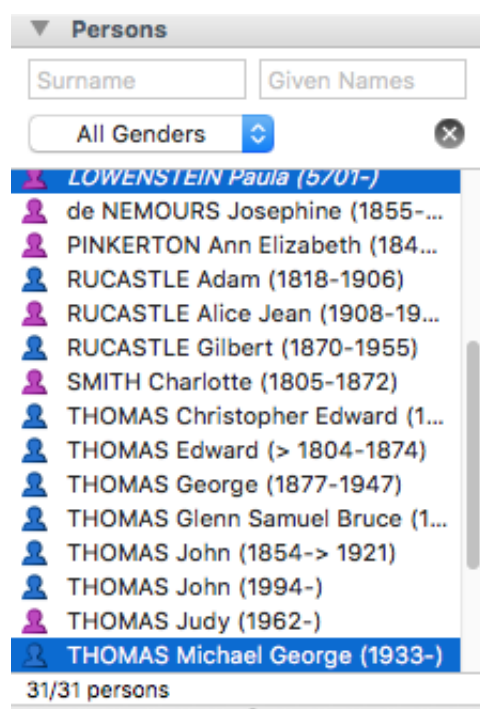


Use the tree chart menus to manage also the layout of the screen or the selection of people on the tree chart.

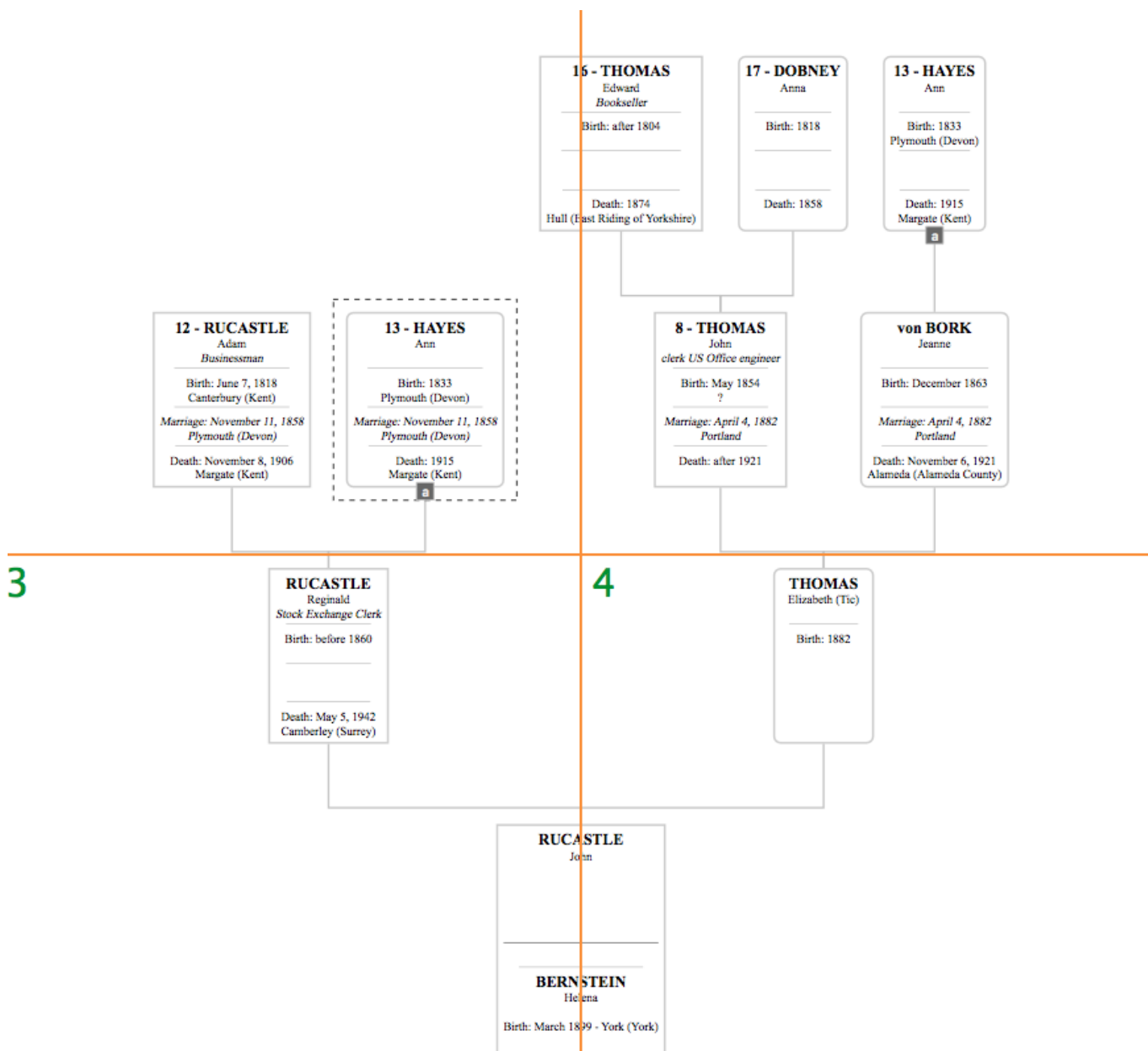
Info • You can create a new tree chart while an existing tree chart is already on the screen. Click the  **New** button on the chart toolbar and select a new type of tree chart and a new theme, or choose **File > New**.

Persons Panel

The **Persons** panel of the tree chart contains a list of all individuals 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 and/or one or more given names. Refine the search by selecting from the pop-up 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. Heredis will only display one complete branch and duplicate branches are cut off. You may locate implex ancestors in the list because they are displayed in gray. Click the name in black to display the whole branch. Click the name in gray to display other locations of this ancestor on the tree chart. Their boxes have identical implex lettering.



Info • In the tree chart, click the implex lettering of the box to navigate to the other box of the implex ancestor.

The **Data** panel shows you a summary of the person whose box is selected. All information displayed here may appear in the box according to the type of content selected.

The **Preview** panel shows 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.

▼ **Persons**

Surname Given Names

All Genders ⌵ ✕

- BERNSTEIN Helena (1899-)*
- von BORK Jeanne (1863-1921)
- DOBNEY Anna (1818-1858)
- HAYES Ann (1833-1915)
- HAYES Ann (1833-1915)**
- RUCASTLE Adam (1818-1906)
- RUCASTLE John
- RUCASTLE Reginald (< 1860-1942)
- THOMAS Edward (> 1804-1874)
- THOMAS Elizabeth (Tic) (1882-)
- THOMAS John (1854-> 1921)

11/11 persons

▼ **Data**

Personal Data
Surname: HAYES
Given Name: Ann

Birth
Date: 1833
Place: Plymouth (Devon, SOUTH WEST, ENGLAND)

Death

▼ **Preview**

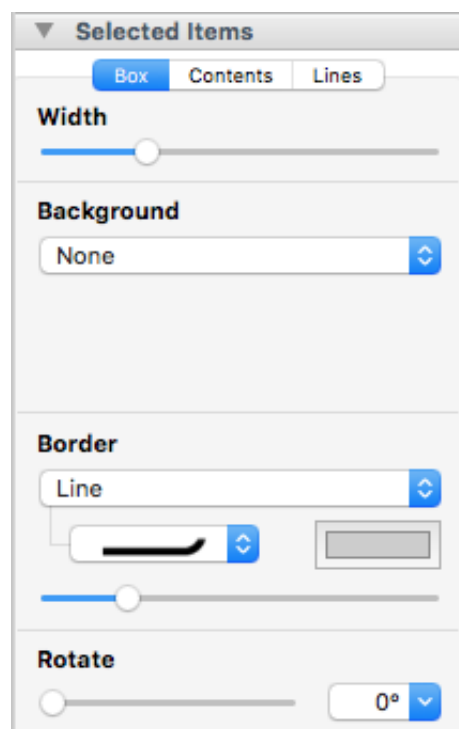
13 - HAYES
Ann

Birth: 1833
Plymouth (Devon)

Marriage: November 11, 1858
Plymouth (Devon)

Death: 1915
Margate (Kent)

Settings Panels



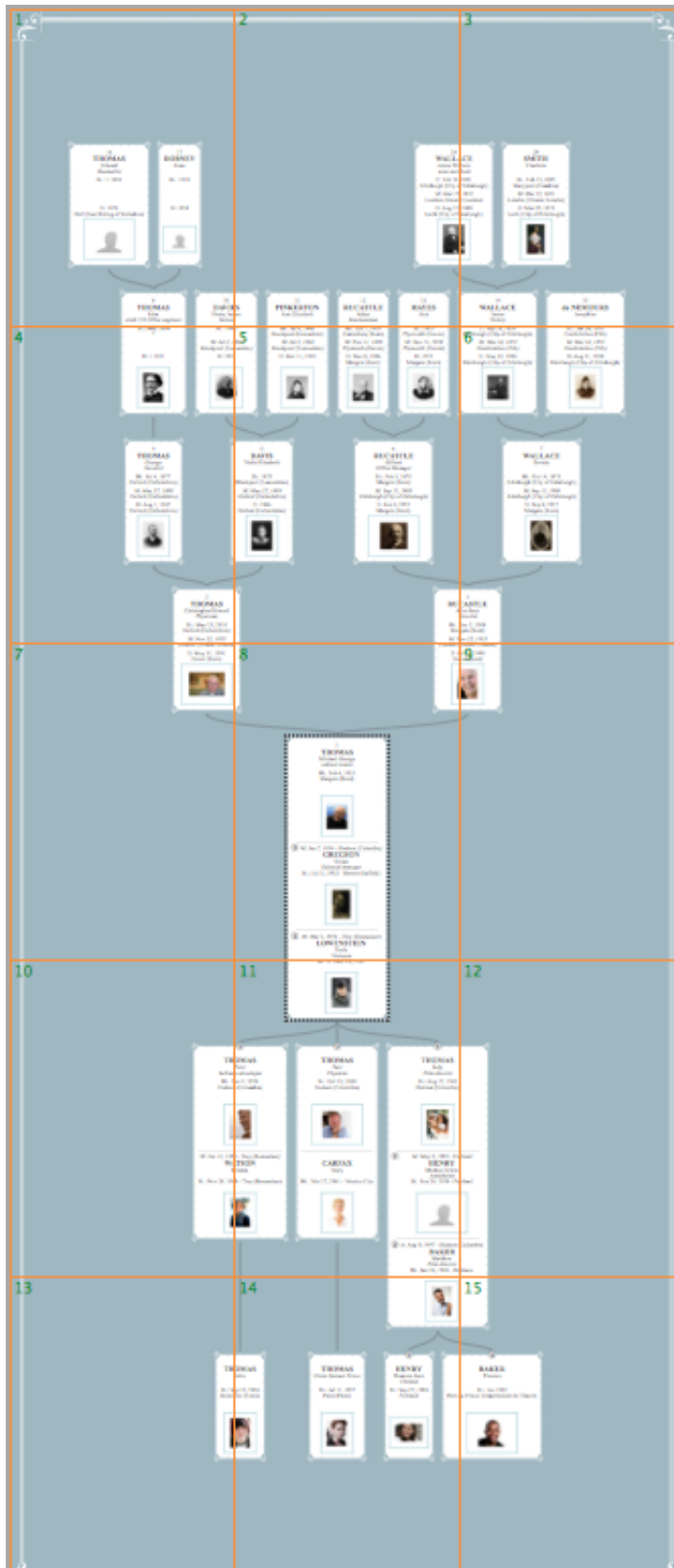
You may modify the unlimited tree charts to give them a more personal graphical appearance. These panels allow either changes to be applied to the whole tree chart or changes to a given selection (one or more boxes).


Display screen

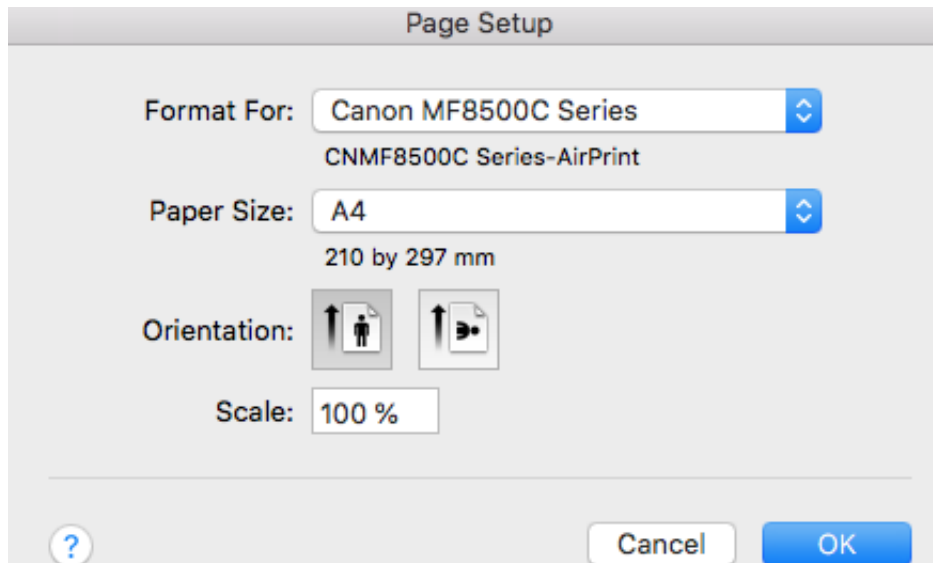
The central area of the screen shows all the boxes of the tree chart, the background image and the frame of the tree chart.

To help you check and estimate the size of your tree chart, materialize the pages on the screen.

Unfold the **Print Setup** panel and select **Show Page Breaks** or choose **View > Show 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 or choose **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 **View > Zoom > Increase Magnification** or **View > Zoom > Decrease Magnification**. To return to the actual size of the tree, choose **View > Zoom > Actual Size**.

You may also select different levels of zoom on the bottom bar of the tree chart screen.

- Select a value from the pop-up menu or use the slider to change the zoom level. Heredis indicates the factor used to reduce or enlarge to the right of the cursor.
- Click the **100%** button to return to the real size of the tree.
- Hold down the **Option** (⌘) key and the cursor takes the form of a magnifying glass. With a left click, the tree chart grows, with a right click, the tree chart is reduced. You may also drag the mouse around a group of boxes to increase their size or use the mouse wheel up or down to enlarge or reduce.

Info • Remember to display the tree chart in full screen mode to have as much room as possible: click the **Full Screen** icon (green) on the screen bar of the tree chart.

Selection

Before making changes to a tree chart, first select the boxes to which they will apply. Depending on the type of change to be made, make individual selections or selections of a genealogical order.

- To select all boxes of the tree chart, choose **Select > Select All**. From anywhere in the tree chart, you can right-click the mouse and choose **Select All**.
- To select one or more boxes of the tree chart, drag the mouse cursor over the boxes to be selected.
- To select more boxes that are not contiguous, select the first box, and then, holding down the Command (⌘) 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 **Persons** panel.

Format the tree chart

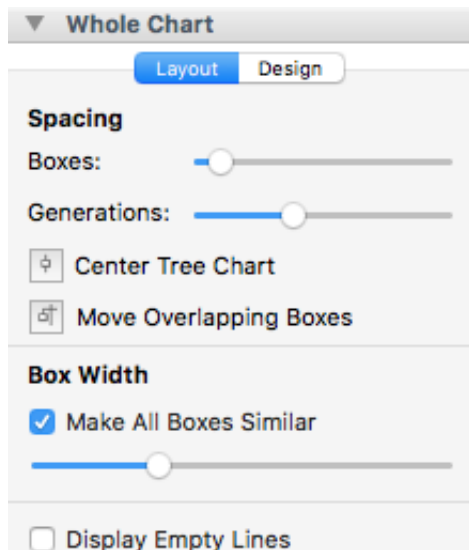
To make changes, display the tree chart panel column and the **Whole Chart** and **Selected Items** by clicking the disclosure triangle.

Hourglass Chart



Change the layout of the tree

1. Click the **Layout** tab on the **Whole Chart** panel.



2. Change the space between the boxes or the spacing between generations by using the sliders.
3. 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.
4. Click the **Center Tree Chart** button to reposition it optimally after modifications.
5. Click **Move Overlapping Boxes** to reconstruct the tree chart, preventing boxes from straddling over two pages. The tree chart layout is thus facilitated since only connecting lines between the boxes require adjustment.
6. Change, if necessary, the width of all boxes of the tree chart with the cursor. If the selected theme contains boxes of varying sizes, to suit to the data contained, select **Make All Boxes Similar** and specify the desired width with the cursor.

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.

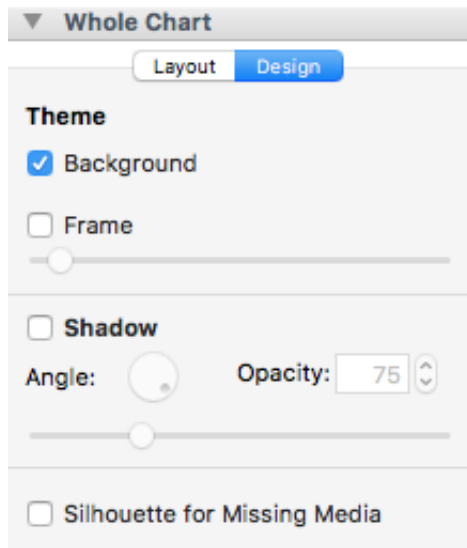
To cancel the moving of the selection, press **Command** (⌘)-**Z** or choose **Edit > Undo**.

To restore the move, press **Shift-Command** (⇧⌘)-**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. Click the **Design** tab in the **Whole Chart** panel.

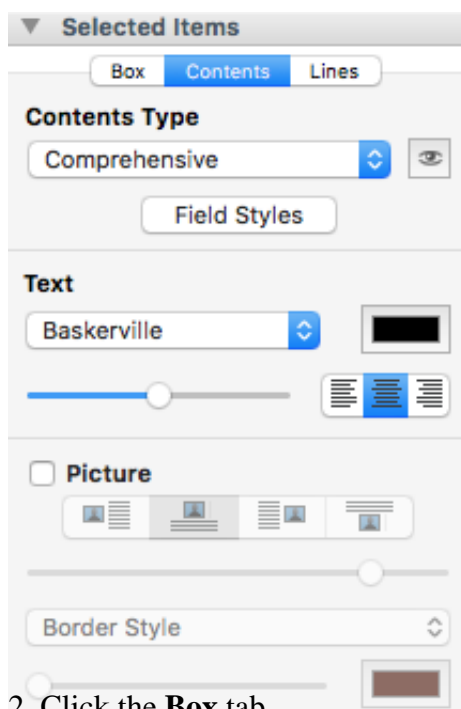


2. Display the frame of the tree as well as the background pattern by clicking the **Frame** and **Background** tick boxes. Change the frame size of the tree with the cursor.
3. Tick the **Shadow** box to add a shadow to all the boxes on the tree chart. Turn the rotary tool to indicate the axis of the shadow and specify its opacity by typing directly into the input field or by using the arrows to increase or decrease it. Change the width of the shadow with the cursor.
4. Tick the **Silhouette for Missing Media** box for all boxes of the tree chart to have an image. Heredis draws the silhouette of a man or a woman for the persons to whom you have no assigned image.

Change the tree chart boxes

All boxes of a tree chart may be modified individually or overall.

1. Select the boxes to be changed and unfold the **Selected Items** panel.

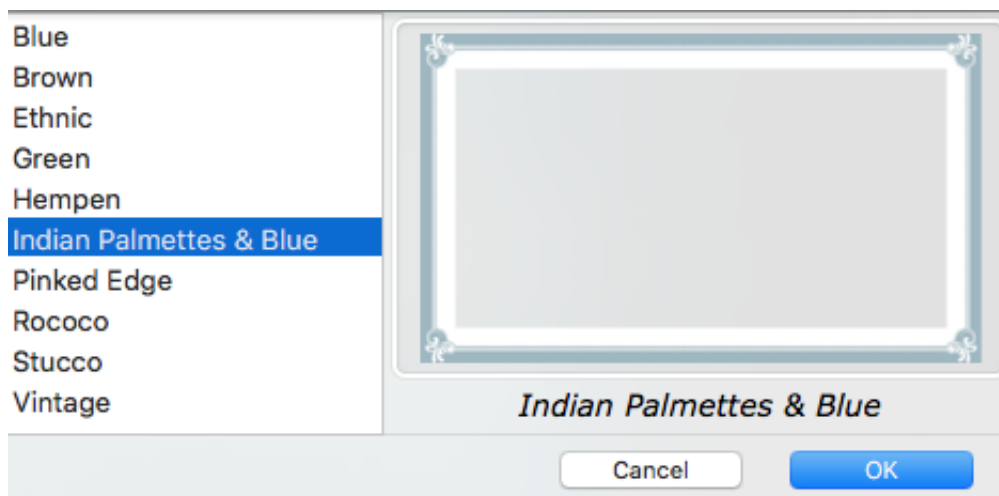


2. Click the **Box** tab.

3. Change the width of the boxes selected with the cursor. If the boxes are not of a fixed size, the change will be proportional to the initial size of each box.

4. Choose the type of background: **None**, **Color Fill**, **Gradient Fill** or **Picture**. The tools vary depending on the type selected.

- **None**: the text appears directly on the tree chart box and the box is transparent.
- **Color Fill**: click the color box to choose a color.
- **Gradient Fill**: click in each of the color fields to choose the start and finish colors. Click the arrows to reverse the gradient in the box. Turn the rotary tool to indicate the gradient axis.
- **Picture**: click the **Modify** button (👁️) to select a new background image for the box.



5. Choose the type of border for the box: **None**, **Line** or **Frame**. Specify the appearance of the border according to the type selected.

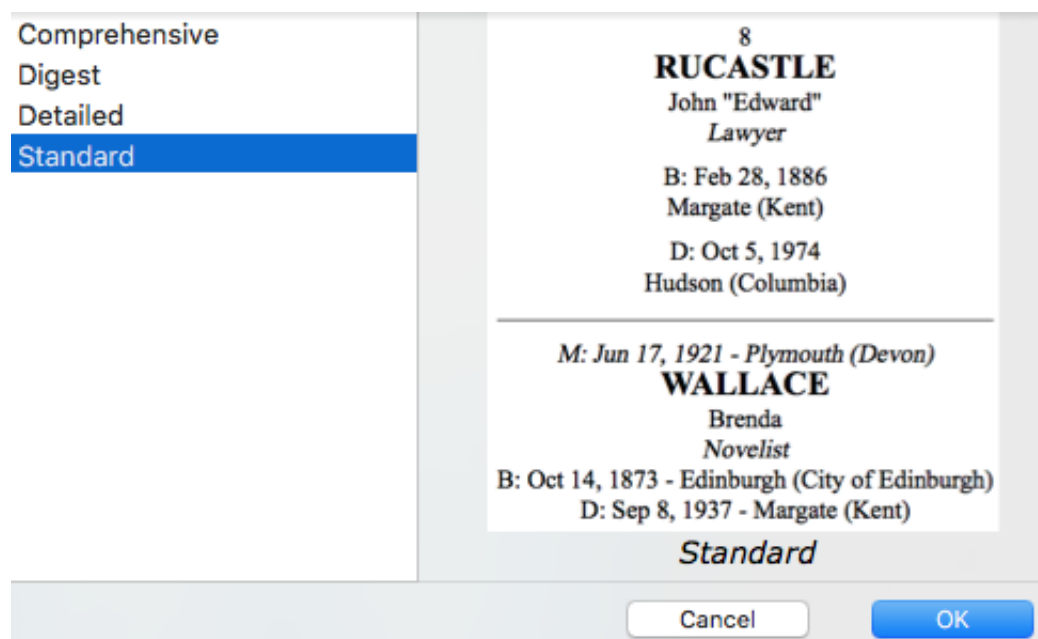
- **None**: the box is not bordered.
- **Line**: select a form of border (straight or rounded corners). Click the color box to choose a hue in the color panel. Use the slider to set the width of the border.
- **Frame**: click the **Modify** button (👁️) to select a new frame image for the box. Use the slider to set the width of the frame.

Info • You may only apply borders to drawn boxes. The background images of the box must contain a border in the image.

6. Indicate whether the selected boxes should be turned. To change the axis of the selected boxes, use the cursor or select a value from the pop-up menu.
All changes are immediately displayed on the tree chart.

Modify the content

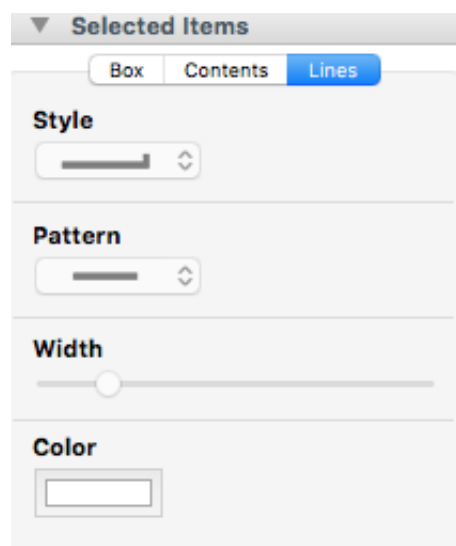
Click on the **Modify** button (👁️) on the **Contents** tab to apply to the selected boxes. Choose the content you want to apply to the selected boxes.



Click OK, the new content is applied on the selected boxes.

Info • For each box on the tree chart, you can see the information displayed. Unfold the **Data** panel to check them.

Modify connecting lines



1. Click the **Lines** tab.
2. Choose the type of line to connect the selected boxes from the pop-up menu: right angles, rounded corners or curves.
3. Select a line style from the pop-up menu.
4. Specify the width of the connecting line with the cursor and click the color box to choose a color.

All changes are immediately displayed on the tree chart.

Edit the text of a box

The screenshot shows a dialog box titled "Edit Box" with three tabs: "Person", "Family 1", and "Family 2". The "Person" tab is selected. The dialog contains the following fields:

- Number: 1
- Surname: THOMAS
- Given Names: Michael George
- Occupation - Title: cabinet maker
- Birth Date: Bi.: Feb 6, 1933
- Birth Place: Margate (Kent)
- Death Date: (empty)
- Death Place: (empty)

At the bottom right, there are "Cancel" and "OK" buttons.

1. Double-click the box to be edited 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.

You can also consult our articles [\(Mac\) Print a tree chart](#), [\(Mac\) Save a tree chart](#), and [\(Mac\) Export a 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 **Command (⌘)-S**.
2. In the **Save As** field, change the name of the tree chart if necessary.
3. Choose the location where the tree chart should be saved. If your file directory is not visible, click the disclosure triangle to the right of **Save As**.
4. Click **Save**.

Info • The tree is saved with the main data displayed for each person. Even if some data are not shown in the boxes at the time of saving, they can be used when the tree is reopened. For example you could apply a more detailed content to the boxes of the tree chart even if it was built with minimum content.

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


To obtain a copy of the tree chart and make further changes, select **Save > Save as** or press **Shift-Command (⇧⌘)-S**.

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. Select **Open > Chart File**. Choose the location in your file directory and click **Open**.

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. Click the **Print**  button on the toolbar or choose **File > Print**.
2. Click the **PDF** pop-up menu and select **Save as PDF...**
3. Choose the location where the tree file in PDF format will be saved. If your file directory is not visible, click the disclosure triangle to the right of **Save As**.
4. Click **Save**.

Info • According to your work habits, you may save the tree chart in PDF format directly to iPhoto or Aperture, or transform the tree chart in JPG or TIFF images.

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 unfold the **Print Setup** panel and then click **Page Setup**.
2. Select the printer you will use in the **Format For** menu.
3. Choose a standard paper size in the **Paper Size** menu. If you want to select a customized paper size, choose **Manage Custom Sizes** from the menu.
4. Click the button corresponding to the desired orientation.
5. If necessary, enter a percentage in the **Scale** field. A value below 100% reduces the image, a value greater than 100% enlarges it.
6. 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. Tick the **Show Page Breaks** box. 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.

Info • Modification of the print setup may require the moving of new overlapping boxes.

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 **Add Printer** from the **Printer** menu.

Info • For more information on adding a printer, look for *Add Printer* in the *Mac Help*.

3. To get a preview of the pages to be printed, click the scroll arrows.
4. Click **Print**.

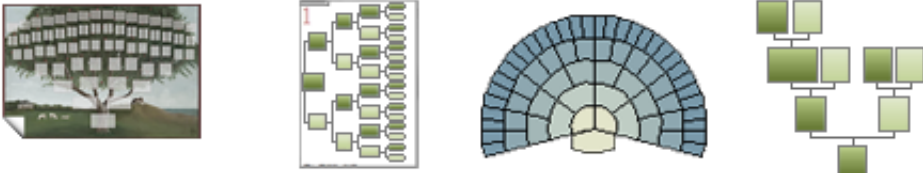
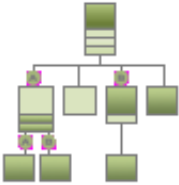

You can create as many graphical representations of your genealogy. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

Choose the fan tree chart 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.

Choice of tree chart

In the **Charts** menu or in the displayed selection screen, choose the type of tree to build from the list to the right.

Choose a tree chart

Ancestors	
Descendants	
Hourglass	

Heredis proposes various types of predefined size tree charts (from A4 to A0 or Letter to Quad demy). 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.

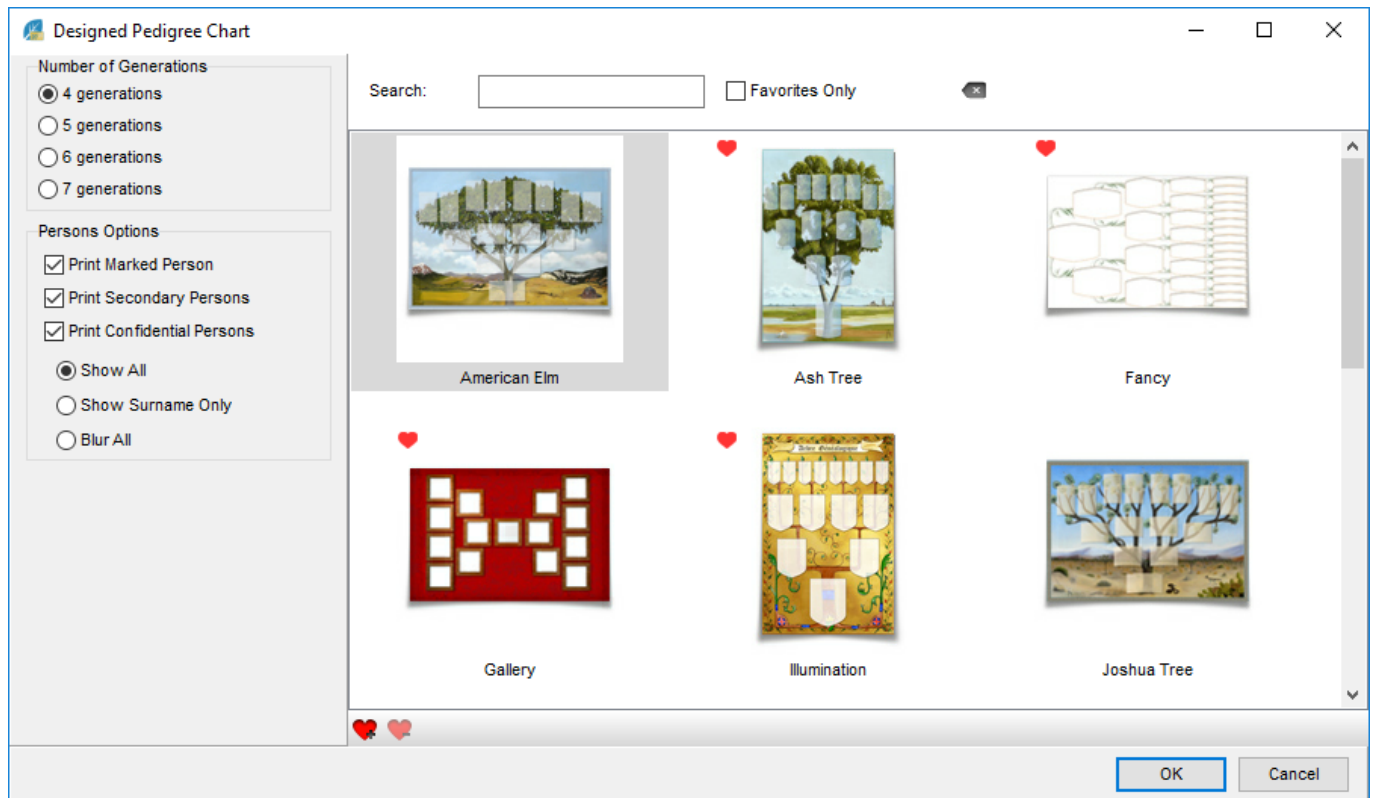
When a tree exceeds the size of your printer, each page is printed with an overlap to facilitate mounting of the chart.


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.

Choice of theme

Theme of illustrated charts



Click a theme in the viewer. To facilitate your choice, Heredis displays an overall preview of the tree to be edited with this theme or a preview of a box. Scroll through the different themes by pressing the arrow keys or with the mouse. The last used themes are preset for each type of tree chart. After testing the different themes of tree charts, you may define your favorite themes. Click the **Add to Favorite** 

button and the theme is marked with a heart icon that allows it to be recognized.

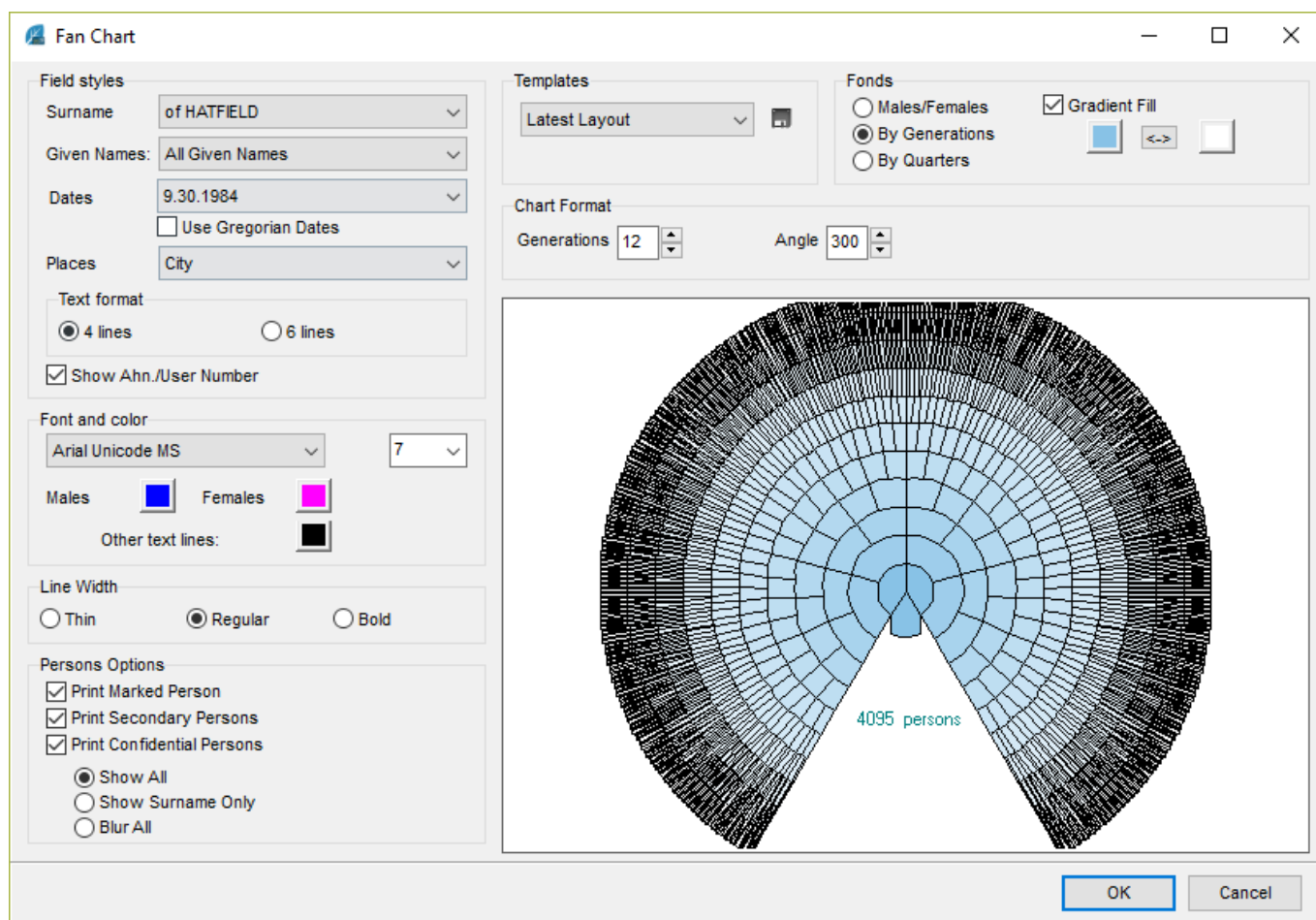
Info • You have a search filter for favorite themes. Thus, you can display only the themes that you commonly use.

Chart Settings

Specify the construction parameters that suit you for the selected theme: number of generations, people to be displayed or not on the tree chart.

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

Fan 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 panel.

Toolbars and menus

When the tree chart is displayed, the menus and buttons are different from those for data management.

You may use the buttons for normal actions: Save, Pages, Add, Layout, Print. Display only the buttons you use most often by choosing **Windows > Customize Toolbar**.



Use the tree chart menus to manage also the layout of the screen or the selection of people on the tree chart.

Info • You can open another previously saved tree chart while the tree chart is already open on the screen choose **File > Open**.

Persons displayed in the tree chart

The **Search** panel of the tree chart contains a list of all persons included in the chart. Clicking a person in the list previews that person's box in the tree chart. A double click navigates through the tree, if its size exceeds that of the screen, to display the box for a selected person.

To quickly find a person in the list of individuals on the tree chart, enter the surname or given name. Refine the search by selecting from the drop-down menu, the gender of the person sought if the name is multiple.

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.

Tree chart formatting

You may modify 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 fan tree chart, the title of the tree and any images that you have added in the background.

To help you check and estimate the size of your tree chart, materialize the pages on the screen.

In the toolbar, click  **Pages > Show/Hide Page Breaks**  or in the menu choose **Display>**

Show/Hide Page Breaks.

The number of pages depends on the chosen page format for your printer. To change the format and page orientation in your printer, click the  button in the **Print** panel.

To move around the tree chart, use the horizontal and vertical bars, or change the zoom factor or double-click the name of a person from the Persons panel to display his/her box directly.

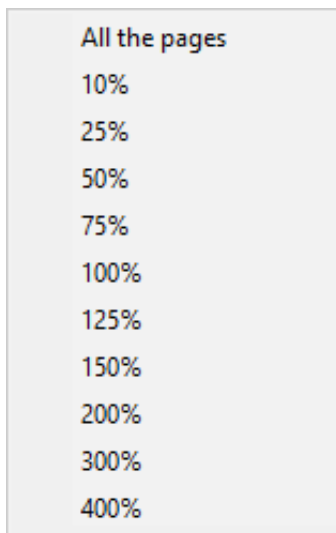
Zoom

You can increase (zoom in) or reduce (zoom out) the display of the tree chart. It is often necessary to reduce the display of a tree chart to visualize all required generations. Choose **Display > Zoom >**

Increase Magnification or **Decrease Magnification**. To return to the actual size of the tree, choose **Display > Zoom > 100 %**.

You may also select different levels of zoom on the bottom bar of the tree chart screen.

- Click the arrow and select a value from the drop-down menu or use the slider to change the zoom level. Heredis indicates the factor used to reduce or enlarge to the left of the bar.



- Click the **100%** button to return to the real size of the tree.
 - Hold down the **Alt** key. With a left click, the tree chart grows, with a right click, the tree chart is reduced. You may also use the mouse wheel up or down to enlarge or reduce.
- Info** • Remember to fold back the **Search** and/or **Tools** panels to have the maximum available space for display of the tree chart.

Selection

heredis 13/12/2018

82 %

Before making changes to a tree chart, first select the boxes to which they will apply. Depending on the type of change to be made, make individual selections or selections of a genealogical order.

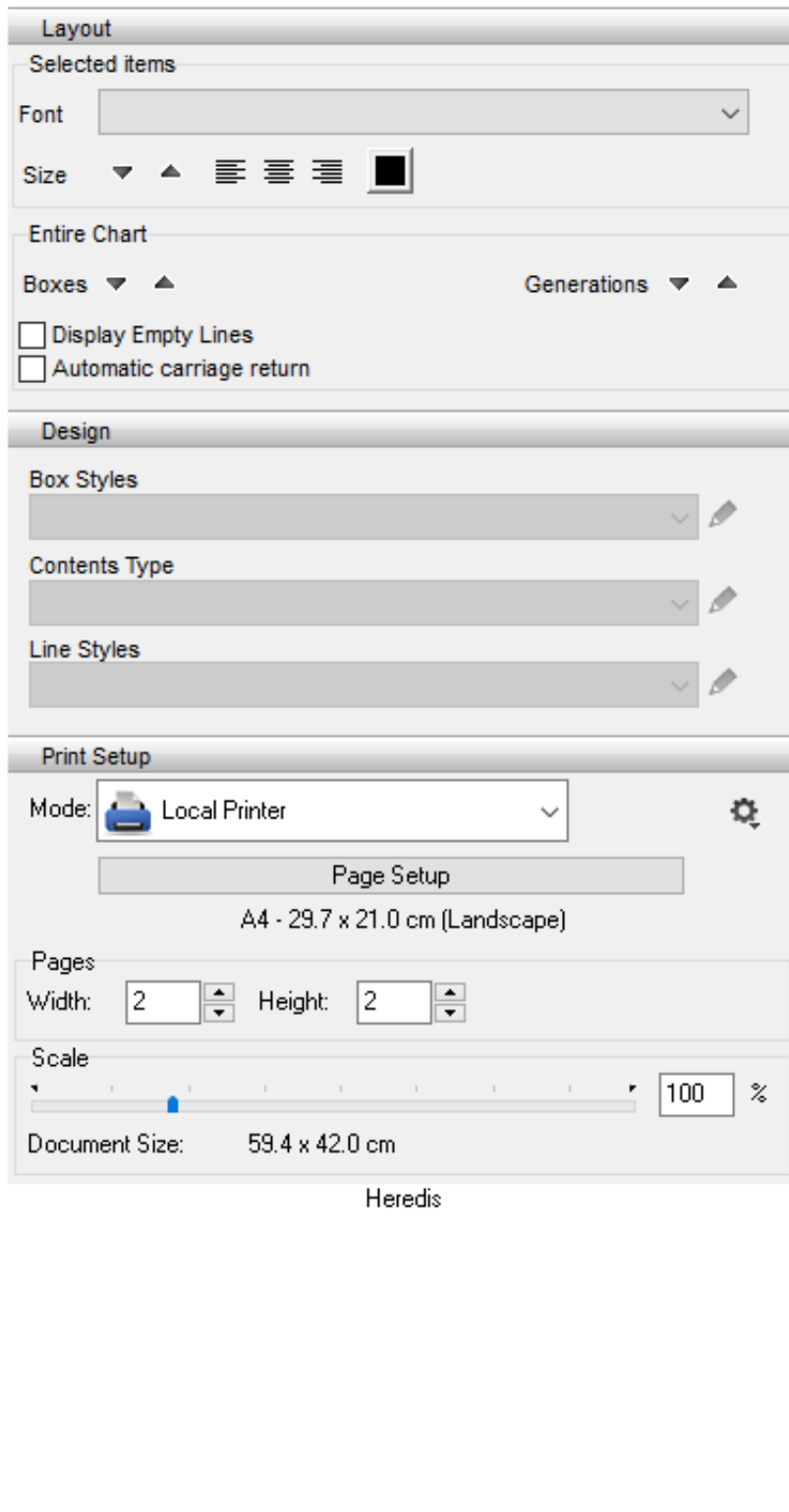
- To select all boxes of the tree chart, choose **Select > Select All**. From anywhere in the tree chart, you can right-click the mouse and choose **Select All**.
- To select one or more boxes of the tree chart, drag the mouse cursor over the boxes to be selected.
- To select more boxes that are not contiguous, select the first box, and then, holding down the **Shift** key, the additional box or boxes. To make genealogical selections from any box in the tree, right-click the mouse and choose **Select Men Only** (or **Women Only**, or **Person and All Ancestors**, or **Person and All Descendants** or **Generation**).

Info • Persons corresponding to the selected boxes are also selected in the **Search** panels.

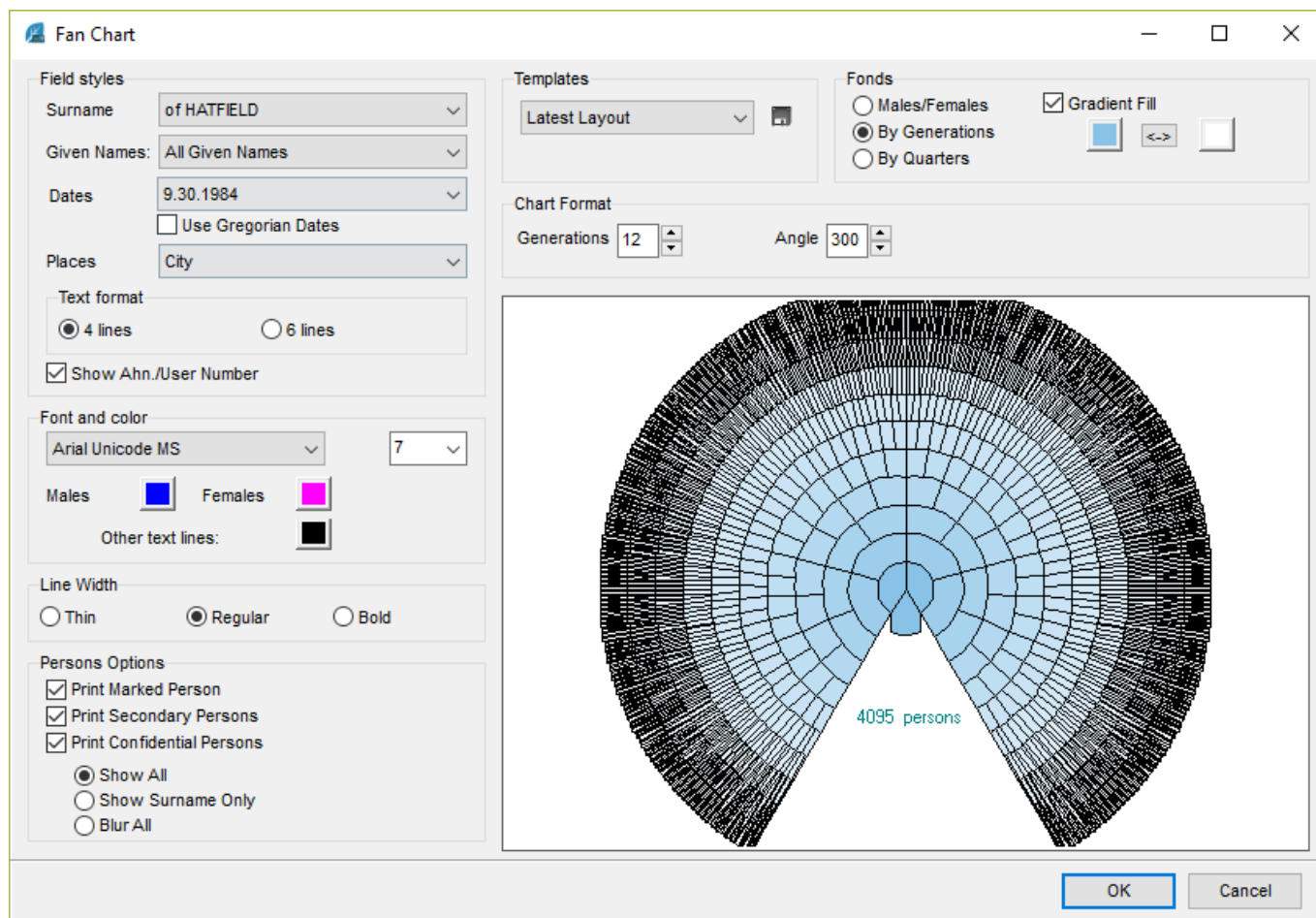
Format the tree chart

To make changes, use the tools in the tree chart **Tools** panels. To go further in the formatting of the boxes, make your changes in the **Layout** panel.

Layout Panel



Fan tree chart layout panel



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

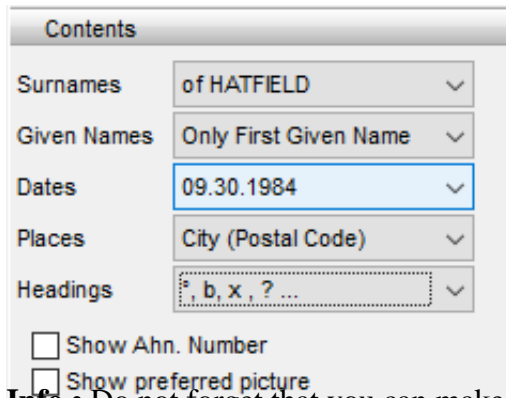
Modify the contents of selected boxes

The screenshot displays the 'Field styles' and 'Font and color' configuration panels in Heredis. The 'Field styles' panel includes dropdown menus for 'Surname' (set to 'of HATFIELD'), 'Given Names' (set to 'All Given Names'), 'Dates' (set to '9.30.1984'), and 'Places' (set to 'City'). It also features radio buttons for 'Text format' (with '6 lines' selected) and a checked checkbox for 'Show Ahn./User Number'. The 'Font and color' panel shows 'Arial Unicode MS' as the font, size '7', and color selection boxes for 'Males', 'Females', and 'Other text lines'. The 'Line Width' panel at the bottom has radio buttons for 'Thin', 'Regular' (selected), and 'Bold'.

- 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** to add this information, if it exists, in the selected boxes.

Change the text formatting

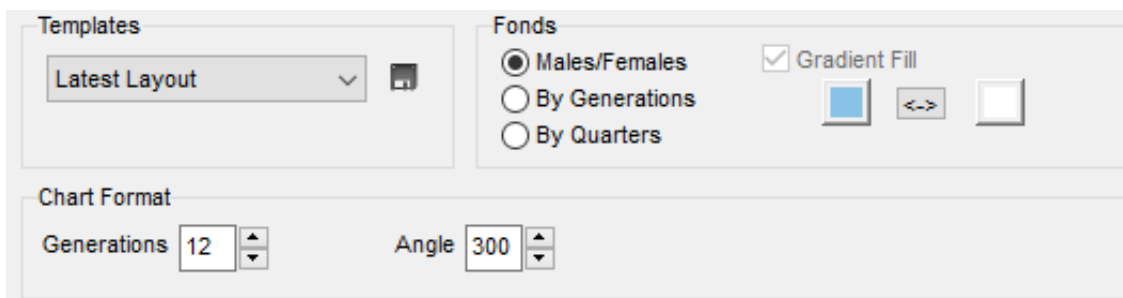
Without delay, change the font, size, color and text alignment with the drop-down menu, the cursor and the buttons of the **Layout** panel.



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 offers 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 gender.
 - 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.

Edit the tree chart title


The tree chart title is a modifiable text zone.

Heredis proposes a title containing the name of the primary person. Double-click the title to open the text editor and make the necessary content changes and formatting of the text.

Add a Picture


Select the **Edit > Add Picture** menu or click the **Add**  button on the toolbar to add a graphic illustration to your tree chart.

The picture is added at the top left of the tree chart displayed

- It is possible to add several pictures. If they must overlap, there are options for stacking images. Right-click the image to move the selected image forward, backward or to the background if it is a background image for the tree chart. Whatever option chosen, the boxes of the tree chart remain in the foreground
- When the picture is enlarged or reduced manually with the mouse, it is possible to restore the proportion between the picture and its frame by using the right-click **Resize Image Proportionally** option.
- The right-click **Resize Image to Fit Frame** and **Default Picture Size** options allow to resize the image in its display area.
- The image is an object that can be formatted. Click the  button on the toolbar or select **Modify Properties** from the right-click menu on the image. Only box style changes are possible. As with the tree chart boxes, you have available presets applicable to the surround of the image.

You can also consult our articles [\(PC\) Print a tree chart](#), [\(PC\) Save a tree chart](#).

You can create as many graphical representations of your genealogy as you wish. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

Choose from the different types of tree charts proposed in the **Charts** menu or click **Charts**  on the toolbar to visually select the tree charts proposed by Heredis.



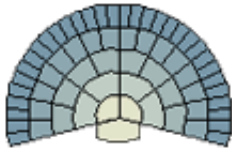

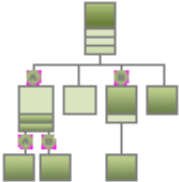

Edit a tree chart

The printing of a tree chart takes as its starting point the primary person displayed and will display his/her ancestors, descendants or both as an hourglass tree chart.

Choice of tree chart

In the **Charts** menu or in the displayed selection screen, choose the type of tree to build from the list to the right.

Choose a tree chart

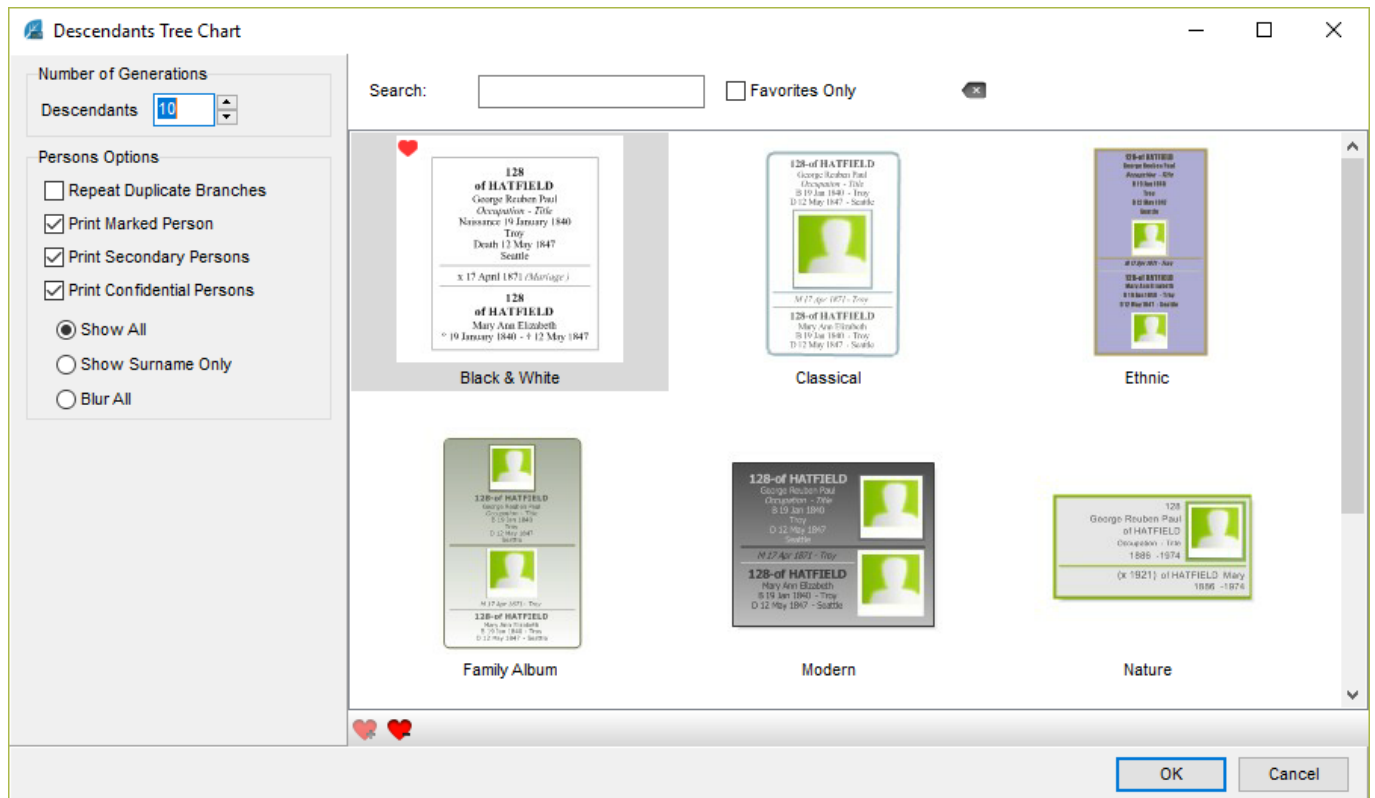
Ancestors				
Descendants				
Hourglass				


Heredis proposes various types of tree charts of unlimited size. Whatever the type of tree chart selected, you can print it or have it printed over several pages or a single long strip of paper.

When a tree exceeds the size of your printer, each page is printed with an overlap to facilitate mounting of the chart.

Choice of theme

Choose a theme



Click a theme in the viewer. To facilitate your choice, Heredis displays an overall preview of the tree to be edited with this theme or a preview of a box. Scroll through the different themes by pressing the arrow keys or with the mouse. The last used themes are preset for each type of tree chart. After testing the different themes of tree charts, you may define your favorite themes. Click the **Add to Favorite** 

button and the theme is marked with a heart icon that allows it to be recognized.

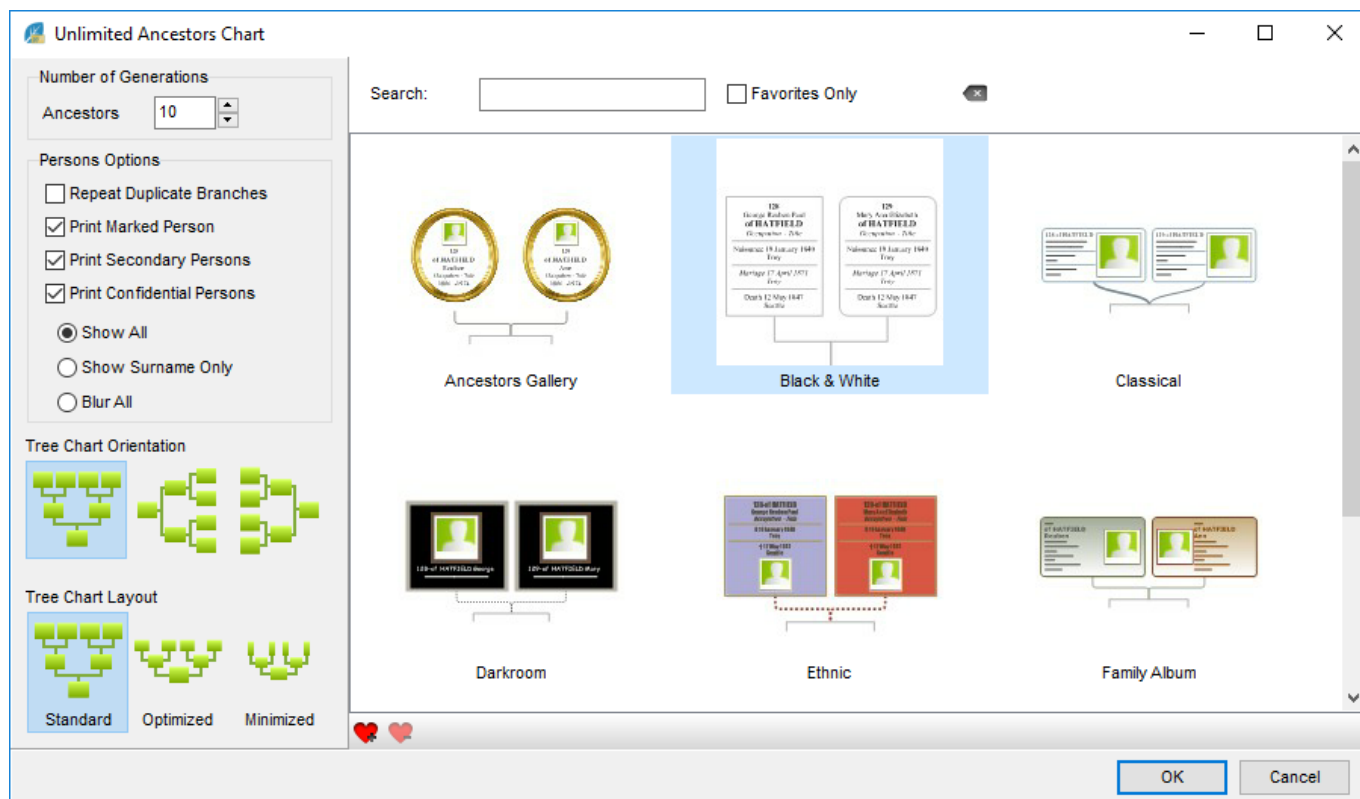
Info • You have a search filter for favorite themes. Thus, you can display only the themes that you commonly use.

Chart Settings

Specify the construction parameters that suit you for the selected theme: number of generations, people to be displayed or not on the tree chart.

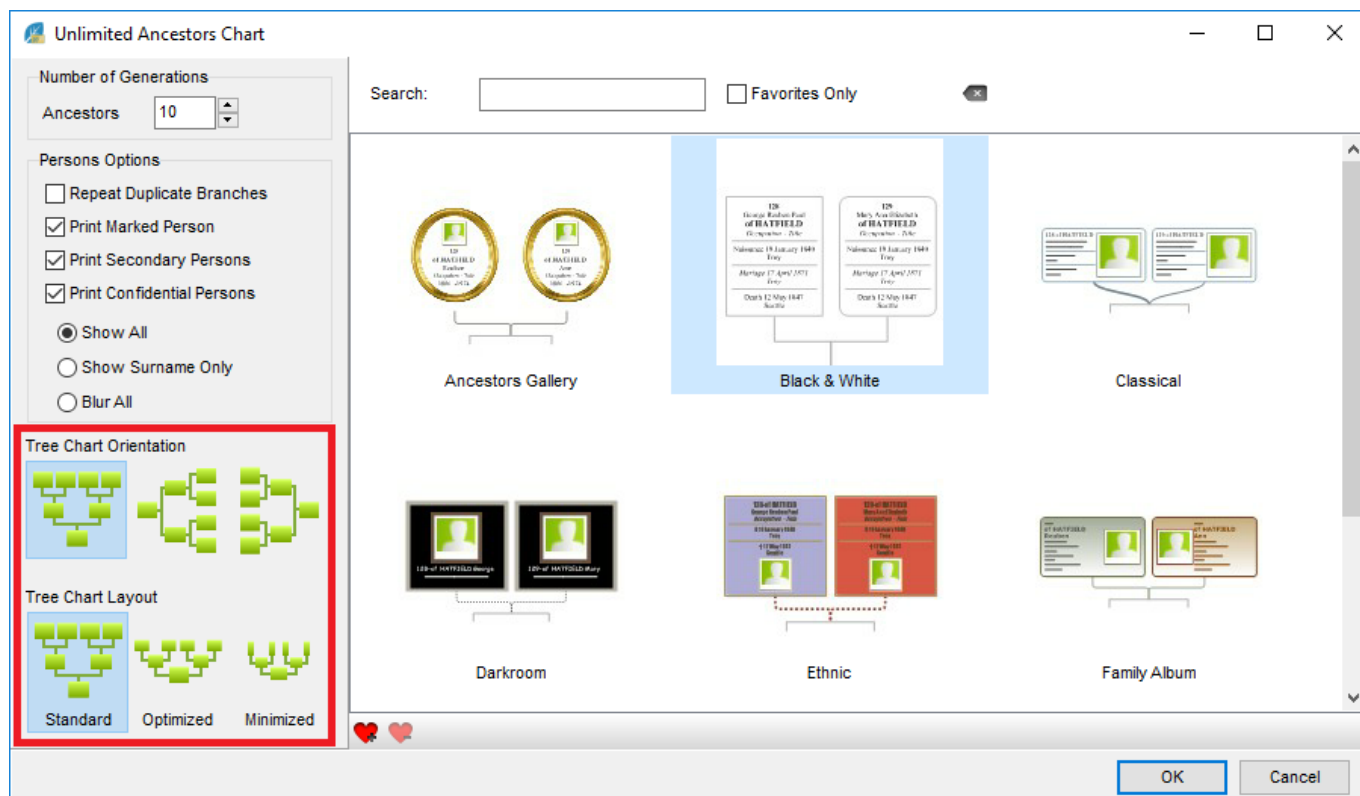
1. Indicate the number of generations. It is unlimited for ancestors as well as descendants.

Unlimited Chart



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

Choose Orientation & Layout



3. Choose a method for automatic construction according to the space you want to allocate to the tree chart.

- The **Default** tree chart is built with all boxes of the same size, that is to say that the box of the central character has the same size as that of persons shown in the third generation or 10th generation. In this tree chart, generations will be located one above the other without overlapping.
- In the **Optimized** tree chart, boxes gradually decrease in size with the higher generations and they slightly overlap.
- In the **Minimized** tree chart, the boxes will diminish in size and content and their position can be rotated at the end of the branch to save even more room.

4. Select the persons for inclusion on the tree chart. By default all persons appearing in the ancestry or descent of the primary person are displayed on the tree chart. You may untick secondary persons, or marked and confidential persons, for them not to be displayed on the tree chart. You may also hide all the data you have declared to be private (events, pictures, etc.).

Click **OK** to start the construction of the tree chart according to the theme selected and with the chosen parameters.

Tree Chart Screen

Heredis displays a tree chart representing the lineage of the primary person and which is printable immediately. If you want to make changes to the tree chart, you have tools in the specific Tools panels of the various tree charts.

Toolbars and menus

When the tree chart is displayed, the menus and buttons are different from those for data management.

You may use the buttons for normal actions:  **Save**,  **Pages**,  **Add**,  **Layout**,  **Print**. Display only the buttons you use most often by choosing **Windows > Customize Toolbar**.



Use the tree chart menus to manage also the layout of the screen or the selection of people on the tree chart.

Info • You can open another previously saved tree chart while the tree chart is already open on the screen choose **File > Open**.

Persons displayed in the tree chart

The **Search** panel of the tree chart contains a list of all persons included in the chart. Clicking a person in the list previews that person's box in the tree chart. A double click navigates through the tree, if its size exceeds that of the screen, to display the box for a selected person.

To quickly find a person in the list of individuals on the tree chart, enter the surname or given name. Refine the search by selecting from the drop-down menu, the gender of the person sought if the name is multiple.

When there are marriages between blood relations (implex) on your tree chart, certain ancestors may be included more than once. By default, Heredis will only display one complete branch and duplicate branches are cut off. If you want to repeat the implex branches, tick the option in the settings screen of the tree chart prior to construction.

Click the name of the ancestor in the **Search** panel and Heredis displays the various positions of the person in the tree chart. Click on the first position to see the entire branch displayed. The different boxes for the ancestor have identical lettering.

Info • In **Search** panel of the tree chart, click the name of a person in the list, his/her summary appears in the **Summary** panel.

Preview of the selected box

The **Tools** panels displays the selected box. At the opening of the tree chart, Heredis displays a complete view of the document, whatever its size. The preview is very useful in large tree charts, when the content of the boxes is not readable on the screen. This visualization immediately displays any changes that you apply to the box.

Tree chart formatting


You may modify the unlimited tree charts to give them a more personal graphical appearance. In the fixed size tree charts, the changes apply only to the content of the boxes. The overall environment is not editable.

The different **Tools** panels allow either changes to be applied to the whole tree chart or changes to a given selection (one or more boxes).

Display screen

The central area of the screen shows all the boxes of the tree chart, the title of the tree and any images that you have added.

To help you check and estimate the size of your tree chart, materialize the pages on the screen.

In the toolbar, click **Pages > Show/Hide Page Breaks** 

or in the menu choose **Display> Show/Hide**

Page Breaks.

The number of pages depends on the chosen page format for your printer. To change the format and page orientation in your printer, click the Page Setup button in the **Print** panel.

To move around the tree chart, use the horizontal and vertical bars, or change the zoom factor or double-click the name of a person from the Persons panel to display his/her box directly.

Zoom

You can increase (zoom in) or reduce (zoom out) the display of the tree chart. It is often necessary to reduce the display of a tree chart to visualize all required generations. Choose **Display > Zoom > Increase Magnification** or **Decrease Magnification**. To return to the actual size of the tree, choose **Display > Zoom > 100 %**.

You may also select different levels of zoom on the bottom bar of the tree chart screen.

- Click the arrow and select a value from the drop-down menu or use the slider to change the zoom level. Heredis indicates the factor used to reduce or enlarge to the left of the bar.
 - Click the **100%** button to return to the real size of the tree.
 - Hold down the **Alt** key. With a left click, the tree chart grows, with a right click, the tree chart is reduced. You may also use the mouse wheel up or down to enlarge or reduce.
- Info** • Remember to fold back the **Search** and/or **Tools** panels to have the maximum available space for display of the tree chart.

Selection

Before making changes to a tree chart, first select the boxes to which they will apply. Depending on the type of change to be made, make individual selections or selections of a genealogical order.

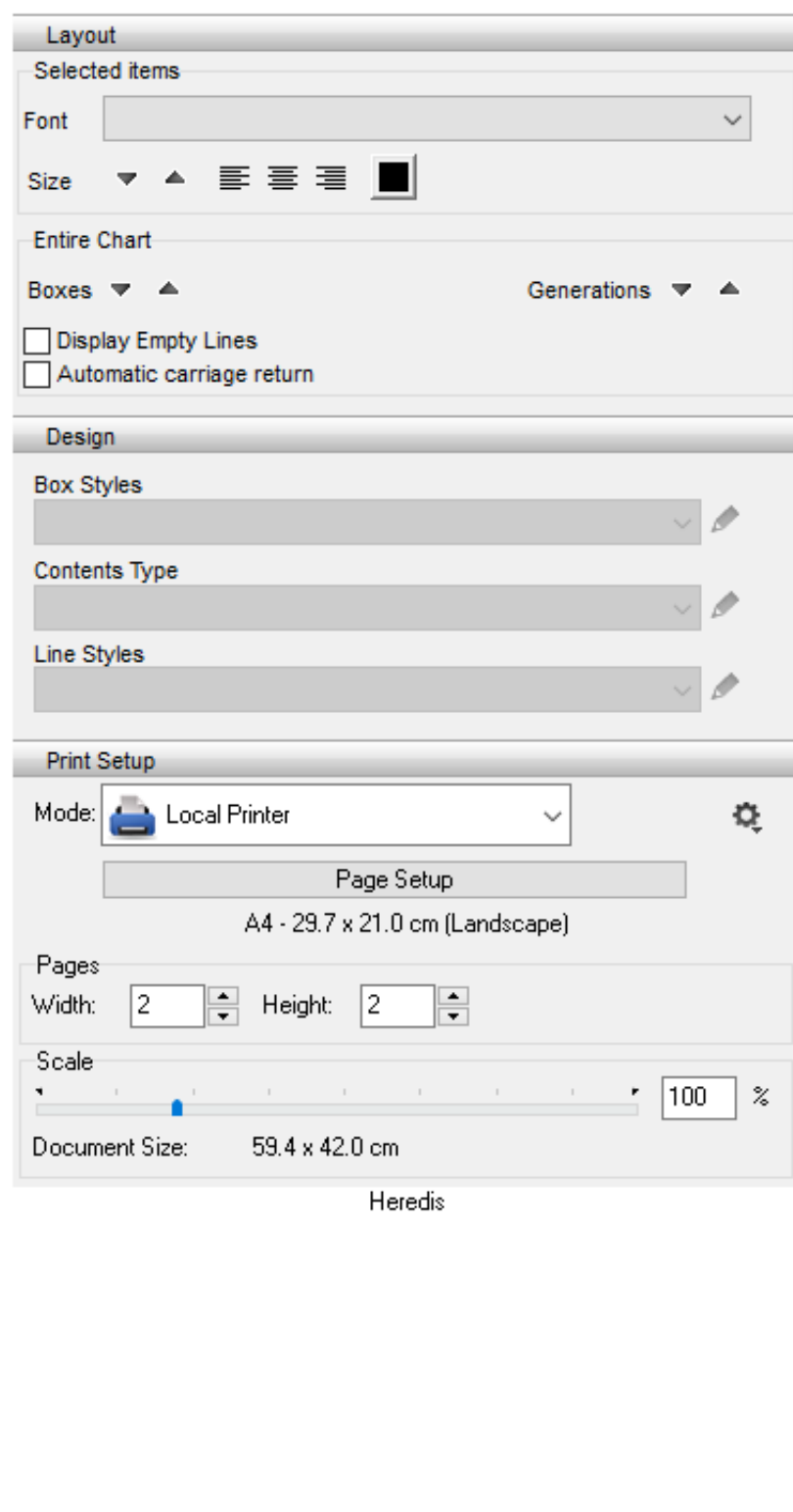
- To select all boxes of the tree chart, choose **Select > Select All**. From anywhere in the tree chart, you can right-click the mouse and choose **Select All**.
- To select one or more boxes of the tree chart, drag the mouse cursor over the boxes to be selected.
- To select more boxes that are not contiguous, select the first box, and then, holding down the **Shift** key, the additional box or boxes To make genealogical selections from any box in the tree, right-click the mouse and choose **Select Men Only** (or **Women Only**, or **Person and All Ancestors**, or **Person and All Descendants** or **Generation**).

Info • Persons corresponding to the selected boxes are also selected in the **Search** panels.

Format the tree chart

To make changes, use the tools in the tree chart **Tools** panels. To go further in the formatting of the boxes, make your changes in the **Layout** panel.

Layout Panel



Modify the contents of selected boxes

- Choose the content formats that suit you for surnames, given names, dates, places and genealogical headings from the drop-down menus.

- Tick the **Show Ahn./User Number** and **Show Preferred Picture** boxes to add this information, if it

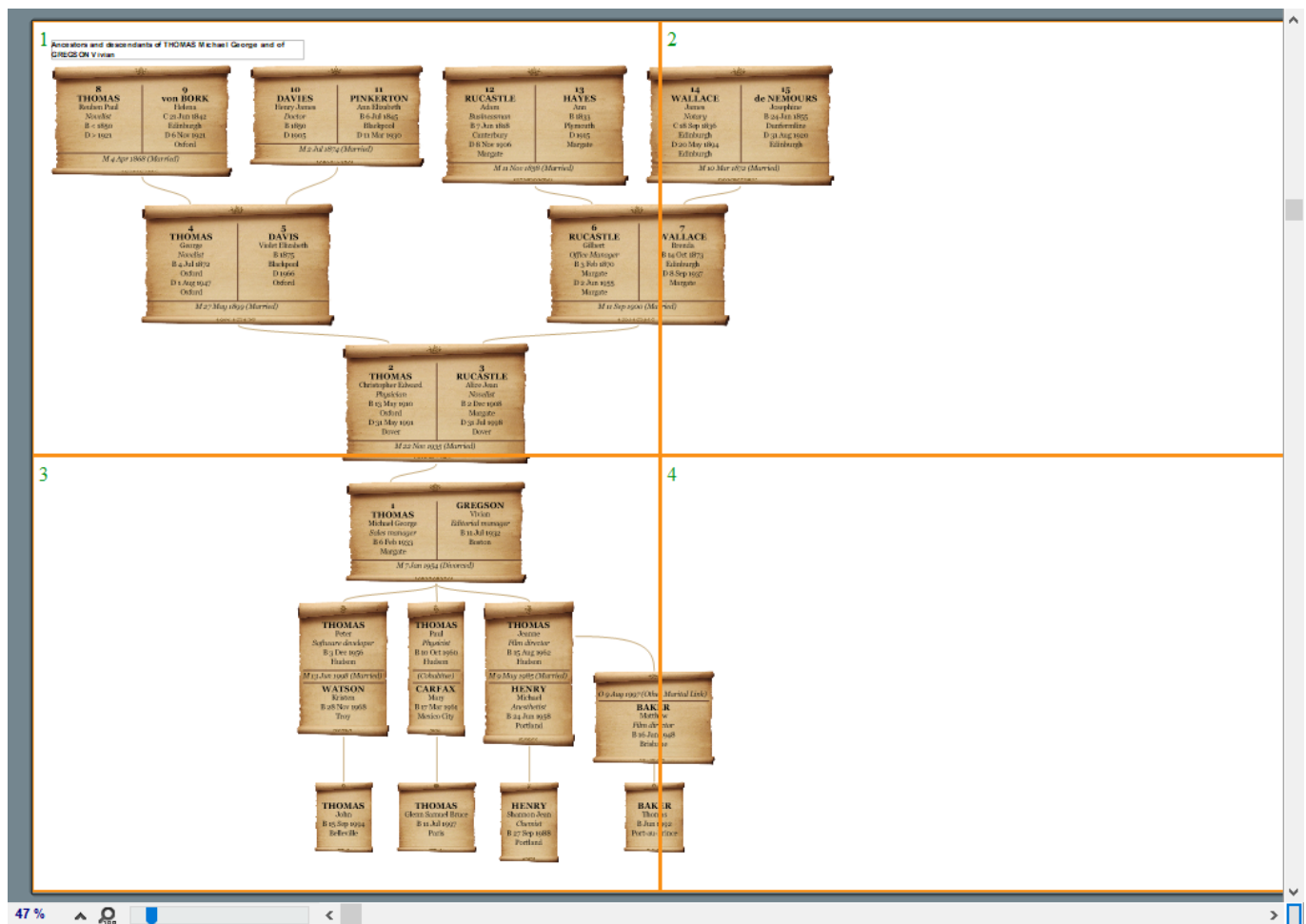
exists, in the selected boxes.

Change the text formatting

Without delay, change the font, size, color and text alignment with the drop-down menu, the cursor and the buttons of the **Layout** panel.

Info • Do not forget that you can make a selection of all men in the tree chart, then all women, to apply different text colors. For this, use the **Select** menu or right-click of the mouse.

Hourglass Chart



Change the layout of the tree

1. In the **Layout** panel, change the spacing between boxes or the spacing between generations by clicking the arrow buttons.
2. Tick the **Display Empty Lines** box for all boxes to be filled with the same number of lines, even if you do not have information.
3. Click the **Pages > Center Tree Chart** button to reposition it optimally after modifications.

Move elements in the tree chart. After selecting boxes, several methods for moving them are available. Choose the one that suits you best

- Mouse: Drag the selection to its destination by holding the mouse button pressed.

Info • Hold down the **Shift** key to prevent any movement off the generation axis. Each box moved will remain aligned with the other boxes in the same generation.

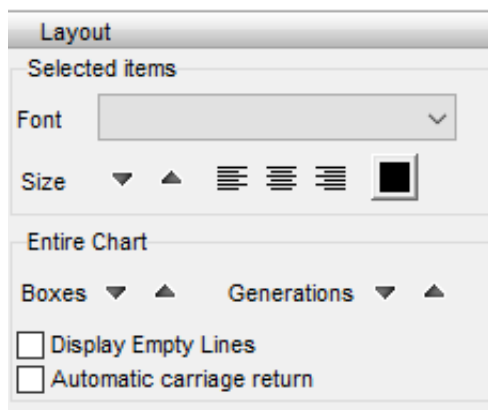
- Arrow keys: press the arrow keys to move to the position you wish to select.

To cancel the moving of the selection, press **Ctrl-Z** or choose **Edit > Undo**. To restore the move, press **Shift-Ctrl-Z** or choose **Edit > Redo**.

Change the design of the tree chart

Change the graphical appearance of your tree charts with a few clicks. Some graphical changes apply to the whole tree chart, others apply only to the boxes you selected.

1. Select the boxes to be modified or choose **Select > Select All**.
2. In the **Layout** panel, change the overall font, size, alignment and text color.
3. The display of boxes on the tree chart is defined by three elements: box styles, content types and connecting line styles. The different themes that come with Heredis contain several presets for each of these elements. They are available in the **Tools > Layout** panel of the tree chart.
 - Choose a preset to be applied to the selected boxes in the dropdown menus. A preview screen shows you the appearance of available presets.

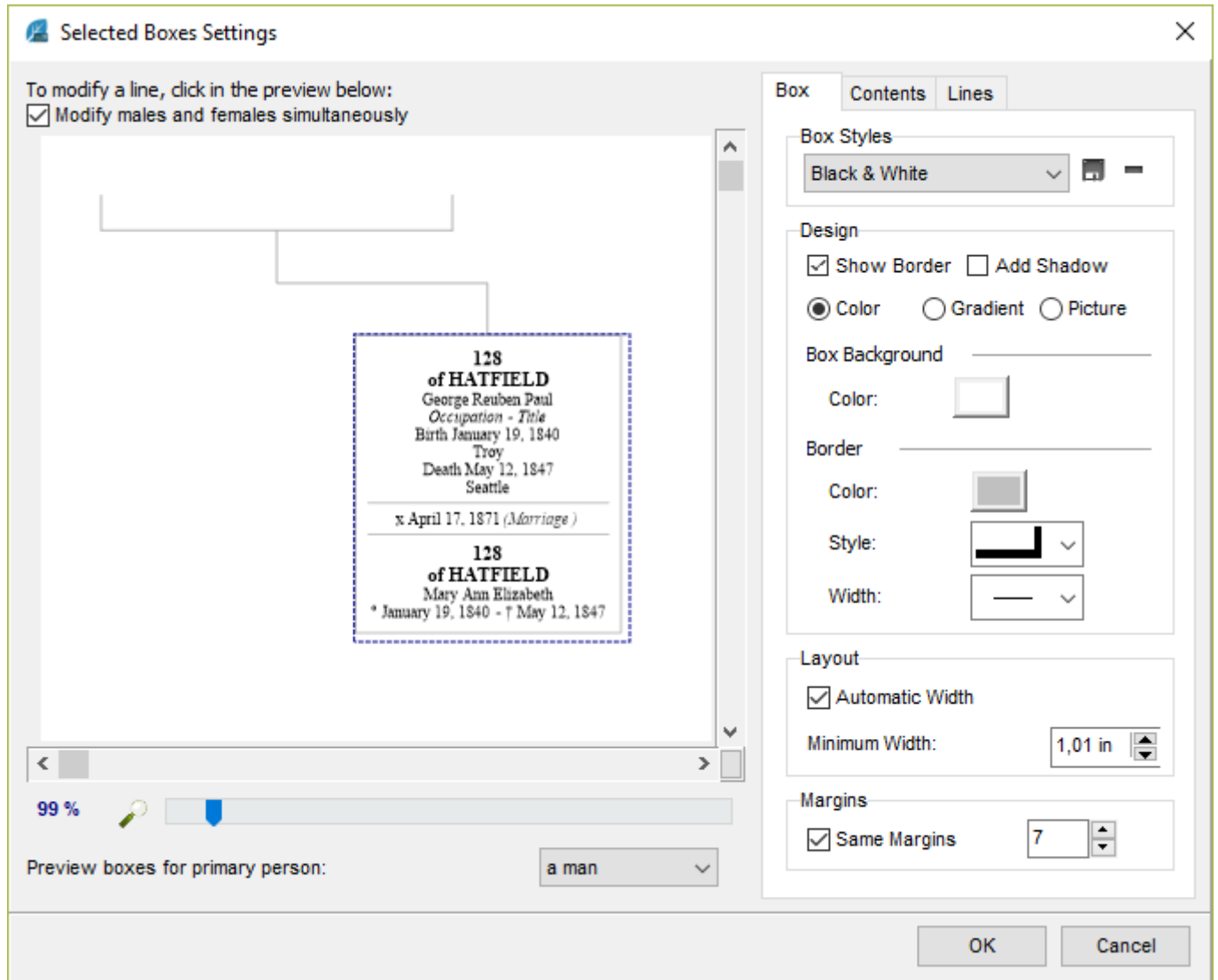


- You can change each preset of box styles, contents or connecting lines. Click the **Layout** button in the toolbar, use the right-click menu on the selected box, or click the **Edit...** box shown as a pencil to the right of each menu to access all the changes.

Info • By clicking on the pencil, you open the setup screen of the preset. To change the presets of box style, contents and connecting lines at the same time, click the **Layout** button.

- The box preview contains a tick box in the top left of the preset edit screen, for applying a modification to the males and females simultaneously.

Change the box style



Change the Box style preset displayed or choose a different preset from the Box Styles drop-down menu to form a base for your custom formatting.

1. Click the border of the box to change border, shading, box background, orientation and size of the box including padding.
2. Click on an item, eg. name, to access the formatting of this item. When a line contains two distinct elements, they may be changed independently of one another, for example Surname – Given Name or Date - Place.
3. Click on the picture to determine its size, its border and its eventual position in the box.

Info • One can only change the borders of the drawn boxes If you choose an image for the box

background, the outline must be included in the image.

All changes are immediately displayed in the preview of the box.

Info • To see better the changes made in the preview box, use the zoom slider at the bottom of the window or click the magnifying glass icon and choose a zoom percentage.

Click **OK** to apply the changes to all selected boxes on the tree chart.

Modify the content

Selected Boxes Settings

To modify a line, click in the preview below:
 Modify males and females simultaneously

Box Contents Lines

Contents Type
 Detailed(Descendancy)

Selected Line
 Date of Marriage (Date of Marriage Family Status)

Headings
 *, b, x, ? ...

Dates
 September 30, 1984
 Use Gregorian Dates
 Mention Source

Preview boxes for primary person: a man

OK Cancel

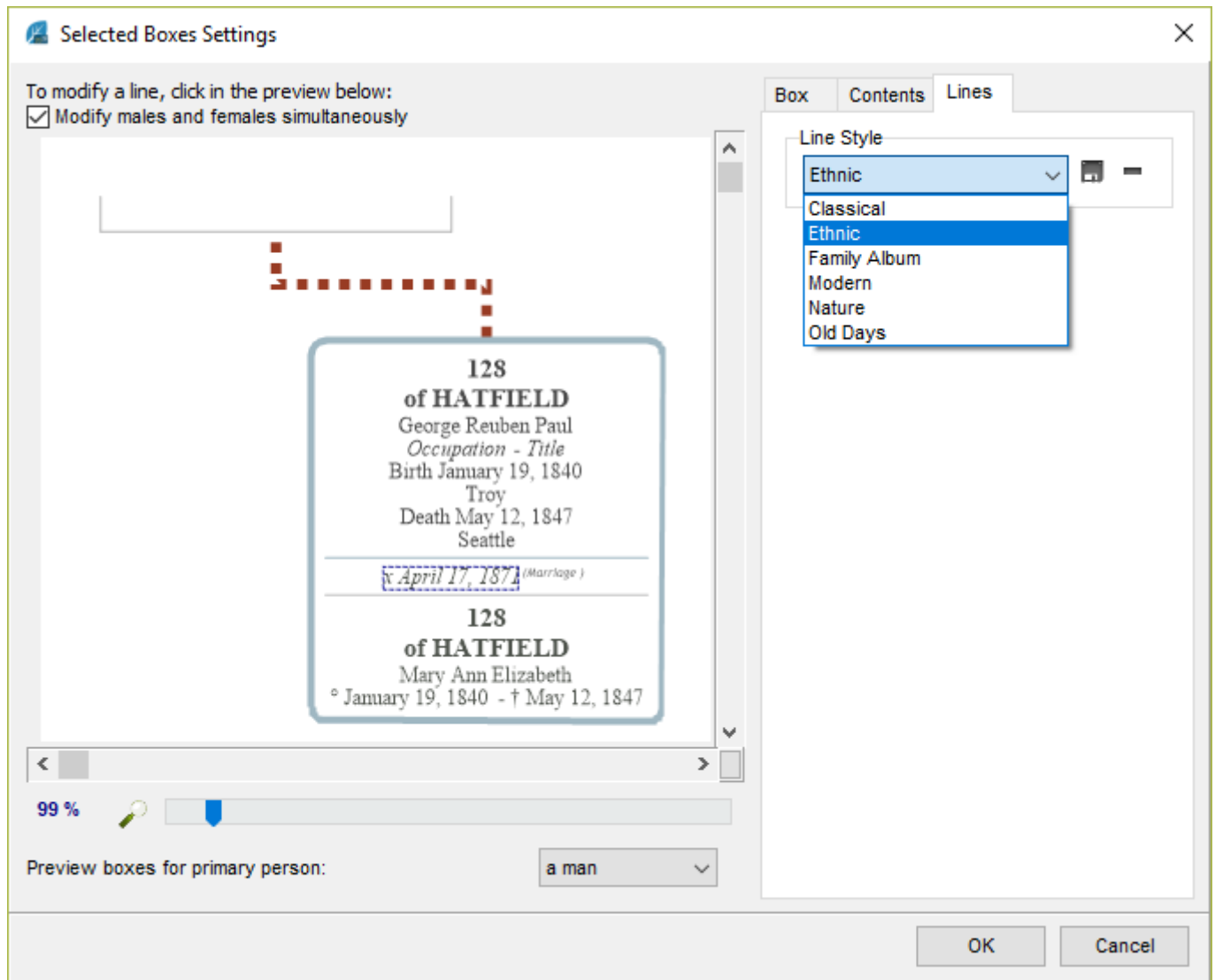
Change the **Content type** preset displayed or choose a different preset from the drop-down menu as a base for your custom formatting.

Click on each item displayed in the box to change the data formats. For example, click the name to indicate management of the particle, whether to include the prefix and suffix of the name. Click on a date to indicate the desired format (long, short, in numbers or letters, etc.).

Info • One can materialize the presence of a source for each event mentioned in the boxes. Select the date field and tick the Mention source box to add the symbol (s) following the dates shown.

Click **OK** to apply the modified contents of the selected boxes on the tree chart.

Modify connecting lines



Modify the Line style preset displayed or choose a different preset from the drop-down menu as a base for your custom formatting.

1. Click the border of the box or on the connecting line to display the **Line** tab.
2. Choose the type of line to connect the selected boxes from the dropdown menu: right angles, rounded corners or curves.
3. Specify the width of the connecting line with the cursor and click the color box to choose a color.

Click **OK** to apply the modified lines to the selected boxes.

Edit the text of a box

The screenshot shows a dialog box titled "Edit Box" with three tabs: "Child", "Family a", and "Family b". The "Child" tab is selected. The dialog contains the following fields:

- Number : 1
- Surname : THOMAS
- Given Names : Michael George
- Occupation : cabinet maker
- Title :
- Date of Birth : Birth : February 6, 1933
- Place of Birth : Margate
- Date of Death :
- Place of Death :

At the bottom of the dialog are two buttons: "OK" and "Cancel".

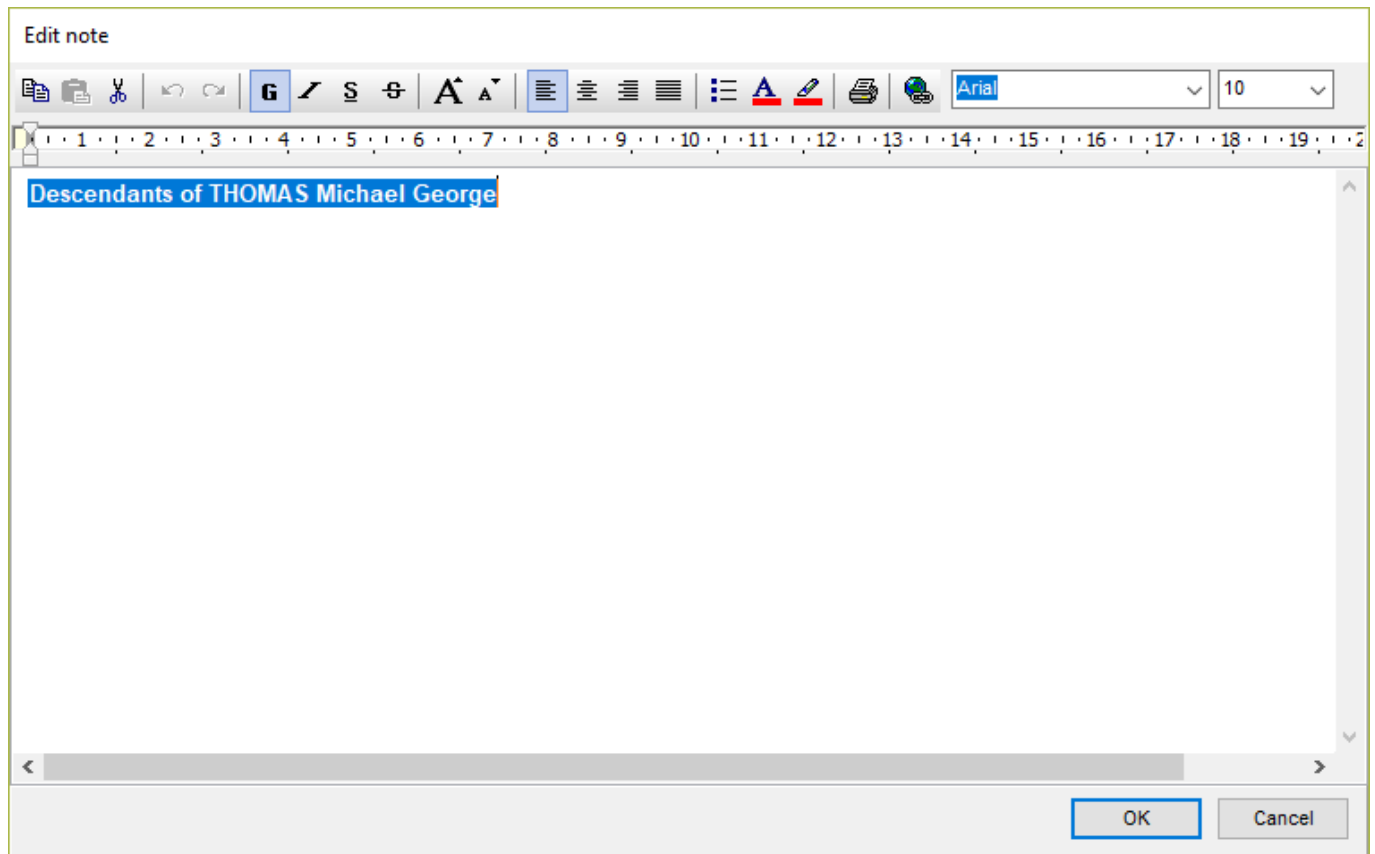
1. Right click on the box to be edited and choose Edit Text to open the editing field.

Info • You can only edit one box at a time.

2. Enter changes to the displayed text.

3. Click **OK** to apply changes.


Edit the tree chart title



The tree chart title is a modifiable text zone.


Heredis proposes a title containing the name of the primary person. Double-click the title to open the text editor and make the necessary content changes and formatting of the text.

Add a Picture

Select the **Edit > Add Picture** menu or click the **Add**  button on the toolbar to add a graphic illustration to your tree chart.

The picture is added at the top left of the tree chart displayed


- It is possible to add several pictures. If they must overlap, there are options for stacking images. Right-click the image to move the selected image forward, backward or to the background if it is a background image for the tree chart. Whatever option chosen, the boxes of the tree chart remain in the foreground
- When the picture is enlarged or reduced manually with the mouse, it is possible to restore the proportion between the picture and its frame by using the right-click **Resize Image Proportionally** option.
- The right-click **Resize Image** to **Fit Frame** and **Default Picture Size** options allow to resize the image in its display area.

- The image is an object that can be formatted. Click the  button on the toolbar or select **Modify Properties** from the right-click menu on the image. Only box style changes are possible. As with the tree chart boxes, you have available presets applicable to the surround of the image.

You can also consult our articles [\(PC\) Print a tree chart](#), [\(PC\) Save a 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**.
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 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.

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.

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**.

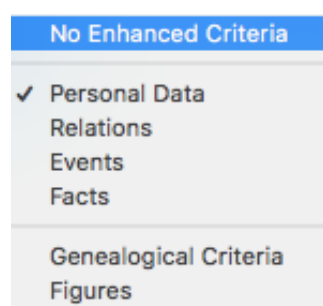
Heredis offers a simple and rapid search for persons based on their Surname, Given Names and Gender. If this research does not easily isolate the person you are looking for, you have available other search criteria corresponding to all the information you have entered. These advanced research criteria are grouped in the Persons panel and are classified by research theme (**Personal Data, Relations, Events, etc.**).

1. Open the **Persons** panel.
2. Enter if needed the **Surname, Given Names and Gender**.

When the list of search results is too long and does not isolate the person sought, unfold the pop-up menu and choose the theme of criteria that can most help.

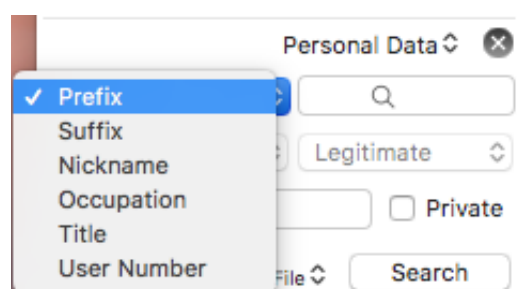
Personal Data

1. Select the criteria **Personal Data** from the pop-up menu.



2. The first criteria line concerns the identity fields entered on the **Add or Choose...** screen or on the **Personal Data** and **Family Group Data** tabs.

Select the item on the pop-up menu (**Prefix, Suffix, Nickname, Occupation, Title, User Number**) and then fill in the entry box with the desired information: «Jock» for the nickname or «Baker» for the occupation.



3. The second line of criteria concerns the User Fields you have created and completed.

Select the item from the pop-up menu (**Religion, Health, Nationality, etc.**), then complete the entry box with the appropriate keyword: «blind» if you selected "Health" or "Catholic" if you are looking for information on Religion.

Info • Click the magnifying glass in the entry box to select the **Is empty** or **Is not empty** option.

4. The theme of identity includes the flags you have assigned to the person (**Child Status, Signature,**

Media, Childless, Unmarried, Secondary, Marked, Confidential), tick the box on the third line and select the search criteria in the first menu and the value of this criterion in the second pop-up menu: **Child Status** is **Adopted** or **Signature** is **Cannot Sign** (the person cannot sign).

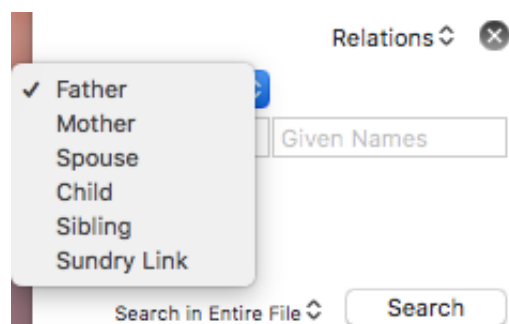
5. Enter a word or phrase in the **Note** search box to find the individual according to the content of his/her person note. Tick the **Private** box if you are looking for a private note. You can also click the magnifying glass in the search box to indicate that you are looking for a person whose note **Is not empty** or **Is empty**.

6. Click **Search** to start the search over the entire file. To start another search, clear the criteria by clicking the **Remove enhanced criteria** button to the right of the choice of research topic menu and then select new criteria.

Relations

1. Select the criteria from the **Relations** pop-up menu. This type of criterion gives access to combined information based on the links between the person and others related to him/her.

2. Select the type of link (**Father, Spouse, Child, etc.**) from the menu.



3. Enter **Surname** and/or **Given Names** of individuals linked to the person.

- If you are looking for a «Matthew», whose brother's name was «Reuben», you will enter «Matthew» in the **Given Names** field at the top of the **Persons** panel, then select the **Siblings** criterion on the pop-up menu and finally, enter «Reuben» in the **Given Names** field for advanced criteria.
- When searching for an person by his/her spouse, you can specify the family status. Tick the **Family Status** box, then select the status from the pop-up menu (**Married, Divorced, etc.**). You can add a word or phrase in the **Note** search box to search according to the content of the Family note. Tick the **Private** box if you know you are looking for a private note.
- When searching for an individual by the people that you have linked to the person, specify the type of link (**Adoptive Parent/Child or Heir/ Testator, etc.**). Tick the **Type of Link** box and select it from the short cut menu.

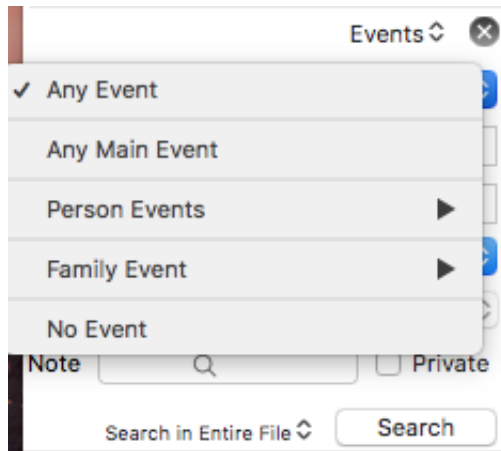
You can add a word or phrase in the **Comments** search box to search for what you have entered in the commentary on the link.

4. Click **Search** to search the entire file. To start another search, clear the criteria by clicking the **Remove enhanced criteria** button, to the right of the choice menu for a research theme, and select new criteria.

Events

Find one or more persons in your file based on recorded events.

1. Select the criteria in the **Events** menu.



2. Leave the **Any Event** criterion or select the type of event to be considered. You can choose either all person events or family events, or a particular event.

Info • Heredis allows you to display all persons for whom you have not entered an event to guide your research.

3. Enter **Place** (that is to say any field for the place), **Subdivision**, **Start Year** and/or **End Year** of the event to find the person.
4. To search based on dates (incomplete, approximate, empty, expressed in a particular calendar), select the criteria from the pop-up menu.
5. To search based on elements assigned to the event (**Sources**, **Witnesses**, **Media**) or details of the event (**Private Event**, **Cause of Death**), tick the box on the fifth line and select the corresponding search term.
6. In the **Note** research field, enter a word or phrase to search by content of the Note event. Tick the **Private** box if you are looking for a private note. Click the magnifying glass to select the **Is empty** or **Is not empty** option.
7. Click the **Search** button to search the entire file. To start another search, clear the criteria by clicking the **Remove enhanced criteria** button, to the right of the choice menu for a research theme, and select new criteria.

Facts

Find all the persons sharing the same kind of Facts

1. Select the criteria **Facts** on the pop-up menu.



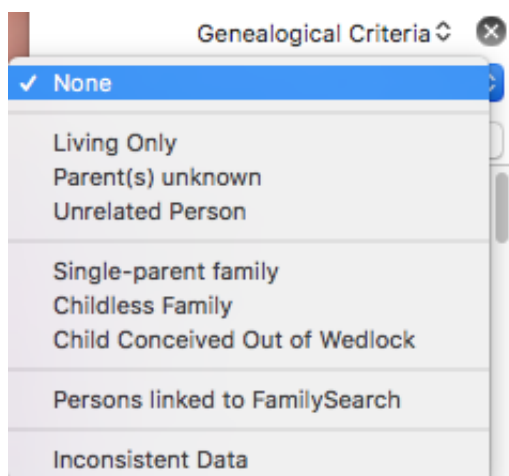
2. You will find all the categories you created. Choose the one you want.

3. Click the **Search** button to search the entire file. To start another search, clear the criteria by clicking the **Remove enhanced criteria** button, to the right of the choice menu for a research theme, and select new criteria.

Genealogical criteria

To learn more about your genealogy or to correct any errors, you can identify individuals based on genealogical criteria.

1. Select **Genealogical Criteria** on the pop-up menu.



2. Choose the most relevant genealogical criteria proposed in the menu: **Living Only, Treetop, Unrelated Person, Single-Parent Family, Childless Family, Child conceived Out of Wedlock, Inconsistent Data.**

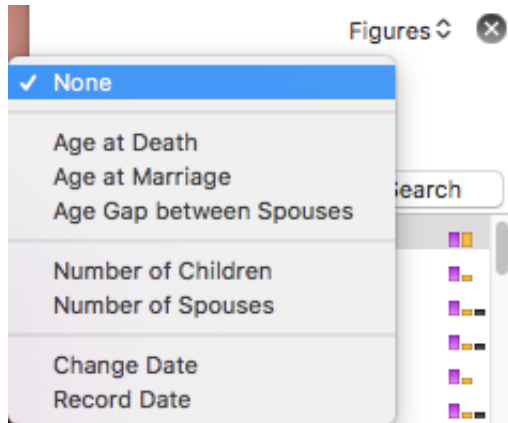
3. Click the **Search** button to search the entire file. To start another search, clear the criteria by clicking the **Remove enhanced criteria** button, to the right of the choice menu for a research theme, and select new criteria.

Calculated data

You can identify persons based on data calculated by Heredis from the information you enter concerning:

- the life of the individual: age at death, age difference with spouse, number of children...
- changes to your genealogical file: creation date or modification date for a person

1. Select **Figures** on the pop-up menu.



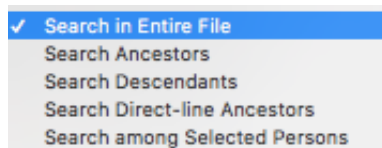
2. Choose the type of search to perform: **Age at Death, Age at Marriage, Age Gap between Spouses, Number of Children, Number of Spouses, Record Date, Change Date.**

3. Select the appropriate operator (**Is Equal, Is Greater Than**, etc.), then enter the desired number or date.

4. Click the **Search** button to search the entire file. To start another search, clear the criteria by clicking the **Remove enhanced criteria** button, to the right of the choice menu for a research theme, and select new criteria.

Limit the extent of the search

The search is performed throughout the genealogical file.



However, you can limit the search to **Ancestors** of the primary person, his **Descendants**, the **Direct-line Ancestors** of this genealogy.

You can also search **Among Selected Persons** only already shown in the **Persons** panel, which allows you to refine an initial search with additional criteria.

Use the pop-up menu next to the **Search** button and select the branch to be considered for research.

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.).

The screenshot shows the Heredis search interface. At the top, it says "Search (72 items)" with a left-pointing arrow. Below this are tabs for "Persons", "Places", "Media", "Sources", and "Branches". The "Persons" tab is selected. There are three input fields: "Surname", "Given Name", and "Gender" (with a dropdown menu set to "All" and a clear icon). Below these is a "Show/Hide Enhanced criteria" arrow. A dropdown menu is set to "Search in Entire File". There are input fields for "Place", "Spouse's name", and "Years Betw." (with two sub-inputs and an "and" connector). There are two checkboxes: "Without Source" and "Direct-Line", each with a corresponding dropdown menu. A "Search" button is at the bottom.

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 primary person in a new **Immediate Family**, just double-click the name. To start a new search, click **Remove criteria** icon. All individuals in the file are displayed again.
3. When the list of results is too long and fails to isolate the search person, click the **Show/Hide Enhanced Criteria** arrow to unfold the advanced search criteria.
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, Smart Search Results, Last added or modified persons**.
5. Combine the following criteria to refine your search:
 - a place. You can either enter a town, a county, a full or partial postal 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 persons 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, Parents Unknown or Linked to FamilySearch.

To display the persons corresponding to these Enhanced 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**.

The screenshot shows the 'Search by Name' dialog box with the following details:

- Search Contains:** Surname and Given Name input fields.
- Gender:** M, F, ?
- Direct-line Ancestors Only:**
- Search Results List (Left):**
 - KAGANOVITCH Sacha (1966-)
 - LOWENSTEIN Paula (5701-)
 - MORLEY Andrew (1899-1932)
 - MULLAN David (1975-)
 - MULLAN Jonathan (1931-)
 - de NEMOURS Josephine (1855-1920)
 - PINKERTON Ann Elizabeth (1845-1930)
 - ROCTON Adrian (1988-)
 - ROCTON Christian (1962-)
 - RUCASTLE Adam (1818-1906)
 - RUCASTLE Alice Jean (1908-1998)
 - RUCASTLE Gilbert (1870-1955)
 - RUCASTLE Reginald (< 1860-1942)
 - SMITH Charlotte (1805-1872)
 - SMITH John
 - THOMAS Christopher Edward (1910-1991)
 - THOMAS Edward (> 1804-1874)
 - THOMAS Elizabeth (Tic) (1882-)
 - THOMAS George (1870-1871)
 - THOMAS George (1872-1947)
 - THOMAS Glenn Samuel Bruce (1997-)
 - THOMAS John (1994-)
 - THOMAS Judy (1962-)
 - THOMAS Kate Elsie (1941-)
 - THOMAS Marion (1900-1985)
 - THOMAS Michael George (1933-)
- Individual Profile (Right):** THOMAS Michael George
 - Ahn. # 1 (Generation 1):** cabinet maker, 06.02.1933 - Margate
 - Parents (2):** P THOMAS Christopher Edward (1910-1991), M RUCASTLE Alice Jean (1908-1998)
 - Spouses (2):** 1 GREGSON Vivian (1932-), x 07.01.1954 - Hudson; 2 LOWENSTEIN Paula (5701-), x 03.03.1976 - Troy
 - Children (3):** 1 THOMAS Peter (1956-), 1 THOMAS Paul (1960-), 1 THOMAS Judy (1962-)
 - Other events:** Census: 25.03.1965 - Hudson (Columbia)
 - Shared events:** Census: 25.03.1965 - Hudson (Columbia) - Participant (THOMAS Peter, THOMAS Paul, THOMAS Judy)

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.



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.

Smart Search

This function allows you to find specific data in your genealogy by combining different search criteria; you may then modify or process the data you have found.

To access **Smart Search**:

- choose **Smart Search** in the **Find** drop-down menu
- or select the **Search > Smart Search** tab
- or click on the **Find**  icon and select  **Smart Search** in the drop-down menu

PC Smart Search screen

The screenshot displays the PC Smart Search interface. At the top, there are navigation tabs for 'Family', 'Data', 'History', and 'Search'. Below these are buttons for 'Search Wizard', 'Smart Search', and 'Find/Replace'. The 'Criteria' section features a search model dropdown, a 'Persons' dropdown, a 'Surname' text field, a 'Begins With' dropdown, and an empty text field. Below this is a search scope section with 'All criteria' and 'The entire file' dropdowns. A large empty box contains the text 'No criterion entered'. The 'Results' section shows a table with columns: Surname, Given Names, Birth Date, Birth Place, Death Date, and Death Place. Below the table is a 'Processing selected persons (0)' section with various dropdown menus for filtering (Marked, Confidential, Secondary Person, Unmarried, Child Status, Signature, Declared consistent, Declared complete) and buttons for 'Edit', 'Export Heredis File', 'Export Gedcom File', and 'Delete'. The bottom status bar shows 'Ahn. #1 Generation 1', '3 Spouses', and '3 Children: 2'.

MAC Smart Search screen

The screenshot displays the Heredis Smart Search interface. At the top, there are navigation tabs for 'Family', 'Data', 'History', and 'Search'. Below these are buttons for 'Search Wizard', 'Smart Search', and 'Find/Replace'. The 'Criteria' section is expanded, showing a search model dropdown set to '< Choose a search model >'. The search criteria are set to 'Persons' with the search field 'Surname'. The operator is 'Begins With'. The search scope is 'All criteria' in 'the entire file'. A 'Search' button is located at the bottom right of the criteria section. Below the criteria section is the 'Results' section, which contains a table with columns: Surname, Given Names, Birth Date, Birth Place, Death Date, and Death Place. The table is currently empty. Below the table is the 'Processing selected persons (0)' section, which includes a list of dropdown menus for 'Marked', 'Confidential', 'Secondary Person', 'Unmarried', and 'Childless'. To the right of these are buttons for 'Child Status', 'Signature', 'Declared consistent', 'Declared complete', 'Add to note', 'Link a source', 'Edit', 'Export Heredis File', 'Export Gedcom File', 'Delete', and 'Find/Replace'.

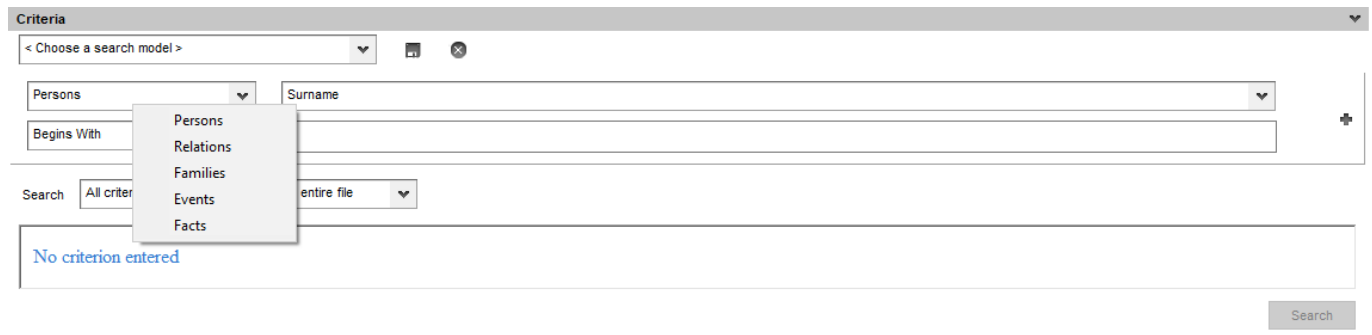
The Smart Search tool is composed of a “Criteria” field, a “Results” section, and a “Processing selected results” section. This screen is also linked to a specific side panel entitled “Results”.

Search Criteria

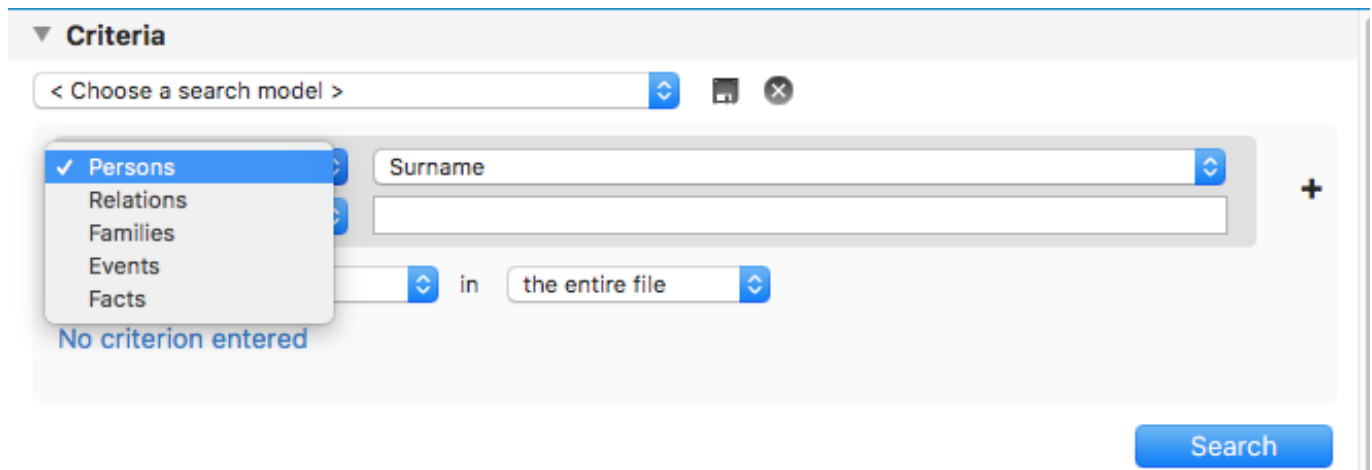
The Heredis default display shows **<Persons>** as the first search criterion, then the **<Surname>** field, and the **<Begins With>** operator. In the entry field to the right of **<Begins With>**, type in the first letters of the surname you are looking for and click on the **Search** button to find all relevant persons in your genealogy.

The initial search criterion will determine what the next field options are.


PC Selecting criteria



MAC Selecting criteria

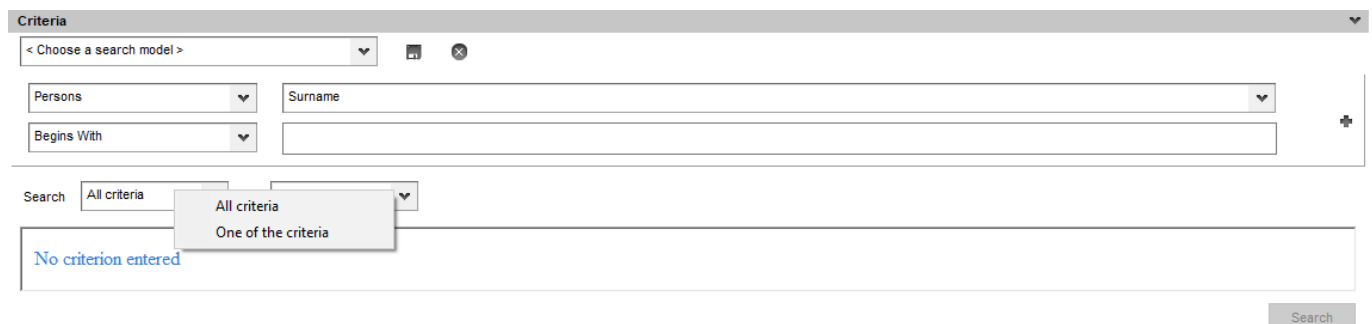


Click on each of the fields and specify the type of information you are looking for in your genealogy. You can combine criteria such as **Persons, Relations, Families, Events, Facts** to build more or less intricate searches depending on the number of criteria you have selected.

- The  button to the right of the **<Choose a search model>** pop-up menu allows you to remove all existing criteria and to clear the list of results.
- The + and – buttons to the right of a criteria line allow you to add or remove a criterion. Note that the – button won't be displayed unless you have already added at least one criterion.

Additionally, you can organize the combination of your criteria by clicking on the pop-up menu located below the criteria selection area.

PC How to combine search criteria



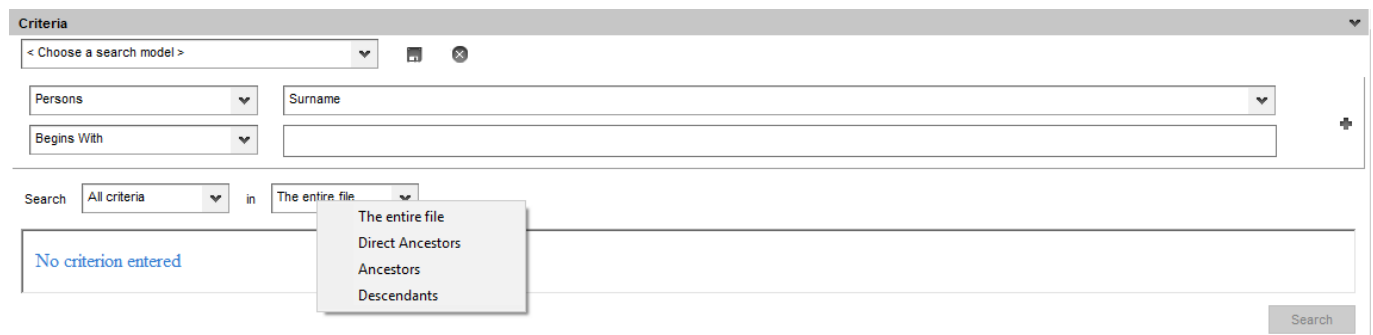
MAC How to combine search criteria



The default search mode is set on **<All criteria>**. This option allows Heredis to search all data that match at least one of the criteria you have selected. You can also narrow your searches down to specific parts of your genealogy or use the entire file.

Click on the pop-up menu that reads **<the entire file>** and select **<direct-line ancestors>**, **<the ancestors>**, or **<the descendants>**.

PC How to limit the search

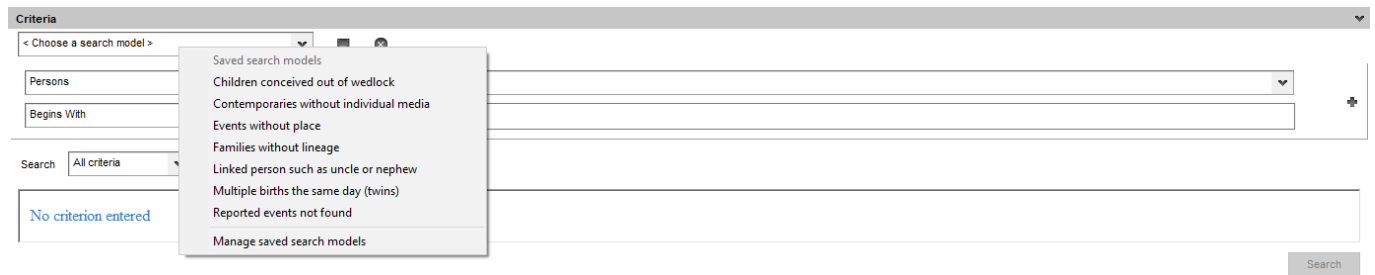


MAC How to limit the search

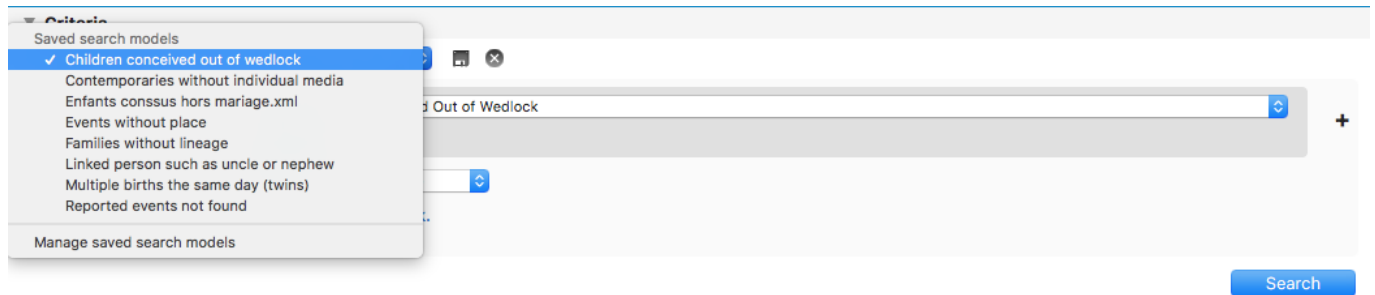



Heredis provides pre-saved search models to help you create your searches step by step. Click on **<Choose a search model>** and select the model you are looking for.

PC List of saved search models



MAC List of saved search models



The fields associated with the model you choose are automatically prefilled. You can modify a search model by changing or adding criteria and save these modifications by clicking on the  **Save As** button located to the right of the field entitled **<Choose a search model>**.

To manage your models or to reload the saved search models, click on **<Choose a search model>** and select **Manage saved search models**.


A phrased version of your search is automatically displayed below the criteria fields area. This allows you to verify that the search you have created matches your needs. A message alerts you in case the search you are creating is incorrect.

Other options are available from the indented wheel  in the upper right corner. If you tick **Search in variants**, the searches will be extended to the variants you entered in your genealogy.

If you activate the **Comprehensive** mode, two additional buttons will be displayed to the left of the **Search** button: **Search in results** and **Add to results**.

Search in results allows you to research data within the results of your previous search in order to refine your results.

Add to results allows you to add your search results to the results of your previous search. Thanks to this option, you can build a list of results, adding up data from a series of searches.

Note: When you consider your research is complete, hide the Criteria area by clicking on the **Criteria** banner; this will leave more space available to display the results from searches and processing. More space can also be freed by deactivating the phrasing of your search: click on the  indented wheel in

the upper right corner and untick **Show the edit**.

Search results

When you click the **Search**, **Search in results** or **Add to results** buttons, Heredis displays the data found under the **Persons**, **Families**, **Events** and **Facts** tabs.

Within each tab, a number (in brackets) indicates how many persons, families, events and facts were found.

PC Display of Smart Search results

The screenshot shows the Heredis PC interface. At the top, the 'Criteria' section is active, with 'Events' selected in the dropdown and 'Marriage' entered in the search field. Below this, a search bar shows 'I'm looking for all "Marriage" events.' The 'Results' section is visible, showing a table of search results. The table has columns for Surname, Given Names, Birth Date, Birth Place, Death Date, and Death Place. The results are as follows:

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
von BORK	Helena	c 21.06.1842	Edinburgh (City Of Edinburgh)	† 06.11.1921	Oxford (Oxfordshire)
CARFAX	Mary	* 17.03.1961	Mexico City (Federal District)		
DAVES	Henry James	* 1850		† 1905	
DAVIS	Violet Elizabeth	* 1875	Blackpool (Lancashire)	† 1966	Oxford (Oxfordshire)
GREGSON	Vivian	* 11.07.1932	Boston (Suffolk)		
HAYES	Ann	* 1833	Plymouth (Devon)	† 1915	Margate (Kent)
HENRY	Michael	* 24.06.1958	Portland (Oregon)		

Below the table, there is a 'Processing selected persons (29)' section with various dropdown menus and buttons for actions like 'Marked', 'Confidential', 'Secondary Person', 'Unmarried', 'Child Status', 'Signature', 'Declared consistent', 'Declared complete', 'Edit', 'Export Heredis File', 'Export Gedcom File', and 'Delete'. At the bottom, a status bar shows 'Ahn. #1 Generation 1' and '3 Spouses 3 Children: 2 1'.

MAC Display of Smart Search results

Criteria

< Choose a search model >

Events: Marriage Exists

Yes

Search: All criteria in the entire file

I'm looking for all "Marriage" events.

Search

Results

Persons (28) Families (15) Events (15) Facts (8)

Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
BLACHIER de la CHAUX	Marie Françoise	* 11.18.1787	Satillieu (Ardèche)	† 11.16.1856	Satillieu (Ardèche)
COLIGNY	Catherine Émilie	* 09.08.1902	Saint-Rambert-l'Île-Barbe...	† 01.25.1988	Lyon (Rhône)
COLIGNY	Louis	* 12.20.1863	Lyon (Rhône)	† 03.15.1955	Caluire-et-Cuire (Rhône)
COSTET	Jeanne "Émilie"	* 10.29.1860	Saint-Vallier (Drôme)	† 04.17.1949	Lyon (Rhône)
DEMARI	Annie Marguerite Marie	* 07.23.1957	Annecy-le-Vieux (Haute-S...		
DUBOIS	Pierre				
DUCHAMP	Alexandre Joseph	* 11.16.1849	Annonay (Ardèche)	† 03.03.1947	Lyon (Rhône)
DUCHAMP	Aurélien Lucas	* 04.23.1982	Paris (Paris)		
DUCHAMP	Charles Alexandre	* 04.29.1817	Annonay (Ardèche)	† 02.15.1878	Satillieu (Ardèche)
DUCHAMP	Claude Charles	* 02.03.1931	Lyon (Rhône)		
DUCHAMP	Eric Antoine Bernard	* 12.06.1952	Lyon (Rhône)		
DUCHAMP	Jean-Marie	* 04.26.1899	Saint-Vallier (Drôme)	† 03.26.1993	Lyon (Rhône)

Open the **Summary** panel. To verify the results displayed in the list are correct, click on any line in the list of results and the details will appear in the **Summary** panel. The data displayed in this panel varies according to the tab you selected under **Results**.


Should you notice a mistake to be corrected, double-click on the line in the list of results to directly access the person's **Personal Data** in your genealogy file.

(MAC) Results panel

The results of your smart search are also available in the **Results** panel.

Results Panel – List of found persons




You can navigate in Heredis while keeping your search results on hand. Use the **<Persons>** pop-up menu to select and display results from the **Families**, **Events** or **Facts** tab. At any point, you can go back to the Smart Search screen by clicking the button  to the right of the pop-up menu.

From this panel, select a person and use the drag and drop feature to easily complete your genealogy.

Processing results

Now that you have found persons, families, events or facts in your file, you may want to update this data, share it with a cousin, or even publish it in a document.

The Processing feature allows you to do this and much more, based on the data you have selected in the **Results** section under the current tab.

Note: in **Comprehensive** mode, by clicking the  indented wheel in the upper right corner, checkboxes appear at the beginning of each data line so you can select the data you wish to process.

All lines are selected by default; you can untick, one at a time, the lines of results you do not want to include in your processing. Or you can decide to **Deselect all** and then tick the data lines you want to include in your processing.

If you want to go back to including all results, click **Select All**.

Unfold the Processing section by clicking on the **Processing selected** <persons>, <families>, <events>, or <facts> banner: action buttons related to the **Results** tab you selected will be displayed.

PC Processing results

Results

Persons (5) Families (5) Events (11) Facts (2)

	Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
	DAVIES					
	DAVIES	Henry James	* 1850		† 1905	
	DAVIS	Violet Elizabeth	* 1875	Blackpool (Lancashire)	† 1966	Oxford (Oxfordshire)
	DOBNEY	Anna	* 1818		† 1858	
	de NEMOURS	Josephine	* 24.01.1855	Dunfermline (Fife)	† 31.08.1920	Edinburgh (City Of Edinbur...

Processing selected persons (5)

Marked ▾

Confidential ▾

Secondary Person ▾

Unmarried ▾

Childless ▾

Child Status ▾

Signature ▾

Declared consistent ▾

Declared complete ▾

Add to note ▾

Link a source

Edit ▾

Export Heredis File

Export Gedcom File

Delete

Find/Replace

MAC Processing results

Results

Persons (28) Families (15) Events (15) Facts (8)

	Surname	Given Names	Birth Date	Birth Place	Death Date	Death Place
	BLACHIER de la CHAUX	Marie Françoise	* 11.18.1787	Satillieu (Ardèche)	† 11.16.1856	Satillieu (Ardèche)
	COLIGNY	Catherine Émilie	* 09.08.1902	Saint-Rambert-l'Île-Barbe...	† 01.25.1988	Lyon (Rhône)
	COLIGNY	Louis	* 12.20.1863	Lyon (Rhône)	† 03.15.1955	Caluire-et-Cuire (Rhône)
	COSTET	Jeanne "Émilie"	* 10.29.1860	Saint-Vallier (Drôme)	† 04.17.1949	Lyon (Rhône)
	DEMARI	Annie Marguerite Marie	* 07.23.1957	Annecy-le-Vieux (Haute-S...		
	DUBOIS	Pierre				
	DUCHAMP	Alexandre Joseph	* 11.16.1849	Annonay (Ardèche)	† 03.03.1947	Lyon (Rhône)
	DUCHAMP	Aurélien Lucas	* 04.23.1982	Paris (Paris)		
	DUCHAMP	Charles Alexandre	* 04.29.1817	Annonay (Ardèche)	† 02.15.1878	Satillieu (Ardèche)
	DUCHAMP	Claude Charles	* 02.03.1931	Lyon (Rhône)		
	DUCHAMP	Eric Antoine Bernard	* 12.06.1952	Lyon (Rhône)		
	DUCHAMP	Jean-Marie	* 04.26.1899	Saint-Vallier (Drôme)	† 03.26.1993	Lyon (Rhône)

Processing selected persons (28)

Marked ▾

Confidential ▾

Secondary Person ▾

Unmarried ▾

Childless ▾

Child Status ▾

Signature ▾

Declared consistent ▾

Declared complete ▾

Add to note ▾

Link a source

Edit ▾

Export Heredis File

Export Gedcom File

Delete

Find/Replace

Processing selected persons

If the **Persons** tab is highlighted in the Results section, you may then decide to:

- Modify a series of additional information for the persons you selected
 - => declare them as marked or unmarked, confidential, secondary, unmarried, childless, consistent, complete
 - => change the field value under Child Status and Signature
 - => add an identical text to all selected persons using **Add to note**
 - => link a common source to all selected persons
- Create a chronological or alphabetical report listing the persons you selected (**Edit by Date or by Name**)
- Export the selected persons as a Heredis or Gedcom file
- Delete the selected persons

Processing selected families

If the **Families** tab is highlighted in the Results section, you may then decide to:

- Modify a series of information for the families you selected
 - => change the field value under **Family Status**
 - => add an identical text to all selected families using **Add to note**
- Create a report listing the families you selected (**Edit report**)

Processing selected events

If the **Events** tab is highlighted in the Results section, you may then decide to:

- Modify a series of information for the events you selected
 - => change the field value under **Search Status**
 - => declare them as private or not private
 - => share or no longer share them
- Add an identical text to all selected events using **Add to note**
- Link a common source to all selected events
- Create a report listing the events you selected (**Edit report**)

Processing selected facts

If the **Facts** tab is highlighted in the Results section, you may then decide to:

- Modify a series of information for the facts you selected
 - => change the field value under **Search Status**
 - => declare them as private or not private
- Add an identical text to all selected facts using **Add to note**
- Link a common source to all selected facts
- Create a report listing the facts you selected (**Edit report**)

Note: the Processing section banner indicates the type of data you are about to process (Persons, Families,

Events, Facts) and the number of records you have selected.

Find/Replace

The **Find/Replace** feature allows you to find a specific text you entered under Persons, Families, Facts or Events and to replace it with a new text you can type in directly.

Find/Replace screen



The screenshot shows the Heredis Find/Replace interface. At the top, there are tabs for 'Family', 'Data', 'History', and 'Search'. Below these are buttons for 'Search Wizard', 'Smart Search', and 'Find/Replace'. The 'Find' section contains a 'Text' input field (currently empty), an 'Item' dropdown menu (set to 'Prefix'), and 'Where to look?' options: 'In the entire file' (selected) and 'In Smart Search results' (with a count of 28 persons, 15 families, 15 events, and 8 facts). There are also 'Options' for 'Case sensitive' and 'Entire word'. A 'Find' button is at the bottom right of the 'Find' section. The 'Matches' section shows a large empty table with a 'Select all' and 'Deselect all' button below it. The 'Replace' section has 'Search text' and 'Replace with' input fields, and a 'Replace' button.

You can search a text entered under:

- one of the following fields: **Prefix, Suffix, Nickname, Title, User Number, Person Note, Research Note;**
- a **Family Note** for a Spouse;
- one of the following Events or Facts fields: **Place Subdivision, Description/Cause, Note or Name.**

You may access this function:

- from the drop-down menu **Find > Find/Replace...**

- by selecting the tab **Search > Find/Replace**
- or by clicking on the  **Find** icon then on  **Find/Replace**

Search text

- Type in the text you are looking for in the **Text** field. Note: if you leave this field blank, Heredis will look for all empty fields.
- Select the type of data you wish to modify by clicking the **Item** pop-up menu.
- Specify where to look for the text you have entered: **In the entire file** or **In Smart Search** results. (For more details on this function, refer to the [Smart Search](#) section.)
- Tick the **Case sensitive** box for Heredis to distinguish upper- and lowercase. As an example, it can look for “honest” and replace it with “Honest”
- Tick the **Entire word** box to prevent modifications within a word. Thus you can expect to replace, e.g. in the **Place Subdivision** field, the abbreviation “st” with “street” without affecting “Boston Road”.
- Click the **Find** button to display all relevant matches found in your genealogy.

The number of items that were found is indicated (in brackets) in the **Matches** banner.

Under the list of results, the text you are looking for is displayed in red within each match that was found.

By default, all matches are ticked; you can untick the matches you do not want to modify, one at a time, or you can decide to **Deselect all** and then tick the matches you want to modify.

If you want to go back to including all matches, click **Select All**.

Replacing text in your genealogy

Find

Text: ✕

Item: ⌵

Where to look?

In the entire file

In Smart Search results
18 persons - 6 families - 38 events - 12 facts

Options

Case sensitive

Entire word

Matches (1)

Events	Place Subdivision
<input checked="" type="checkbox"/> Christening - DUCHAMP Alexandre Joseph (1849-1947)	Paroisse St François

Paroisse St François

Replace (1)

Search text:


Replace with:

Replacing text

Enter your new text in the **Replace with** field.

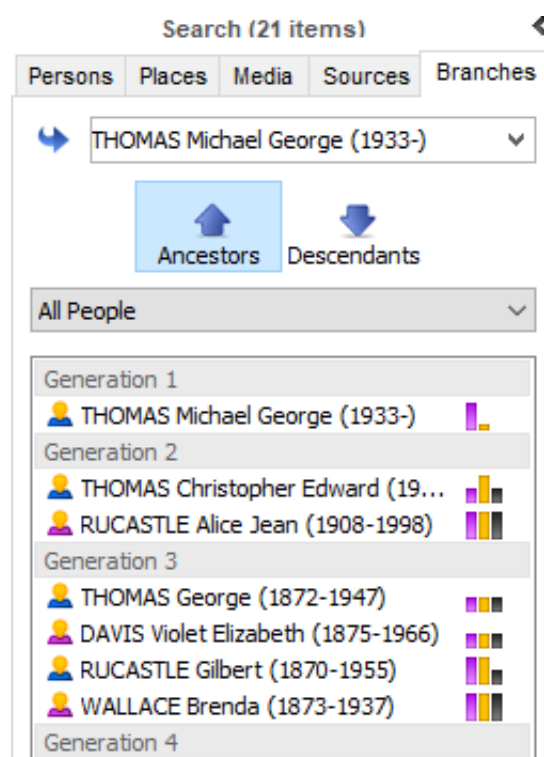
Click the **Replace** button to apply your changes to all the matches you selected.

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

(MAC) If the **Branches** panel is not open, it will be displayed and updated by clicking the  **Display Family Branch** icon on the **Search** tab > **Search Wizard** of the primary person displayed. 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** panel.

Each person displayed in the branch has an icon showing the completeness of data for the three main life events: Birth or Baptism in violet / Marriage in yellow / Death in black. Double-click any person to display the details.



You have a display filter available in a pop-up menu. You may choose between **All people**, **Treetops**, **Hide Complete Persons**, **Search Status is 'Search Record'**, **Complete Persons Only** and **Sort by Change Date**. As an example, you will display **Complete Persons Only** to display a positive status of your work on this branch. If you **Hide Complete Persons**, you will have a clear idea of the work still to be done on the branch.

If you decide that there is much more work to be done on the descendants of a given ancestor, you may select **Memorize This Branch** from the pop-up menu.

The list of persons displayed in the pop-up menu corresponds to the family branches you will have

memorized, both ancestors and descendants. Select the name to redisplay the memorized branch.

When you select a memorized branch from the pop-up menu, it will replace the previous branch displayed. You may also display the branch of the primary person by clicking the button to the left of the pop-up menu.

Do not overlook to suppress the memorized branch once you have finished your research of this lineage. Open the pop-up menu and select **Clear This Branch**.



You know that the person has lived in this city or region? Consider using the event places to find someone in your genealogy.

To find a place among the places of your file, you have several options:

With the Places panel

Use the search box on the **Places** panel to type a word in any entry field for the place you are looking for: the city, postal code, county, state, country.

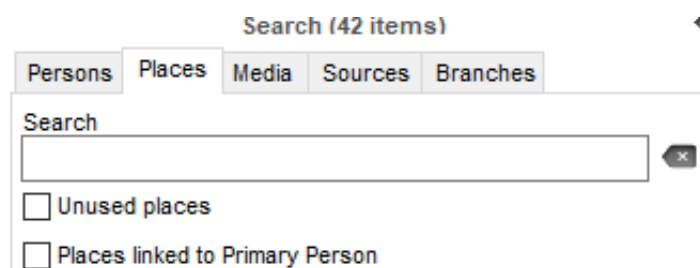
The number of items found matching your search is displayed at the bottom of the panel.

To cancel a search on one element of the place, click the (PC)  (MAC)  **Delete** icon to the right of the Search box.

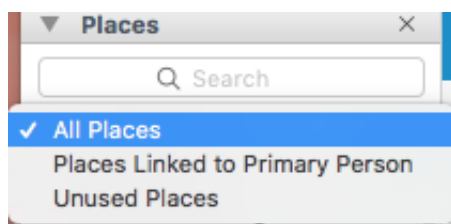
Refine the search by selecting sort criteria from the pop-up menu: **Unused Places, Places Linked to Primary Person**. The list is updated according to the selected criteria.

To cancel the sort criteria, select **All Places** in the pop-up menu.


PC Places Panel



MAC Places Panel





With the Places Index

Open the **Places Index** from the **Tools** menu, on the toolbar or click the  **Places Index** button on the **Places** panel.

In the **Search** box, type a word in any input field of the source being searched.

The number of items found matching your search is displayed beneath the search box.

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

To cancel a search on elements of the index, click the (PC)  (MAC)  **Delete** icon 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 classified by the presence of a variant (V), note (N), media (M), or City, County... by clicking on the column header.

See the list of events in which this place is used by clicking the **Usage** tab. Double-click the line of the event to navigate and view this person and this event.

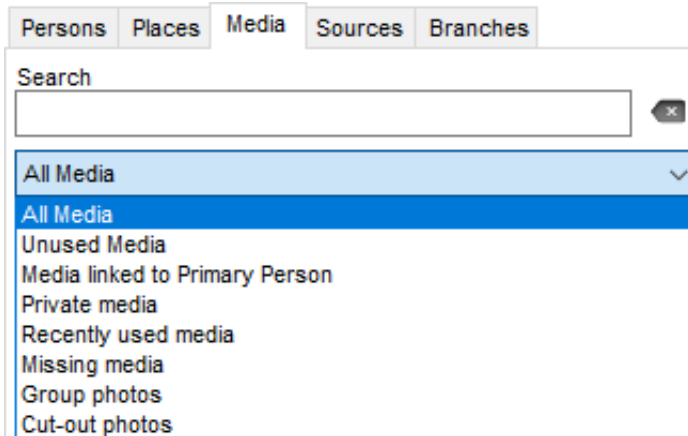
See the [Places Index](#) article for further details.

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

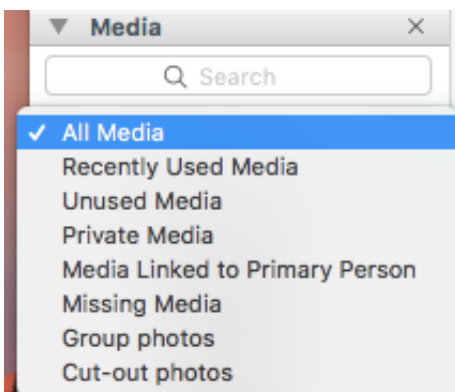
With the Media panel

1. Open the **Media** panel.
2. Type the name or partial name of the media sought in the search box. Cancel the search by clicking on the (PC)  (MAC)  Delete icon to the right of the search area.
3. Refine the search by selecting sort criteria from the pop-up menu: **Recently Used Media, Unused Media, Private Media, Media Linked to Primary Person, Missing Media**. The list is updated according to the chosen criteria. To cancel the sort criteria, select **All Media** on the pop-up menu.
4. To better identify the media selected, change the display mode for the media, as a list or in thumbnail images, by clicking the corresponding buttons. You may also enlarge the thumbnails by using the zoom slider.

PC Media Panel - Search Criteria




MAC Media Panel - Search Criteria





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

The media may be easily assigned to a data item of your file by drag and drop.

In the Media Index

Open the **Media Index** from the Tools menu, or by clicking the  **Media Index** button 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 beneath the Search box.
Click the **Search** icon to select search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.
To delete or replace the search word, click the (PC)  (MAC)  Delete icon to the right of box.
- Limit the search to a type of media by selecting from the first pop-up menu: **Image Files, Audio Files, Video Files, Other Types, Missing Media, Private**.
- Limit the search based on the type of data to which the media is assigned by selecting from the second pop-up menu: **Persons, Families, Sources, Events, Surnames, Given Names, Places or Unused Media**.

To better identify the media selected,

- Sort the list or the thumbnails by the name of the media file or the date you entered. Choose from the pop-up menu located below the display field of the media.
- Change the display mode of the media, as a list or thumbnails, by clicking the corresponding buttons. You may also enlarge the thumbnails by using the zoom slider.

MAC Info • The results displayed in a list can be classified according to the presence of a note (N), a private media (P) or by the file name, by clicking the column header.

When media are selected from the list, see the data to which the media are assigned by clicking the Usage tab. (MAC) Double-click the data for display in a new screen.



For further details, see [Media Index](#).

Find a source simply among all the sources assigned to events in your file.

With the Sources panel

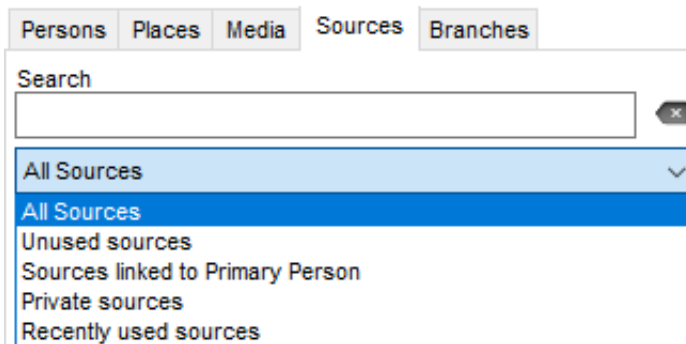
Use the **Search** box in the **Sources** panel to type a word contained in any input field for the source selected: the document, the name of the author, the call number, etc.

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

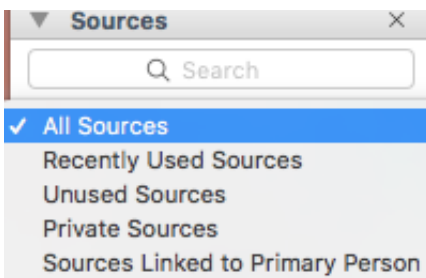
To cancel a search on any word, click the (PC)  (MAC)  Delete icon to the right of the search box.

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

PC Sources Panel Filter




MAC Source Panel Filter



To cancel the sort criteria, select **All Sources** from the pop-up menu.



With the Sources Index

Open the **Sources Index** from the **Tools** menu, or by clicking the button  **Sources Index** on the toolbar.

In the **Search** box, type any word contained in any input field of the source desired.

The number of items found matching your search is displayed beneath the Search box.

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 (PC)  (MAC)  **Delete** icon to the right of the search area.

You will limit the search to unused sources by checking the **Unused Sources** box.

The results can be classified by the presence of a note (N), media (M), private source (P) or Title, Document, Origin... by clicking on the column header.


See the list of events in which this source is used in the **Usage** field at the bottom of the screen. Double-click the line of the event to navigate and view this person and this event.

See the [Sources Index](#) article for further details.

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](#) No. 1.

- Click  **Root** on the toolbar.
- Choose **Find > View Root Person**.

Search for a direct ancestor

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


1. Click **Find > Search by Number**  on the toolbar or choose **Find > Search by Number**.
2. Click the **Ahnentafel Number** tab and type the number to be searched.
You can type any one of the numbers carried by the person you are searching for if there is more than one ([implex](#)).
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**.

PC Search by number

Search by Number

Ahnentafel Number

User Number

Rechercher ce numéro FamilySearch :

OK Cancel

MAC Search by number

Sample Family File 2018 - Search by Number

Ahnentafel Number User Number FamilySearch Number

Type in the FamilySearch Number to be search

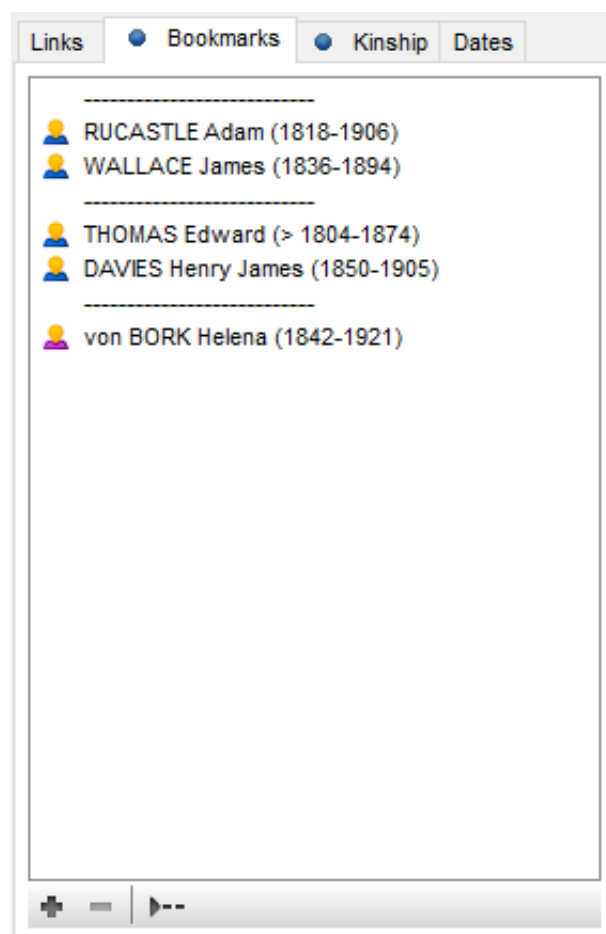
Cancel OK

2. Click the **User Number** tab and type in the number to search.
3. Click **OK** to display the person corresponding to the number as the primary person.

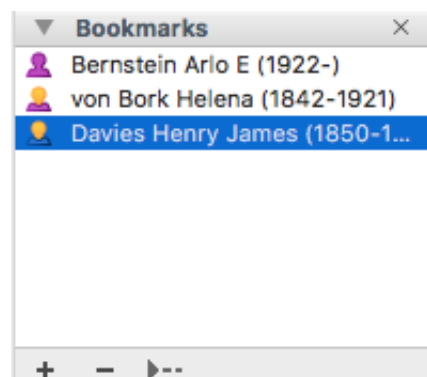
Search for a bookmarked person

Open the **Bookmarks** panel that will display a temporary list of persons you require to access frequently.

PC Bookmarks



MAC Bookmarks



Double-click a person in the list to view as the primary person.

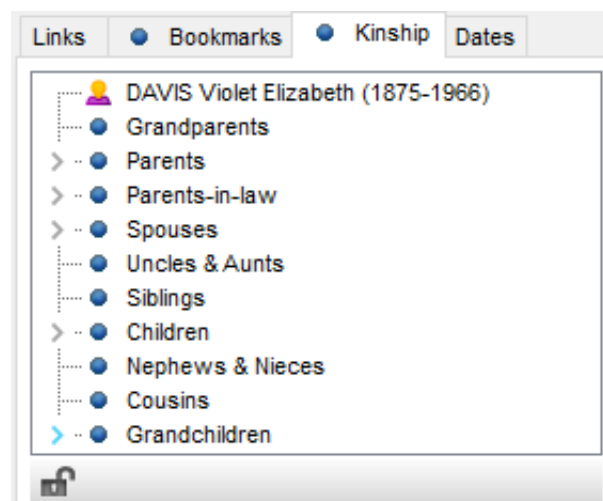
Info • To add a person to the **Bookmarks** list, use drag and drop, or click the **+** (Add primary person to bookmarks) button on the panel toolbar.

Search for family connections

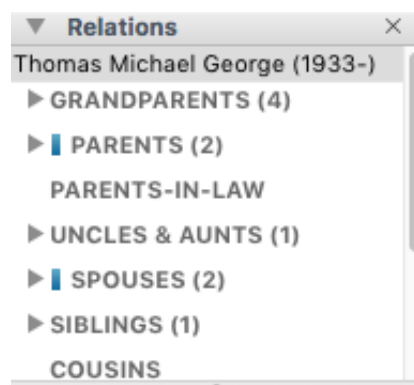
Open the (PC) **Kinship**, (MAC) **Relations** panel. It displays all the persons who are directly linked to the primary person: they are related, they are cited in one of the events, they played a role in his/her life or

you have established a personal link between them.

PC Kinship's Panel



MAC Relations Panel



Unfold the fields according to the type of relation linking the individual and the primary person: **Parents-in-Law**, **Cousins**, **Grandchildren**, etc.

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

Level 1 Information

Open the top level to see the names of parents or persons related to the primary person.

Consult the list of direct relatives, persons connected to an event for the primary person (godfather, best man, etc.) or those for whom you have created a personal link.

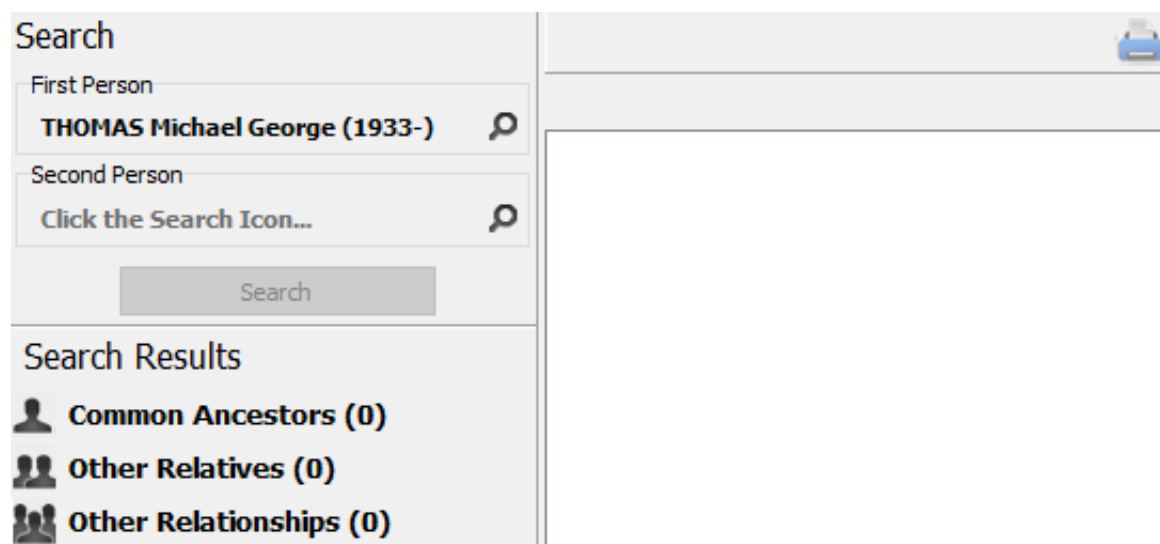
Info • The step relations (aunts and uncles by marriage, step-brothers and sisters, etc.) are shown in italics under the name of their spouse. Half-brothers and sisters are shown in grey.

Level 2 Information

If additional information is available, click the disclosure triangle next to their name to unfold this level. Double-click the person sought to display him/her as the primary person on a new **Immediate Family** screen. Double-click the event to open it directly in the **Personal Data** tab.

Look for links between two individuals

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. Enter a full or partial name or just the first letter, to limit the search for duplicates to only a part of the persons in your genealogy and shorten the search time.
3. Click **Find**.

For further details, see [\(PC\) Permanent control for duplicates & Merge two persons](#), [\(Mac\) Permanent control for duplicates & Merge two persons](#).

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 beneath the search box. Click the **Search** icon to select search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.
 3. Select the desired item from the list and consult all the details you entered.
 4. Click the **Statistics** tab to see periods of use of the element.
 5. Click the **Usage** tab and check the list of persons for whom you typed the given name, the surname or occupation. (MAC) Double-click the line to display the individual as the primary person.
-


Click the **Search** tab  to get an online research tool.

Heredis displays known data for the primary person, but also for his/ her immediate family, to help in your research. It highlights missing information, makes suggestions for online research and connects you to your favorite data provider.

It keeps a record of the research you have undertaken and allows you to create research notes.

The research tool will be displayed for the primary person, but you can also use memorized branches to manage your research of different lineages.

The **Search Wizard** tab is divided into two areas. In the upper part, Heredis displays a list of all events of the primary person and relevant events of his/her relatives. At a glance, you know if there are missing dates or places. You immediately know if you have associated with the event a source, witnesses, media, a note. An icon also shows the status of your research for each event. It is clickable and editable.

The list of events displayed is configurable by clicking on the indented wheel  icon.

PC Search Wizard

Family
Data
History
Search

Search Wizard
Smart Search
Find/Replace
⚙️

Michael George THOMAS - Ahn. 1 (G 1)

B: Mon 6 Feb 1933

Sales manager

Events	Date	Age	Place	Subdivision	
Birth	6 February 1933		Margate		•
Marriage with GREGSON Vivian (1932-)	7 January 1954	20	Hudson		•
Divorce with GREGSON Vivian (1932-)	1974	40			•
Marriage with LOWENSTEIN Paula (5701-)	3 March 1976	43	Troy		•
Event with DAVIES			Camberley		•

Web Search
Research Note
Sources
Media
Map

Search Location: Heredis-Online EN ⚙️

Surname

Given Names

Place
 Period

Spouse

Disabled fields are not available on this site

Search

Search on all sites

Ahn. # 1 Generation 1
🚩
🔑
📊
3 Spouses
3 Children: 2 👤 1 👤

Mac Search Wizard

Family
Data
History
Search

Search Wizard
Smart Search
Find/Replace

DUCHAMP Jean-Marie - Ahn. # 2 (G 2)
 B: Apr 26, 1899 - D: Mar 26, 1993
docteur en médecine

Event	Date	Age	Place	Subdivision	
Birth of his half-brother Lucien	January 23, 1883		Saint-Vallier		
Marriage of the parents	December 27, 1886		Saint-Vallier	Mairie	
Birth	April 26, 1899		Saint-Vallier	dans la maison paternelle	
Birth of his spouse COLIGNY Catherine	September 8, 1902	3	Saint-Rambert-l'Île-Barbe		
Death of his half-brother Lucien	May 10, 1914	15	Saint-Vallier		
Marriage with COLIGNY Catherine	October 12, 1925	26	Lyon	Abbaye d'Ainay	
Birth of his son Claude	February 3, 1931	31	Lyon	Chez sa grand-mère, rue Godefroy au domicile familial	
Birth of his son Paul	H Heshvan 3, 5695	35	Lyon		
Census	March 26, 1936	36	Lyon		
Death of the father	March 3, 1947	47	Lyon	à son domicile, 34 avenue de Saxe	
Death of the mother	April 17, 1949	49	Lyon	Hôpital Sainte-Croix	
Marriage of his son Claude with KLEI...	August 12, 1951	52	Lyon		
Marriage of his son Claude with VIAL...	July 16, 1955	56	Lyon	Abbaye d'Ainay	
complete information on birth event	October 8, 1957	58	Villeurbanne	Mairie	
complete information on marriage event	January 25, 1988	88	Lyon	à son domicile, 12 avenue de Saxe	
complete information on death event					

Web Search
Research Note
Sources
Media
Map

Search Location: Heredis-Online EN Search Histo

Person

Surname: Given Names:

Period **Place**

Search Date Search Place

Start Year: End Year: Place:

Spouse

Search Spouse

Surname: Given Names:

Disabled fields are not available on this site

In the lower part, you will find the various elements for analysis and the availability for online research.


- The **Sources** tab shows all sources related to the events shown in the upper part. Select an event to see if one or more sources are associated with it (they are displayed in bold).
- The **Map** tab positions all known events on a map, distinguishing between those of the primary person and those of the immediate family.
- The **Research Note** tab displays a text box for notes. Any research note will be included in the **Notes** window of the primary person.
- The **Web Search** tab provides online research on websites of your choice, taking into account all relevant elements already known (identity, location, time, etc.). These elements may be changed taking into account your own analysis of your data. The record of previous online searches allows you to return easily to your required research.

Choose from the different research sites proposed by Heredis. Click the indented wheel icon to add your own research sites. Click the + button and enter the site to be displayed in the list and the URL you will have copied from the address bar of your browser.

Heredis Online contains all the genealogies published by Heredis users. You can run searches across more than one hundred million data items already referenced in the genealogies of the Heredis Community.

The Search in Online Archives

tool allows you, from your software, to access the Online Archives portal. Heredis facilitates your research and also allows you to integrate acts you have found and cut into your family tree, by creating the event and the associated source for example.

Click on the button 

or choose from the menu **Find > Search in Online Archives...**

Access and navigation in Online Archives sites

Heredis displays the Online Archives search portal in a real web browser.

Online Archives Portal



Online Archives

You have a button bar with the following options:



Archives Button: displays the home page of the online archives.



Bookmarks Button: lists the sites you have added as bookmarks and allows you to manage the list of bookmarks.



Previous, Next Navigation buttons: they give you an indication of the history of your

browsing and allow to re-display pages already consulted.




Update Button: updates the page displayed on the screen.

Capture Button: Captures the whole page displayed in the browser. If you have already made a capture, this button opens a menu either for you to make another capture, or see the list of already captured but not processed sites.


(MAC) As in any internet browser, you can add a new tab by clicking the + button on right side of tabs bar or close a tab by clicking the cross to the right of the title of the displayed tab.

The Archives portal concerns the Archives of France but also those of other countries. For France, they are classified as follows: **Departmental Archives, Municipal Archives and the National Archives.**



In the **Departmental Archives**, the list of archive sites mentioned is large. To easily find a website in this list, you can search by entering a department number or name in the search box in the footer panel. Enter 69 for example to access the archives of the Rhone. The resulting list offers the DA of the Rhone, but also those of Lyon, part of the Rhone department. By clicking on the  button on the button bar, you return to the home page for a list by Country.

Use the   navigation buttons to navigate as on a website.

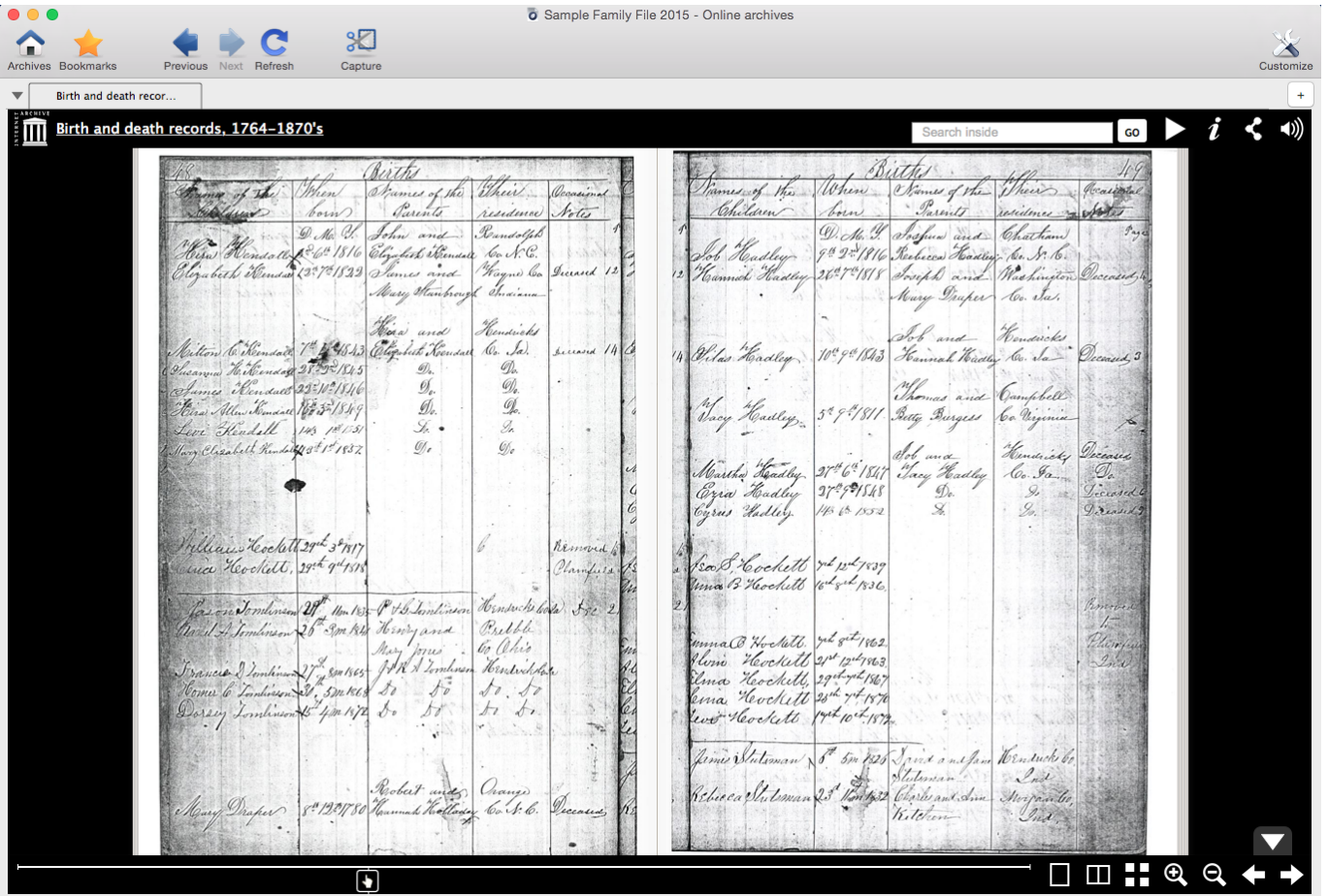
The Archives of France portal also offers Municipal Archives and the National Archives (military records, libraries ..).

If a site appears to be missing from the list, share it via the  button at the bottom right of the footer band.



Each proposal will be submitted to the Heredis team. If accepted, it will appear on the portal and will be permanently accessible to all users.

Your research will often focus on a given territory: select the sites you visit most frequently and add them by clicking the  button > **Add Bookmark**. To make changes to your bookmarks, click  > **Edit Bookmarks**: you can add other sites and delete them with the + and - buttons . By clicking on a line, you may change the name or address of the sites.





Online Archives Pages




When you capture a deed or any other document, you capture all of the displayed page in the browser.

To capture an act, click the  button. Crop the image to remove unwanted parts with the  button: When you click this button, your mouse cursor changes shape. Place your cursor at the spot where the picture should be adjusted. Hold down the left mouse button and slide the selecting window to encompass the desired area. When you release the mouse, the **Crop** button appears on the image; then click this button. Your image is now framed.

If you have managed to capture all of the act, click **Process my capture**, or on the **Capture the rest of the act** button in order to cover the act in its entirety.

When you have captured several images, the  Previous and  Next buttons allow you to scroll through the list of your captures. If you want to save a copy to your computer, click the  **Save** button and choose the location on your computer. Rename the image with the **Rename** button if the name does not suit you. The  **Delete** button will delete the capture displayed in this window.

You can edit the capture by clicking the  **Edit** button. Your image is displayed in the **Photo tool** and you can edit the image to make the document more readable (see the article on [Photo Tool](#) to see the details of this feature). Once the editing parameters are right for you, close this window and treat your captures.

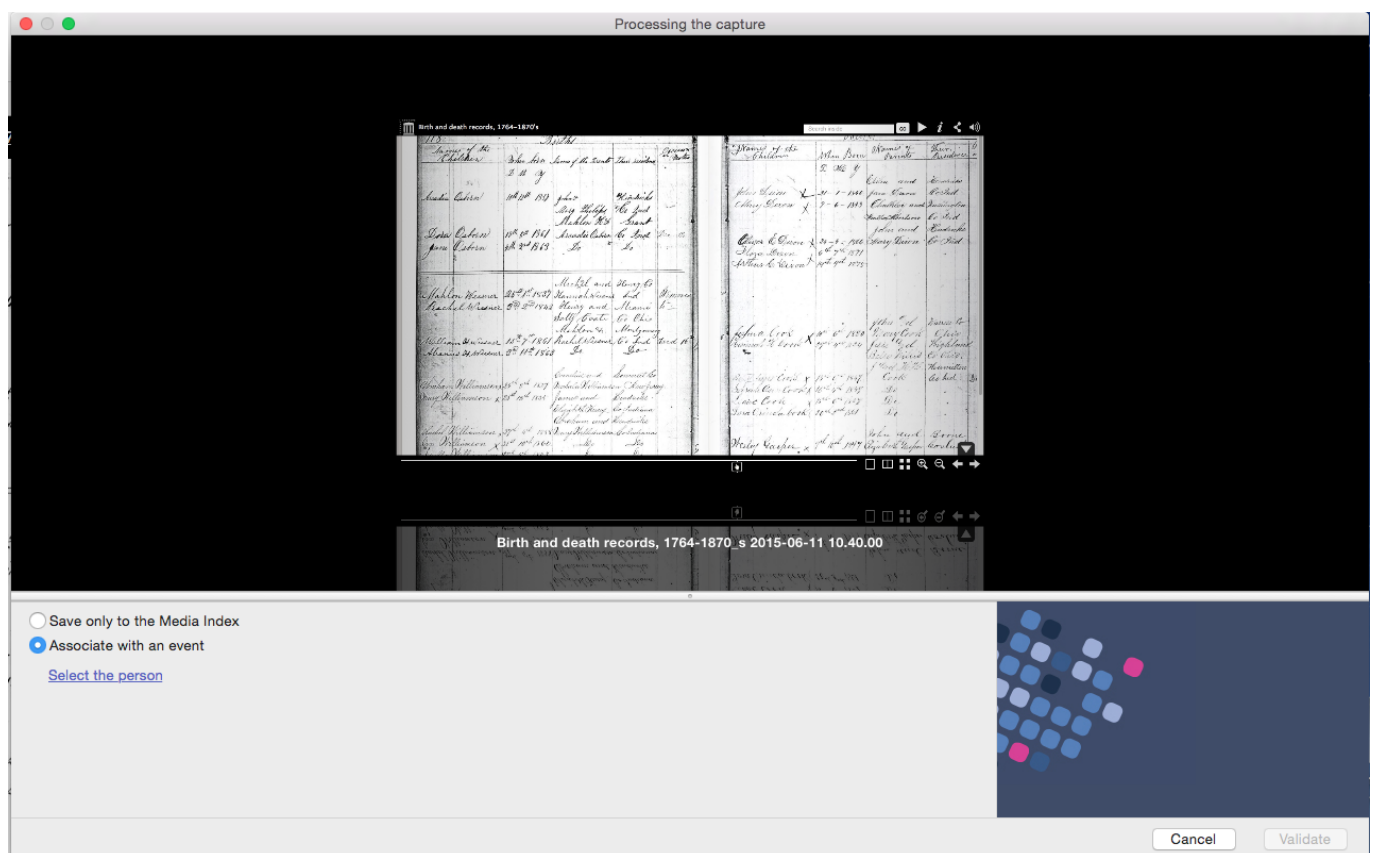
Info • All the captured images are declared as being private by default in order to respect the terms of use of the archives.

Remember that if you close the **Archives Online** tool without managing your captures, they will be retained in the list of captures only as long as the Heredis session is still open.

Processing captures

Heredis allows you to process the capture of acts to associate them with an event of your genealogy and save the information concerning the act.

Online Archives Capture



Two choices are available to you for treating these captures: If you do not have the time, tick the **Save only in the media index** box for treating it at a later date, or **select Associate with an event**.

Associating with an event

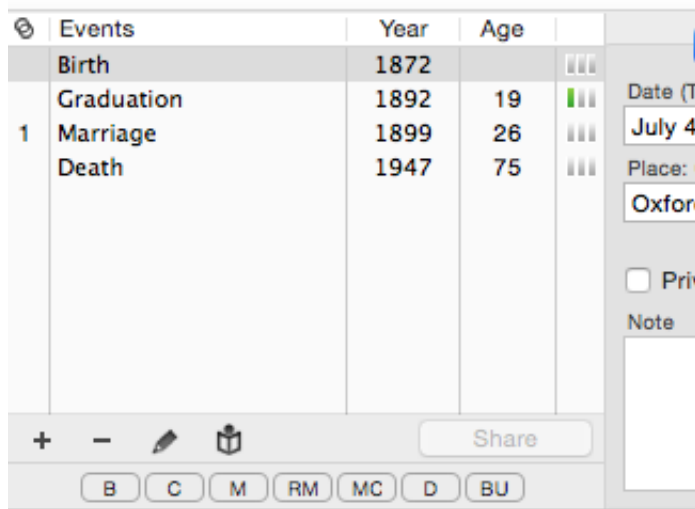
Select **Associate with an event** and select or create the person to whom the captures are to be associated. Then unfold the dropdown list to select an existing event or create one if it has not already been created. Heredis by default ticks **Add a Source** to the event to create a source for the act captured. By unticking this box, the image or images of the act will be associated with the event in the Media tab and not in the source.

When you click **Validate**, Heredis opens the source and prefills known information, the type of the source, the title of the source, the Archive depository, the nature of the source, its quality, the website and automatically associates the capture or captures with the source.

Fill in any missing information if necessary and click **OK** to create the source.

The **Online Archives search** tool may be launched directly from the file of the person.


Events



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

Share

B C M RM MC D BU

From the **Data Entry** tab, select the event you want to complete. Start the online archives search by clicking the  **Online Archives** button below the list of events. Heredis displays directly the list of available archives from the town for the selected event provided you have previously entered this information. When you have found and captured the act of the event to be completed, Heredis prefills the treatment of captures with the relevant information on the person and the event selected in the **Data Entry** tab.

It remains for you to validate and possibly complete the missing information for the source.

Heredis integrates various functions that allow you to search, compare, link, and import persons from FamilySearch universal Family Tree.

Click on the **Search > FamilySearch** tab if you wish to access it.

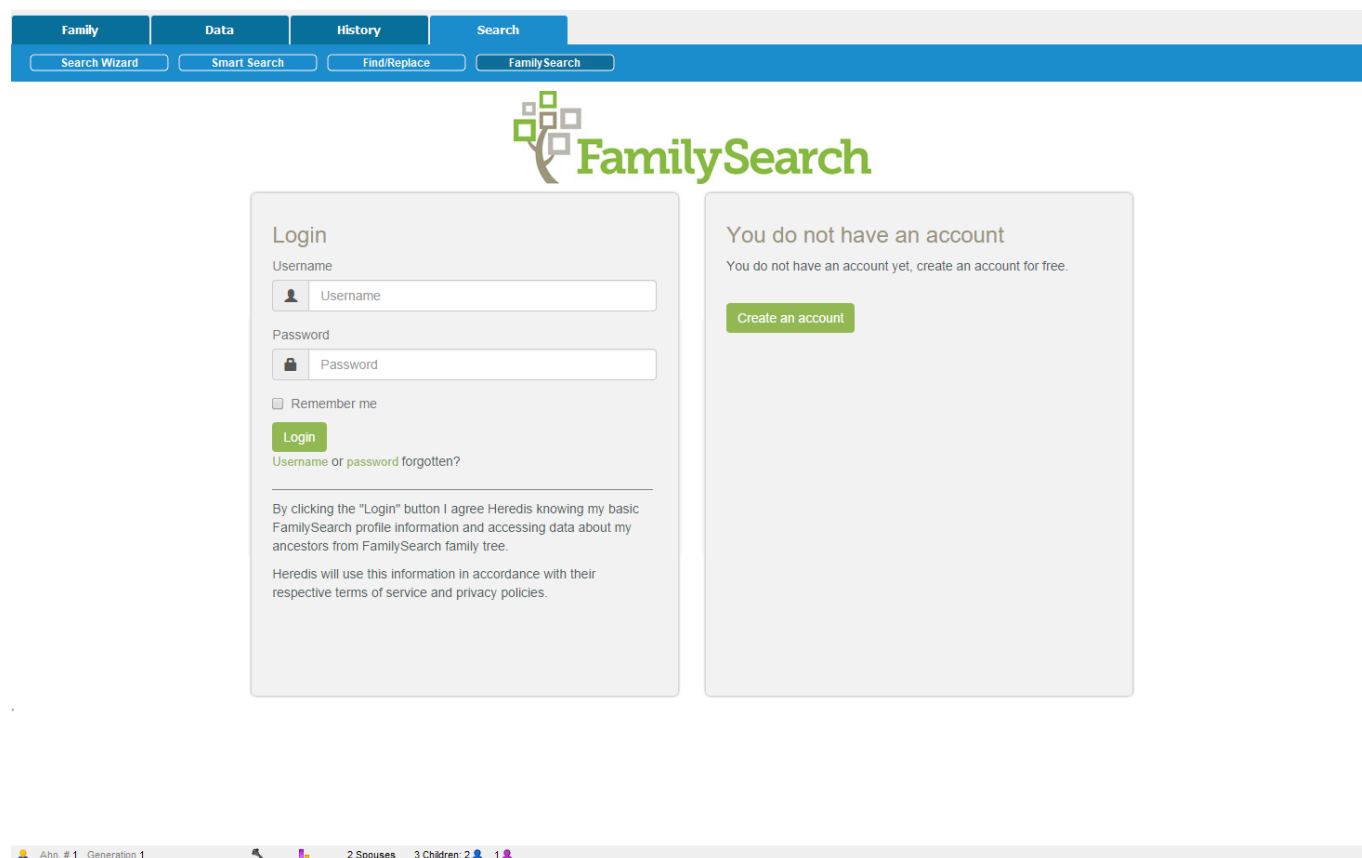
Note: for an easy access to these functions, customize your toolbar by adding the button



Connecting to FamilySearch

In order to enjoy these features, you must connect to your FamilySearch account directly from Heredis. If you are new to FamilySearch, you can create a free account online.

Family Search account



The screenshot shows the Heredis interface with a navigation bar at the top containing tabs for Family, Data, History, and Search. Below the Search tab are buttons for Search Wizard, Smart Search, Find/Replace, and FamilySearch. The main content area features the FamilySearch logo and two panels. The left panel is titled 'Login' and contains fields for Username and Password, a 'Remember me' checkbox, a 'Login' button, and a link for 'Username or password forgotten?'. Below the login fields is a disclaimer: 'By clicking the "Login" button I agree Heredis knowing my basic FamilySearch profile information and accessing data about my ancestors from FamilySearch family tree. Heredis will use this information in accordance with their respective terms of service and privacy policies.' The right panel is titled 'You do not have an account' and contains the text 'You do not have an account yet, create an account for free.' and a 'Create an account' button. At the bottom of the interface, a status bar shows 'Ahn. #1 Generation 1', a search icon, and '2 Spouses 3 Children: 2 1'.

Primary Person

In this tab, you can compare, link or unlink a person from your Heredis genealogy file to a person found in FamilySearch.

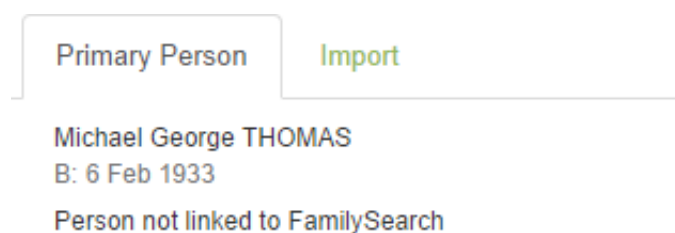
The banner under this tab in Heredis displays:

- the primary person's data, as saved in your Heredis genealogy file, his/her surname, given names, dates and places of birth and death.

- the person's first name and last name, his/her FSID if the primary person is already linked to a person in FamilySearch, as well as the current status of any family ordinance request.

Other content in this tab varies according to context.

Heredis primary person for Family Search.



1) The primary person is not linked to a FamilySearch Person

You must find the Ancestor's Name in FamilySearch's International Genealogical Index (IGI) that corresponds to your primary person so you can link the two together.

Heredis displays a search form that includes the surname, given names, dates and places of birth and death for the primary person. These fields are automatically prefilled with the data already entered for this person in your genealogy.

If you click on the **More criteria** button, additional search fields for the primary person's parents and spouse will appear, which should allow you to refine your search on FamilySearch. The **Reset** button will delete the content of all search fields displayed on the screen.

Click on the **Search** button, Heredis will directly access FamilySearch servers and display the list of persons found.

If you click on a person in the list of results, detailed information on the FamilySearch person you selected will be displayed in the **Summary** side panel.

If a person listed in the results seems to correspond to your primary person, click on the **Compare** button at the end of the line to compare the Heredis and FamilySearch persons in details.

Compare Heredis to Family Search.

The screenshot displays the Heredis software interface with a comparison between Heredis and FamilySearch data. At the top, there are navigation tabs: Family, Data, History, and Search. Below these are buttons for Search Wizard, Smart Search, Find/Replace, and FamilySearch. The main area is split into two columns: Heredis on the left and FamilySearch on the right.

Hereditis Column:

- Primary person: Christopher Edward THOMAS (1910-1991)
- Spouse: Alice Jean RUCASTLE (1908-1998)
- Child: Michael George THOMAS (B: 6 February 1933 - Margate - Kent - South East - ENGLAND)
- Spouses list:
 - Vivian GREGSON (1932-) (7 January 1954)
 - Paula LOWENSTEIN (H 5701-) (3 March 1976)
- Children list:
 - Peter THOMAS (1956-)
 - Paul THOMAS (1960-)
 - Jeanne THOMAS (1962-)

FamilySearch Column:

- Primary person: Alton Leons Pelt - L9PD-4MJ (1899-1944)
- Spouse: Bertha A Chason - LHF2-4D7 (1891-1969)
- Child: George Thomas - LVQF-8LS (B: 1933 - Florida, United States)

At the bottom of the interface, there are 'Back' and 'Link' buttons. A status bar at the very bottom shows: Ahn. # 1 Generation 1, 2 Spouses, 3 Children: 2 (blue icon), 1 (purple icon).

To make it easier for you to compare the two, Heredis displays the Heredis primary person's immediate family next to the immediate family of the FamilySearch person you selected.

If you click on the **Link** button, Heredis will attach the FamilySearch person's ID number to the primary person in your Heredis genealogy file.

The two persons are now linked.

If you do not wish to link the two persons together, click on the **Back** button.

2) The primary person is linked to a FamilySearch Person

If the individual displayed as the primary person in Heredis is already linked to a person in FamilySearch, Heredis displays a window showing the data already saved for this person in Heredis next to the corresponding data saved in FamilySearch.

Family Search Linked Person.

The screenshot shows the Heredis interface with a primary person record for Elizabeth (Tic) THOMAS (B: 1882). The record is linked to a FamilySearch person, Elizabeth Thomas - LDQ7-WTX (B: about 1882 - Mississippi, United States). The Heredis side shows parents Reuben Paul THOMAS and Helena von BORK, and a spouse button. The FamilySearch side shows a spouse William Ross - LDQ7-W5S and five children: Viola Ross - LDQ7-HR2, L.D. Ross - LDQ7-HB3, Robert Lee Ross - LDQ7-CS4, Charlie Ross - L8Y4-FK4, and Dudley E Ross - LDQ7-CHZ. An Unlink button is visible below the FamilySearch section. At the bottom, a banner indicates 'No Ahn. Number', 'Unmarried', and 'No Child'.

3) The primary person is linked to a FamilySearch person who has been deleted

Heredis informs you in the banner of the **Primary person** tab that the FamilySearch ID number was not found.

If you wish to link this person to another FamilySearch person, click on the **Unlink** button displayed in the banner.

Consult the History

Directly from Heredis, you can consult the history of modifications that have been made to the FamilySearch record of the linked person. Click the History button to access it.

Modifications History - Michael Thomas (LC6R-M3R)

Person Source Reference Added

6/26/2014

A Spangler - cis.user.MMMQ-7SZM

Birth Name Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Gender Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Death Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Birth Added

6/03/2012

Family Search - cis.wkca.MMMM-M9QH

Close

Note: Modifications made in FamilySearch after your import is processed will not be automatically updated in your file.

Import

From this tab, you can import a FamilySearch branch into a Heredis genealogy file.

To access it:

Click on the following tabs: **Search > FamilySearch > Import**

or select from the menu: **File > Import > FamilySearch...**

Family Search Import.

Family
Data
History
Search

Search Wizard
Smart Search
Find/Replace
FamilySearch

Primary Person
Import
Hello, helene debacq
Logout

Import Tree from FamilySearch

Starting person

You (B3RJ-3C8)

Heredis Primary Person

FamilySearch ID Number

Options

Number of ancestors generations 4

Number of descendants generations 1

Import children of ancestors

Import alternate names

Import

No Ahn. Number
Unmarried
No Child

1) Set the parameters for your import

Source Person

- Yourself: select this option to recover all or a portion of the genealogical data you have already entered in FamilySearch.
- Primary person in Heredis: if the individual displayed as the primary person in Heredis is already linked to a person in FamilySearch, you can select this option and thus complete his/her ancestors or descendants thanks to the data already gathered in FamilySearch's global tree.

Note: if the primary person is not linked to a person in FamilySearch, this option is greyed out.

- FamilySearch ID number: enter a person's FamilySearch ID number in order to retrieve a FamilySearch branch that will complete your genealogy.

Additional Options

Choose the number of generations for ancestors and descendants (limited to 5 maximum).

Tick **Import Children of ancestors** to retrieve the primary person's siblings, uncles, aunts, etc.

You may also tick **Import Alternate Names** to retrieve additional names that might have been entered in FamilySearch.

Note: if you set the number of generations for ancestors and descendants to 1, the import will include the Source person and his/her spouse(s).

2) Imported data

When you click on the **Import** button, the following information is retrieved from FamilySearch's global tree:

- persons
- events
- notes
- sources

All the persons imported into your Heredis genealogy are linked to in FamilySearch's global tree and are recognizable thanks to their FamilySearch ID number.

Rules applied during data import from FamilySearch to Heredis:

When importing persons from FamilySearch, you may face a number of situations such as:

- the person to be imported is already in your genealogy with the exact same FamilySearch ID (FSID): this person will not be imported again to prevent the creation of duplicates; the import process will move on to the ancestors' or descendants' branch, according to your import settings.
- the person to be imported is already in your genealogy but does not have a FamilySearch ID (FSID) number or the FSID number is different: this person and his/her ancestors' or descendants' branch will not be imported to avoid creating inconsistent data.

Notes: If the person to be imported is already in your genealogy – without a FamilySearch ID number – and if he/she is not linked to the branch being imported, he/she will be added to your genealogy as a homonym.

The data imported from FamilySearch will never overwrite personal data in your Heredis file.

Persons in Heredis linked to Persons in FamilySearch

In Heredis, various functions are available to help you find persons in your Heredis genealogy file who are linked to FamilySearch persons.

1) Search by numbers

Search Menu > Search by number

Enter the FamilySearch ID number you are interested in and Heredis will automatically take you to the matching person, who will be displayed as the primary person.

2) Advanced search

The advanced search will allow you to apply filters to your list of persons in order to only display the persons linked to FamilySearch.

From the Persons panel, on PC in the <Enhanced criteria> replace <None> with <Persons linked to FamilySearch>. On Mac, select <Genealogical Criteria> and replace <None> with <Persons linked to FamilySearch>.

PC Family Search Enhanced Criteria.

MAC Family Search Advanced Criteria.

3) Smart Search

To access it, click on the **Search>Smart Search** tab.

Select <Persons> and replace the <Surname> field with <Linked to FamilySearch> then click on the **Search** button to start searching. All persons linked to FamilySearch are displayed just below the Results area. Refer to our **Smart Search** section for more details on this feature.

PC Smart Search.

Criteria

< Choose a search model > [icon] [x]

Persons [v] Linked to FamilySearch [v]

Yes [v]

Search: All criteria [v] in The entire file [v]

I'm looking for persons linked to FamilySearch.

[Search]

MAC Smart Search.

Criteria

< Choose a search model > [icon] [x]

Persons [v] Linked to FamilySearch [v]

Yes [v]

Search: All criteria [v] in the entire file [v]

I'm looking for persons linked to FamilySearch.

[Search in results] [Add to results] [Search]


Note: if the primary person in your genealogy is directly linked to a person in FamilySearch, Heredis will display his/her FamilySearch ID number in the status bar. This number is also displayed in the Summary panel, under the person's name.

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 - Android) 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.

Your cousin is visiting and his PC has the latest version of the Heredis software? Connect it to your local network and share your genealogy with him/her. You're going to the Archives with your iPad? Share your file with the iPad to have all your updated information with you. If you add new facts, you will recover them the next time you open both devices.

Sharing your genealogy with other devices on local network

From your computer, click on the **Share**  button to link your family tree with a remote device connected to your WIFI or Ethernet network. Heredis can distinguish which version is the most recent and will let you know to do a recovery on one or the other of your connected devices.

You changed a date and added two pictures on your phone? Heredis will ask you if you want to recover those modifications the next time you open this shared genealogy, from your computer.

How to share your file from a computer (MAC or PC) via WiFi network?

- Select the menu **File > Share on the local network**. Heredis displays the list of devices connected to your local network and running a compatible version of Heredis.
- Select a device available in the list and click on the **Share** button to link the genealogy with the selected device. The remote unit then receives a sharing request.
- On the remote device, accept the sharing request. For the first sharing, Heredis copies all the data of the open genealogy file as well as the media. Your genealogy is now linked to two devices, the computer from which you initiated the sharing request and the selected remote device.

Make changes and save new data from a PC, a Mac, an iOS or an Android device.

- On a remote Mac or PC, Heredis automatically alerts you a newer version of your file is available. In this window, key information of the file are displayed (modification dates, number of persons, last persons modified) allowing you to compare them with those of the open file.
- On iOS or Android device, you won't be automatically alerted and you will have to click on **Share on local network** button, select the remote device and then click on **Click to receive the file from remote device** to get the latest version of your family tree. If you accept to receive the modified file, Heredis updates the family tree with the data entered or modified on the remote device. Only genealogical data or media that has been modified, or added, will be transmitted.

Note: In order for the information to be shared, the genealogy file must be saved. Do not concurrently update your genealogy on both connected devices because you will not be able to keep changes made on

both sides.

Heredis will always offer you to receive the most recent file. If you agree to receive the latter, changes made to the least recent file will be lost.

If you no longer want to share your file with a remote device:

- Select the **File** menu > **Share on local network**, select the device and click the **Stop sharing** button.

The device in question will no longer receive notifications concerning updates to this genealogy. You can reactivate this sharing at any time by clicking again on **Share on local network**.

Transferring to a mobile device without WIFI

You can copy your genealogy in a format suitable for exchange with a mobile iOS (iPhone, iPad, iPod touch) using iTunes or with a mobile Android device using Google Drive.

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).

(PC) Import a family tree in Heredis for iOS

Prepare your family tree for 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 *.hmv* 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 Mac.

(MAC & PC) Import a family tree in Heredis for Android

Prepare your family tree for Android

Before you can copy your family tree from the Heredis format onto an Android device, you must prepare this family tree.

From your computer:

- Launch Heredis
- Open your family tree.
- Select the menu **File > Prepare for > Heredis Android...** Heredis creates a compressed file recognizable by the application Heredis for Android.
- Click **Yes** to start creating the file. It has the same name as the original file with the extension *.hmvz*
- Heredis opens (PC) **Windows Explorer**; (MAC) **Finder**, showing you where to transfer the compressed file in Google Drive.

Copy a family tree prepared for Android in Google Drive

From your computer:

- Launch your internet browser and go to the link drive.google.com
- Sign in to your Google Account (Select or add the same account that is associated with the Play Store on your Android device)
- Click on **My Drive**.
- Select the file prepared for Android (it has the *.hmvz* extension) from the (PC) **Windows Explorer**; (MAC) **Finder**. Drag it into your browser window in My drive to copy it to your Google Drive account.

Import a family tree from Google Drive into Heredis for Android

From your Android tablet or mobile:

You can proceed in 2 ways.

1st solution:

- Launch Heredis
- Click the **Home** menu and select **Import family tree**.

- Click the **Continue** button and select, in your Google drive account, the family tree prepared for Android.

2nd solution:

- Launch Google Drive
- Click on the file to load
- Click the **Continue** button The Heredis for Android application will automatically open the file.


Info • If you transfer your file prepared for Android directly to the SD card of your Android device or another online storage application (Dropbox, OneDrive), the procedure to retrieve your family tree in Heredis for Android is identical.

Synchronizing via USB

Heredis can detect removable devices (USB, external hard-drive) connected to your computer. You are going to your country home? Synchronize your genealogy on a USB flash drive with the **Sync** button then the USB button and then connect it to your home computer in the countryside. You can update your file instantly. Before leaving, synchronize your computer again with the USB flash drive and update your files with all your weekend work as soon as you return home.

Exchange with another 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 via 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.

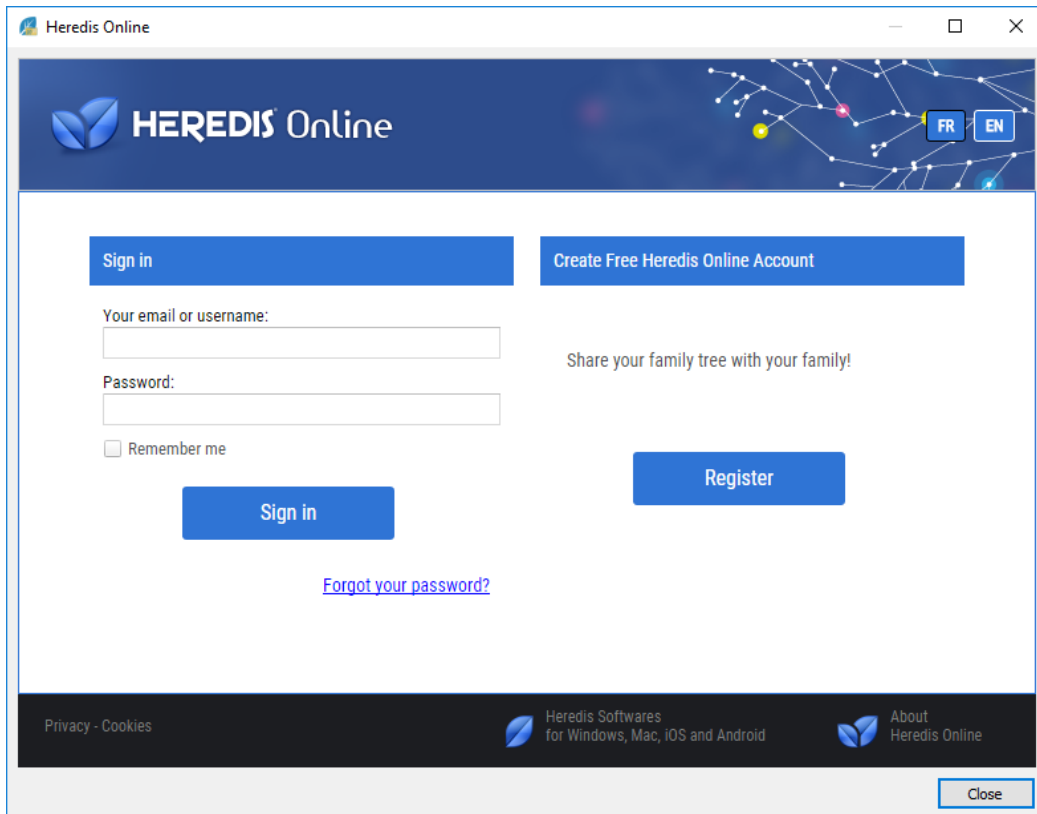
Heredis includes the creation of a personal online website for displaying your genealogy. No need to use a service provider, your data is hosted for free on Heredis Online. You have a real website dedicated to your genealogy, searchable by your family, friends and other genealogists, who will all have an overview of who your ancestors were, places where they lived and the various documents that you have found concerning them. In addition, Heredis allows you to be contacted by any person who is interested in your genealogy.

Create a Heredis Online account

You must create a Heredis Online account before publishing your genealogy, allowing you to access your account, to modify or delete published genealogies and to be identified as a person hosted by Heredis Online.

1. Click the **Heredis Online** button  and choose **My account** or choose **File > Heredis Online > Manage My Account** from the menu. You can manage your account from the home page too.
2. Click the **Create A Free Account** button. Enter your email address, your username and your password. Complete the identification data and check out the Heredis Online Terms of Service and then tick the box.

Register or create a Heredis online account



The screenshot shows the Heredis Online registration page. At the top, there is a dark blue header with the Heredis Online logo on the left and a network diagram on the right. Below the header, there are two main sections. The left section is for signing in, with a blue button labeled 'Sign in' at the top. Below it are input fields for 'Your email or username:' and 'Password:', a 'Remember me' checkbox, and another blue 'Sign in' button. A link for 'Forgot your password?' is located below the password field. The right section is for creating a new account, with a blue button labeled 'Create Free Heredis Online Account' at the top. Below it is the text 'Share your family tree with your family!' and a blue 'Register' button. At the bottom of the page, there is a dark blue footer with links for 'Privacy - Cookies', 'Heredis Softwares for Windows, Mac, iOS and Android', and 'About Heredis Online'. A 'Close' button is located in the bottom right corner of the window.

3. Click **OK**, your account is created.

Managing account information


Log in by entering your username and password. Do not forget to tick the **Remember me** box for the data to be stored for future use.


The **Account Management** screen allows you to change your login information and your address. Click the **Edit** button to access it.

Once you have published genealogies, they will appear in the lower part of the window.

Managing your publications

Click on the **Visit Website** link to view your online genealogy.

Click the indented wheel  icon to change your settings for publication. There is no need to republish in order to view notes in your online genealogy, or to hide data which is less than 150 years' old. Once you have changed the settings, they are applied to your personal website.

Click on the  button to delete the genealogy from your personal website.

Info • you can carry out these operations remotely, even if you do not have your computer to hand, by connecting to your Heredis Online account from any Internet browser.

Publish a genealogy to Heredis Online

Click the Heredis Online button and choose  **Publish**.

Customize your site by giving it a name. Heredis will place by default that of your genealogy file. You may change the name because it will be included in the URL that you will communicate to your relatives and friends.

From the **Your Website** tab, add an illustration to your homepage to make it more attractive. You can display the main image associated with your root person, or select a photo from your hard disk: the village where your ancestors originated, a shield. Browse your hard disk to select an image.

Customize your Heredis online website settings

Website Settings for "fichier exemple 3"

Homepage | **Privacy**

Website name:

Picture: Do not illustrate my homepage
 Root Person's picture
 Personal Picture (max. 2MB)

Description:

Fill out the host text area; anyone who connects to your site must have an idea of what he will find there!

You have the choice of data you publish from the **Privacy** tab:

- Manage the display of contemporary persons by choosing the number of years to set the privacy level and decide if you want to display the full given name and surname only or not to display at all.
- Display or not individuals who are declared as confidential or private in your genealogy file (individuals, events, notes ...)
- Choose to display or not all notes
- Display or not all sources

You may also tick the **Protect this publication** with a password box, and enter a password in the corresponding text box and click **OK**. Thus, only the holders of a visitor password can access your publication. Other visitors will contact you by email to get the password.

Heredis Online displays a list of your published genealogies. You may follow the progress of moving your genealogy to your personal website. When publishing is complete, click on the link to launch your Internet browser and visit your site.

You will arrive on the home page of your genealogy. Click the **Facebook** button to share your genealogy on your **Facebook** page or click the **Email** button to send an email and share your genealogy website with your family and friends.

High-resolution photos on Heredis Online

The first time you connect to your Heredis Online account from Heredis 2018 18.1, a message will inform you that the photos you publish online are displayed in high resolution.

In the **Media Index**, the **Sent** and **Not Sent** filters, as well as the media **Status** displayed under the **Information** tab, allow you to visualize the list of the media that are online or not.


When you publish a genealogy on Heredis Online, each media has a **Status** (that you can see in the Details tab from the Photo tool) that allows you to clearly identify its current situation: File is online / File is too large / File error / File waiting to be sent / Unauthorized file format / Missing file / File being sent / Unverified file.

Note:

- In the software preferences, using the menu **(PC) Tools > Preferences > Heredis Preferences > Advanced ; (MAC) Heredis World 2018 > Preferences > Advanced**, you can indicate whether you want a copy of your media to be uploaded.

You can also choose to adjust the uploading of these media based on your internet connection. By default, the uploading is based on an ADSL connection type with a 50% usage. These parameters can be modified and personalized at any time but won't be applied until you restart your software.

- In your Heredis Online account:

You can choose whether your media should be displayed in a publication: click on the  indented wheel button, then click on the **Privacy** tab, then make your selection in **Show photos**.

The media that are not linked to any publication can be deleted; to do so, click on the **Online Medias** tab in your Heredis Online account.

- If you realize the media are not uploading properly and that the status of your files reads "File error" or "Unverified file", you can force send them from the **Media Index** by clicking (PC) the **Tools** button / (MAC) on the indented wheel **Option** button and selecting **Reset sending of online media**. You will need to quit and restart Heredis for the uploading of the media to resume.

- Files with the following extensions cannot be uploaded: «exe», «app», «bin», «zip», «rar», «sit», «cab», «ace», «arj», «lha», «lzh», «lzx», «zoo», «arc», «ice», «ics», «7z», «tar», «gz», «gzip», «tgz», «z», «bz», «bz2», «hqx», «sit», «sea», «uue», «apk», «dmg», «bat», «sh», «asp», «php», «js», «jse», «iso», «iss», «msi», «jar», «war», «bak», «sav», «old», «log», «pif», «py», «pyw», «rb», «ged», «heredis», «mdb», «sqlite»

- Files over 4294967295 octets (~4.2 Go) cannot be uploaded either.

Publish group photos to Heredis Online

Heredis allows you to publish group photos on your personal site, as you do for your genealogies.


You will certainly have photos in which you have not been able to identify all the persons present in the photo. Heredis offers tools for identifying these persons and then for publishing the photo in a photo album.

This online album may be viewed by your family, your friends and other genealogists. Thus, visitors to

your site may not only view your photos but contact you if they have recognized people in the photo.

In Heredis, you access this functionality from the **Identification** tab in the photo tool (for details on this tool, refer to the section [Photo tool](#)).

Create and set an album

Once you have identified all the persons in a group photo, you may now share your photo album online by clicking the  **Publish** Button at the bottom right on the **Identification** tab.

A simple interface allows you to connect to your account or create it if it is the first time you use Heredis Online.

When first published, you can change the title of the photo in the **Title** field. If you want to publish this photo in another album, unfold the dropdown list and choose the appropriate album, or create a new one by using the + button.

To personalize this album, click the indented wheel  to the right and you can:

- give it a name that will be included in the URL that you will communicate to your family or to other genealogists. Do not worry about spaces, Heredis replaces them automatically by underscores.
- add artwork to make your homepage more attractive.
- give details of the content of this album in the **Description** text box. The person who visits your site will have an idea on what he or she will find in it!


You can protect your album by a password. Net users who know the password may view your album online and others will contact you by email to get the password.

When all the settings of your publication are satisfactory, click the **Validate** Button. Your photo is now published on Heredis Online.

Info • When you publish a photo which has been declared as private in Heredis, a message alerts you and asks for confirmation before continuing the publication.

Settings and management of your albums

You can at any time access the albums published from the **Album** tab in your account with Heredis Online.

Click the  indented wheel to change the publishing settings for an album or on the cross to delete it. Please note that you will delete all the photos attached to this album.

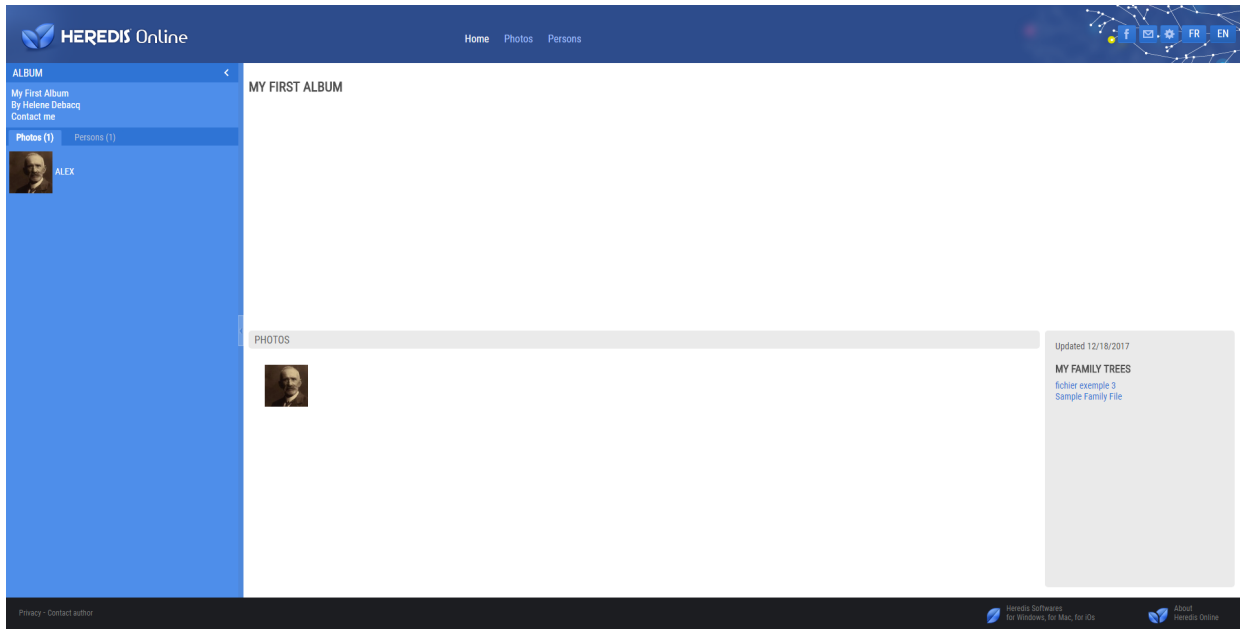
Info • You can carry out these operations from a distance, even if you do not have your computer to hand, by logging into your Heredis Online account from any Internet browser.

Click the album name to display a list of all the photos in this album. You can edit or delete each picture individually.

Consult an album

By clicking on the link **Visit album**, Heredis opens the home page of the album selected in your internet browser.

Consulting an album on Heredis Online



In the left sidebar, you have the name of the album and its author, a clickable link to contact the author and immediately below, two tabs Photos and Persons.

In the **Photos** tab, a list of photos in the album is displayed and the total number of photos, (in brackets) next to the name of the tab.

In the **Persons** tab, the list and the number of persons identified in the various photos in the album are displayed, specifying, for each identified person, the number of times he/she has been identified in the various photos of the album. You also have a search box to locate any person in the list.

The central part allows for 3 different views of the album based on the tab selected in the upper part.

From the **Home** tab, you get an overview of your album where you will find the description text, any selected artwork and the pictures of the album in the form of thumbnails. To the right, Heredis displays the date of the last update of this album as well as a list of your genealogies and other albums already published on Heredis Online.

A single click allows you to open a new tab in your browser with the publication of the selected album.

The **Photos** tab displays each photo in the album in full screen. To the right of the photo, you find the list of numbered persons and below, the commentary and the date if they have been added from the Heredis program.

A button under the photo, also allows you to hide or show the frames numbers on the photo. Hover the mouse over any person identified in the photograph and the list shows the person concerned and vice versa.

Clicking on a person allows you to display him/her in detail in the **Persons** tab. You will then see the information collected for that person and a link to the publication if he/she is present in a genealogy previously published on Heredis Online, as well as photos, in the form of thumbnails, in which he/she has been identified.

When you click on a photo from the **Photos** tab in the left sidebar, Heredis automatically switches to the **Photos** tab in the central area and displays the details of the photo. If you are on the **Person** tab in the left sidebar, click on any person and you will move to the central area of the persons tab this time to display all known information concerning this person.

To go back to the general presentation of the album, click **Home** in the banner at the top.

Sharing an album

If you want to invite your family and friends to check out an album, send them the URL by email, or share it on Facebook. Use the Buttons located in the upper right panel.

As a visitor to a Heredis Online album, you can easily send additional information or indicate an error to the author of the photo albums. Perhaps you have recognized an unidentified person. Click **Contact the author** in the left sidebar under the ALBUM area or in the footer and you will thus advance the work of the author.

Private access

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