Heredis 2026 for Windows

English version

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Download and Install Heredis

System requirements for Heredis 2026

Important: Your licence is personal and confidential, you can use it on 3 computers that you own and at the same time. You can manage your installations in My installations section of your Heredis account.

Heredis 2026 system requirements:

Windows

- **Windows 10 and 11**: current versions supported by the editor; except Surface computers with a processor other than Intel
- 900 MB disk space required
- 4 GB of RAM
- Screen 1366×768 minimum (11″)
- Local administrator account
- Internet connection for research, publishing, integrated maps and dashboard

For an optimal use :

- 8 GO of RAM
- SSD Hard Disk

Mac

- **macOS Ventura (13), Sonoma (14), Sequoia (15) and Tahoe (26)**: current versions supported by the editor
- 900MB disk space required
- 4 GB of RAM
- Screen 1366×768 minimum (11″)
- 64 bits only
- Internet connection for research, publishing, integrated maps and dashboard

For an optimal use :

- 8 GO of RAM
- SSD Hard Disk

Other software to detain

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

You can open easily those documents with software text processors.

Note: Heredis is optimized for Microsoft Office (paid) or LibreOffice (free) word processing

available for download. Heredis is compatible with Microsoft Office for Windows as from Office 2016 and for Mac as from Office 2019. As for LibreOffice, it is important that you have the latest version installed and not an older one.

Adobe Reader are often used by Archives websites.

How to download Heredis?

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

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

Hello H[redacted]

We thank you for your order @1098301.

To install Heredis, click on **Download** button below.
Keep the license number which will be useful only if there is no Internet connection.

Heredis 202[redacted] for[redacted]

Your license key and/or download link:

[redacted]

YOUR DOWNLOAD

How to download again Heredis ?

If you bought Heredis already and want to install it on your second computer or install it again check this article: I have a new computer or a second computer – what to do? (see page 36)

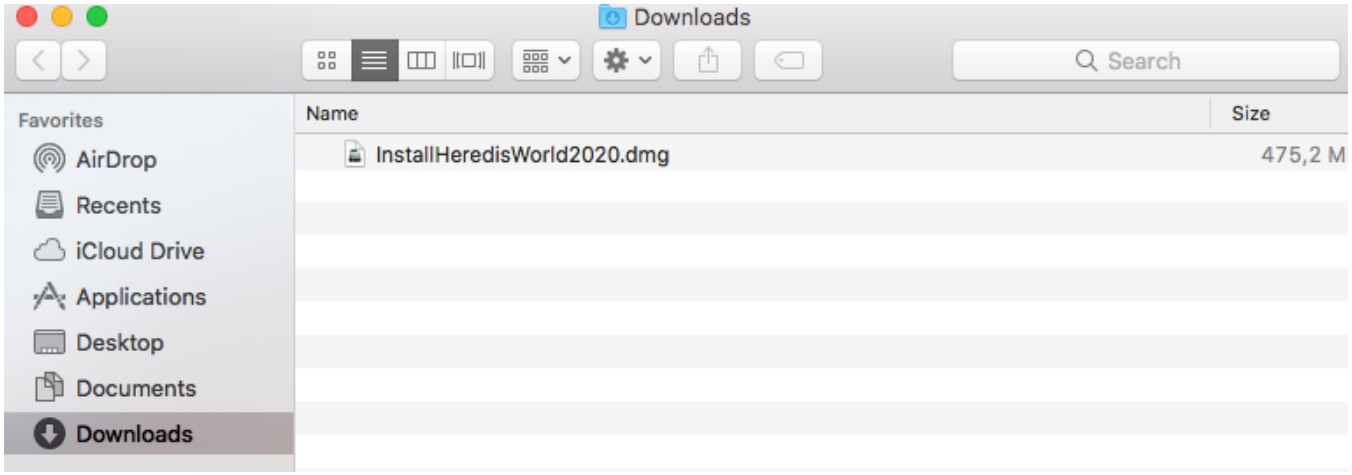
How to find the downloaded software?

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

You can also go to your **Downloads** folder.

See also How to install Heredis' software? (see page 12)

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



See also How to install Heredis' software? (see page 12)

How to install Heredis' software?

Windows

Double-click on InstallHeredisWorld20xx.exe file.
Follow instructions, it will guide you through the setup process.
When setup is over, double-click on Heredis 20xx icon on your desk or access through Windows explorer (Programs (x86) – BSD Concept – Heredis 20xx World).

Then login to activate your licence. For further information see Activating Heredis (see page 19).

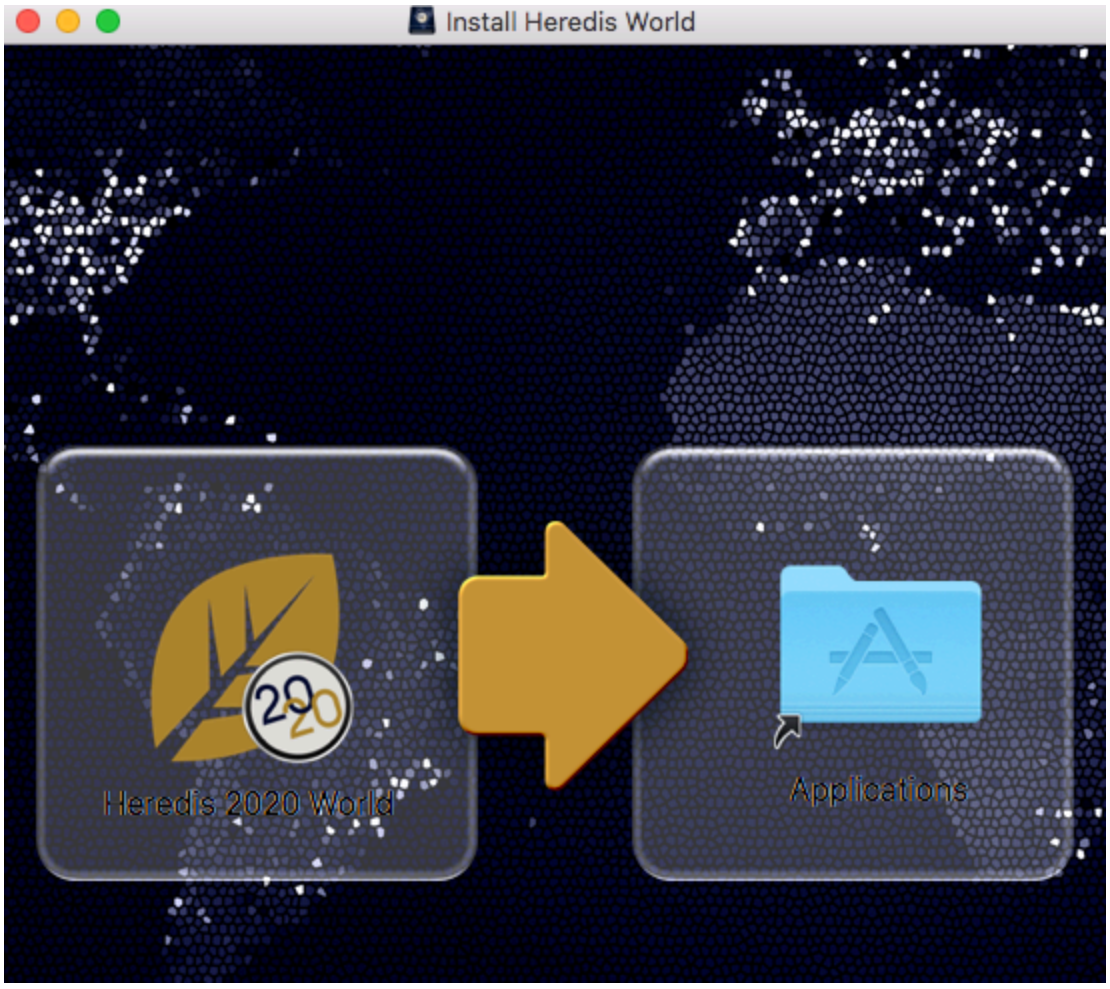
Mac

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

In the Installation window:

1. Drag the Heredis icon in Applications

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



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

Then login to activate your licence. For further information see Activating Heredis (see page 19).

Launch Heredis

After activating your Heredis license (see Activating Heredis (see page 19)), click on Launch Heredis to start working. If you already have Heredis' files from an old version, Heredis 20xx will convert them automatically on the first opening with the newer version.

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

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

Uninstall my old version of Heredis

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

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

(Mac) Drag your old version of Heredis from the Applications and drop it on the Trash Can.

See Uninstall an older version of Heredis (see page 15) for more details.

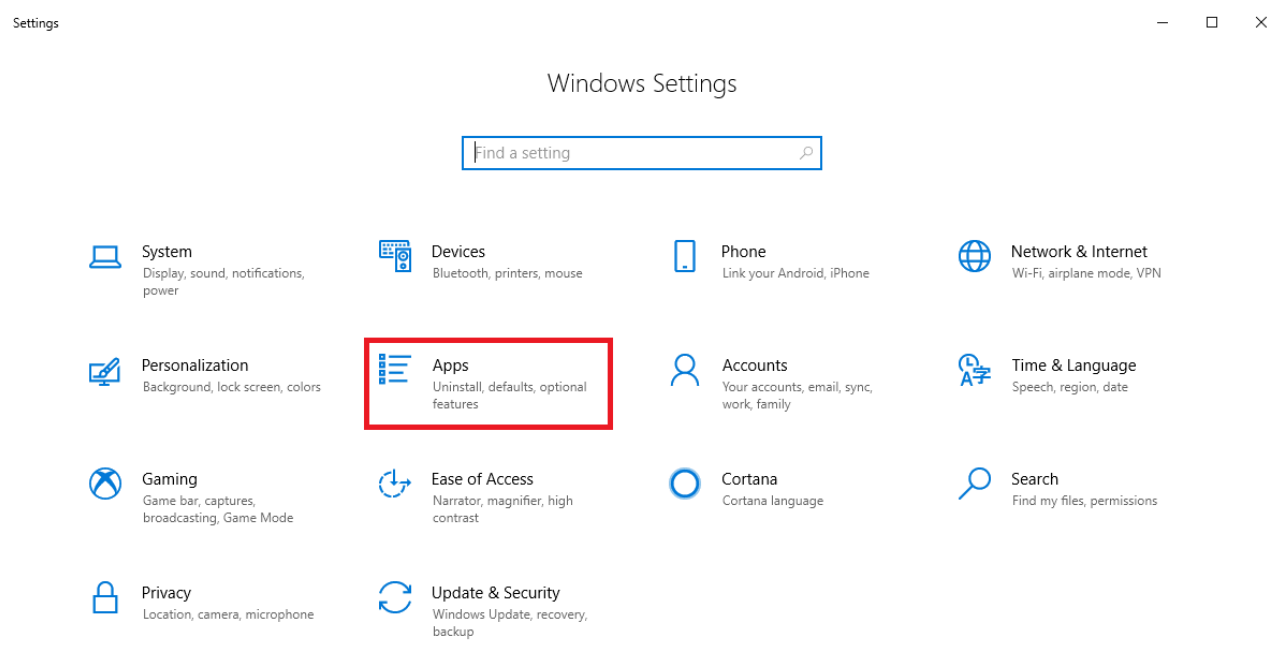
Uninstall an older version of Heredis

Each Heredis version you download is the full software itself. Therefore, it is unnecessary to keep your older versions of Heredis.

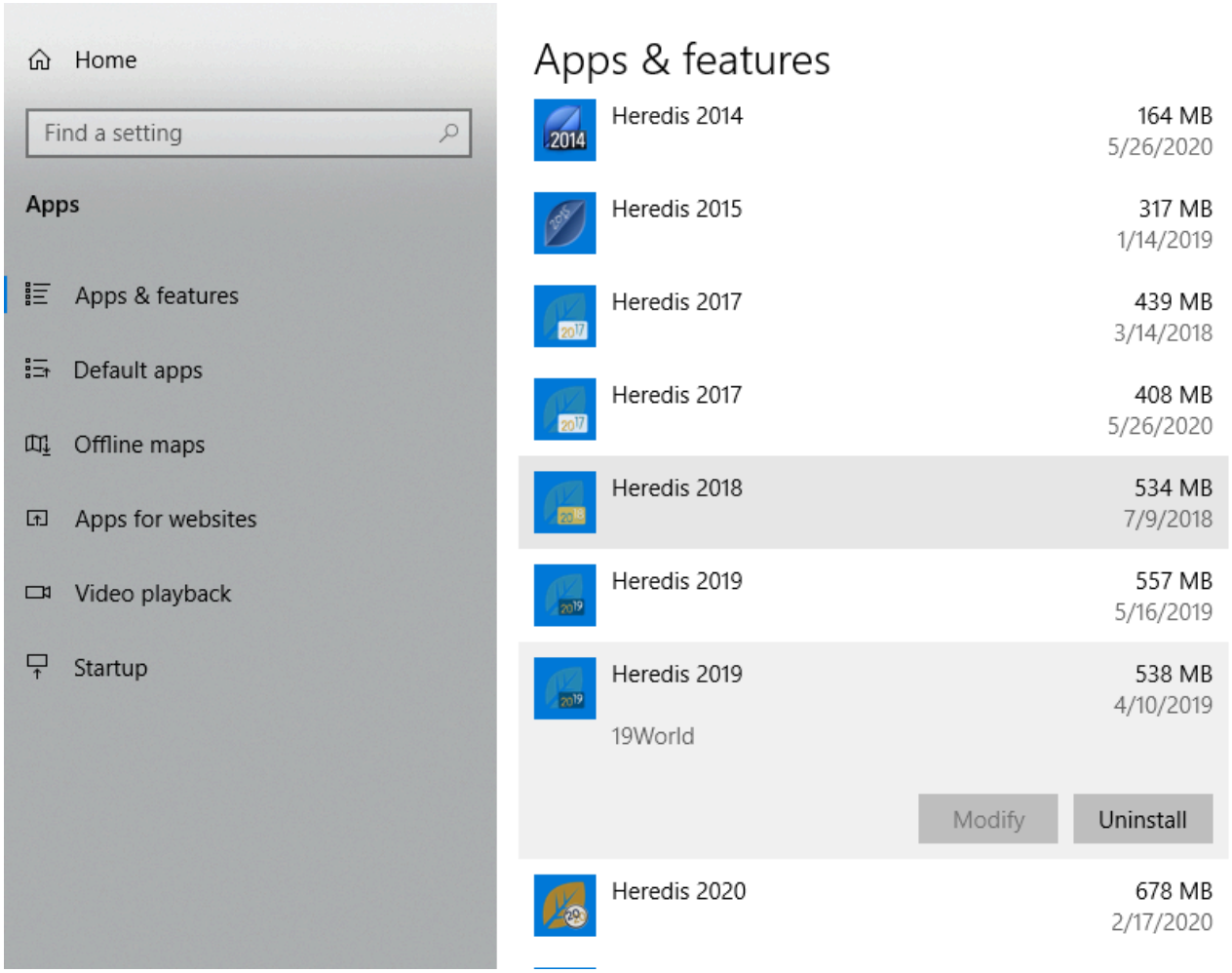
To uninstall Heredis from your computer:

On Windows

1. Click on the Windows button then on the cogwheel
2. Click on Apps



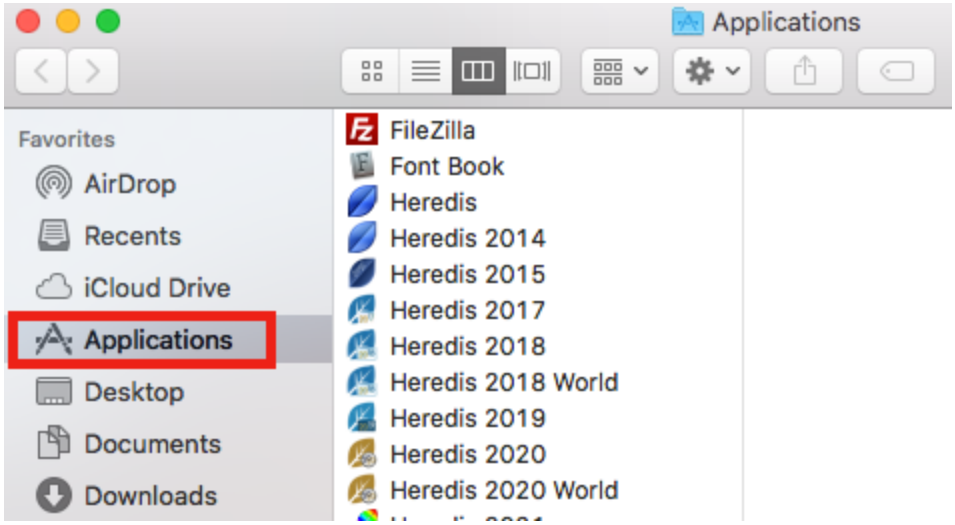
3. Search in the lists of your apps the old version of Heredis. Click on it and then click on Uninstall button.



On other Windows versions, uninstall old version of Heredis from the Windows Control Panel / Uninstall a program. According to your Windows version, the access to the Windows Control Panel might be different. Make a search on the internet with a search engine to learn more about how your Windows works. By using the Windows utility, your old version of Heredis will be properly uninstalled.

On Mac

1. Open your Finder, click on Applications



2. Drag your old version of Heredis and drop it into the Trash Can

Activating Heredis

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

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

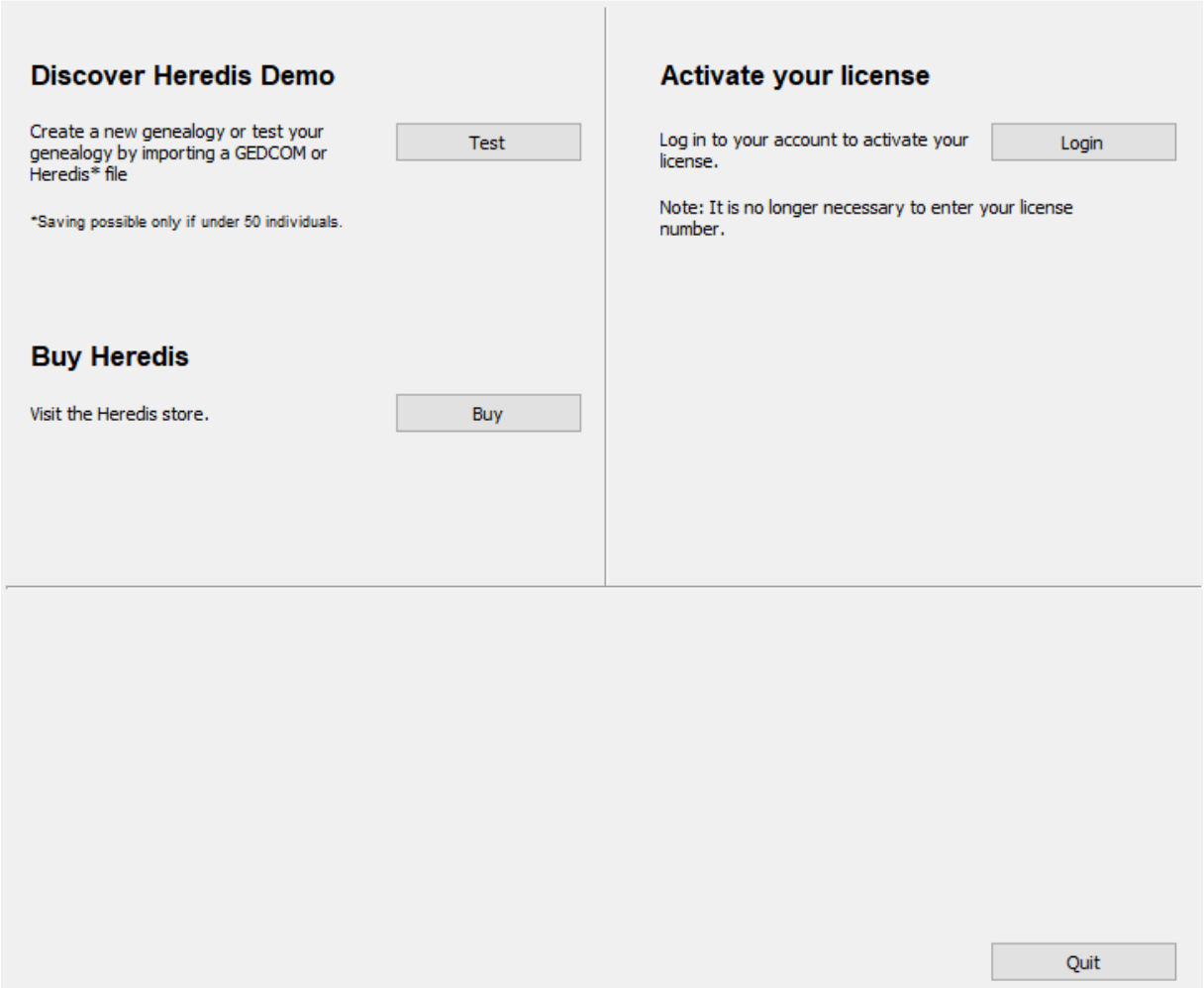
A Heredis license for Mac is valid only for Mac. Similarly, a Heredis license for Windows is usable only for Windows. If you change your operating system, you'll need to acquire a license for the new system.

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

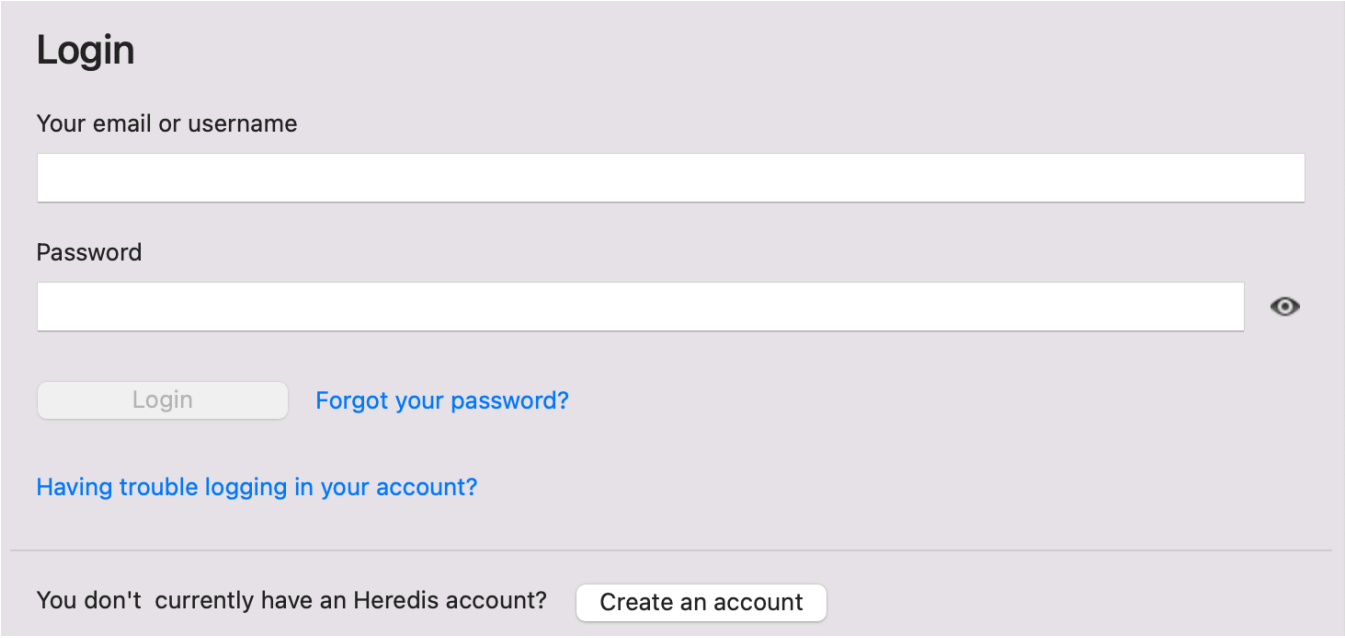
Start with the purchase of a Heredis license on Heredis' Shop, then download and install the Heredis software on your computer.

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

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



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



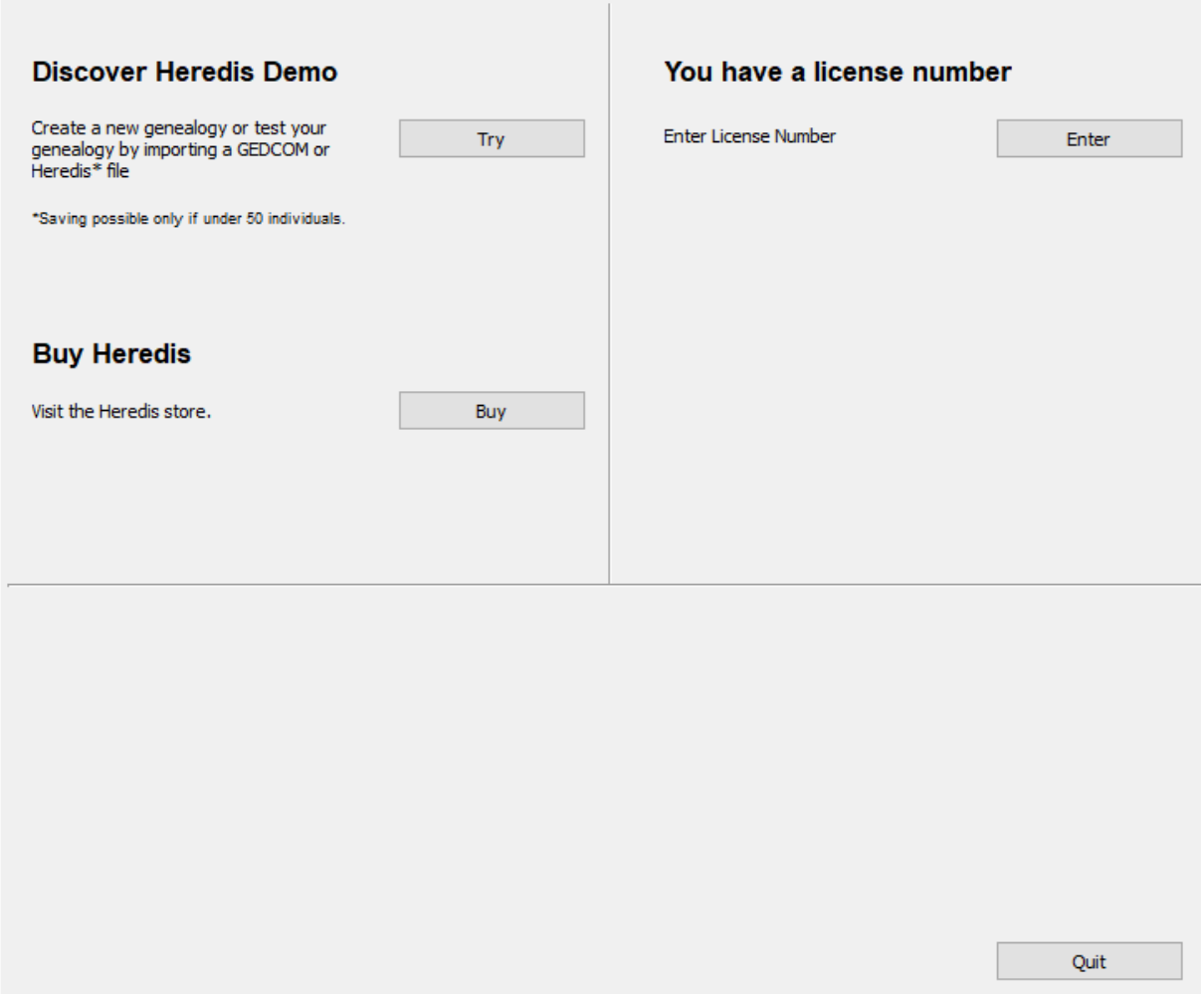
If you have forgotten your password, click on the link “Forgot your password?” to receive a reset email valid once.

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

To know how to install Heredis on a second computer, see I have a new computer or a second computer – what to do? (see page 36)

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.



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

Note: If this computer is later connected to the internet, the following time Heredis is launched

you will be asked to log in to your account to finalize the activation process. Some features require internet such as maps, access to Online Archives … but features that do not require internet are usable without a connection.

In case of problems

You have a message informing you that you no longer have a license available? See Manage my installations and the use of my license (see page 31) for more information.

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

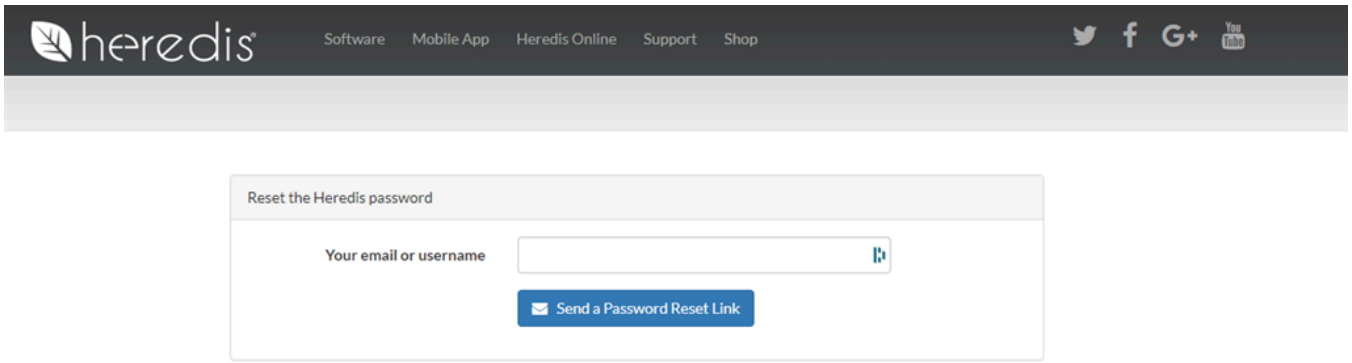
Check that the antivirus/firewall installed on your computer or embedded in your internet box does not block Heredis. If so desactivate it while installing Heredis and autorize Heredis to access the network, tell those software that Heredis is trustworthy.

I forgot my account password. What should I do?

Go to the Heredis Online shop.

Click the **Sign in** button, and then in the **Already registered** box , click **Forgot your password?** A new window will appear.

Enter your email address or user name in the appropriate field and click the **Send a Password Reset Link**. You will receive an email shortly thereafter to reset your password.



Please note that special characters and symbols cannot be used in passwords.

Your Heredis password is valid for all Heredis services (online store, license activation, etc.) and should not be used for other websites for security reasons. Your Heredis password must be at least 8 characters long.

My email address has changed, how do I update it in my Heredis account?

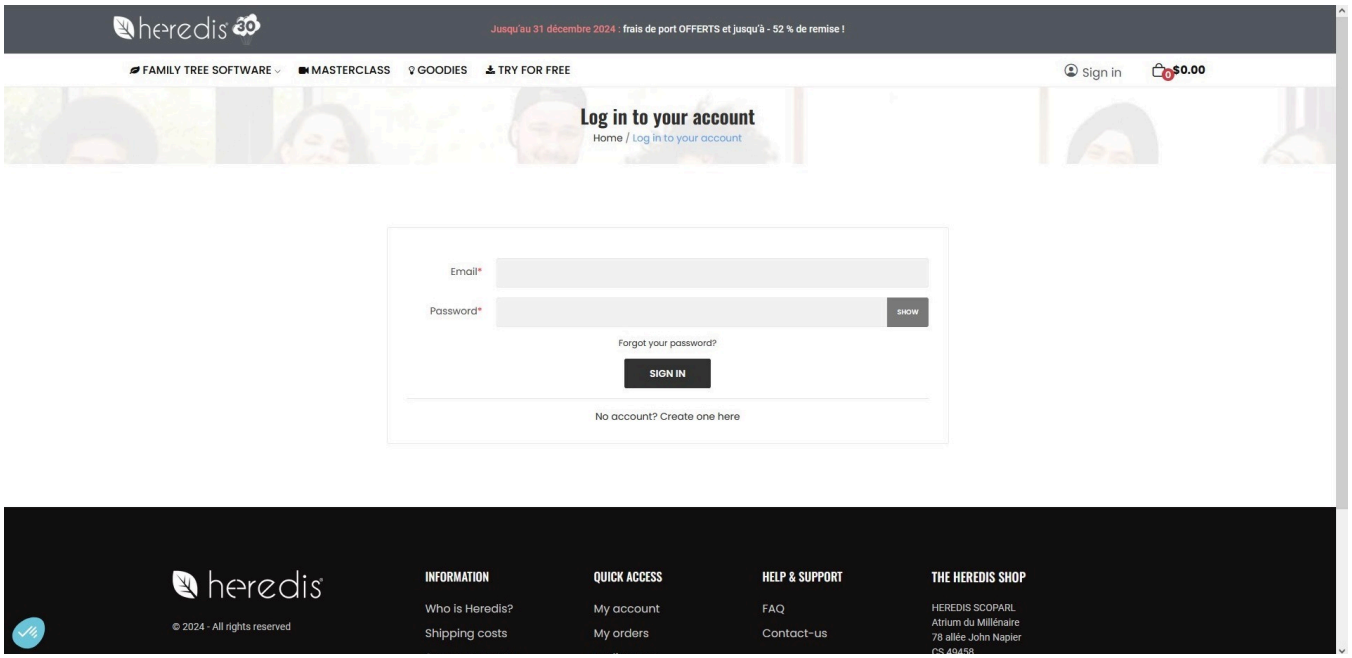
First of all, just because your email address has been changed doesn't mean that your Heredis account that was created with the old email address no longer works.

In your Heredis account, the email address serves as an identifier. So, if you know the password, you can change your email address by logging in with your old address.

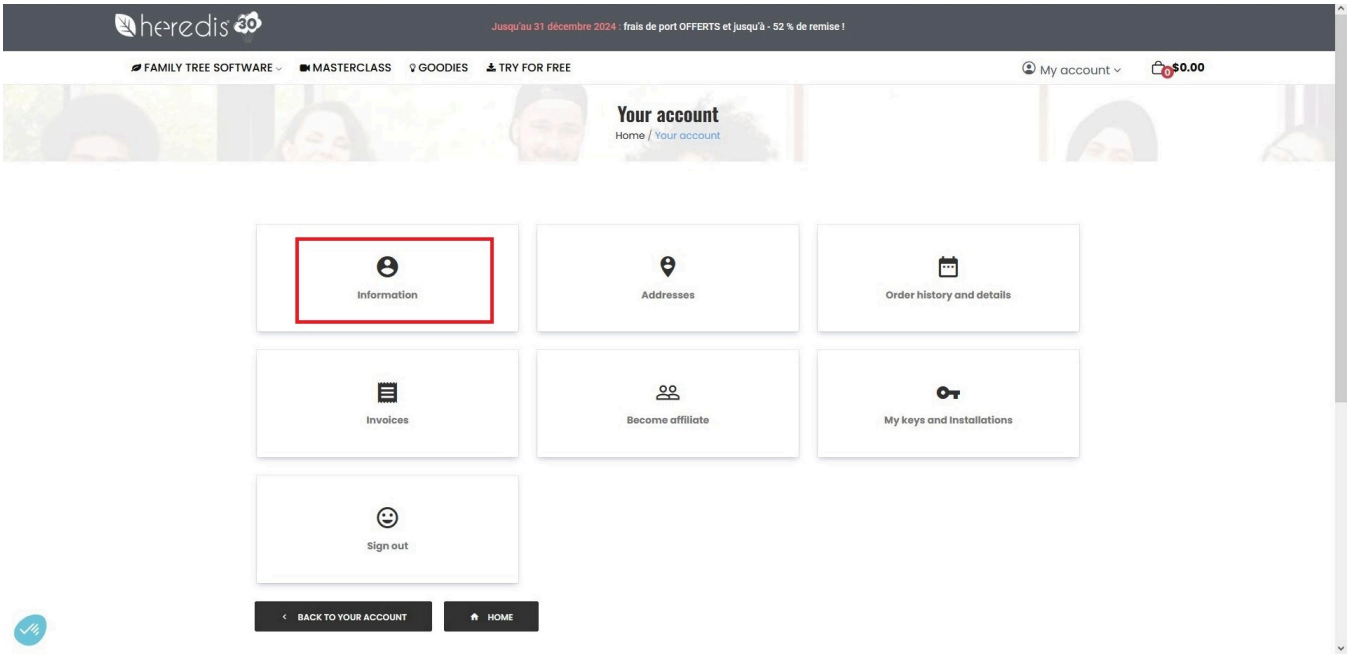
You know your password and your old email address

1- Go to the shop: shop.heredis.com
2- Log in to your account by clicking on **Sign in**:

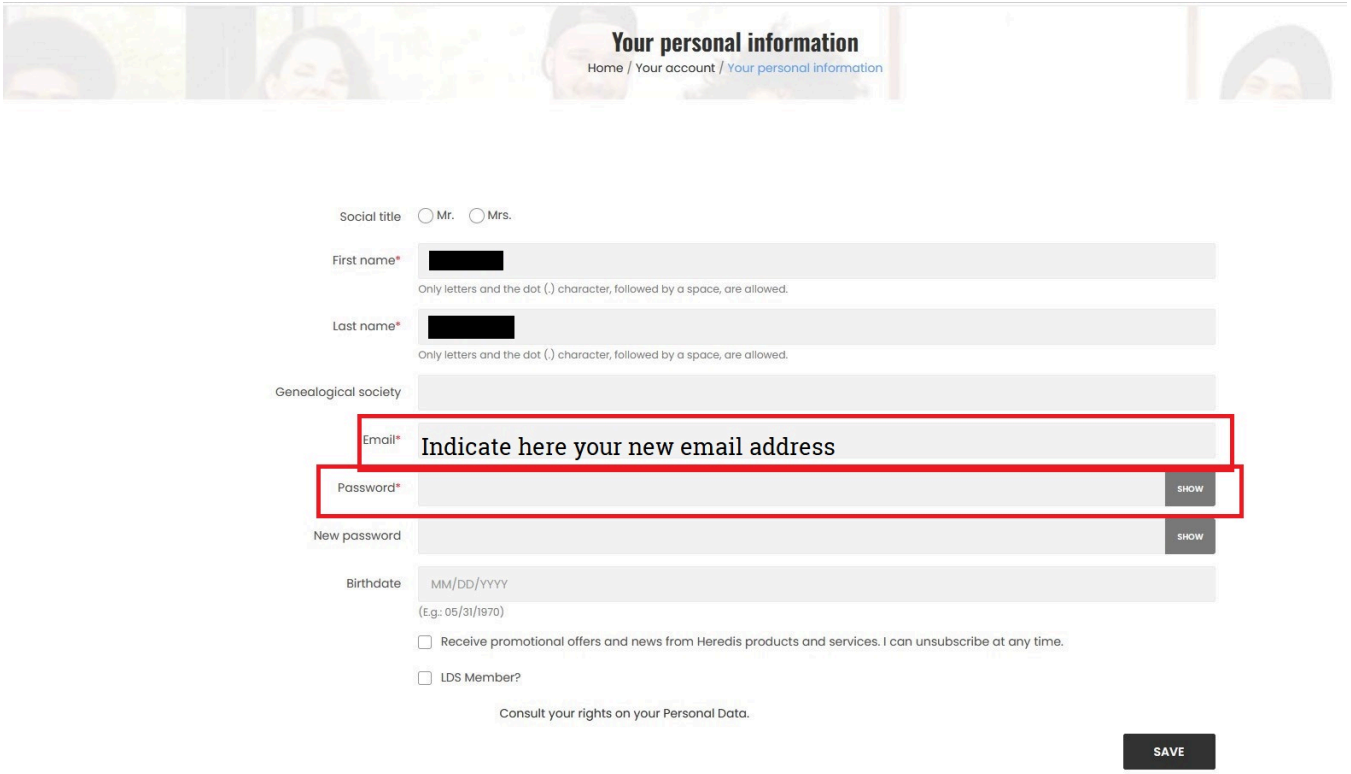
3- Fill in your old email address and then your password. Click **Sign in** to validate.



4- Choose the **INFORMATION** section to change your email address.



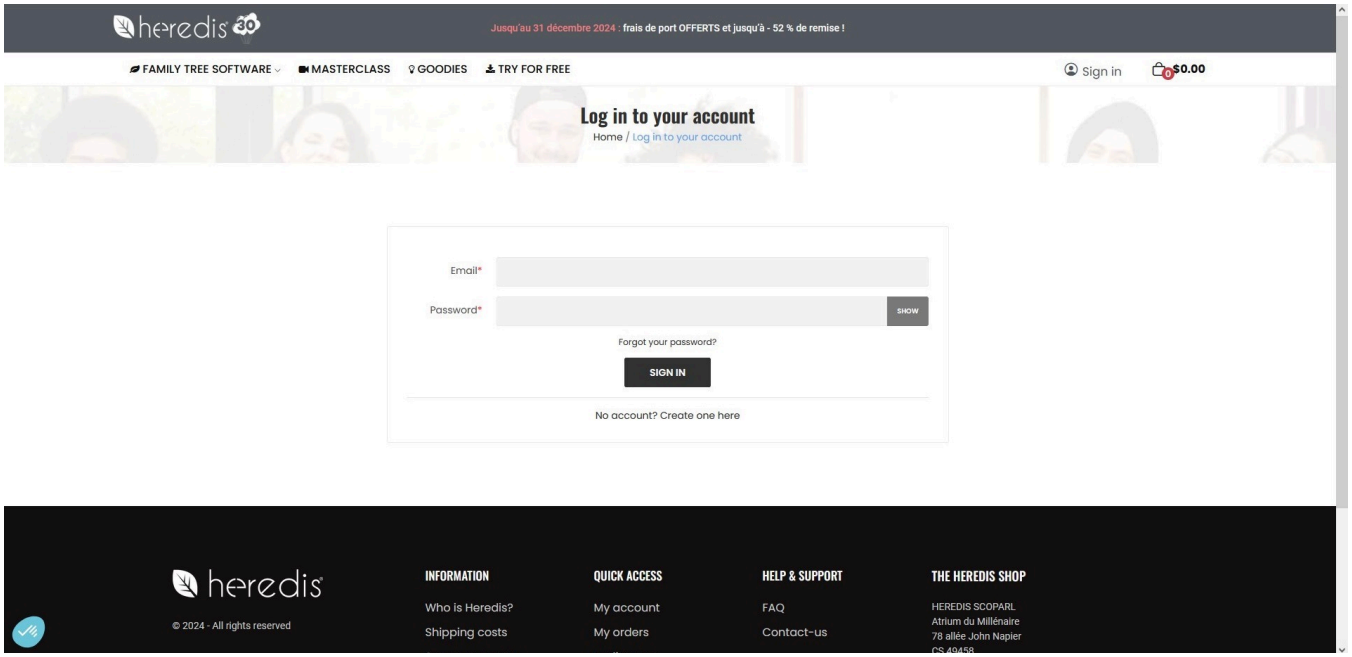
5- Enter your new email address in the **Email address** field. Enter your **current password** (the one that allowed you to log in). Click **Save**.



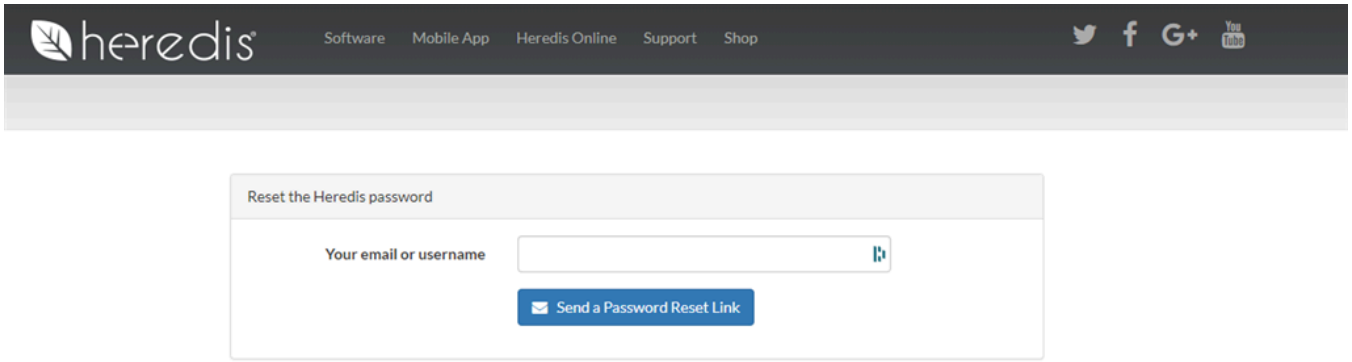
You no longer have your password but still have access to the old email address.

1- Go to the shop: shop.heredis.com
2- Click on **Sign in**:

3- Click on **Forgot your password?**



4- Enter your old email address and click the **Send Password Reset Link** button. You will receive a reset email.



5- Check your mailbox and open the email that was sent to you. Click on the link in the email. If you don't have anything in your inbox, check your Spam or Junk Box.

6- Indicate your new password and confirm it in the 2nd input field. Confirm by clicking on **Save**.

7- Then log in as indicated in the previous paragraph to change your email address.

You have forgotten your password and you no longer have access to your old email address

Contact customer service by giving as much information as possible to identify you: old email address and / or postal address, your name and surname.

How to update Heredis?

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

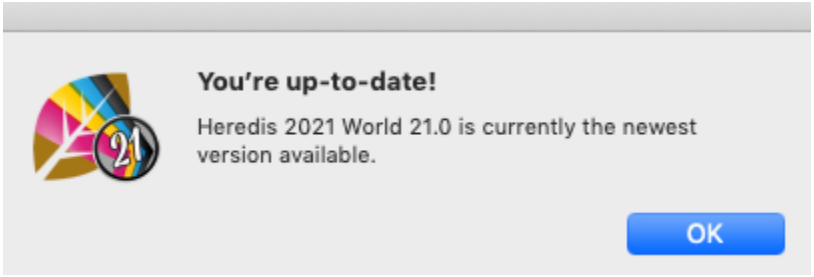
To be kept informed, simply be connected. When Heredis can be updated, just accept the downloading and installation of the update.

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

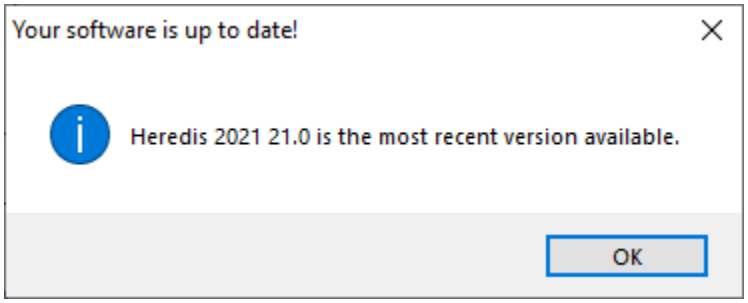
Check for updates

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

(Mac) Check for updates message



(Windows) Check for updates message



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

How to install again Heredis?

If you acquired the software through the Heredis store, you may download the application from your Heredis'shop account in My Keys section. See I have a new computer or a second computer – what to do? (see page 36) to see the full explanation.

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

If you installed Heredis on a second computer, see the article on Share on local network (see page 826) to share your file with the second computer.

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

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

Manage my installations and the use of my license

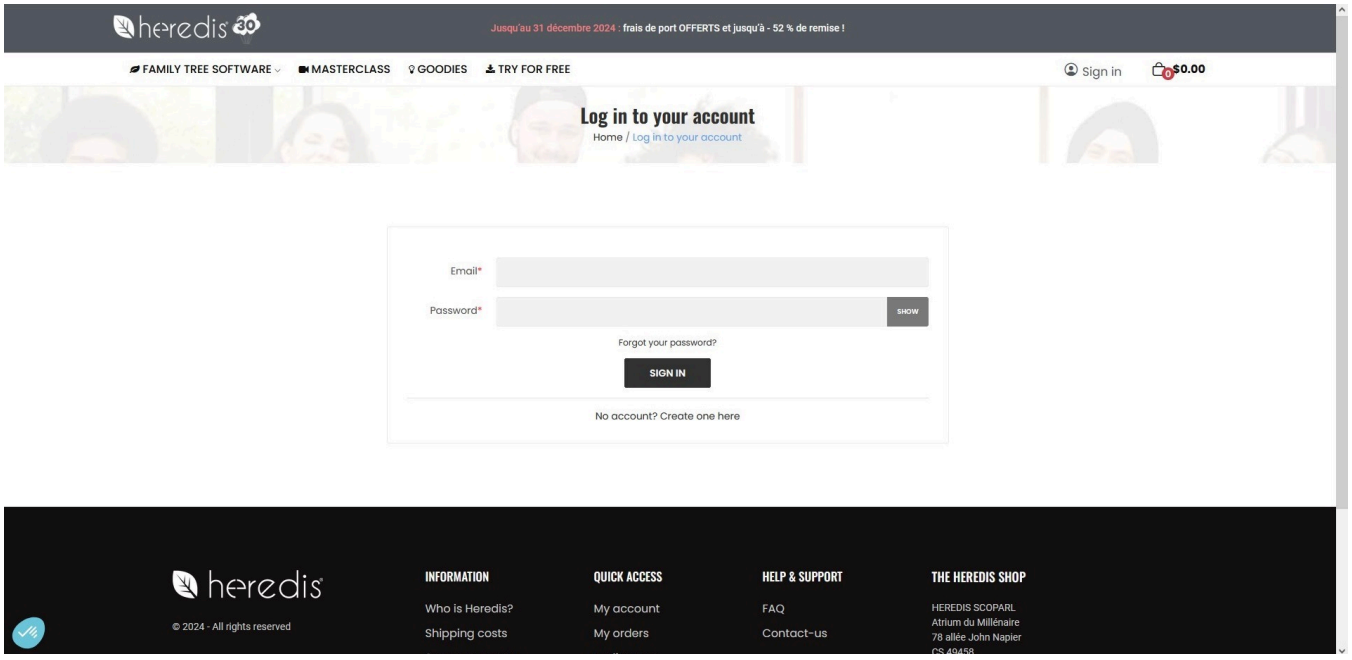
How to manage my Heredis installations

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

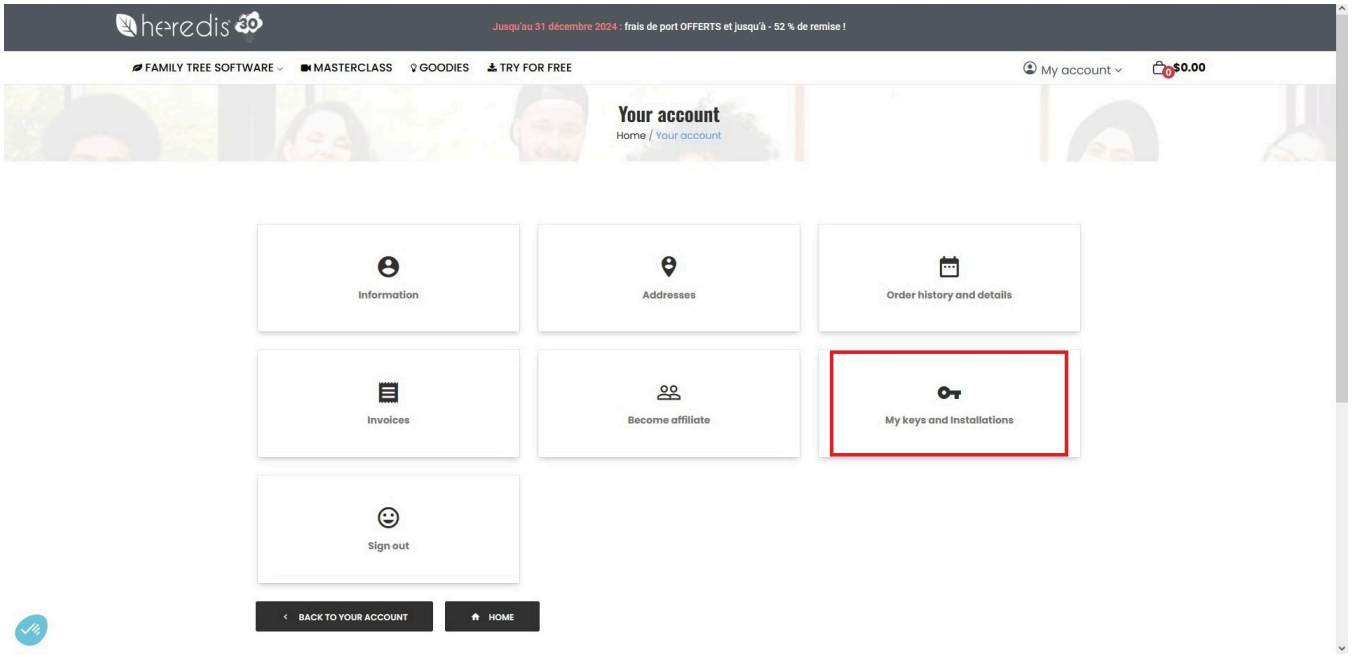
Easily access the management of your installations, either from your account on our Heredis' Shop or directly from the application by clicking on the **Help** scroll-down menu **> Manage my installations**.

1- Rendez-vous to : shop.heredis.com
2- Connect to your account by clicking on **Sign in** :

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



4- Click on **My keys and installations** to manage your installations :



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

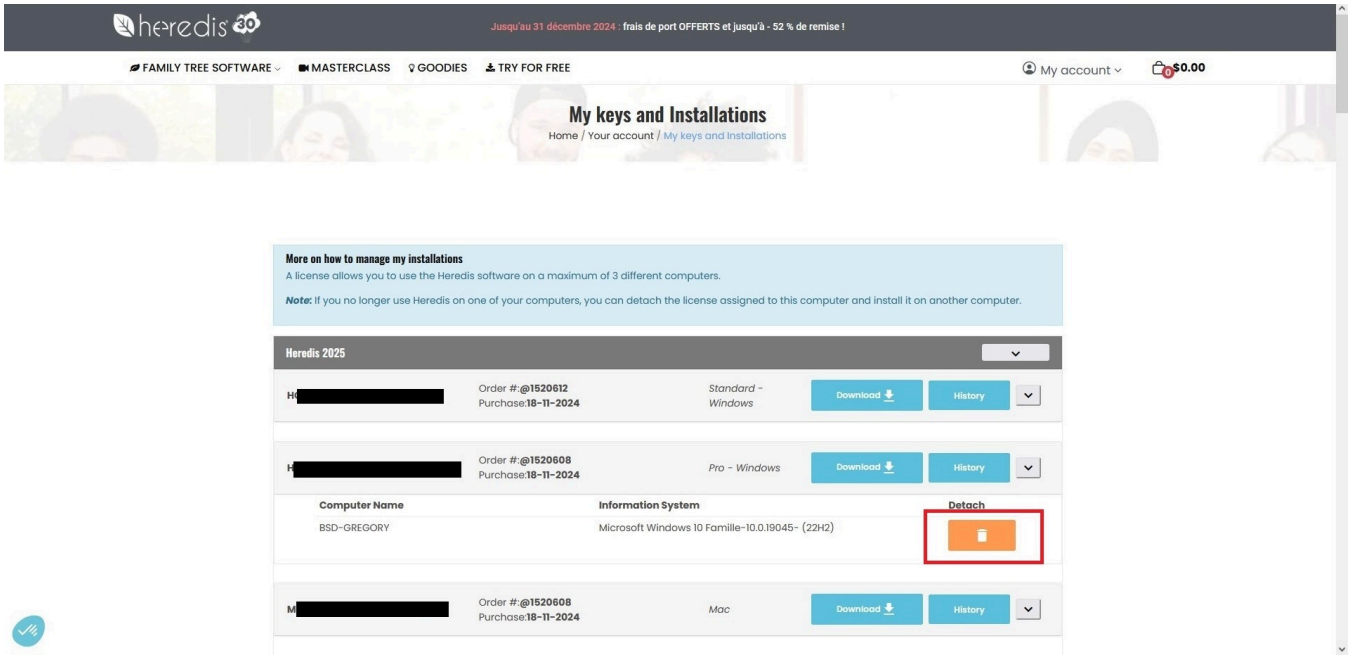
A **History** button will allow you to visualize all actions related to each license (assigning a new computer, detaching…)

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

How to detach the use of my license

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

Manage my installations and the use of my license



How can I transfer my data from my previous program to Heredis?

To take data from another genealogy software, you must first export your file from that software to a GEDCOM format. This GEDCOM file can then be opened by Heredis and automatically converted to Heredis format on the homepage.

For more information, see Create a new file from a GEDCOM 5.5.1 (see page 786) or Create a new file from a GEDCOM 7 and What is a GEDCOM file? (see page 765)

Can I use and install Heredis on multiple devices?

Yes, the Heredis license is a personal and confidential license that you can install and use on up to 3 different devices belonging to you and with the same system.

You have the possibility to manage your license from your Heredis account in the Heredis shop under “My licenses and codes”.

If you have uninstalled Heredis from one computer, then you can detach the license from that computer and use it on another. If you use more than 3 computers, you will need to purchase another license.

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

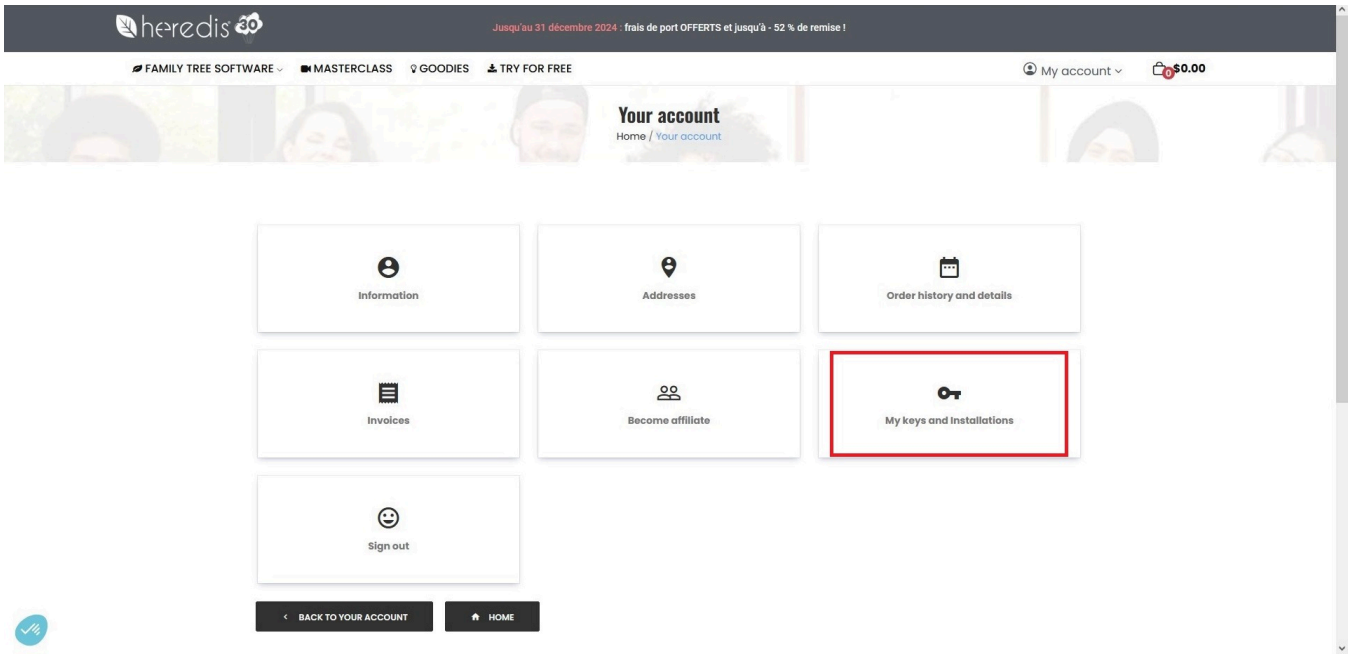
Heredis is a desktop software, which means that your files are saved on your computer. You are the only one who can retrieve them, as we do not have access to your files. Which is why you should always back them up either on a USB drive, a cloud or an external hard drive.

Downloading Heredis

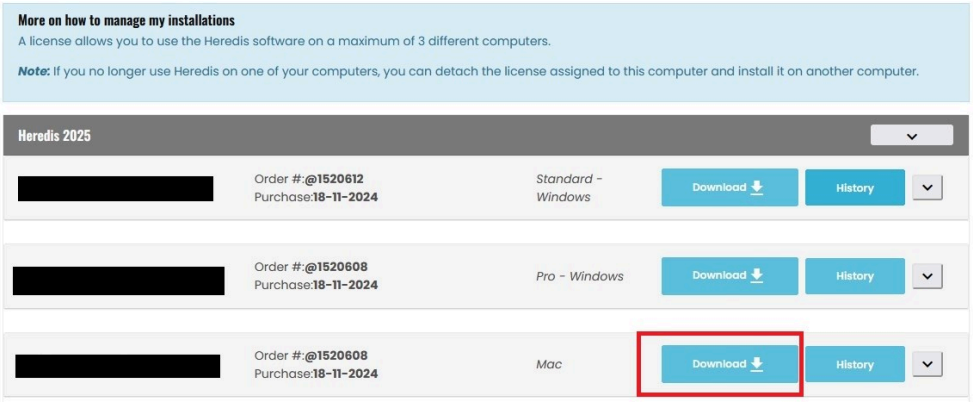
Heredis can be installed on up to 3 computers you own.

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

You can download Heredis from your Heredis store account.
Log in by clicking on the **Sign In** button, enter the email address and password you used to purchase Heredis. If you are already logged in, click on the Hello… button.
Then click on **My Keys and installations**.



You will find the **Download** button under the version of Heredis you wish to download.



Perform the installation as for any software and activate your license for this computer. See the Activating Heredis (see page 19).

Your files

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

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

Before changing computers, remember to make a copy of your .hmw folder (see also The Heredis File and .hmw folder (see page 49)) on a USB key or an external hard drive.

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

If you have not made a copy but still have access to your old computer, you can share your file on the local network:
– turn both computers on
– check and make sure they are both on the same internet network
– launch Heredis (same version) on both computers
– on the old computer, click on the File dropdown menu, then select Share on Local Network…

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

For more information, see the article entitled Sharing your genealogy with other devices on local network (see page 826).

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

Is it possible to recover data created with an older version of Heredis?

Yes, if you are using an earlier version of Heredis, you can simply open the file with the new version. It will then be converted automatically.

See the article Open an existing Heredis file (see page 59).

Avoid using a GEDCOM file if you have a file in an older version of Heredis.

If this does not work, write to us via our contact form and we will convert the file for you.

General

What can Heredis do?

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

Entering

Data

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

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

For further details, see Add persons (see page 177), Input events (see page 206), Save time by inputting faster (see page 125) 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 (see page 540), Media (see page 198), Geolocating Places. (see page 489)

Family tree charts and other documents

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

Print trees

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

For further details, see (Windows) Building single-page pedigree tree charts, (Windows) Unlimited size tree chart (see page 719) or (Mac) Unlimited size tree charts, (Mac) Predetermined size tree charts…

Print reports, sheets, or fully illustrated books

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

For further details see Create and edit sheets (see page 588), (Windows) Create and edit reports (see page 612), (Mac) Create and edit a report, Create and edit a book (see page 566).

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 (see page 844).

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 Export a complete file in Heredis format (see page 752), Export a branch in Heredis format (see page 757), Export a complete file in GEDCOM format (see page 768), Export a branch in GEDCOM format (see page 776), Share on the local network (see page 826)

Glossary

Agnatic: concern only the masculin line

Ahnentafel: genealogical numbering system for listing a person's direct ancestors in a fixed sequence of ascent. The root person of the ahnentafel is No. 1, the subject's father No. 2 and the mother No. 3. Apart from No. 1, who can be male or female, all even-numbered persons are male, and all odd-numbered persons are female. So, the number of any person's father is double of the person's number, and a person's mother the double of the person's number plus one.

Anthroponymy: study of people's name. Onomastic is the study of a name's origin and evolution.

Census: nominative list

Cloud: technology to save your files on an external server rented freely or not by a multinational technology company (iCloud from Appel, Onedrive from Microsoft, Google Drive…)

Family tree chart: graphic representation of part or all of a genealogy

Gedcom: exchanging format for genealogy, it was made by Mormons and make it compatible to most genealogy software

Genealogy: study of family history to establish parentage

Implex: defined as the difference between the number of theoretical ancestors of a person and the number of his/her real ones. It is when the same ancestors appear multiple times in your genealogy.

Media: picture file, audio file, video files… every type of file link to your genealogy.

Publishing: to put online your genealogie and media so other people will see it. Heredis Online is a genealogy publishing website.

Root person: is the person at the base of the genealogy

Source: The informations you gathered come from somewhere. The source is where you can write where you found the data and help you found it back if necessary

Launch Heredis

Double-click the Heredis icon ***(it looks like a leaf)*** to launch the application.

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

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

Each version has its own icon

,

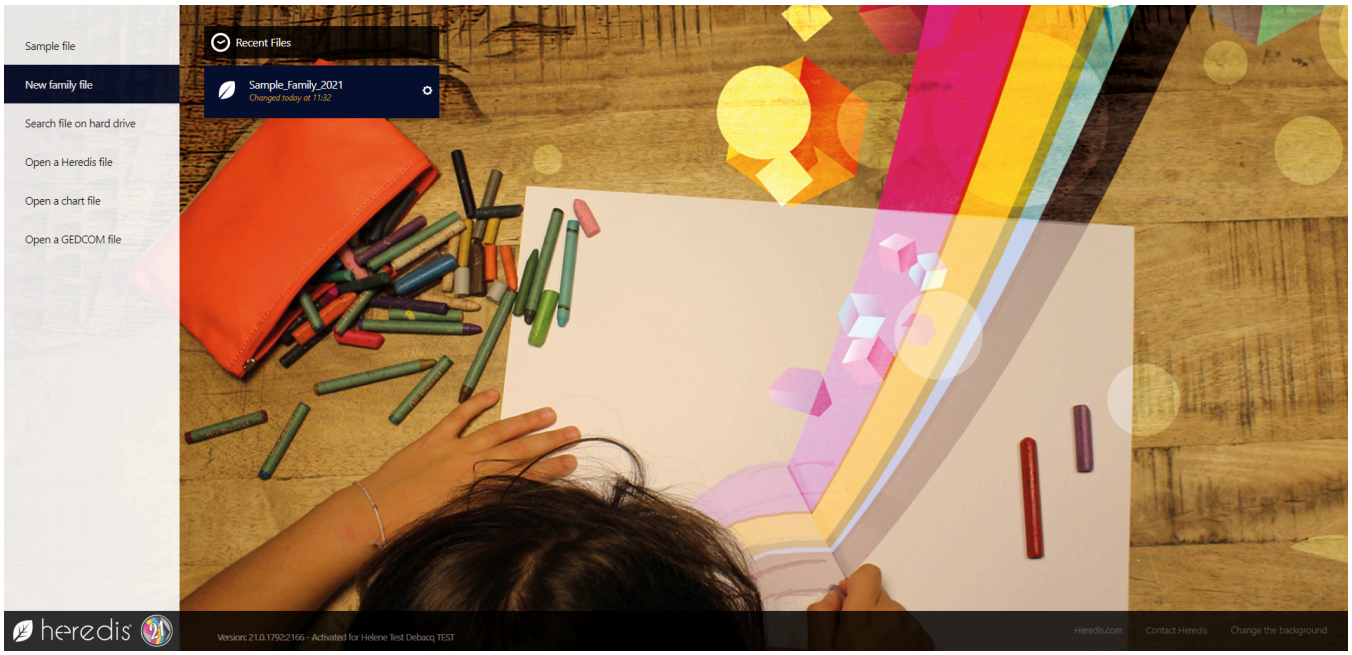
,

, etc.
If you click on the Heredis 2018 icon while trying to use Heredis 2022, then you will open Heredis 2018. You can uninstall older versions of Heredis even if you purchased the new version at the upgrade rate. See also the article Uninstall an older version of Heredis (see page 15).

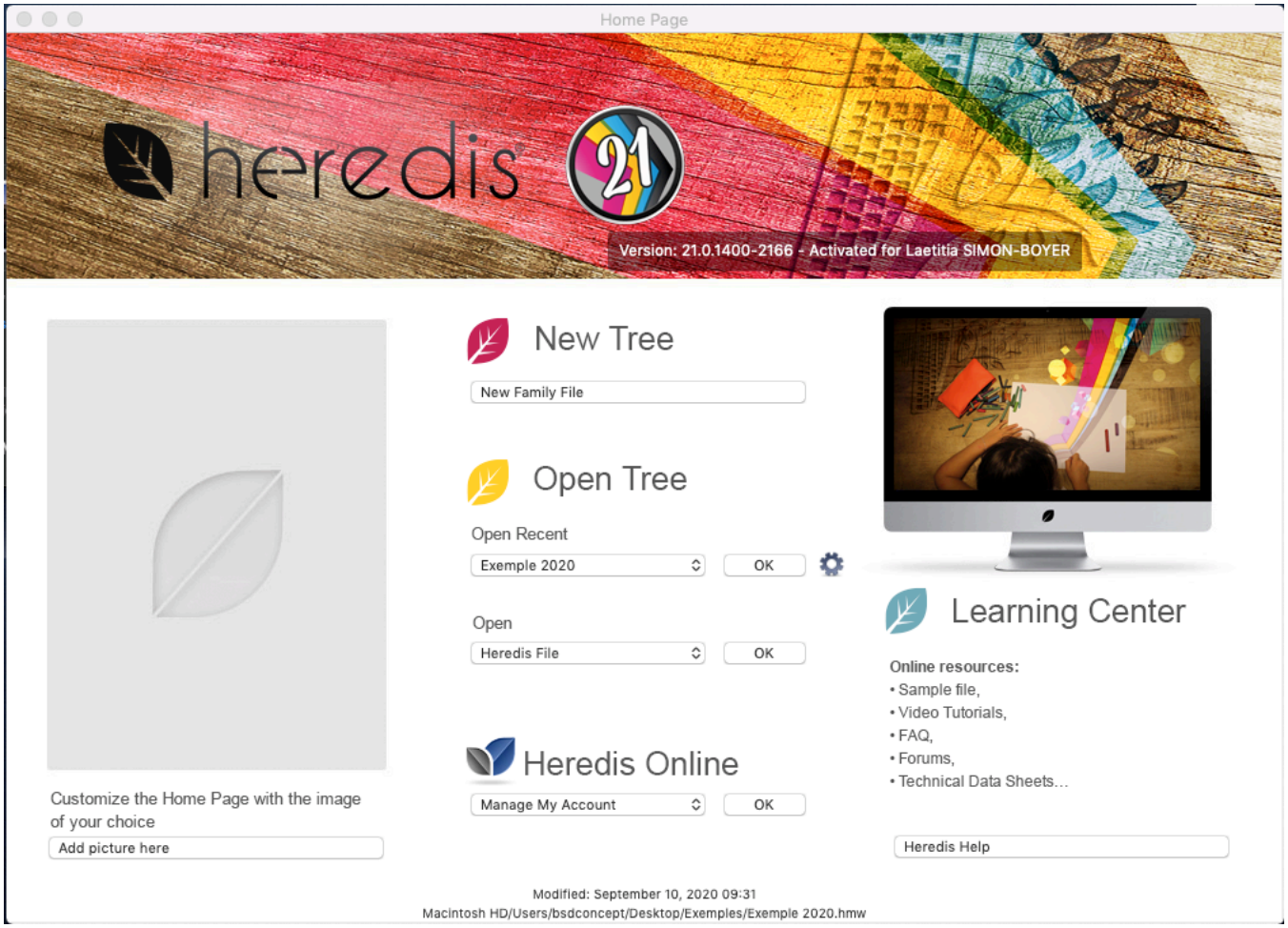
Create a new genealogy file

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

Windows' Home Page

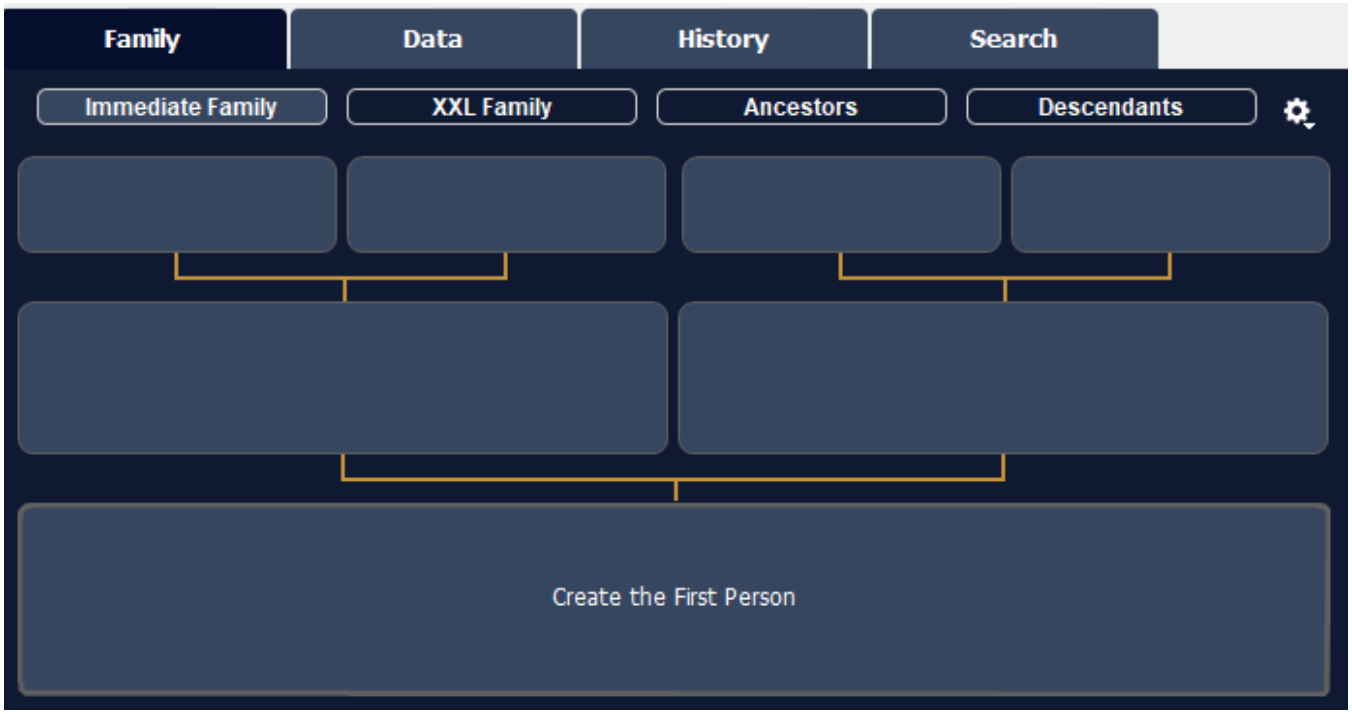


Mac's Home Page



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 (see page 137).

You can also check you Create the first person (see page 132) article.

The Heredis File and .hmw folder

This article is usable for Mac too, however, Mac hides the inside of the .hmw folder. So the risk of making a mistake by erasing something is low for Mac.

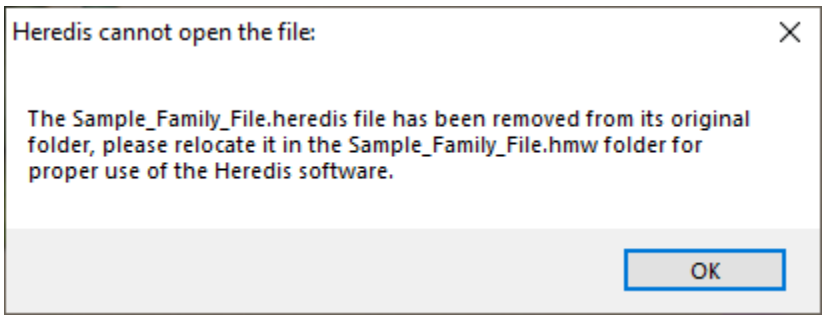
In Windows, your Heredis file appears as a folder with a *.hmw* extension. (for instance: *Sample File.hmw*).

Note: file extensions may not be shown, depending on your computer's settings. We recommend modifying these settings using Windows Explorer:
– from the « View » menu, by checking the option « File name extension », for Windows 8 operating systems and later versions;
– from the « Folder and Search Options » menu, in the « View » tab, for operating systems older than Windows 8, by unchecking the option « Hide extensions for known file types ».

• **Important**
Your genealogy file contains all the data you have entered (*Sample File.heredis* – Type: Heredis Genealogy) as well as a *Media* file in which all the media you have used have been copied. **In order for your file to work properly, make sure to neither separate nor delete the elements included in the file.**

If you wish to move, copy, or save your genealogy to another location on your hard disk drive or on any other drive, make sure to select the entire *Sample File.hmw* folder.

• **Essential**
If you have removed the *Sample File.heredis* file from the *Sample File.hmw* folder, you'll have an error message:



Move it back to the .hmw folder so you can use it.

CAUTION, when naming your files, keep it simple and avoid using special characters, accents, and such (,$§… computers hate those. Rather use _ or – in lieu of spaces.

The Data file (*Sample File.heredis*) only contains graphic thumbnails of the media you've used. The Media file contains a copy of all original media linked to your data (photos, scans, web documents, text…). Even if you have lost or moved your original media, this folder, integrated within your genealogy, allows you to preserve, transfer, or save your genealogy media in a high resolution.

• **Note**
Your original media are still in the location where you had saved them. Heredis has neither moved nor modified them, they have only been duplicated. Do no modify the content of the Media folder or your genealogy will not work properly. See also Media.

Record a file

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

A record overwrites the old version of your file, unlike a backup, which it is a photo of your file in the state at a time T. It is always useful to make a backup at least once a month on external device in addition to the recordings. See also How to save your file (see page 127).

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

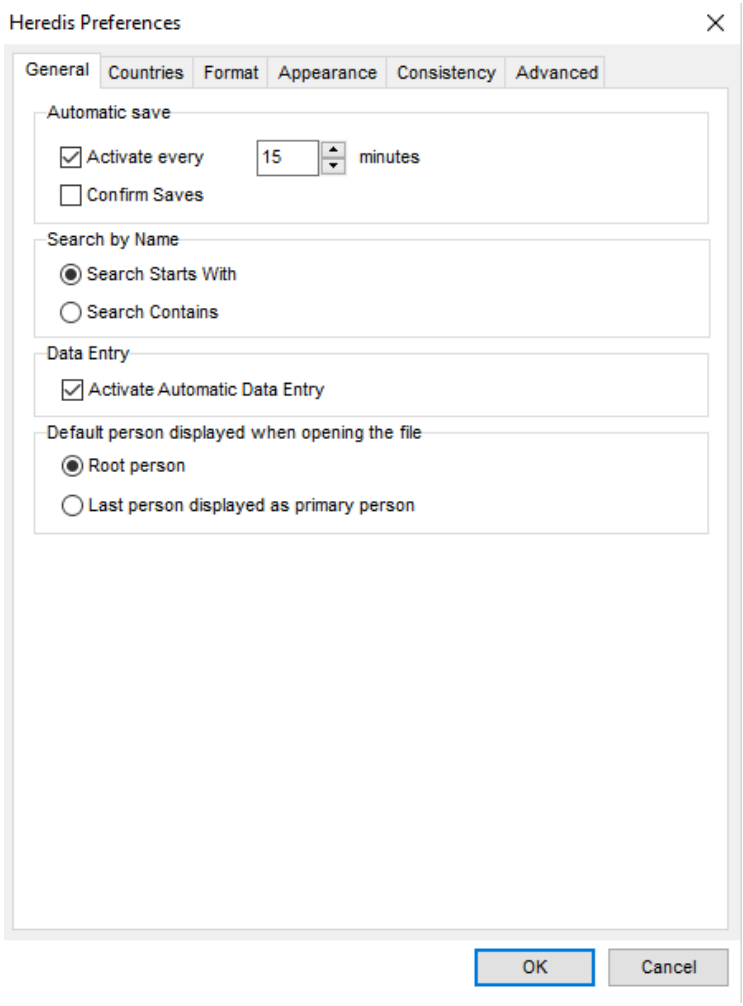
Manually

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

Automatically

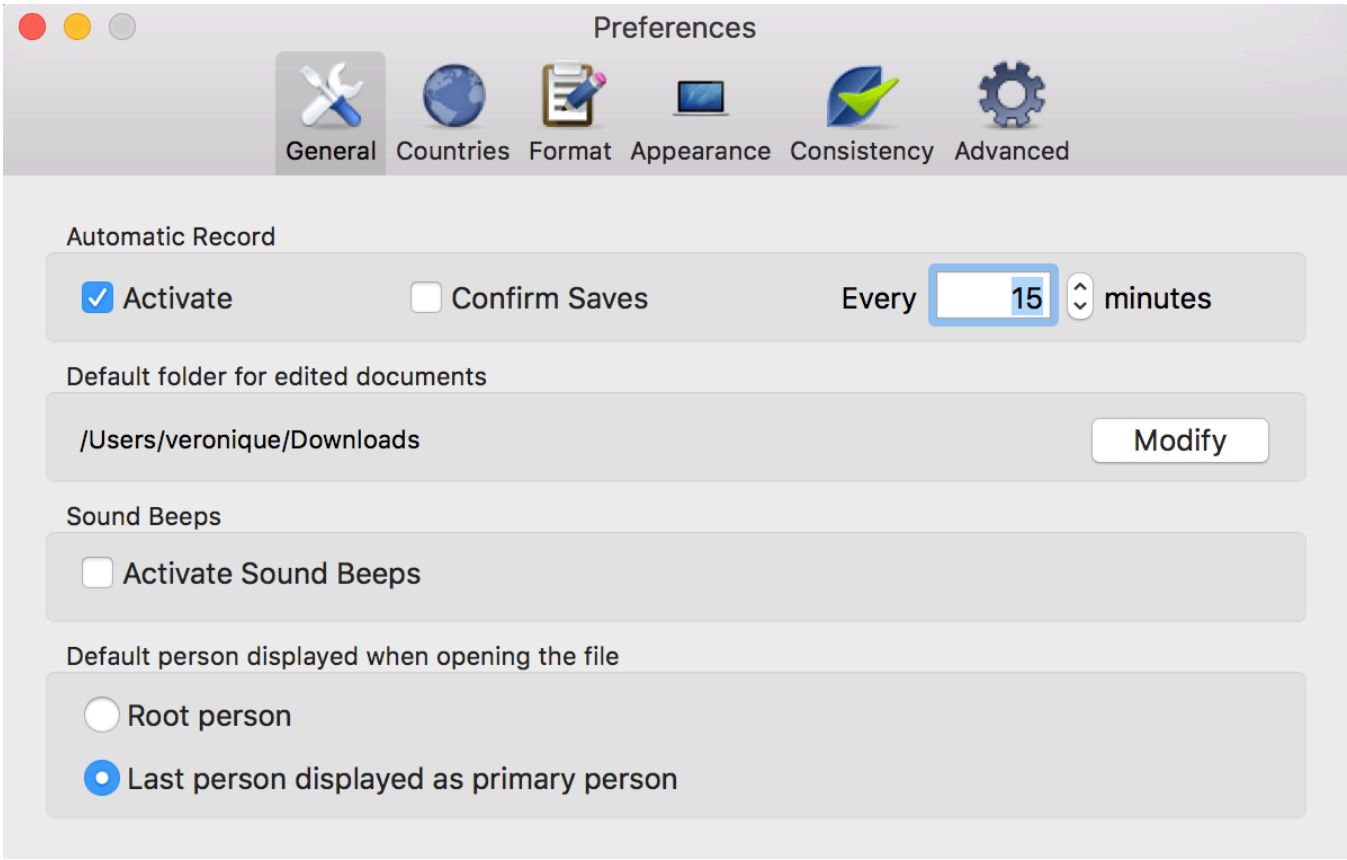
For security you can program automatic recordings of your data.

(Windows) Automatic recording



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

(Mac) Automatic recording



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

Save a file under another name

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

(Windows) Select the **File menu > Save a Copy** . Indicate the duplicate file's destination folder. Heredis creates a new *.hmw* folder, containing genealogical data (file *.heredis*) and folder containing media or a *.ha* file if it is a tree file. Click the **Save** button.
Heredis launches the Windows Explorer and shows you where the copy was made. You can move it, open it or close the window, depending on your needs. Your original file is still open and you can keep working.

(Mac) Choose **File > Save as,**then indicate a name and location.
The file with the new name is open on the screen. To work with the previous version, choose **File > Open Recent** and choose the previous version in the sub-menu.

See also The Heredis file and .hmw folder (see page 49).

(Mac) Back to the recorded version

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

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

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

Close and reopen a genealogy

Close a genealogy file

When you have finished working with a genealogy file, you can close it without leaving Heredis.
• To close the active document, choose **File > Close**. You can also click the Close button in the upper (**Mac**) left, (**Windows**) right corner of the file.
• To close all open Heredis documents, press (**Windows**) Ctrl-Q; (**Mac**) the Option (⌥) key, then click the **Close** button of the active document.

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

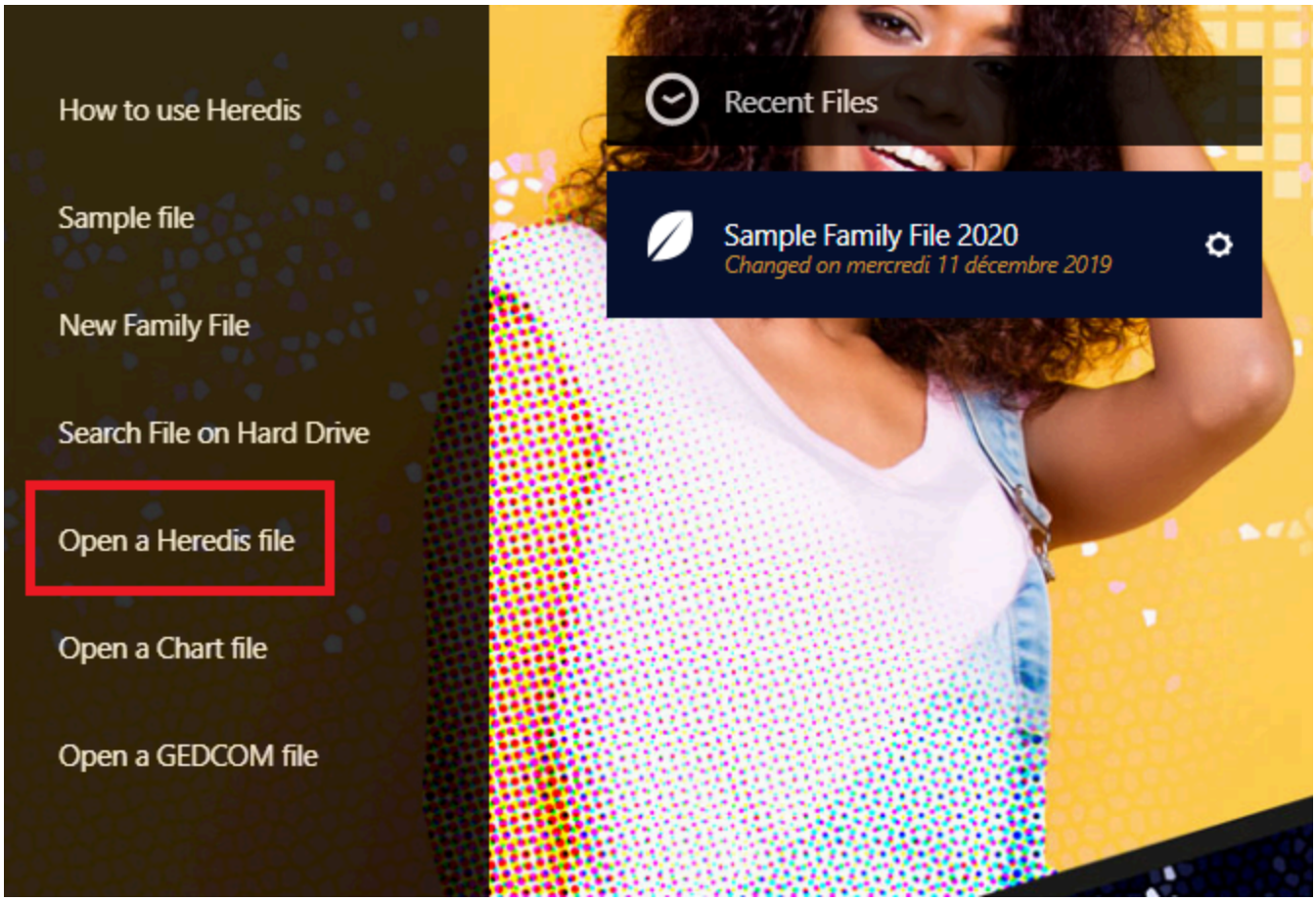
Note: When you close Heredis, wait a few mintues before to shut down your computer, Heredis can take some time to close properly. If you shut down too quickly your computer and Heredis didn't finish to save the modifications you made, you will damage your file. It only takes a minute so please be patient.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

Reopen a genealogy file

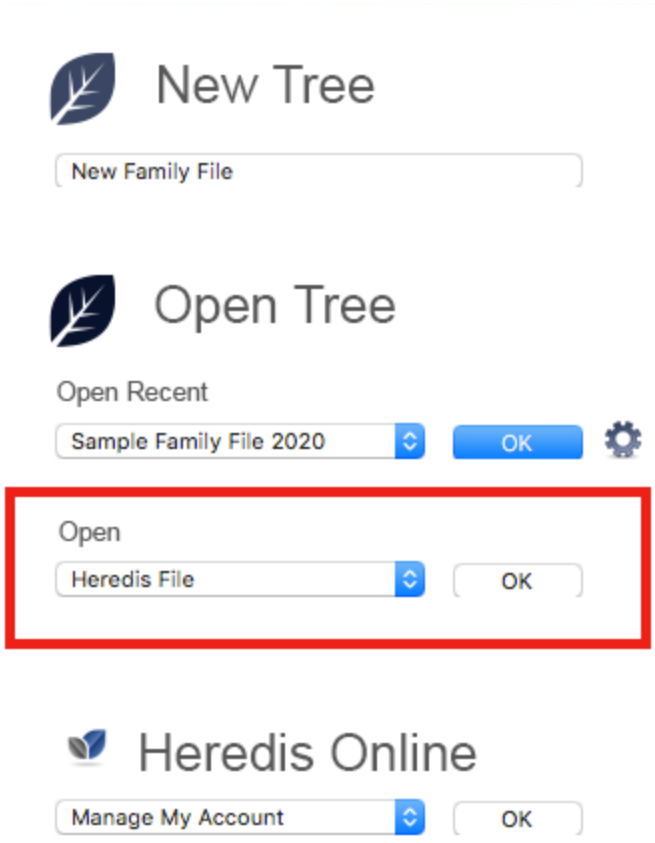
Select your genealogy from the **(Windows) Recent Files**, **(Mac) Open** submenu

or (**Mac**) double-click the file in the Finder.

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



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



If your file is not on the recent files, it doesn't mean it has been deleted! Heredis will never delete your file!

The recent files list might have been cleaned by your operating system or by you after a spring cleaning.

Your file is stored on your hard drive disk. It can easily be found. However, you should make regular backups of your file in case your computer crashes or you need to reinstall your operating system etc. Check out How to save your file (see page 127) article.

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

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

Create a new Heredis file

From the Home page, choose **New Family File.**

Choose where your file will be stored in *.hmw* format and click **Open.** On Windows, click Modify to change the default location > (Documents > BSD Concept > Heredis > Heredis files)

Warning: NEVER change the different files included in the folder in *.hmw*,your genealogical file would be damaged and unusable.

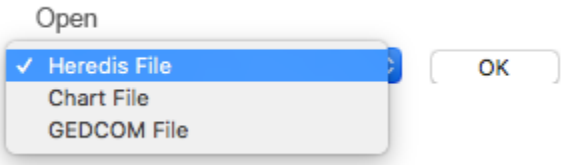
For more information, see What is a Heredis file? (see page 750)

Open an existing Heredis file

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

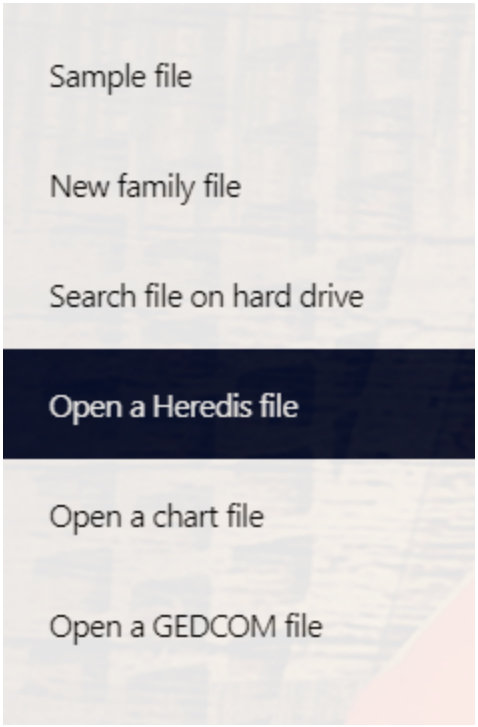
Open a genealogy file if it is not in the recent file list

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

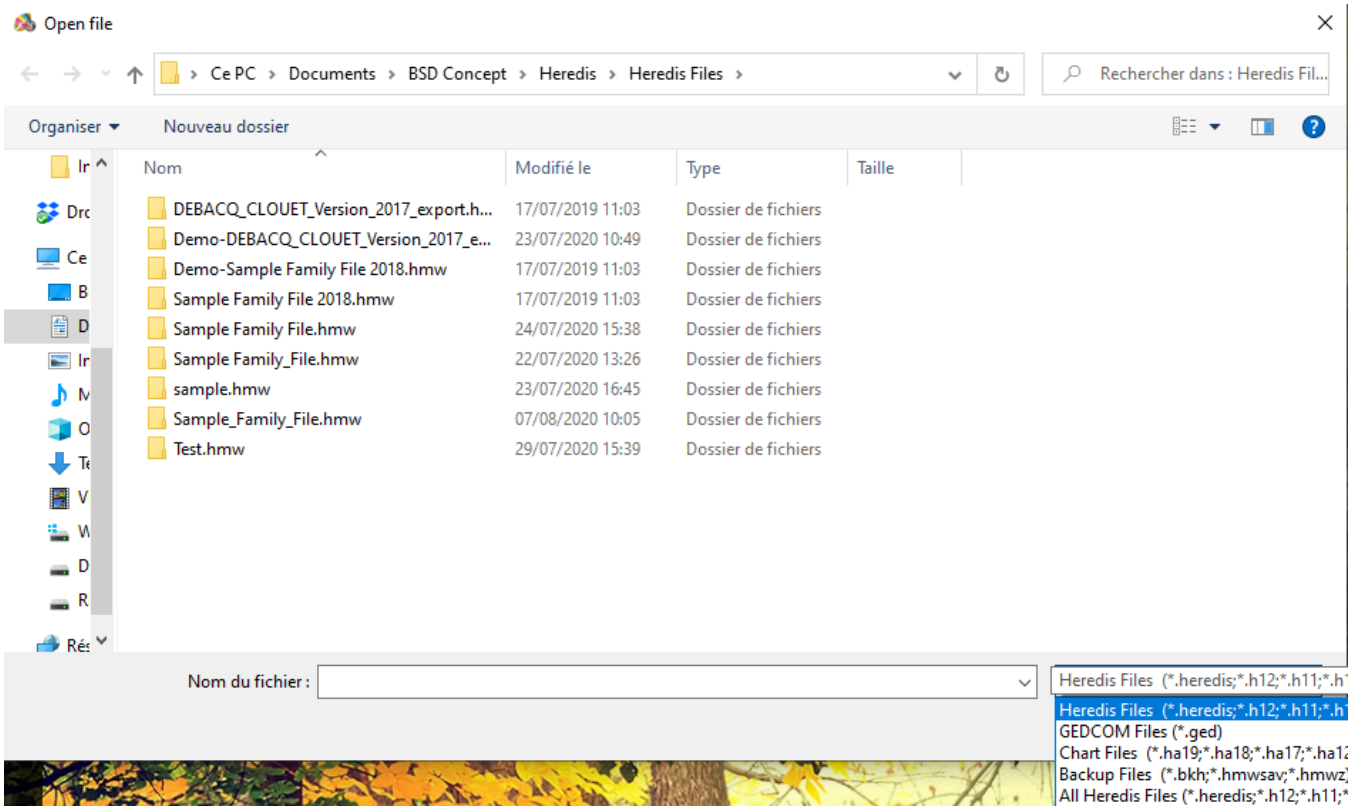


- (**Mac**) To open a Heredis file from the Finder, double-click the file icon or drag it to the Heredis application icon.
  You may open a Heredis file created with an older version of the software from the home page if they were created with a version equal to or after Heredis 2014. Prior to Heredis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

- (**Windows**) To open a file from the **Home** page, click on **Open a Heredis file**, select the file on your hard drive disk and click on **Open**.



- (**Windows**) You can open a Heredis file created using an old version of the software, you will need to change the file type in the opened window. Indeed, before Heredis 2014, the file format had a different extension to each version. Click the Heredis Files drop-down list and choose All Heredis Files. You will see the files in the old formats.



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

select it in your file directory.

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

For more details on opening a GEDCOM file, see Create a new file from a GEDCOM 5.5.1 (see page 786), Creating a new genealogy from a GEDCOM 7 file (see page 795), and What is a GEDCOM? (see page 765) is your file is in GEDCOM format.

Open a recently used file

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

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

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

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

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

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

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

How do I merge 2 Heredis files?

You've created your genealogy and that of your spouse in two separate files and you'd like to put them in the same one? Did you get the file from your cousin, who also uses Heredis and has worked on his side?

2 files cannot be merged.

You can import one file into another, but Heredis will not compare the data.

You'll need to link the connected persons of the 2 files and merge the duplicates.

Importing a file is irreversible. Once you've done it, there's no going back.

It is therefore preferable to create a new file and integrate the 2 desired files. This way, you keep the data from the 2 files separate. If you don't like the result, you can return them to their original form.

- On the Heredis home page, click on **New family file**.
- Give it a name, choose the storage location.
- Then click on the **File menu > Import >Heredis file**.
- Confirm the message stating that the operation is irreversible.
- Choose the file to import.
- Click again on the **File menu > Import > Heredis file**.
- Confirm the message stating that the operation is irreversible.
- Choose the file to import.
- Link common persons, for example, you and your spouse if the 2 persons did not appear in the 2 files.
- Search for duplicates and merge common persons.

Merging duplicates is a delicate and time-consuming operation. All data must be checked before merging.
If merging is possible without too much risk, beyond 4-5 persons, attention gradually decreases and, being human, we tend to validate too quickly during repetitive manipulations.

So please don't make too many mergers at once.

Here are the articles that will interest you:
https://help.heredis.com/en/create-a-new-genealogy-file/ (see page 46)
https://help.heredis.com/en/import-a-heredis-file-in-an-existing-file/ (see page 762)
https://help.heredis.com/en/find-duplicates/ (see page 324)
https://help.heredis.com/en/merging-two-persons/ (see page 330)

Rename a file

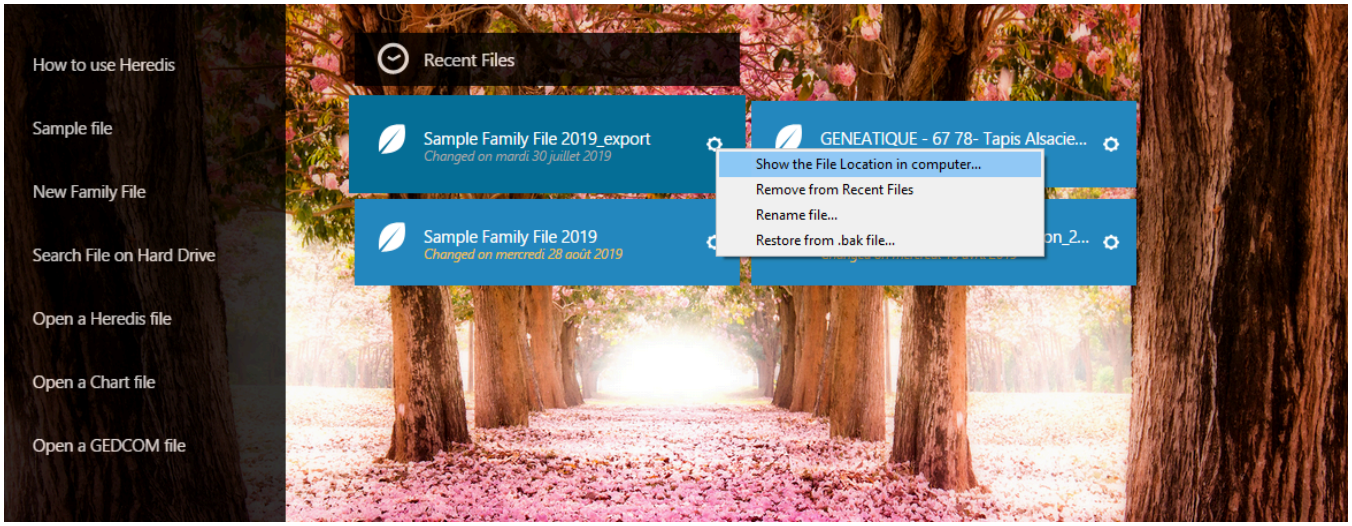
You need to be on the Heredis home page in order to rename a file.

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

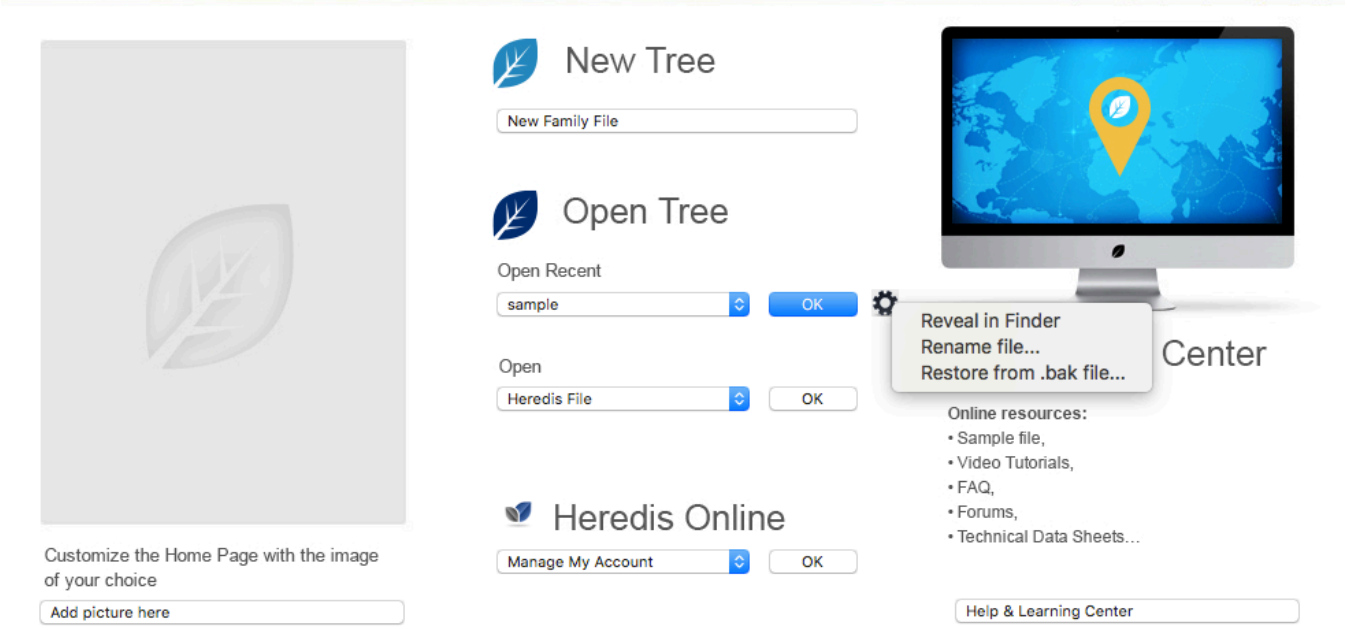
If any of the smaller files is named differently from the others, Heredis will be unable to launch your file. You’ll encounter an error message telling you “The file nameofyourgenealogy.heredis jas been removed from its original folder or has been renamed. To ensure proper use of your genealogy file,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

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

(Windows) Home page



(Mac) Home page



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

See also The Heredis file and .hmw folder (see page 49).

How the Heredis data is structured

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

Persons

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

For each person included in the genealogy file, specify:

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

Also see The different data fields (see page 87) and Add a person with no direct connection (see page 177).

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 (see page 141), Add spouses (see page 164), and Add children (see page 172).

Events

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

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

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

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

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

For more details, see Input events (see page 206) and Heredis' Preferences (see page 107).

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 (see page 261), The different mode for Sources & Citations (see page 272).

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 (see page 233).

Linked Persons

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

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

For more details, see Add linked persons (see page 239).

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 (see page 198) and Photo Tool (see page 540).

Surnames – Given Names – Occupations – Places

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

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

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

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

For more details see Indexes: generalities (see page 412).

Presentation of the Heredis' interface

Genealogy files

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

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

(Mac) Display several working windows

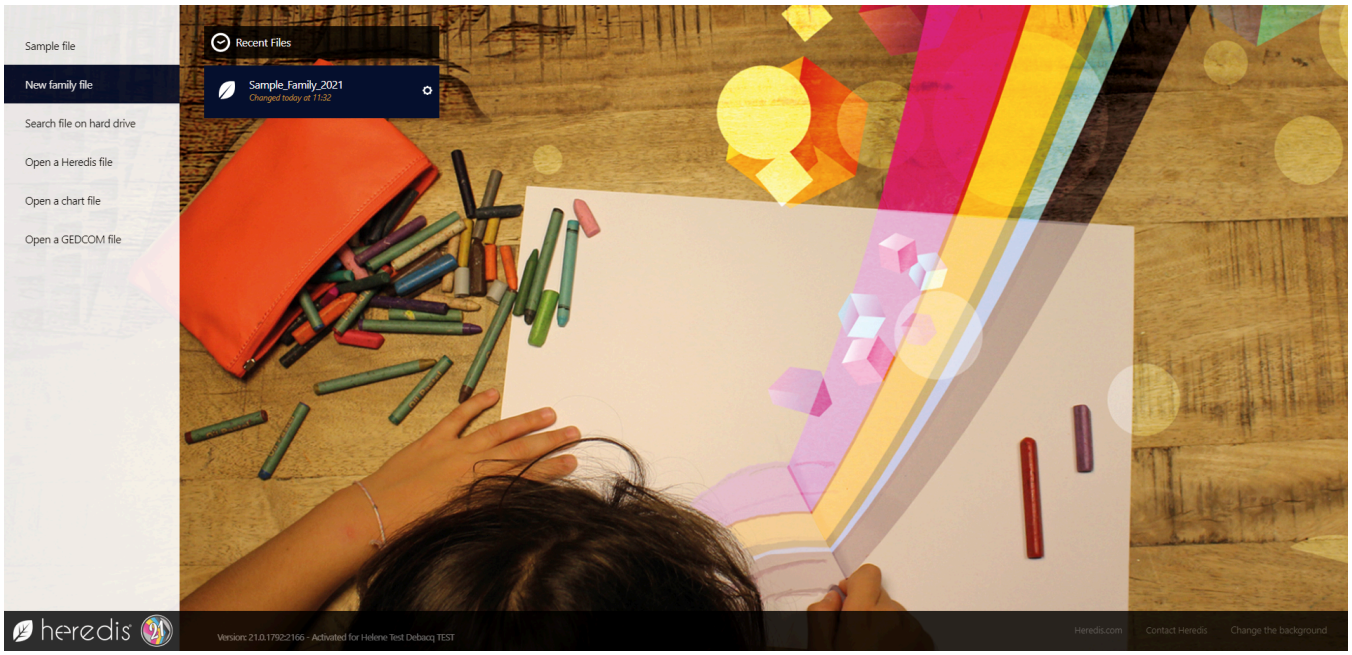
Several views of the same genealogical file may be opened simultaneously: the main navigation screen, tool screens (Indexes, Search for duplicates), tree chart screens, document screens, the Preferences screen…

Display several genealogies simultaneously

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

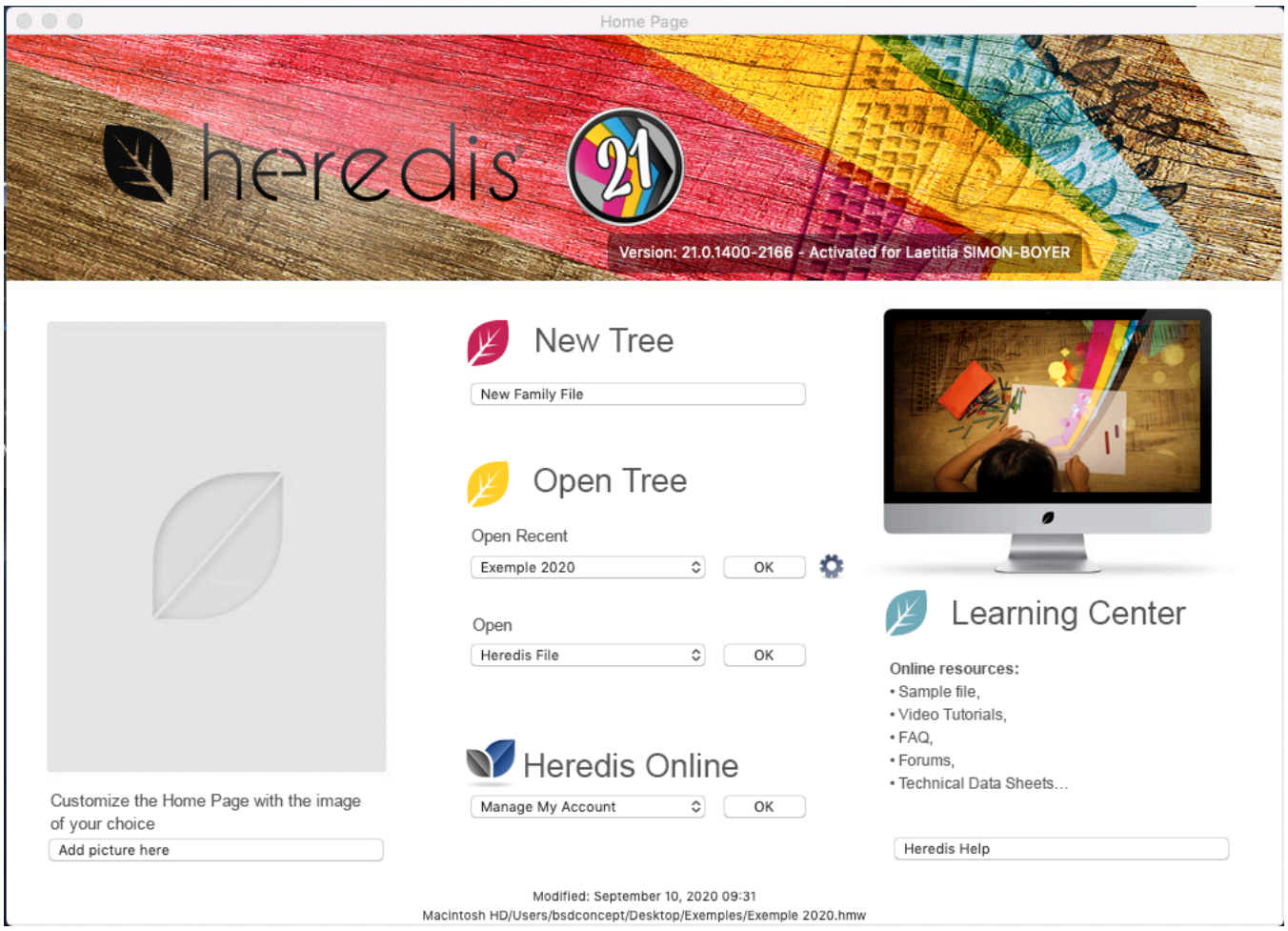
The Home Page

Windows's Home Page



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

Mac's Home Page



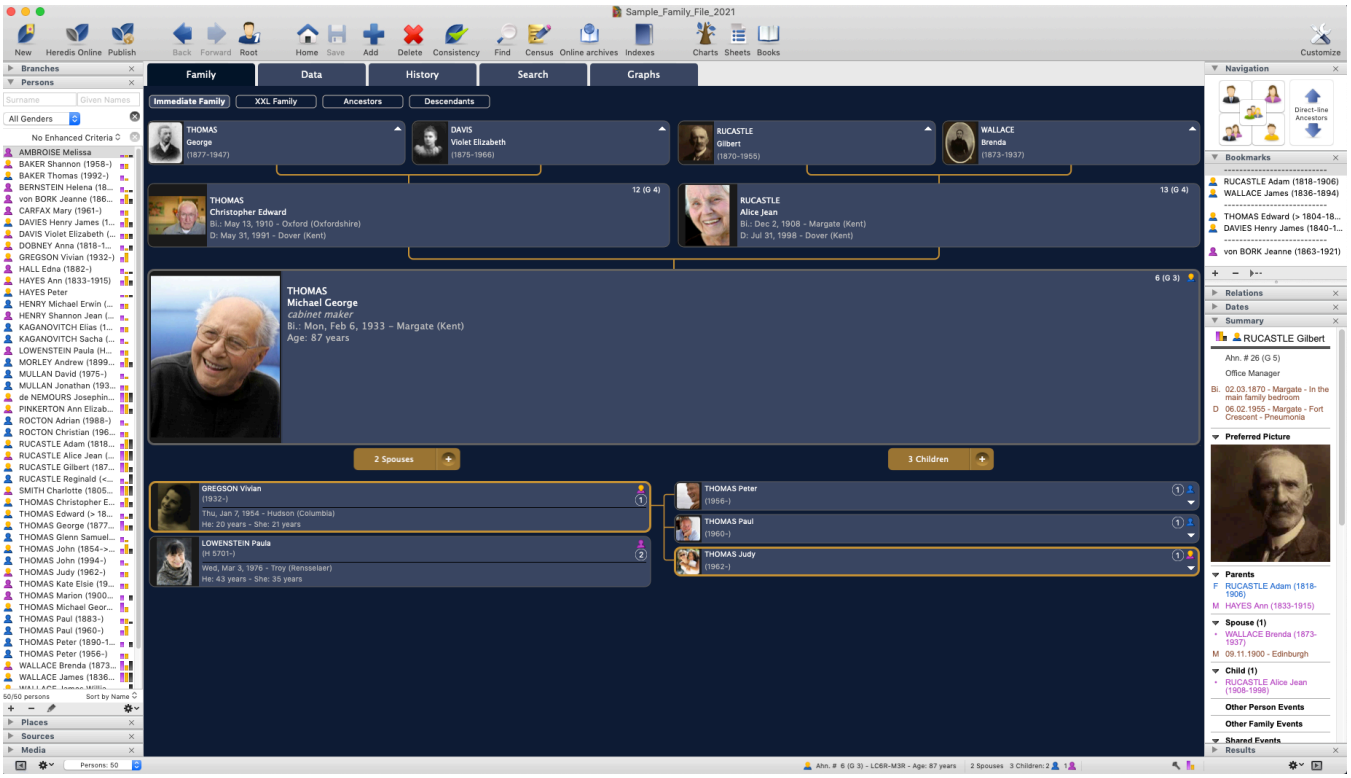
To find again this screen when you are already in a working session, click on the **Home** icon of the toolbar or choose **File > Home Page**.

The main Screen of Heredis

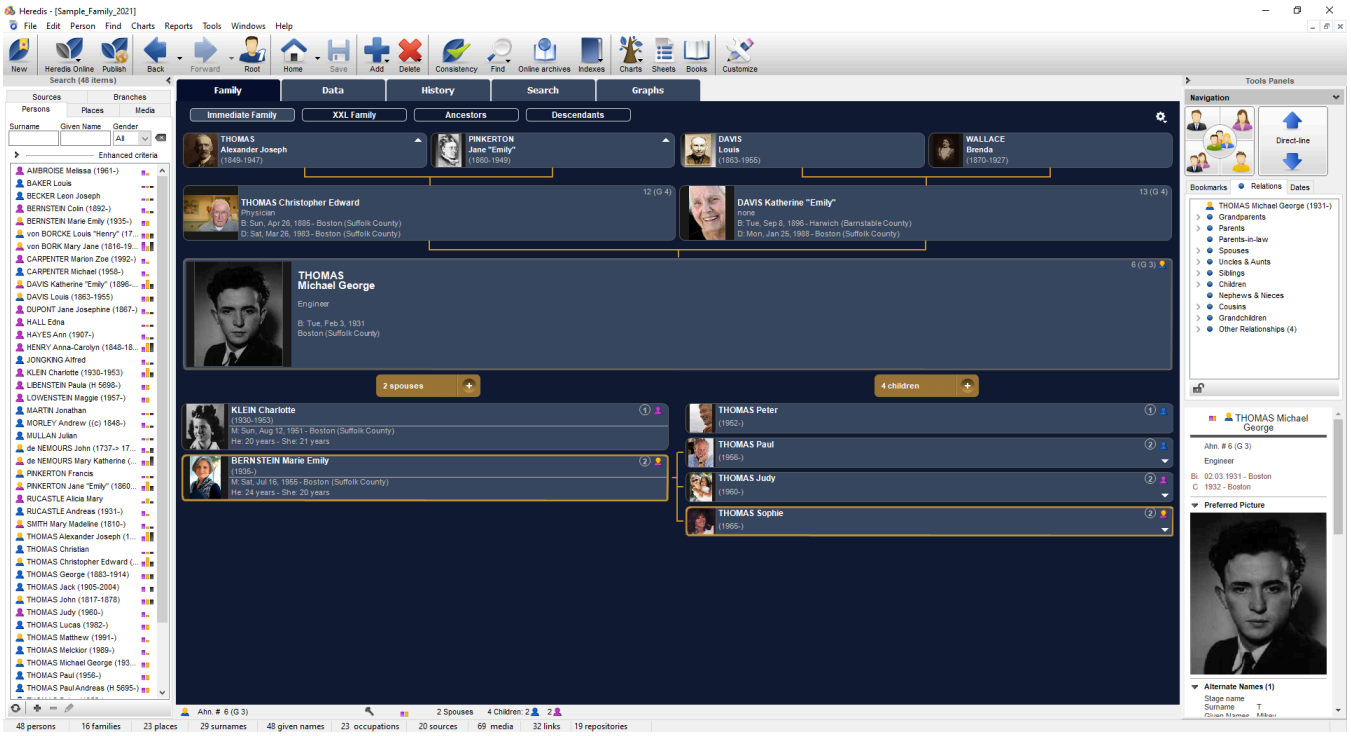
Heredis' software reacts just like any other application / software. It can be resized, displayed full screen **(Windows)** or iconized in your taskbar; **(Mac)** or iconized in the dock.

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

The main screen Mac



The main screen Windows



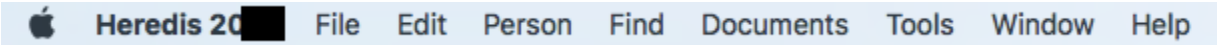
The Menu and Toolbar

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

Menu

(Windows)

(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.

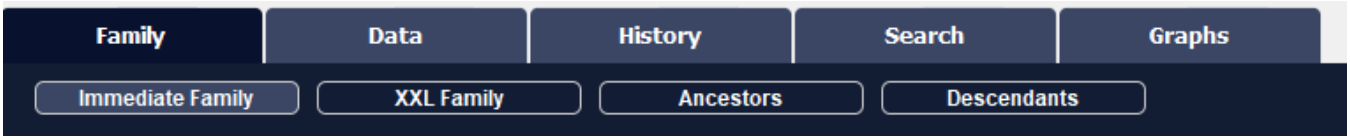
See the article Customize Heredis for further details.

The buttons

See the Buttons article.

The central part of the screen displays four tabs.

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



The **Family** tab allows you to choose between different views of the immediate family of the primary person. It develops as and when you enter data, each person taking his/her place in the organization of the family.
The **Data** tab allows you to add information at any time concerning the primary person and his/her immediate family. Use the Family Group Data to save time.
The **History** tab displays the migrations of the primary person.
The **Search** tab provides a helpful research tool to assist you in reviewing your work and evolving your genealogy. The top of the screen shows the known or missing information. The bottom part of the screen allows you to send a search online on the websites of your choosing in the main existing genealogy website. You can also use the **Family Search** button to access

your family search account and do a research on the primary person and find his/her ancestors and progeny.
The **Graphs** tab displays the dynamic wheels.

For more details, see The different tabs (see page 76).

Search and Tool Panel

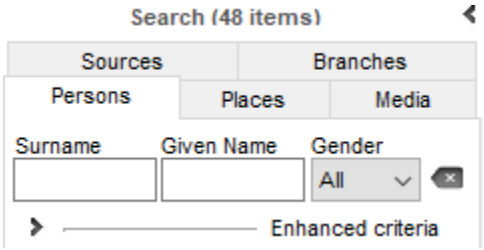
On both sides of the main screen, there are removable panels which provide access to data lists or tools.
Their presentation is customizable. Open and scroll the panels, **(Mac)** move them to improve your personal organization, add columns to the panels, choose how they appear (one at a time or all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

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

Search Panel

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

Windows' Search Panel

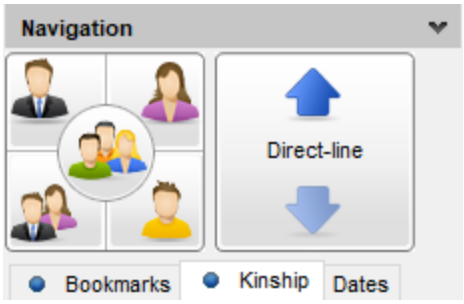


Mac's Search Panel

Tools Panel

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

Windows' Tools Panel



Mac's Tools Panel

For more details, see Customize Heredis/Customize the panels.

Navigating

Explore all the family branches and display the people you want to view, edit or print documents concerning to them.
Drag any person displayed on the screen to change their position: select a child and drag to the grandfather box. If this person is indeed a grandfather, a new **Immediate family** appears.
Drag any person shown in the removable panels or on any data entry tab input or from one panel to another: a bookmarked individual as the primary person, an uncle to the bookmarks, a person from any of the Indexes to the bookmarks, or as primary person etc.

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

Navigate according to Ahnentafel (see page 44) numbering with the **Next Ancestor** – **Previous Ancestor** arrows.

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

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

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

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

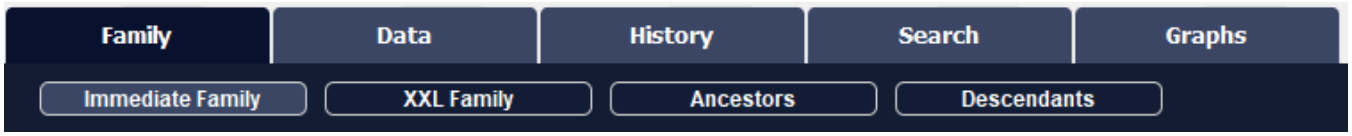
(Mac) For a history of your browsing, position the mouse on the relevant arrow and a list is displayed.

The different tabs and panels

The different tabs

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

Family tabs



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

The **Immediate Family** screen displays the family members who are close to the primary person (parents, grandparents, spouses, children). It also displays the brief information of the primary person and his/her parents (surname, first name, occupation, date and place of birth, date and place of death). If the person does not have a date of death and is assumed to be alive, then his/her age appears. Heredis uses the age at death setting in Heredis' Preferences to estimate whether the person is assumed to be alive or not. See the article Heredis' Prefrences (see page 107) edit in the Consistency tab.

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 (see page 664).

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

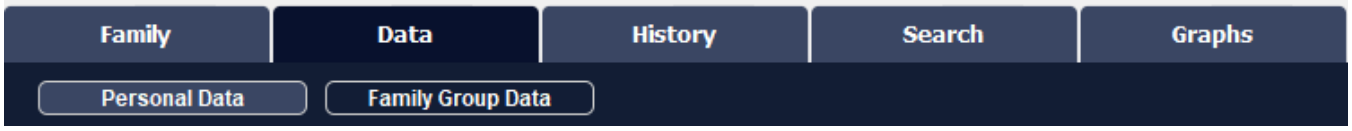
- Change the number of generations displayed with the cogwheel icon or you may start printing the ancestry as it is displayed.
- You can also display views of the ancestors' origins by town, county, state/province or country. For further details, see the article Location tree (see page 706).
- This screen 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 fro mthe cogwheel , 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 cogwheel icon. When you click on **Print**, choose the presentation you

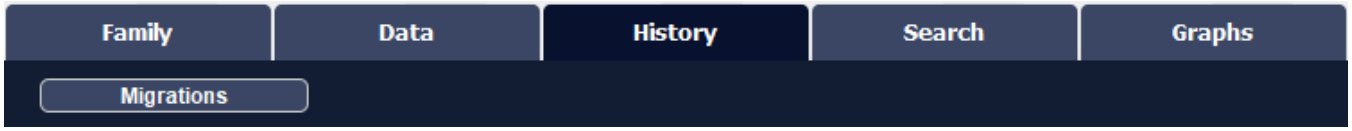
want in the 2 tabs of the displayed window and click on **OK**. Heredis will create a document that will open with your word processing software.

Data tabs



- The **Personal Data** screen shows all the data entered and allows you to add or complete events for the primary person or for the couple. You access the **Personal Data** tab for any person displayed by double-clicking on the name.
- The **Family Group Data** screen provides a summary of the information entered for the primary person and allows you to add all the members of his/her immediate family (parents, spouses, children, step-children) without having to exit this screen. See the article Input a Family Group Data (see page 280).

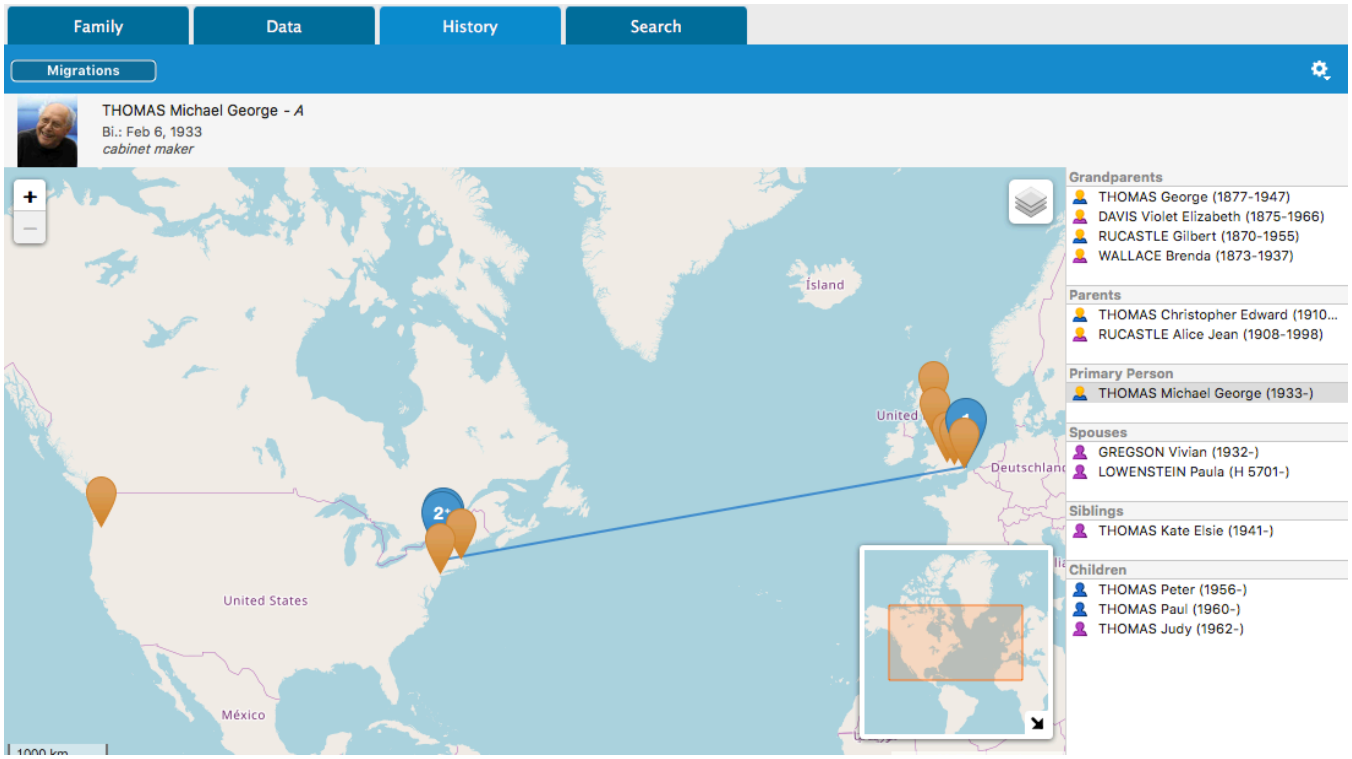
History tabs



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

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

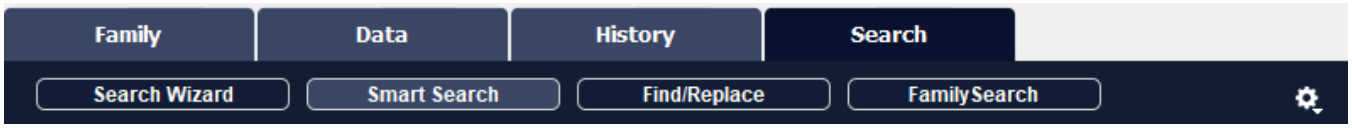
Select the frame with left clic of your mouse, by moving it, you will navigate on the displayed map.



Note:

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

Searches tabs

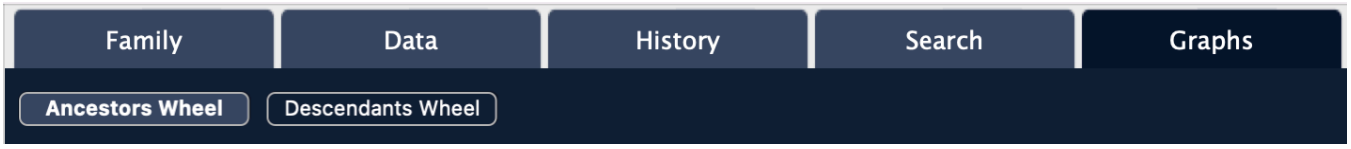


The **Searches** tabs contain research tools for the primary person and your genealogy.

- In **Search Wizard** sub-tab, the upper part shows the known or missing information. The lower part of the screen allows you to launch any online research with the operator of your choice. You can also restart a previous search, enter a research note, check the details of sources, media, or geographic locations for known data. You can easily manage linear research by using the **Branches** panel. Also consult Search Wizard (see page 357) article.
- From this tab, you can also access **Smart Search** which allows you to find data of your genealogy by combining different search criteria such as persons, relations, families, events. See also Smart Search (see page 371) article.
- From the **Find/ Replace** sub-tab, you can also replace and modify data entered in a

Persons, Families, or Events section. For more details, see Find/Replace (see page 382) article.

Graphs tabs



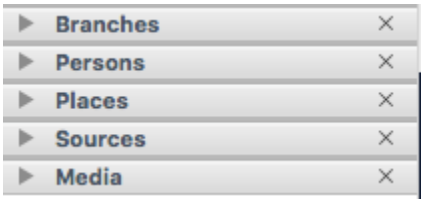
From **Graphs** tab, edit a dynamic wheel. See article The Dynamic Ancestors Wheel (see page 677), Descendants Wheel, (see page 684) Mixed wheel (see page 693) and Location Wheels (see page 702).

The panels

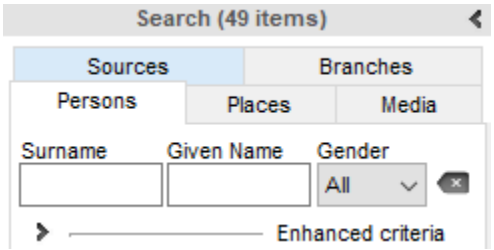
Removable panels display data or tools.

The search panel is displayed in a hidden area on the left of the main screen. Heredis offers different tabs in Windows & Mac version: **Persons**, **Branches**, **Places**, **Media**, and **Sources**. The search panel and the results it displays are always available and provide direct access to the data for viewing or use to complete the entry.

(Mac) Search panel

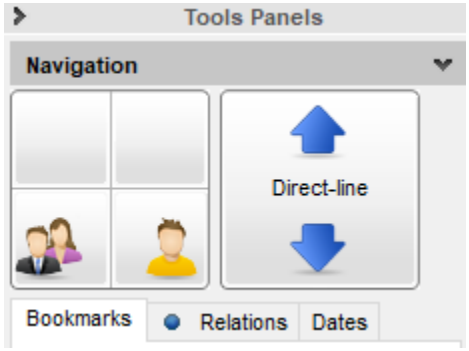


(Windows) Search panel



(Mac) Tools Panels

(Windows) Tools Panels



Display or Hide panels

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

(Mac) Click the close check box on a panel to hide it. To display a hidden panel, click the **Panel Options** button at the bottom of the panel columns and select it from the list.
Add a column of panels, to the right or left of the navigation screen using the **Panel Options** , and then divide the panels into the two columns. Delete a panel column with the same button.

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

Resize the panels

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

(Mac) Arrange panels

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

See the articles Customize Heredis (see page 99) and Heredis' Preferences (see page 107).

Historical facts from the History panel

The **History** panel lets you visualize the historical events that occurred during the life of the primary person.

View historical facts

When a Heredis file is opened, the **History** tab of the work panel displays historical facts contemporary with the primary person.
If you change the primary person, the **History** tab automatically updates the display accordingly.

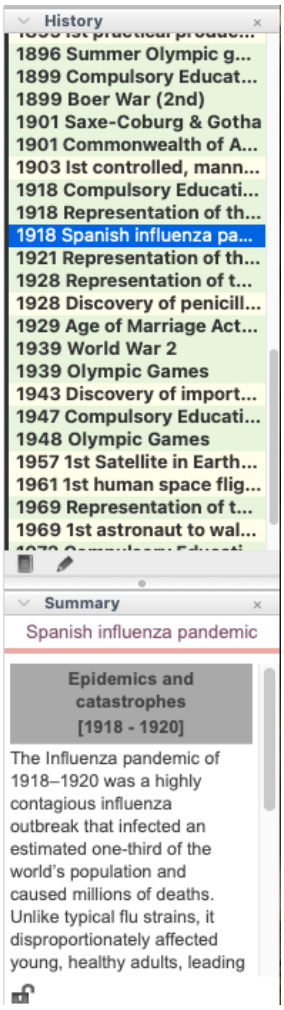
Windows History Panel

macOS History Panel

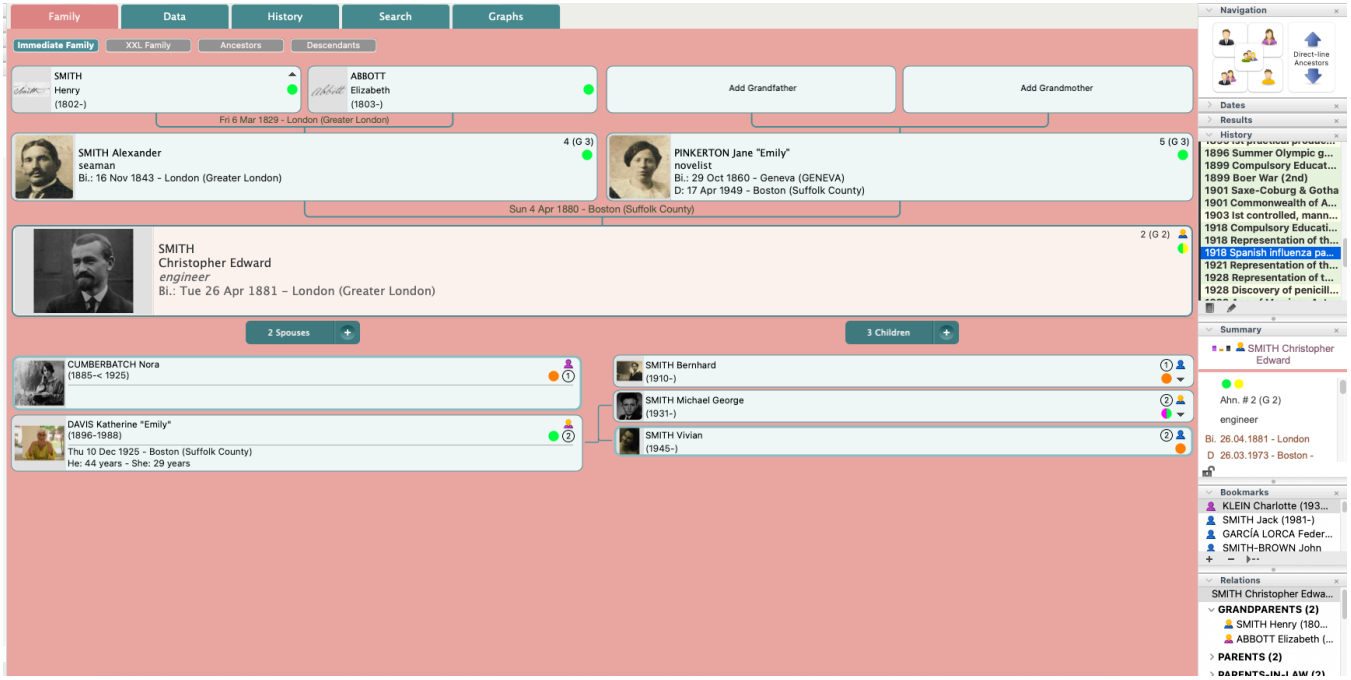
Historical facts from the History panel

Historical facts are displayed on different-colored backgrounds. Each color corresponds to a category of historical fact.

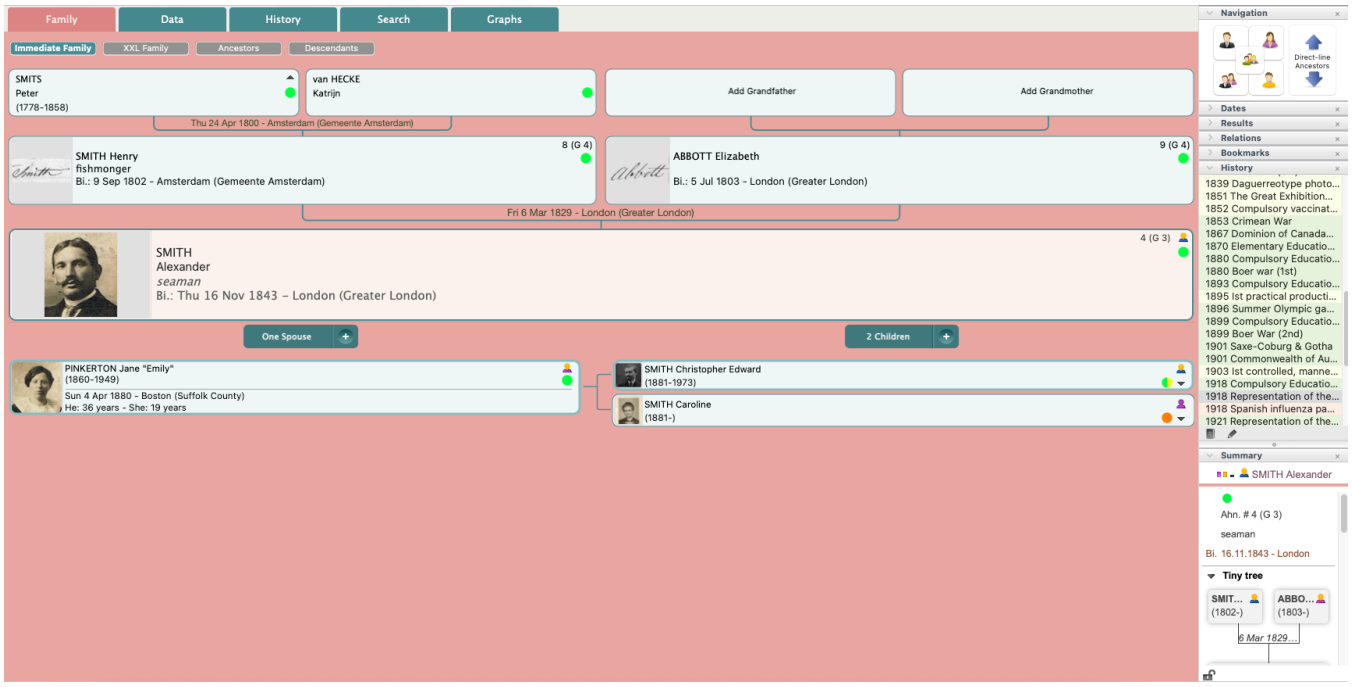
To move around the list, click on the scroll bar or use the arrow keys on your keyboard.
To consult a historical fact, select it from the list and read its details in the **Summary** work panel.



Heredis uses a black line to highlight historical facts from the year of birth to the year of death of the primary person.



If there is only one date of birth, then the historical facts appear from the year of birth onwards, but no lines are highlighted.



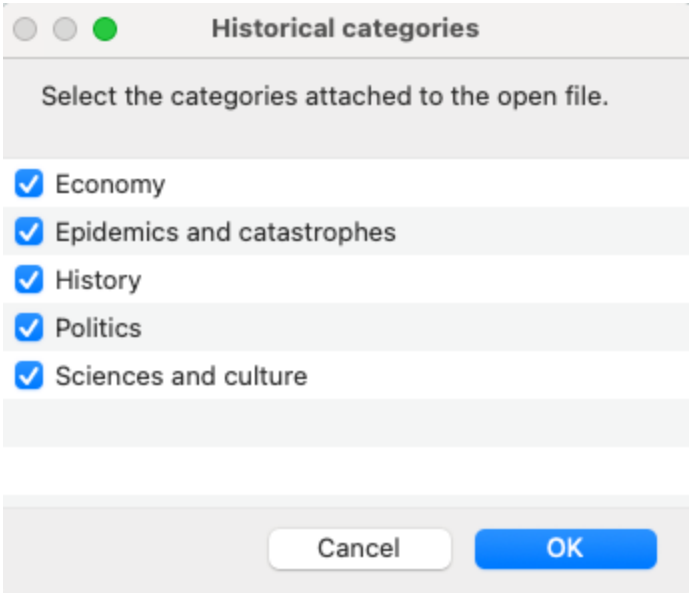
Choose which history files to display

You can select the categories of historical facts you wish to display.

- Click the ✎ button.
- Check the categories you wish to see and uncheck the others.

Windows Category selection

macOS Category selection



This selection is specific to the current Heredis file and will be saved when the file is closed. You will therefore find it again the next time you open your genealogy file.
You can make a different selection for each of the Heredis files you are working on.

Access the historical facts index

Historical facts and historical fact categories are linked to the software, not to your genealogy file. So you'll have the same categories and facts for all your computer files. If you have another computer, remember to export the categories you have modified or created, and import them on the second computer.

Click on the button on Windows and on macOS to open the historical facts index.
This index allows :

- **View** historical facts for categories delivered by default.
- **Create new categories** to choose which historical facts to display or not. Useful for limiting the number of historical facts in individual and family timeline, for example.
- **Create new historical facts** that you can add to any category, even the existing default ones.
- **Modify** one or more historical facts and/or categories.
- **Illustrate** historical facts.
- **Import historical fact categories** with associated facts for backup or exchange purposes.
- **Export categories of** historical facts with associated facts for backup or exchange.
- **Delete** historical facts and/or categories of facts.

For more details on the Historical Facts index, see the article Historical Facts index.

The different data fields

Identity fields

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

Surname

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

See Customize Heredis/Heredis' Preferences and Indexes: generalities (see page 412).

Prefix

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

Suffix

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

Given Names

Type the different given names of the person. The list of given names known to Heredis appears and is updated as and when you type. Once you have located the given name in the list, use the down arrow to select it and then press **Enter** to select it.
If the usual given name is not the first given name, it can be highlighted. To do this, click the icon (Windows: , Mac:)to the right of the field for entering given names, and select the usual name in the list.
Info • The usual given name may also be highlighted by entering it with quotation marks.

Gender

The gender of the person is automatically filled in by Heredis, according to the given name entered. If you want to change it, or if you typed a given name unknown to Heredis or for a multiple given name, type **M** for Male, **F** for Female, or leave **?** for persons whose gender is unknown. You can change the default gender for a given name by editing it in the Given Name Index. If you encounter multiple male Robin, choose by default the male sex in the Given

Name Index. If you meet a woman named Robin, it will be enough to change the sex only for her.

Info: if a given name is unknown to Heredis and add to the given name index, it will get the chosen gender of your first entry to use by default.

Nickname

The display of a nickname will be preceded by aka.

Occupation

Enter the occupation of the person. This item should contain the sole or main occupation he/she held. You may also enter as events any other dated and detailed occupations, for other activities. The list of recognized occupations with Heredis appears and is updated as and when you type. When you see the desired occupation in the list, use the down arrow to select it and press **Enter** to select it.
In the **Occupations** field, recognized occupations are underlined. When you type a word not recognized as an occupation, you may add it to the list of occupations available.

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

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

Title

Indicate here any title of nobility or honorary title.

Personal number

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

Signature

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

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

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

Child status

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

Flags and their use

There are 2 types of flags:

- those suggested by Heredis, see Flags suggested by Heredis (see page 186) article.
- those you can fully personalized, see Personalized flags (see page 188) article.

Use the Smart Search to change flags at once for multiple persons. For example, you want to make confidential all people born after 1920. Use the Smart Search and apply the treatment to make them all confidential at the same time. See Smart Search (see page 371) article for further details.

Facts

With **Facts**, enrich your genealogy with new data and attach witnesses, places, sources, medias and dates to it.
You can add as much as you wish, unlimited number, and you can organize them.
These facts are displayed in the central part of the screen **Data > Personal Data** in the **Facts** tab.
When a **Fact** is filled, the tab is marked with a blue spot.

Facts

Read also Facts (see page 245) article.

Notes

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

For further details, see Input notes (see page 255).

How to find a person in your navigation history

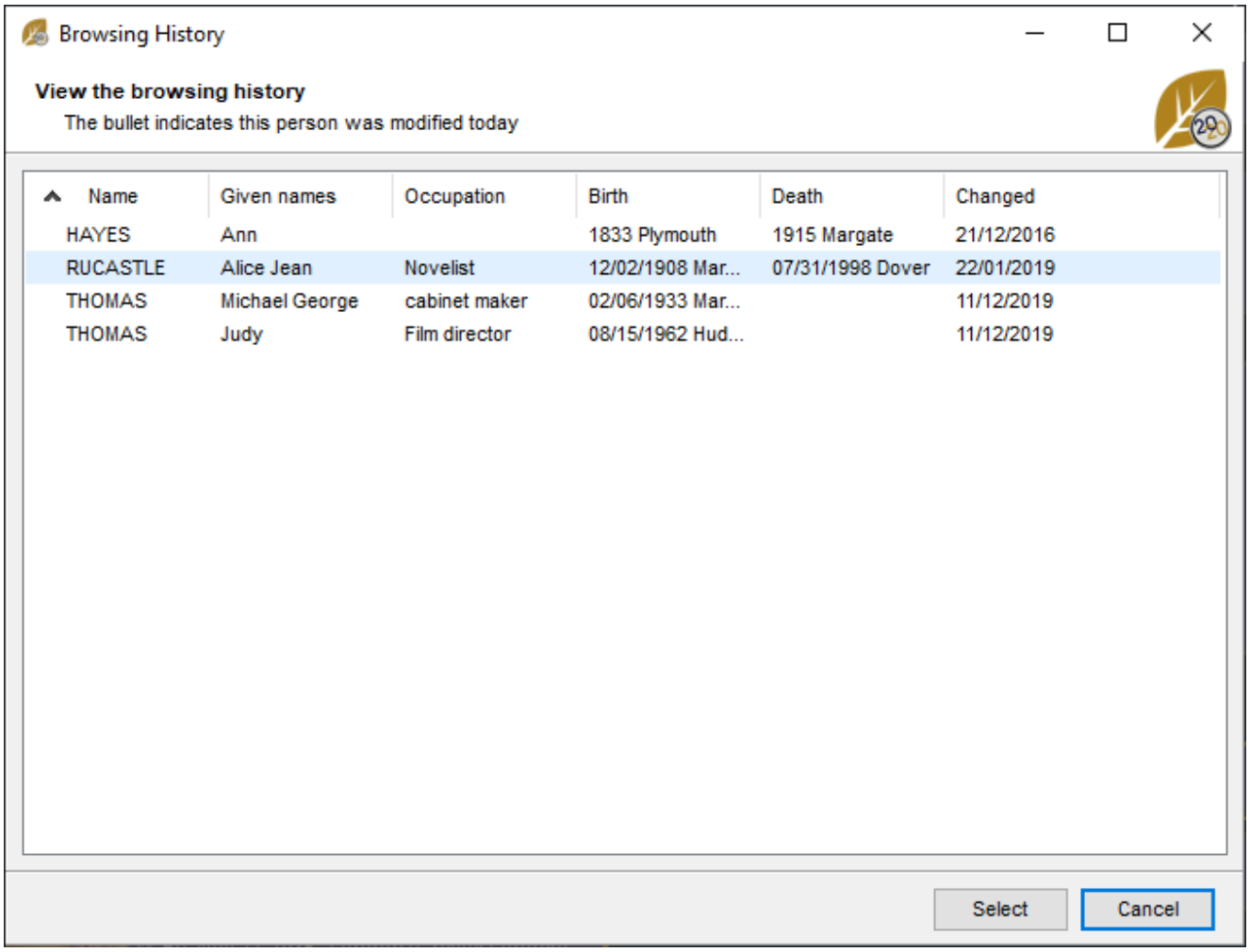
Select **Navigation History** from the drop-down list located to the right of the or buttons in the toolbar.

Windows Only

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

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

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



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

Genealogy numbering

A genealogical research can lead to the processing of thousands of people, some bearing the same name and sometimes the same given name over several generations.
In order to identify ancestors and position them with relation to other persons, various numbering systems have been developed and are commonly used by genealogists.

Ancestor numbering

The method for numbering ancestors is called Ahnentafel (see page 44). 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 (see page 44) 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** (see page 137).

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

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

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

Identifying the Ahnentafel lineage

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

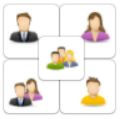
Heredis identifies each person with an icon indicating its gender (blue for men, purple for women and green for persons whose gender is unknown). If the person is a direct ancestor of the root person, the head of the icon is yellow or .

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

If a marriage between blood relatives in his/her ancestry has created a duplicate branch (implex (see page 44)), the primary person's number is followed by the ++ signs. Click the

Ahnentafel number to display the list of all the number the primary person bears.

Navigating in the direct lineage

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

If the primary person displayed is part of the direct lineage of the root person, the **View previous direct-line ancestor** and **View next direct-line ancestor** arrow buttons allow you to move up or down the genealogy, generation by generation, without overlooking a single ancestor.

Descendant numbering

Heredis uses d'Aboville or Lettered numbering to treat individuals listed in a descending genealogy.

The three basic rules for d'Aboville numbering are:

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

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

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

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

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

Implex (duplicate branches)

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

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

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

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

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

See also Implex (Duplicate Branches) (see page 299)

Summaries

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

Click once on

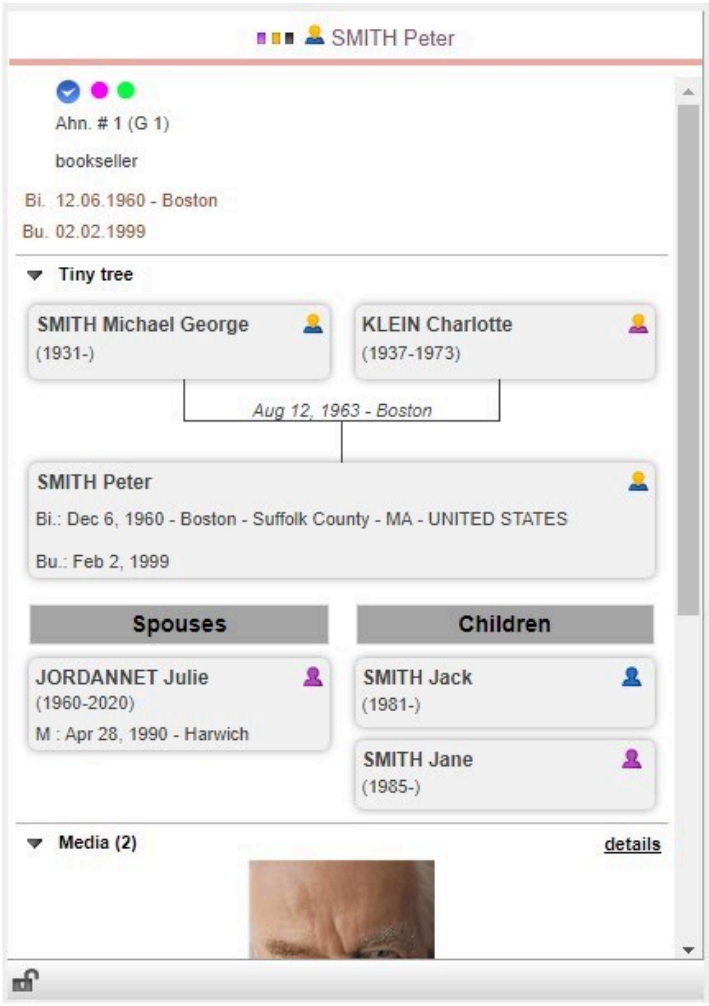
- a person in the **Immediate Family,** the **XXL Family**, the **Persons** panel, in the Add Father/Mother/Spouse/Child/ Unrelated Person window, etc.
- a source in the **Sources tab of Personal data** tab or in the **Sources** panel
- a media item in the **Media** panel
- a place in the Places panel.
- a link in someone's summary
- etc.

In a person's summary, for example, click on the father's name to make him the primary person.

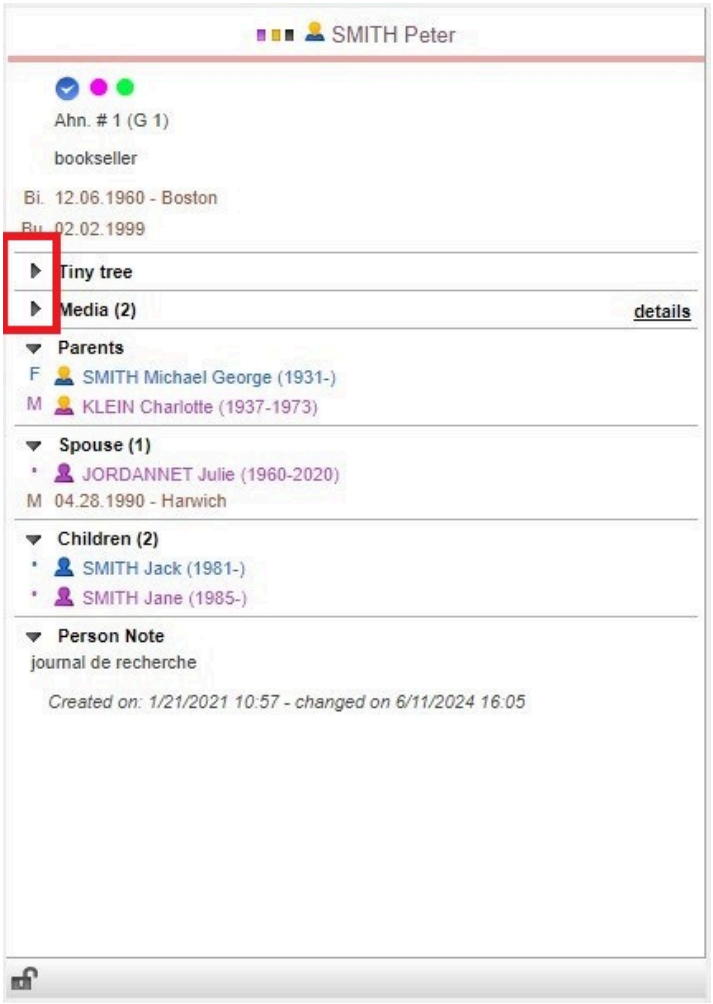
Since Heredis 2025, the summary contains a tiny-tree to visually show parents, spouses and children.

You'll also find Heredis flags and personalized flags.
See the articles Flags suggested by Heredis (see page 186) and Personalized flags (see page 188) for all you need to know about flags.

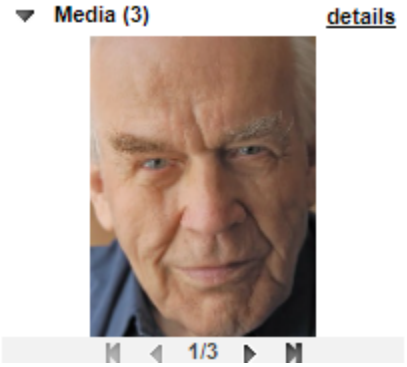
Summary Heredis



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.



In the persons summaries, find the person's media as well as the list of union events completed but also other events. If the person has multiple media in his/her identity area (profile photo), you can scroll through the media using the carousel tools. Use the arrows to change media.



If you have declared an person complete, the icon also appears in the abstract.

Thanks to the lock below the summary, you can block the display on the summary of a person, a source etc.

Click on the lock to close it. So, even if you navigate on another person or source or place etc., the summary does not change.
Click the lock again to open it and the summary changes while browsing.

Since Heredis 2025, only the information you have entered appears, and you will no longer see fields with no information.

Customize Heredis

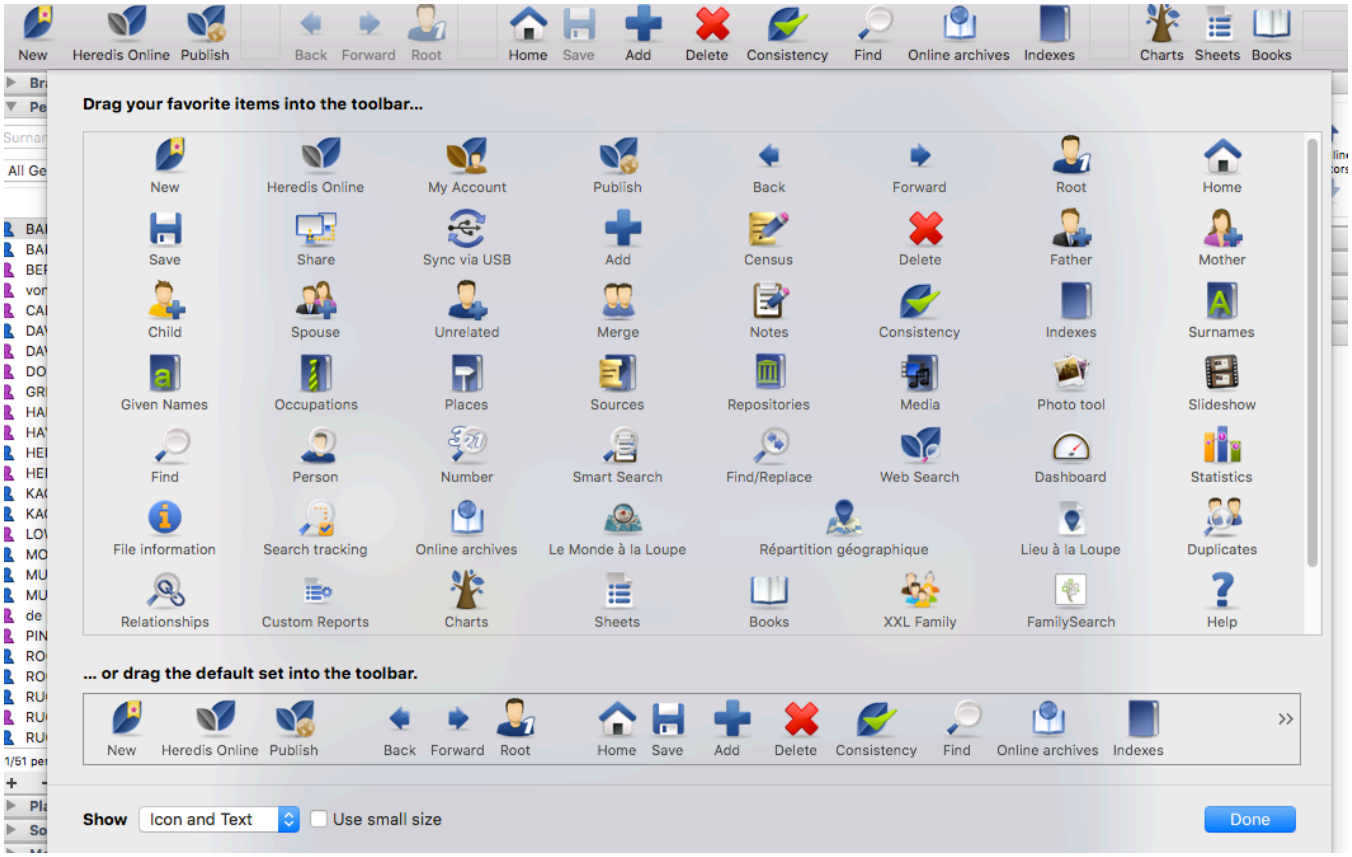
You may adapt Heredis to your personal work methods.

Select the Toolbar

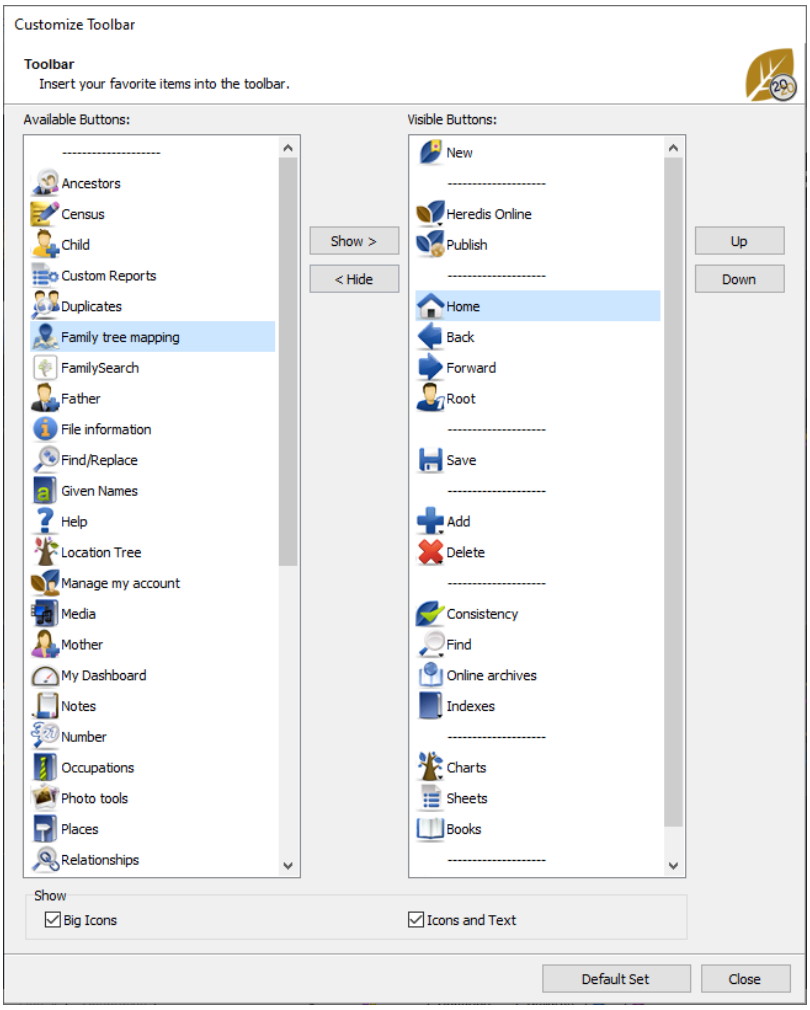
Click **Customize** button to select the tools you need. You can also choose the size of icons and to display or not the text.

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

(Mac) Customize the toolbar



(Windows) Customize the toolbar



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

(Windows) Tick or Untick **Big Icons** and **Icons and Text.**
(Mac) Select **Icon only** from the **Show pop-up** menu and click **Use small size**.

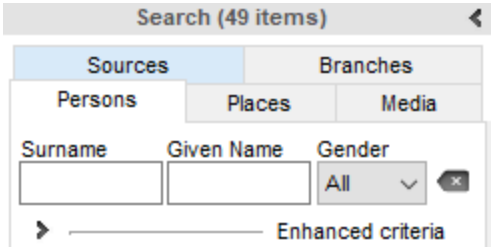
Customize the panels

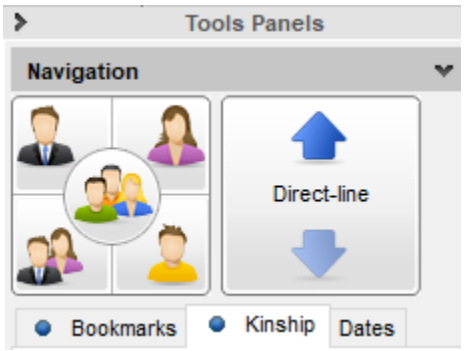
Display or hide the panels

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

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

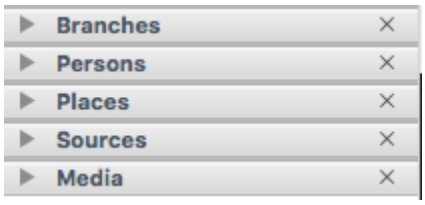
(Windows) Available Panels

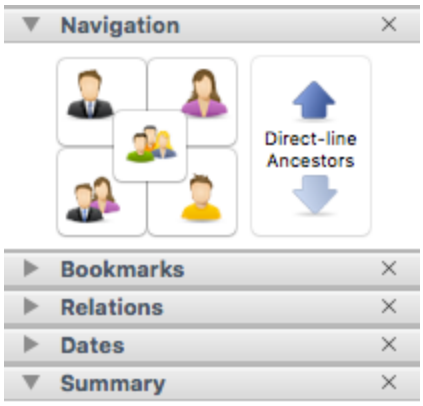




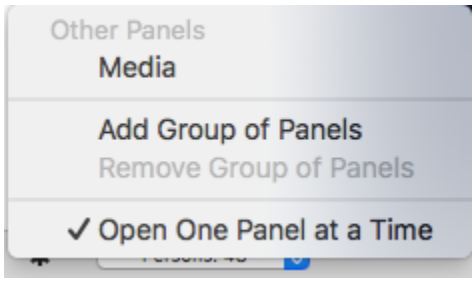
(Mac) Use the buttons at the bottom of the screen to change the display of panels. The arrow button to the right or left will display the column, you can click on the cross button to hide the panel. The cogwheel button at bottom right will give you access to any panels which have been removed. A simple click will display the panel again.
The procedure for opening the panels may be different for each column. Select **Open one panel at a time** and the panel which is open will automatically close when another panel is opened in the same column. Otherwise the panels will remain open as long as you have not clicked the disclosure triangle.
Add a column of panels if you want to have more information simultaneously displayed.
You may reposition a panel in the column or to another column by drag and drop with the mouse. Its new position is indicated by a blue line and then release the mouse to place it there.

(Mac) Available Panels





(Mac) Display a hidden panel from cogwheel



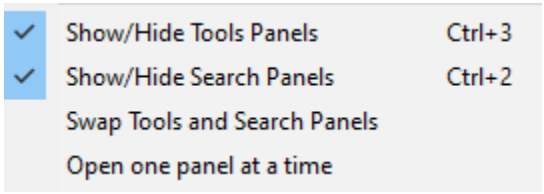
Resize the panels

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

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

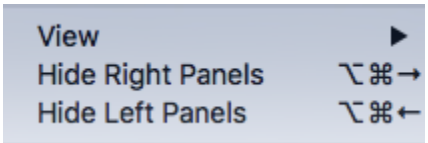
Arrange the panels

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



(Mac) Move the panels by using drag and drop. Click the top bar of the panel and drag to the desired location for the panel in any panel column. When the desired destination is highlighted

by a blue line, release the mouse. Choose **Open One Panel at a Time** by using the **Options** panel button. Heredis automatically closes the displayed panel when you click the display triangle of another panel. Use Window menu to **Show** or **Hide right** or **Left Panels**.



Select data entry method

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

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

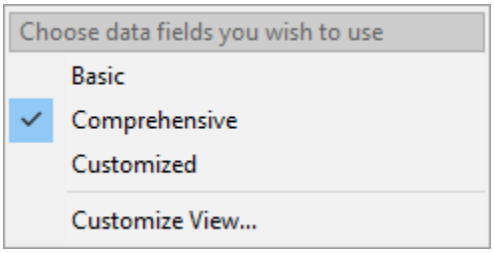
There are three data entry modes (**Basic** – **Comprehensive** – **Customized**) that you may use in different ways depending on the data input screen (**Add** screen, **Personal Data** tab, **Family Group Data** tab).

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

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

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

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



Check the items not displayed

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

See also Heredis' Preferences (see page 107) and Change Heredis colored Theme (see page 106).

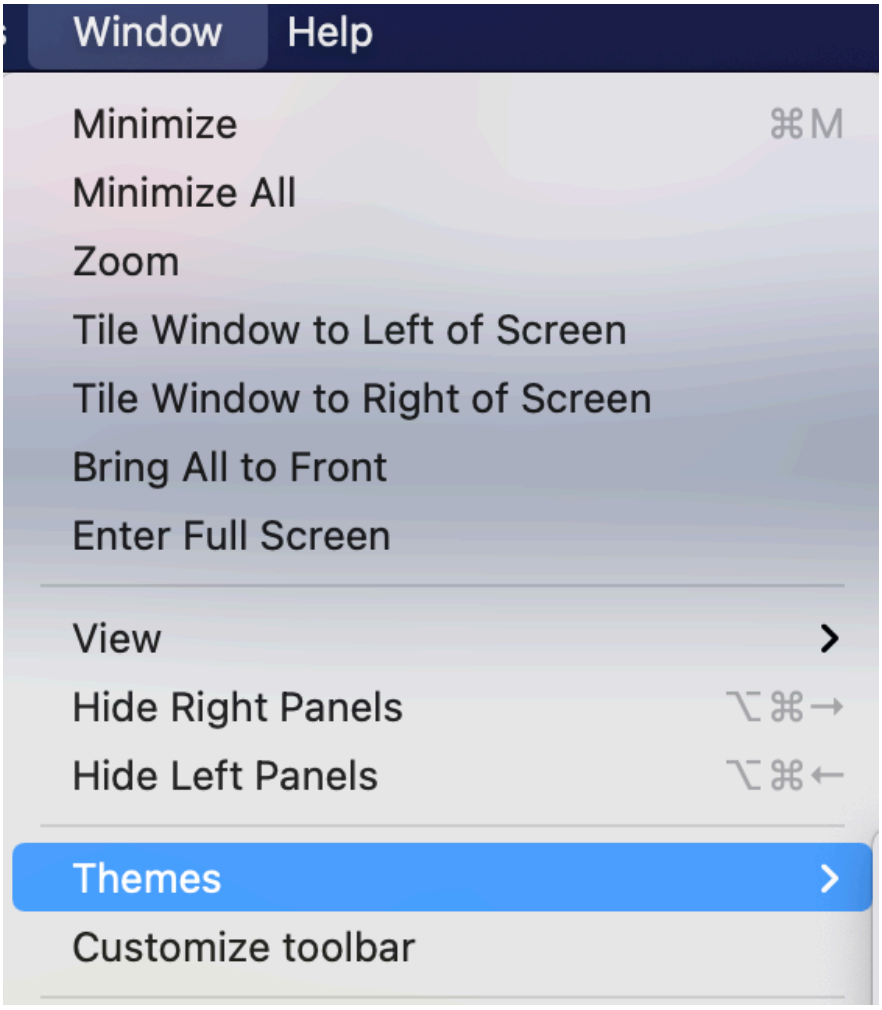
Change Heredis colored theme

You may adapt Heredis to your personal work methods.

Choose your color theme

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

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



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

Heredis' Preferences

(**Mac**) In **Heredis** menu **> Settings**

(**Windows**) In **Tools** menu **> Preferences > Heredis Preferences**

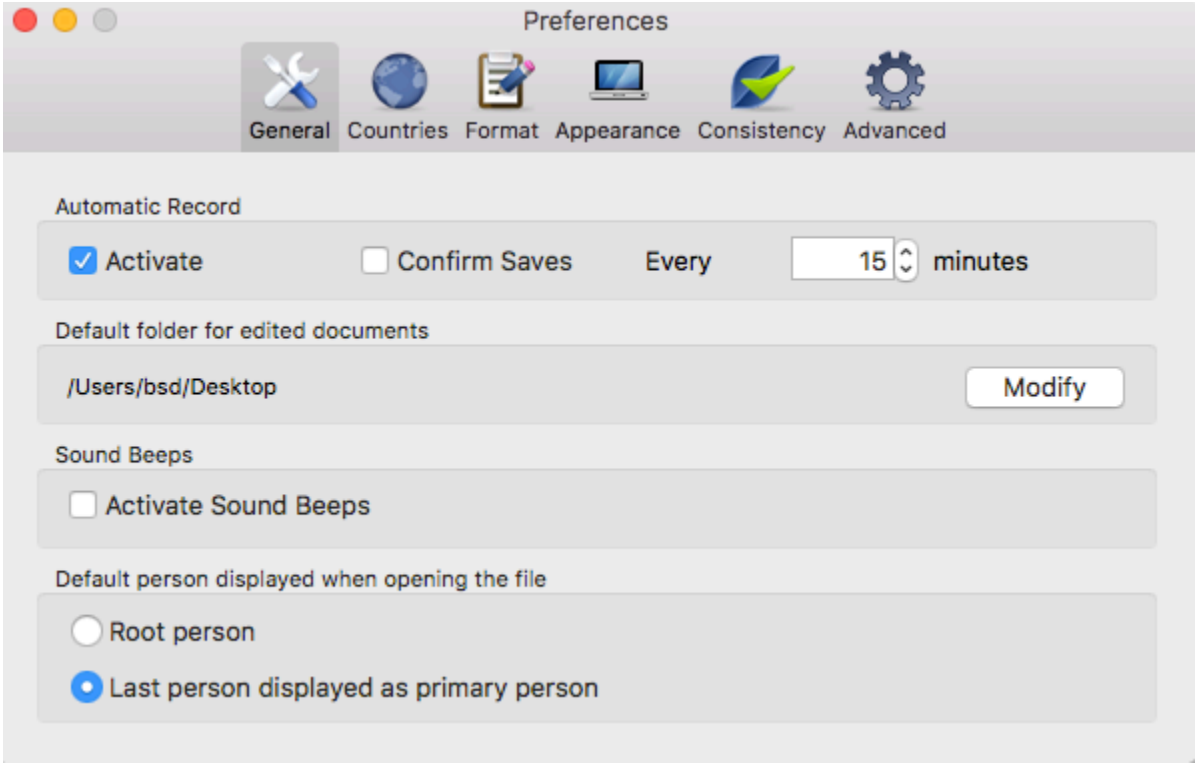
you may define different options. Choose how to display the names, places, numbers.

Choose the default options for creating events and set inconsistency alerts. Choices made in Heredis Preferences will apply by default for all new inputs.

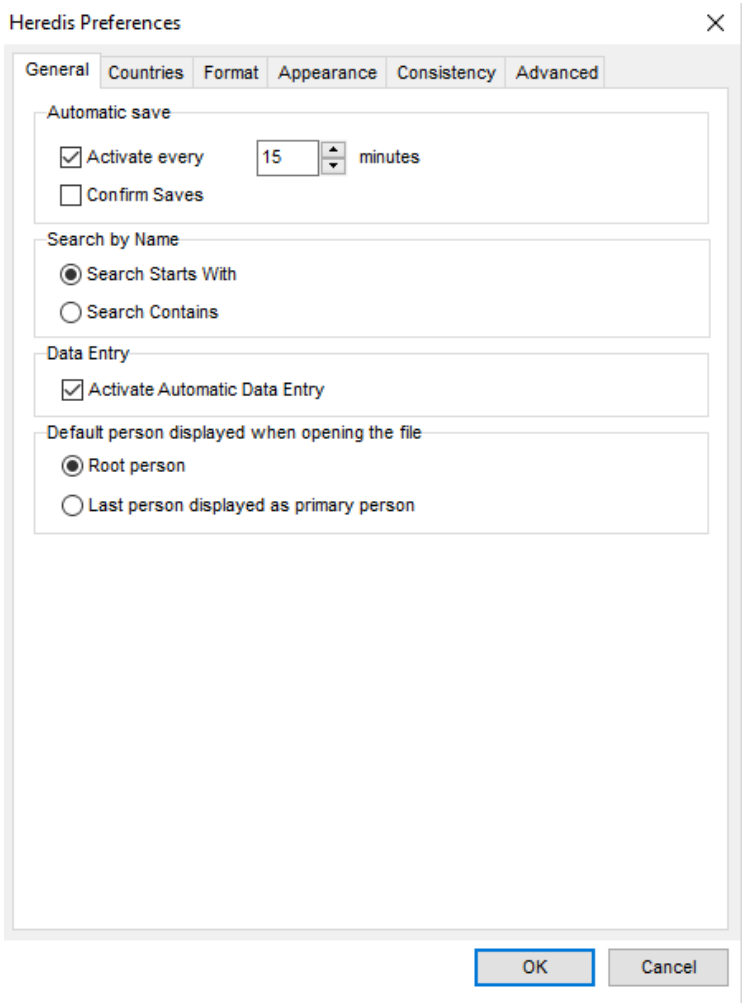
You can change them at any time.

The "General" tab

(Mac) General Preferences



(Windows) General Preferences



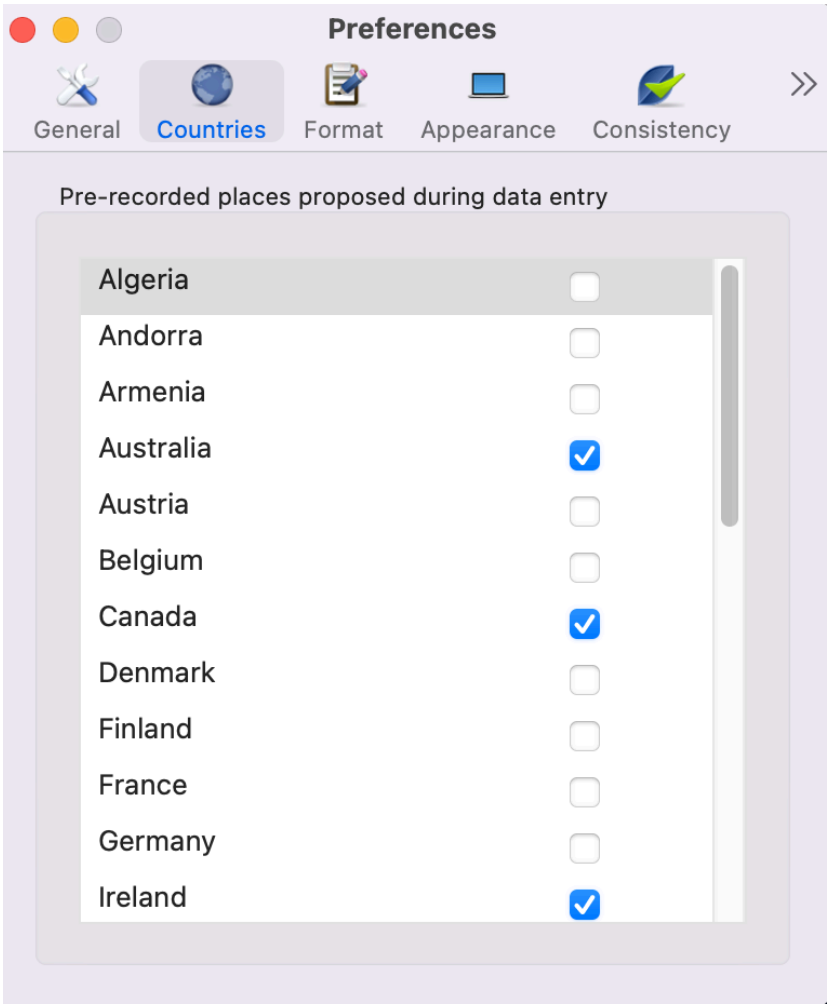
Choose whether to enable automatic recording and change the recording frequency if necessary.
Select the **Confirm Saves** check box if you want to see a window to confirm each auto-save.

Choose name search parameters. Choose to search on the first letters of the name (Starts with) or in the full name (Contains).
(**Windows**) Using **Automatic Data Entry** allows you to have input proposals based on what you have already entered.

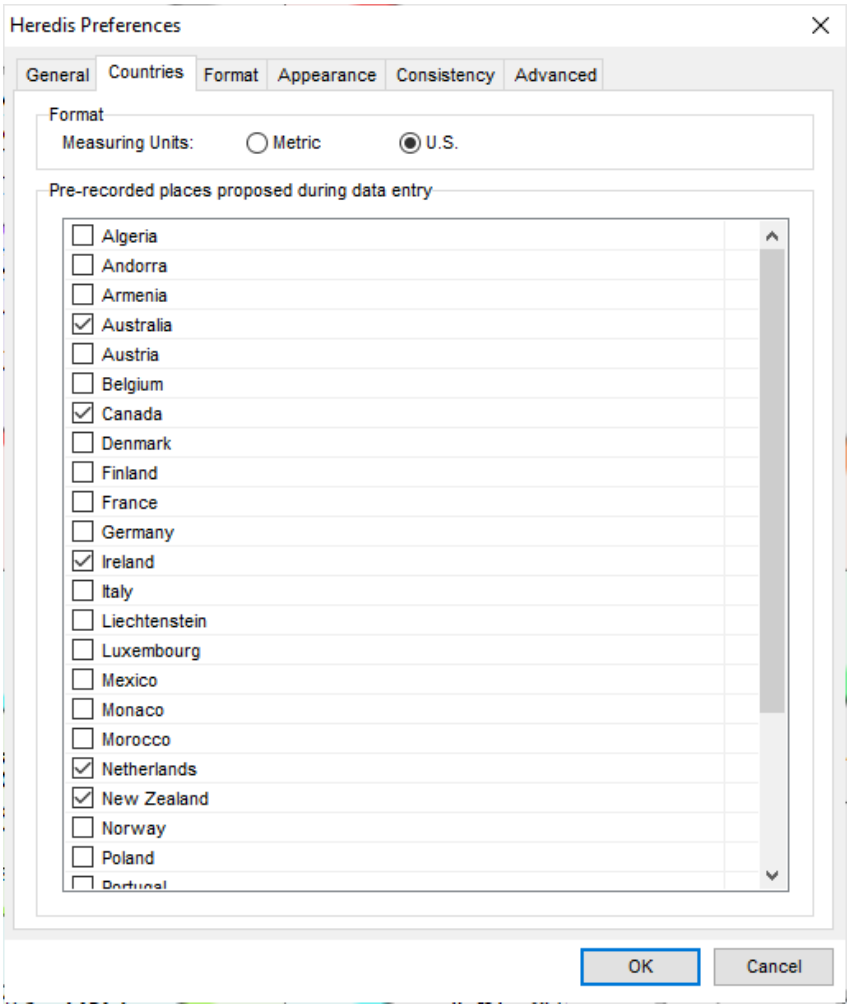
Choose which person appears at the launch of your genealogy. Do you still want to see the root person or the person you last displayed as a primary person?

The “Countries” tab

(Mac) Countries tab



(Windows) Countries tab

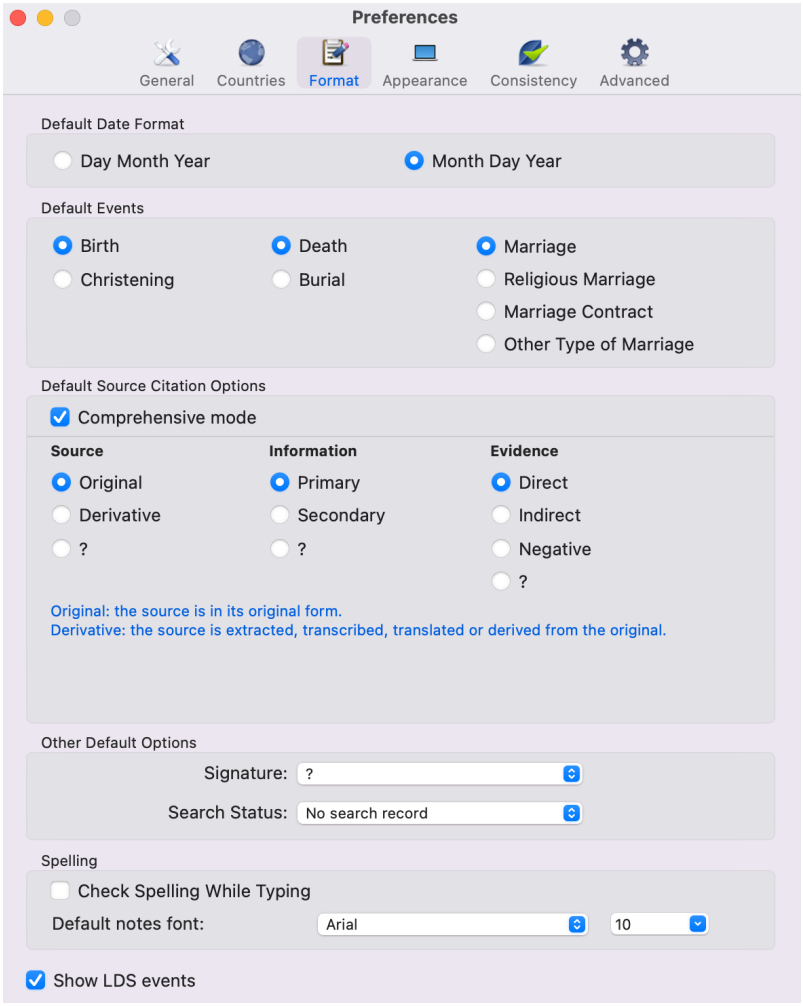


By default, Heredis offers you, when entering a place, the communes of English-speaking countries. If you have ancestors in other countries, check the corresponding country box. You will thus have the proposals of places but also given names according to the countries checked.

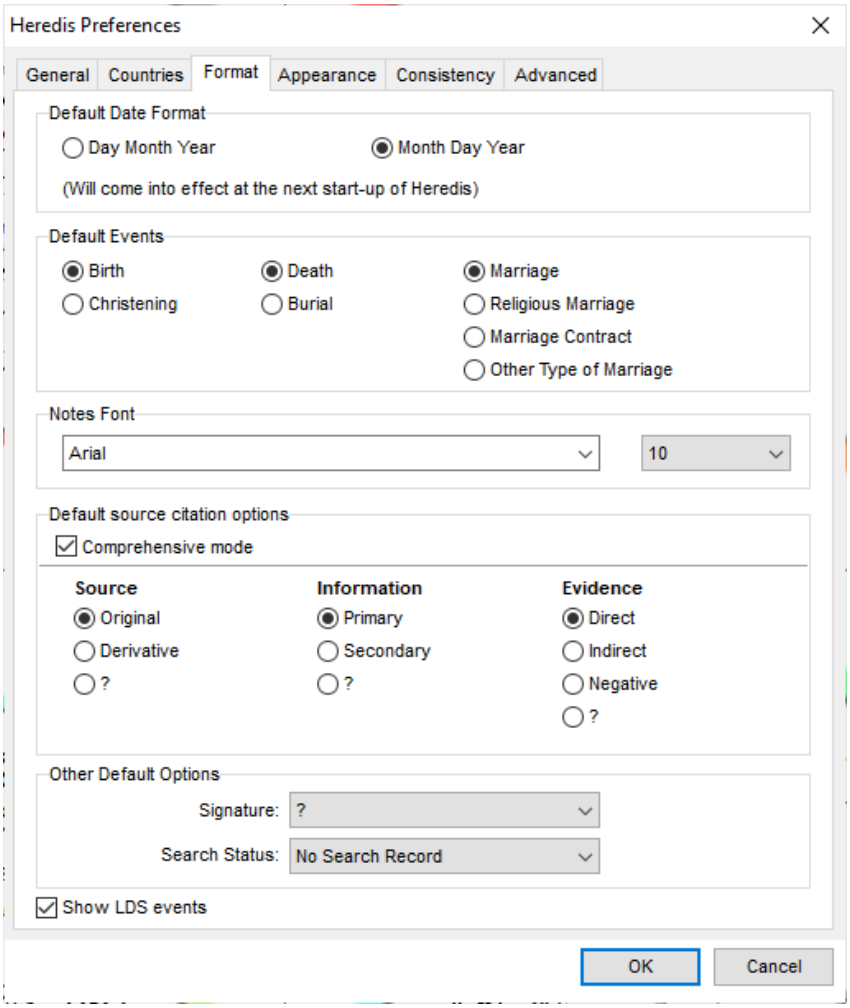
Not all countries in the world are included. Nevertheless, you can enter places that are not in the onboard database. To do this, proceed as described in the article Geolocating Places (see page 489).

The “Format” tab

(Mac) Format tab



(Windows) Format tab



Choose

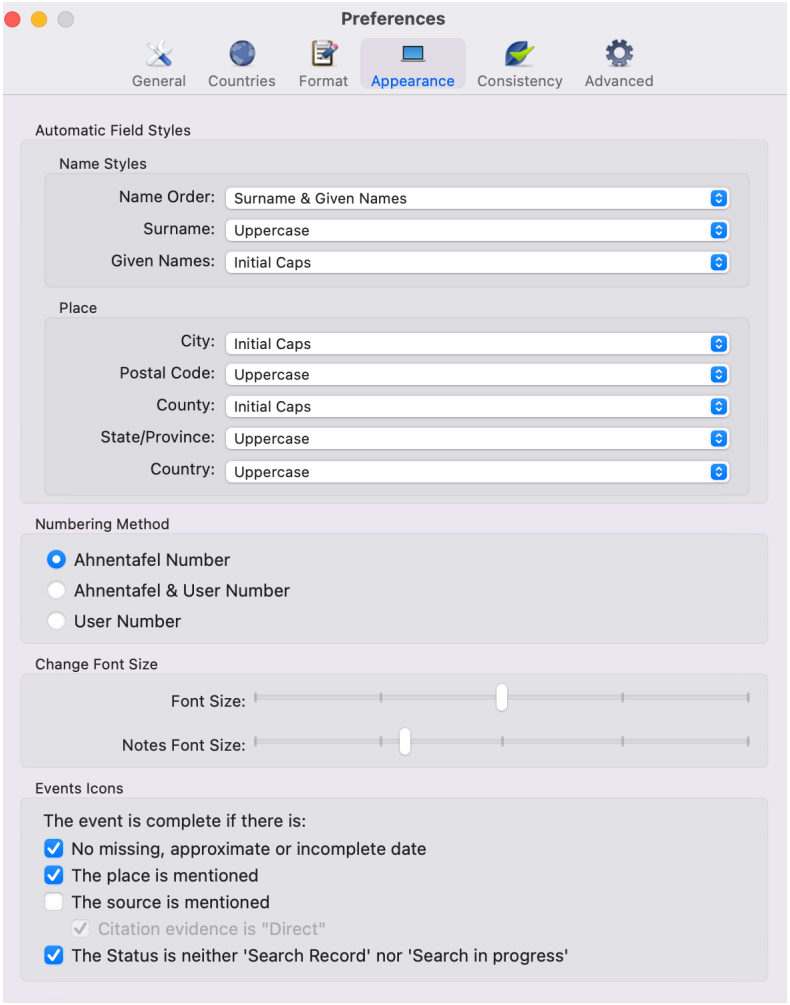
- the **format of the dates**: Day, Month, Year or Month, Day, Year
- the default **event type**: when adding a person (father, mother, child, spouse or other person), the person's input window offers major events by default. For example, you can change it from Birth by default to Baptism. So you don't waste your time changing the type of event.
- **Source** management mode: Select the **Full Mode** check box to use the full source mode and choose the default options to have the least amount of changes to make when entering the source. See also the articles Sources (see page 261) and The different mode for Sources & Citations (see page 272).
- **Proof**: indicate what level of default source proof you want. With each addition of a source of an event, a fact etc. the default proof chosen here will be applied.
    - Evidence is direct if you have the act of the event in question.
    - Evidence is indirect if you have the information through another act.
    - Evidence is negative if you deduce the information from various elements (for example, when estimating a date of birth or death).
    - The ? allows us to clarify that you do not know where the information comes from.
- the **font** and **size** of the notes: each time you add a note (event, source, media etc.), the font and size will be, by default, those chosen here. This change applies only to

notes.

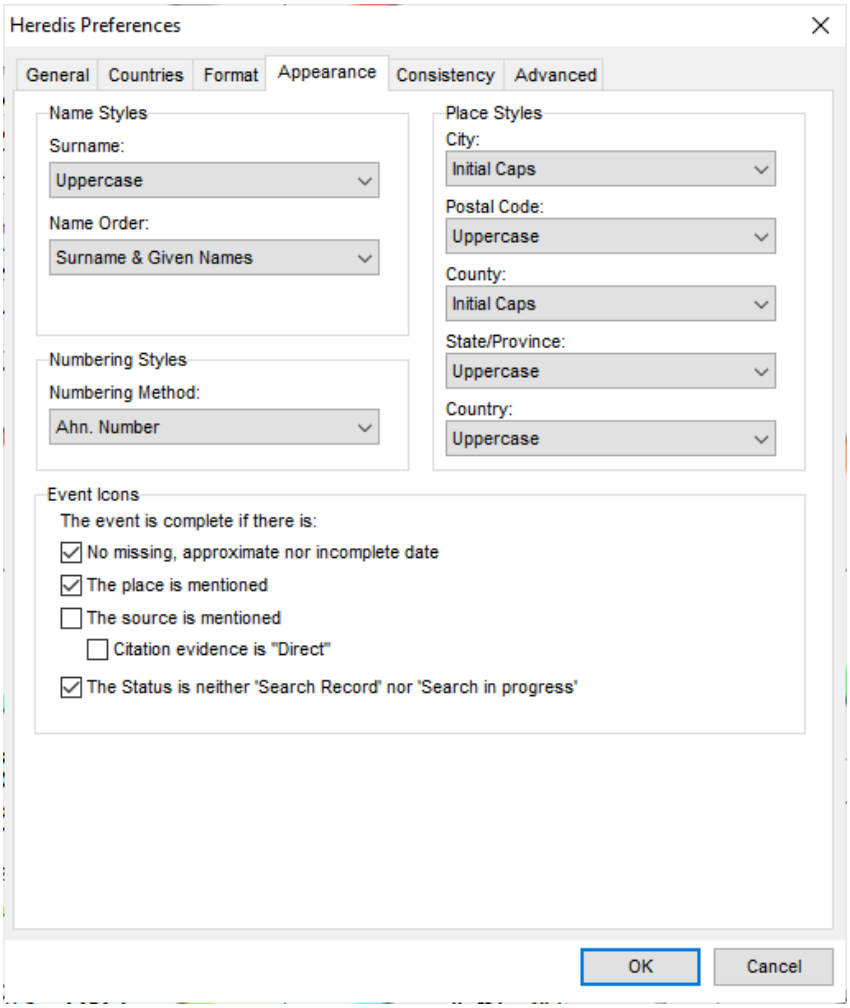
- default options for **signature** and **search status**: For each person creation, the default signature chosen in the Heredis preferences applies. The same applies to the search status when adding an event.
- **show LDS events**: check this box if you need Latter Day Saints events. (LDS Baptism, LDS Confirmation etc.)

The "Appearance" tab

(Mac) Appearance tab



(Windows) Appearance tab



Automatic formatting of data

When you enter a surname or given names, you can type them in either uppercase or lowercase.

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

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

Choose the order in which the surname and given names are displayed.

Choose the format of places, in capital letters or only initials in capital letters.

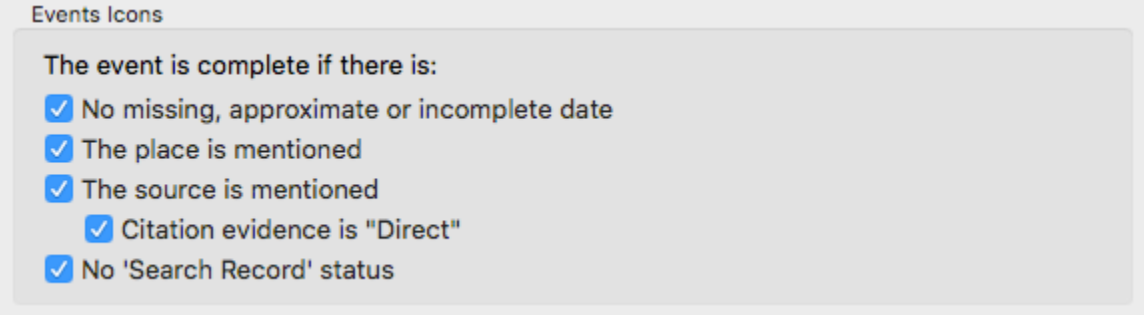
Indicate if you prefer Ahnentafel numbering by default or if you prefer to use your personal user numbering or both.

Completeness of data

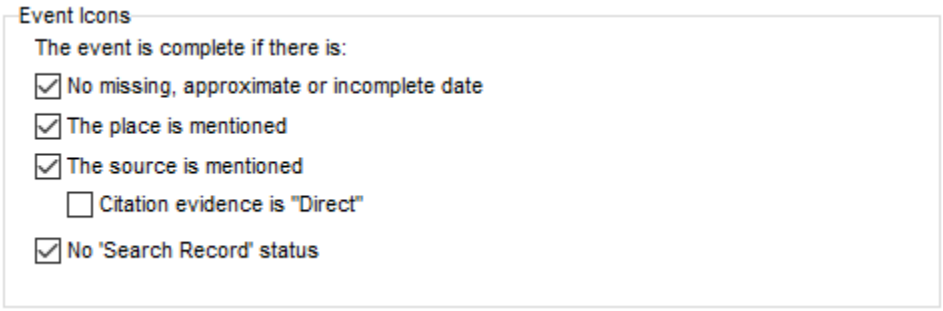
The icon indicates whether or not essential information for major life events is complete (Birth/Christening, Marriage/Union, Death/Burial).
This icon concerns the completeness of information for the primary person in the Status bar and in the **Search** tab. It appears also in the **Persons** and **Branches** panels for all persons displayed.
It also influences **Search Tracking** tool. See Search Tracking (see page 365) article.

You can choose what information is required for an event to be complete: the accuracy of the date, place, the presence of a source and the status of the search for the event. Tick the boxes you believe are essential for you.

(Mac) Completeness setup



(Windows) Completeness setup

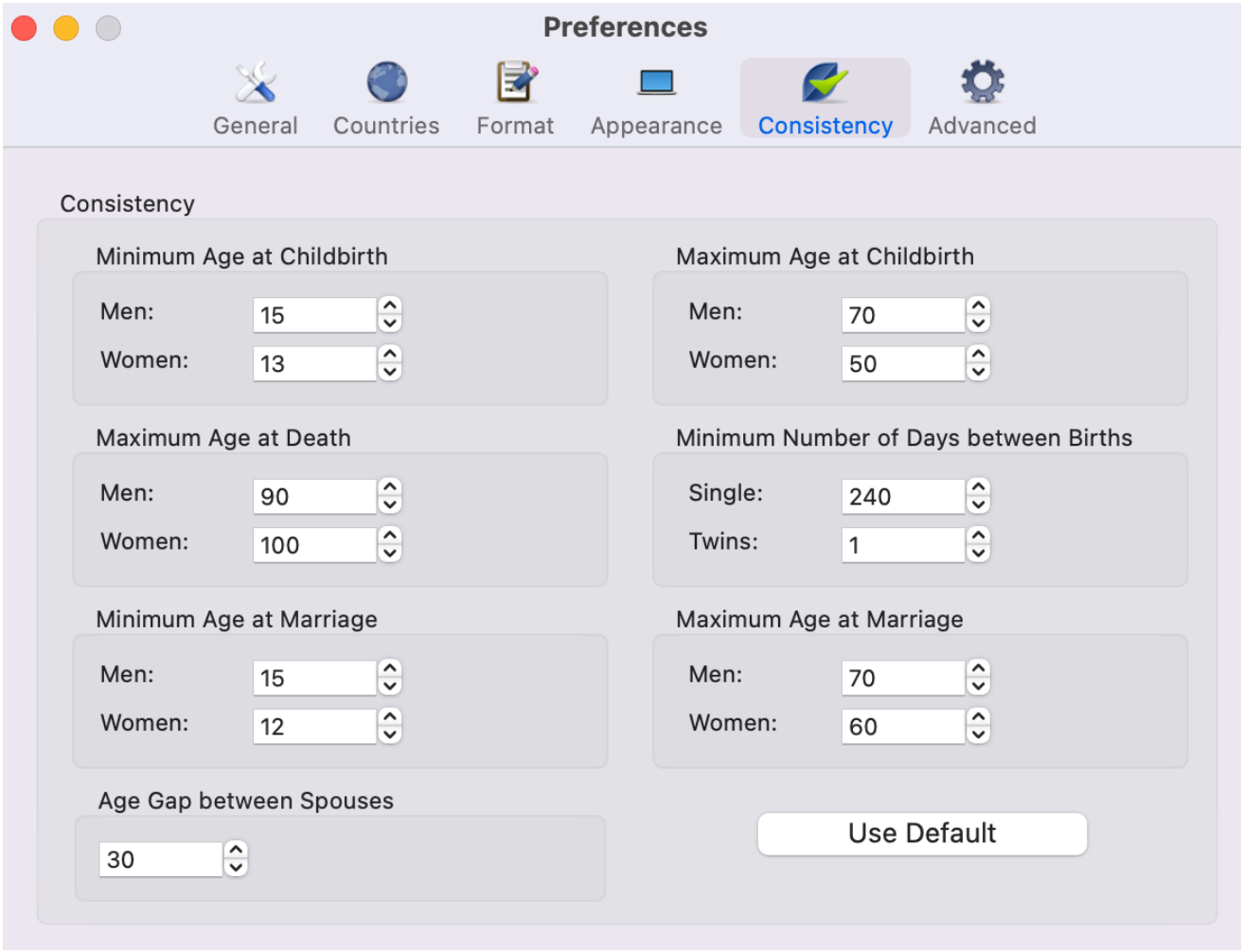


Regardless of the information collected in Heredis, you may determine that certain persons will not require further research. Click on the icon in **Data** tab **> Personal Data** or open the **Search** tab **> Search Wizard** and click the **Consider that this person is complete** button. The icon is surrounded by blue if activated.

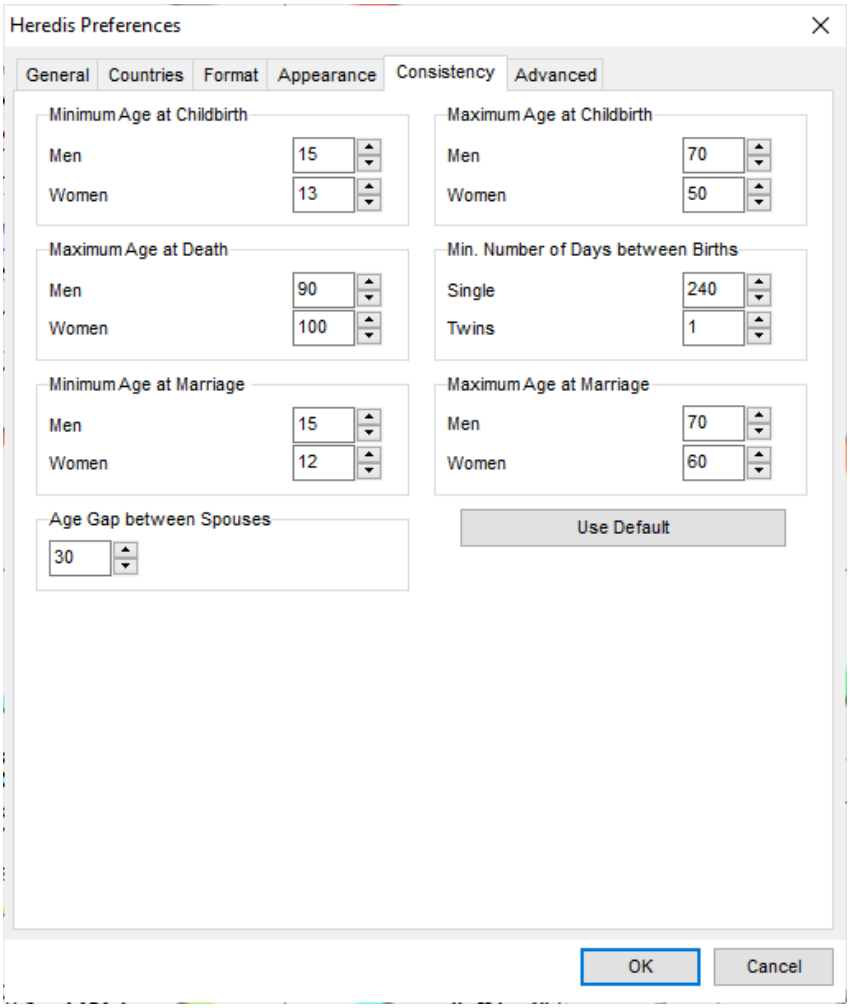
When using the **Branches** panel, choose the **Complete Persons Only** option, and the results take into account both the completeness of the events and the person for whom you had determined that they be considered complete.

The “Consistency” tab

(Mac) Consistency tab



(Windows) Consistency tab



Heredis checks the consistency of your entries. Some controls are not configurable. For example, you will not be able to marry a child with their grandparent or add events after death if you choose a generic event.

Note: To avoid inconsistencies, use the generic event "Event after death" to create events that actually occurred after a person's death. For example, a . See also the article Input events (see page 206) paragraph Create events not proposed by Heredis.

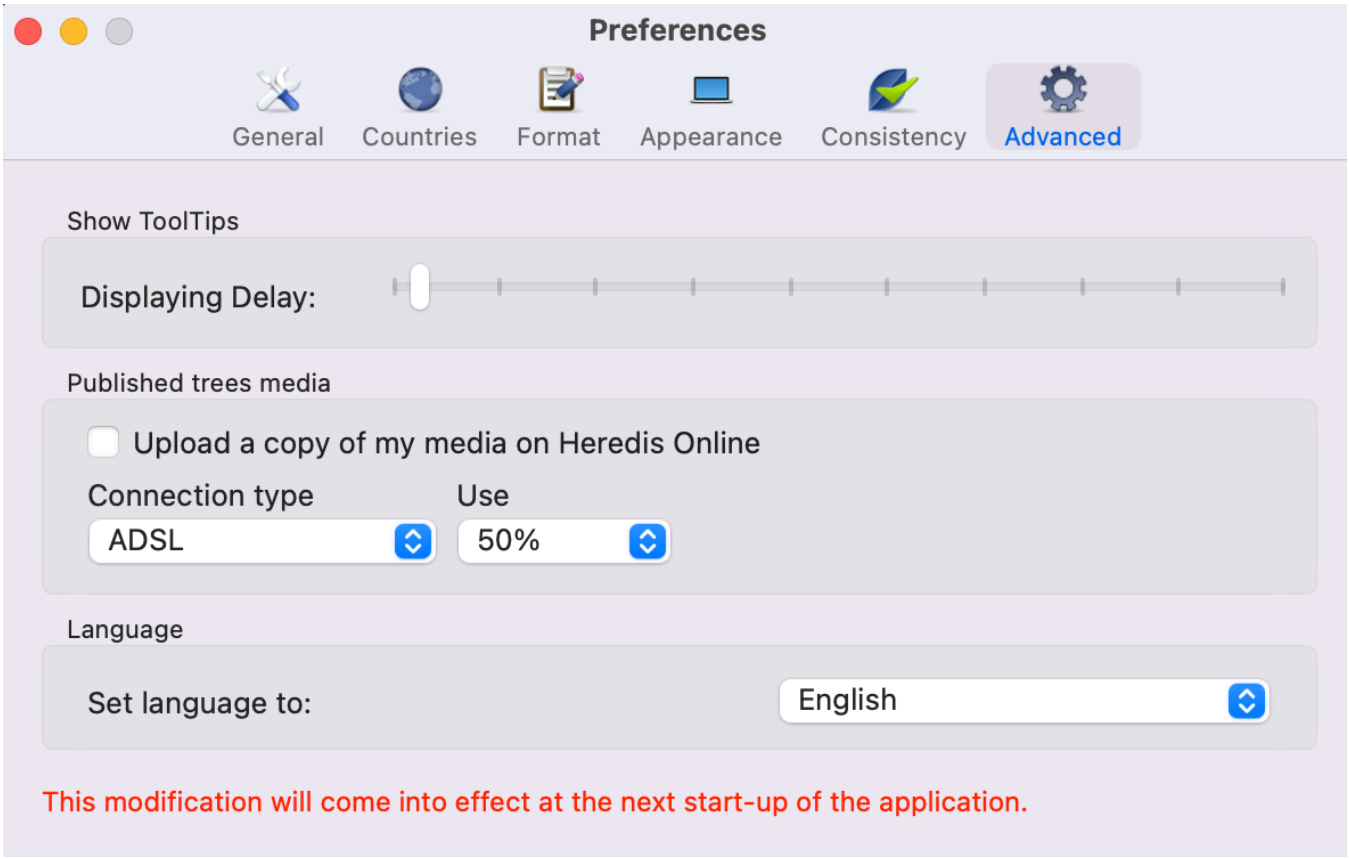
Change the minimum/maximum age at the birth of a child, marriage or death, the minimum number of days between two births, or even the age difference between the spouses.

If you have many ancestors who died after 100 years, it is interesting to change the consistency parameters.

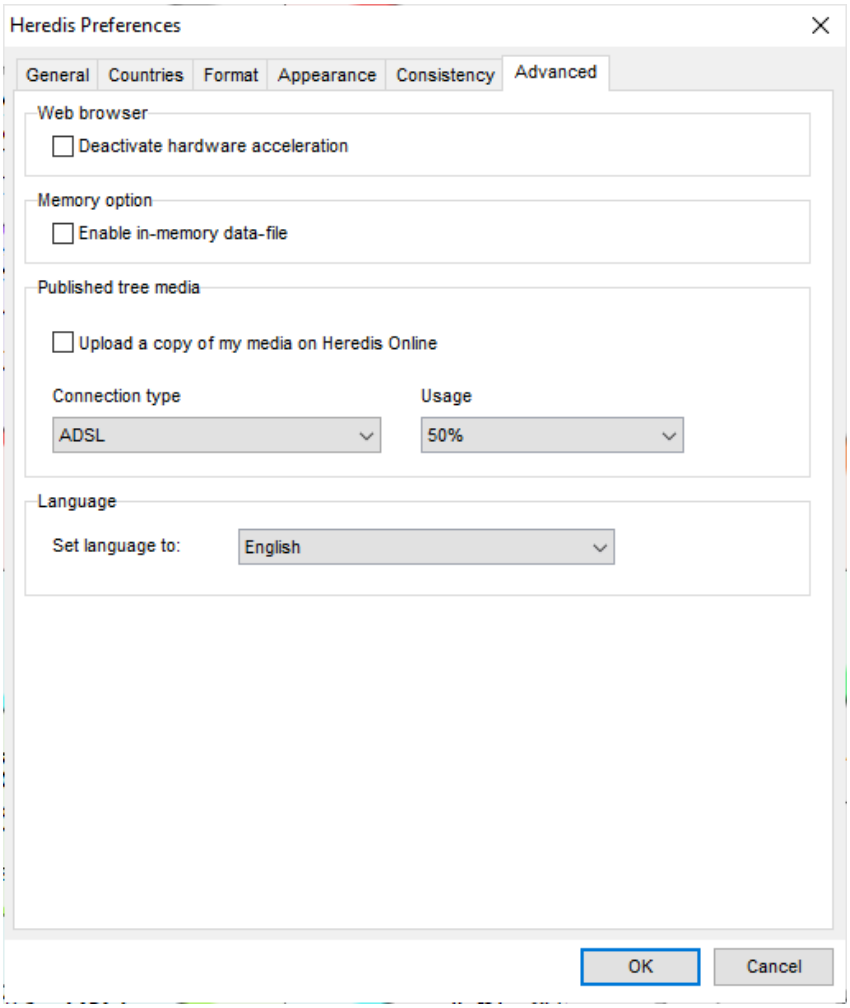
Note: it is also acceptable to have inconsistencies if you justify it. For example, if you have a couple of ancestors who got married before the minimum age for marriage, is it useful to change the consistency for the whole file if only one couple is concerned? It's up to you.

The “Advanced” tab

(Mac) Advanced tab



(Windows) Advanced tab



The **Upload a copy of my media on Heredis Online** box allows you to send your media in high resolution when you publish on Heredis Online. If this box is not checked, the media will not be sent. The low quality thumbnail will be displayed.

You can change the sending speed depending on your internet connection.

On Mac

The **Displaying Delay** slider allows you to increase or decrease the time between when you place your mouse on a function button or title and the appearance of the tooltip that explains the function or button.

On Windows

The **Desactivate Hardware Acceleration** and **Enable in-memory data-fine** checkboxes are tools that technical support may ask you to check or uncheck. These functions are to be used only if requested by technical support.

Consistency Control – Error-free data entry

In order to avoid errors, with each data entry, Heredis checks that the information entered is logical in relation to the persons and events already known. It alerts you to any anomalies which you may either correct or confirm.
Heredis notifies you when you enter an event date which is later than that of the death of such person. You may fix the date entered if you made a mistake, or confirm a post-mortem event, such as the transfer of ashes or an act concerning the deceased's estate.

Note: You can use and personalize a post-mortem event in order to avoid alerts like this. See also Input events (see page 206) article.

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

Consistency control

Permanent control for duplicates

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

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

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

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

For further information, read Find Duplicates (see page 324) and Merging Two Persons (see page 330).

Check all persons in the file

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

- Open the **Persons** panel.
- **(Windows)** Choose the **Enhanced Criteria** then **Inconsistent Data**.

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

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

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

No longer consider a person as incoherent

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

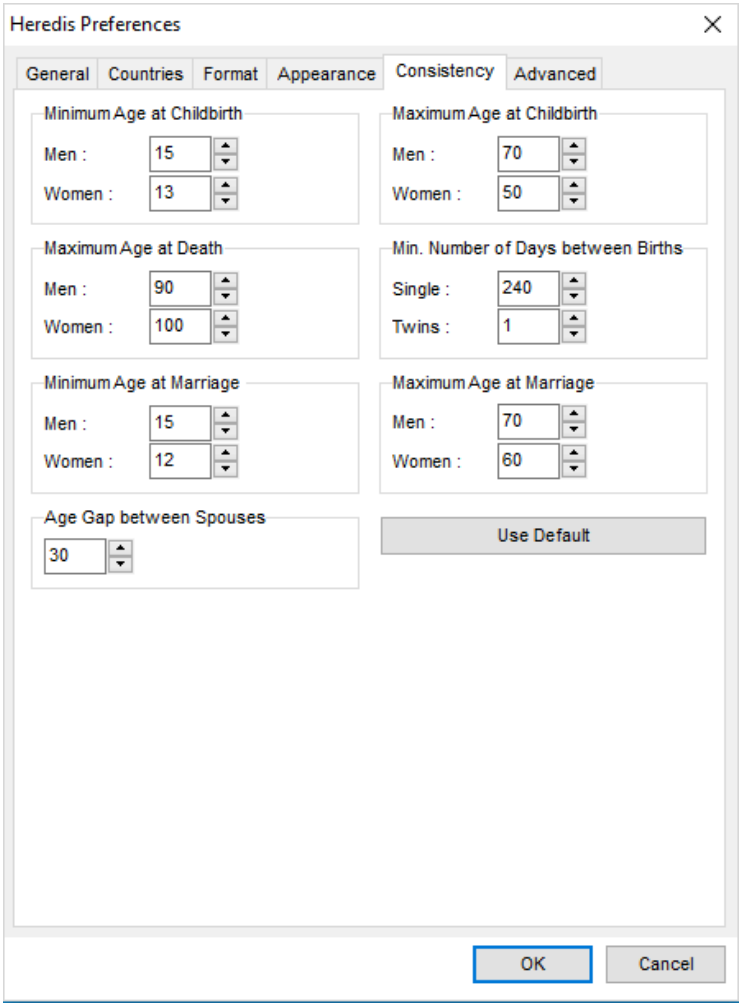
The **Consistency** button changes its appearance and displays a green tick mark. This person will no longer be displayed in the list of a search for inconsistent information.

Change the consistency criteria

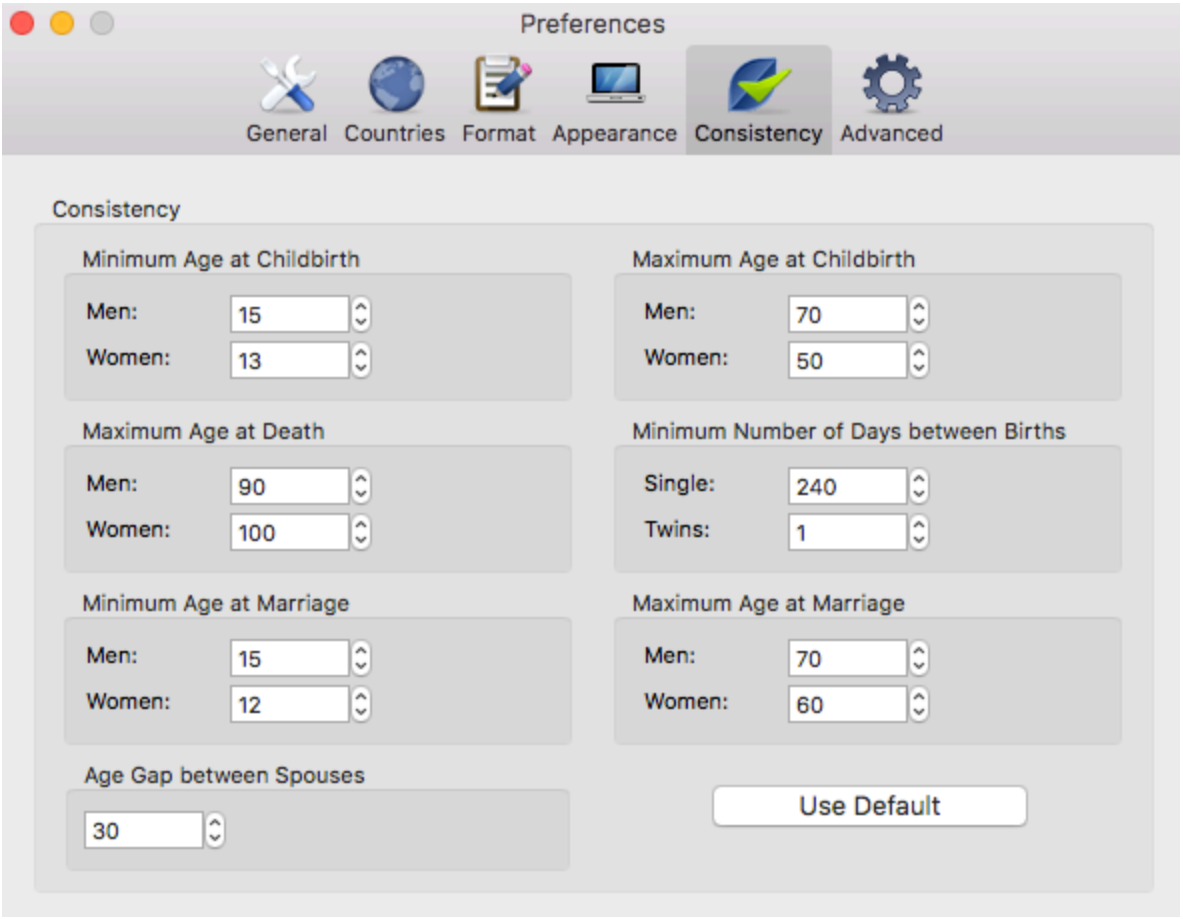
Heredis allows you to set your own criteria for checking the consistency of some data.

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

Windows Consistency



Mac Consistency



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

These amendments are effective immediately for the all file.

Validity Control

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

Dates

Dates should be entered properly.

See article Dates (see page 219) for possible formats.

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

personalize a post-mortem event in order to avoid alerts like this. See also Input events (see page 206) article.

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

Links

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

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

Save time by inputting faster

Data memorized

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

Prerecorded data

The application is supplied with databases of places, given names and occupations.
Choose from the propositions as they appear. If no proposition appears or if it is not appropriate, select **New Place**.
Each new given name entered is automatically added to the **Given Names Index**.
Each new Occupation will be added to the **Occupations Index** by clicking the arrow button in this section after selecting a word or a phrase. The new elements will be proposed in subsequent data inputs.

For more details about Indexes, see Indexes: generalities (see page 412).

Preferences

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

For more details on how to personalize Heredis, see Heredis' Preferences (see page 107).

Automatisms

The **Gender** field is filled in automatically based on the given name entered, but it may be changed. Multiple given names will be automatically entered according to your initial entry, but may be subsequently altered. Check out The different data fields (see page 87) article.
Heredis calculates for you the date of birth of people based on their age at any particular event. It gives them an approximate date which you may confirm later, when you know it. See also Consistency Control – Error-free data entry (see page 120) article.

Drag and drop

To speed up your data entries, complete your data by using drag and drop.
Add links to other people by selecting them in the various panels and deposit them in the data field if it is empty. Select a man in the **Persons** panel and drop it as the grandfather in the **Immediate Family** tab. Select a woman from the (Windows) **Kinship**; (Mac)**Relations** panel and drop in **Personal Data > Event > Christening** to make this person the godmother.
In the same way, you may add information to the **Events** field. Select a source from the

Sources panel and drop it on the event you will have selected to associate it with this event. You may do the same for a place selected from the **Places** panel.
Add media already used for other data by choosing from the **Media** panel and drop them into the appropriate entry fields. A group photo can illustrate both a family and a marriage event.

(Mac) Correcting spelling

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

Census Grid

Heredis created a census grid to help you input all data found in a Census at once. See our Census (see page 282) article for details.

How to save your file

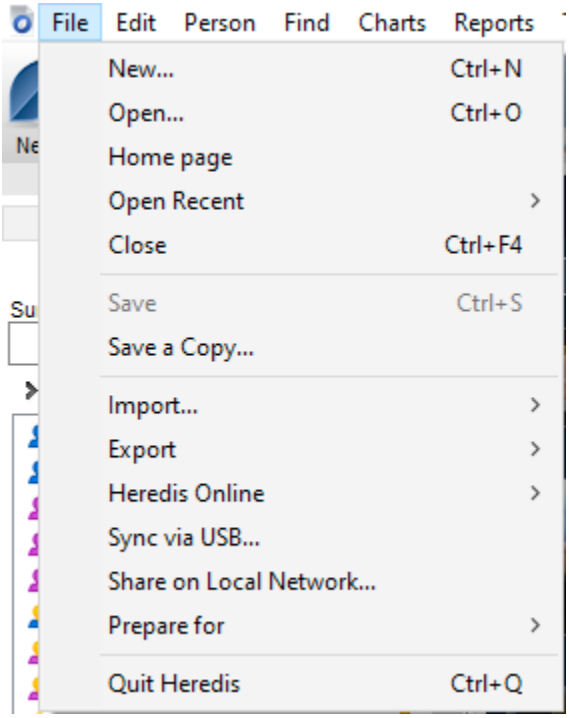
To save your file you have multiple methods.

First possibility: Create a copy of your file

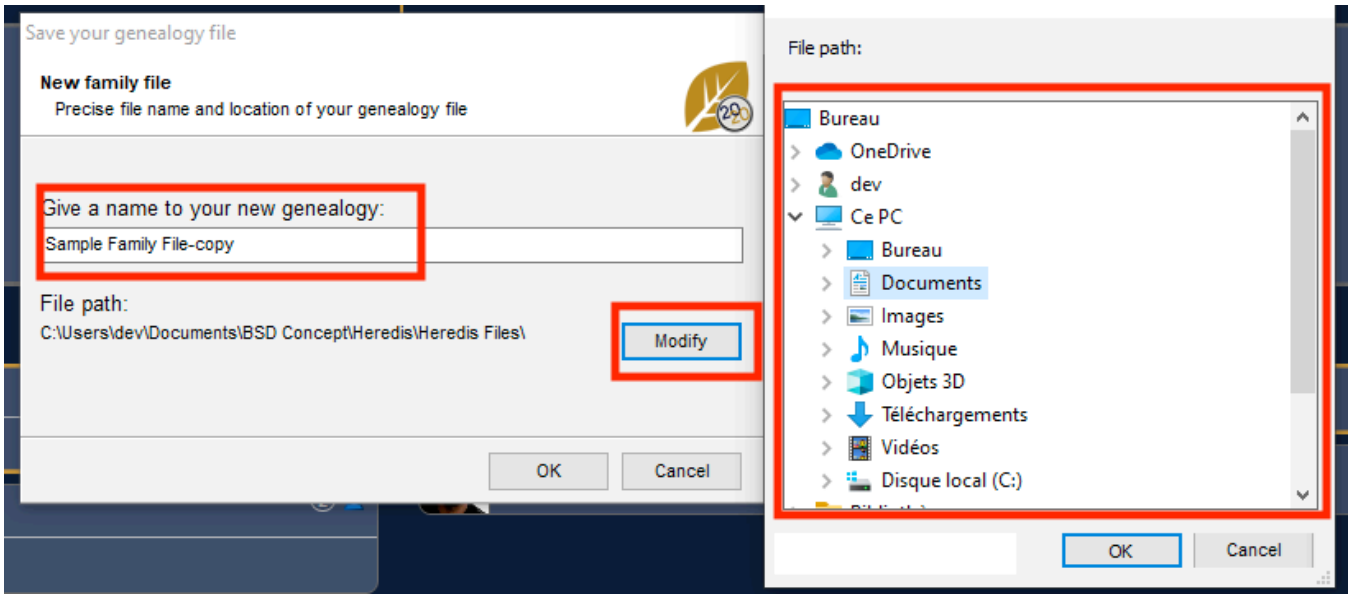
For Windows

To duplicate the file open on your computer – so you can save or modify it:

- Select **Save a copy…** from the File menu.



- Give a name to this copy. Do not use names with special characters. Click on **Modify** to select a destination folder for your duplicated file. Heredis will create a new *.hmw* folder which will include your genealogical data (*.heredis* file) and a folder in which you will find the related media or a *.ha* file (for tree charts). It is safer to choose to store your copies on a USB key, a cloud or an external hard drive disk instead of you computer's hard drive disk.

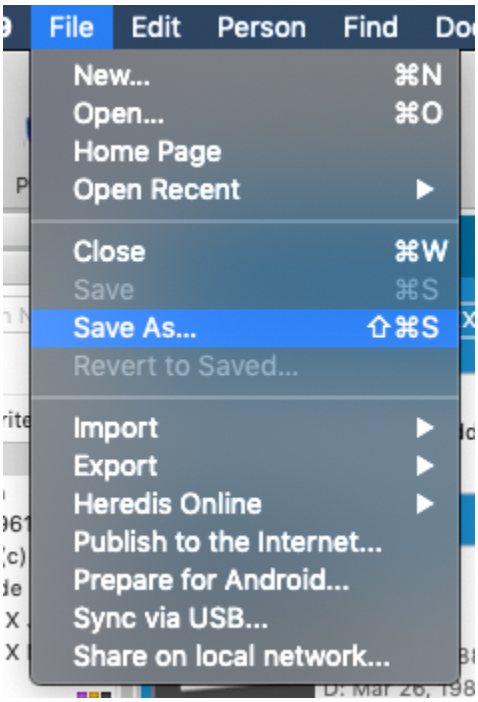


- Click on **OK** button to validate the storage place and again on **OK** to validate the copy.
- Heredis will launch Windows Explorer to show you where the copy has been saved. You are free to move or to close the window. Your original file remains open on your computer and you can keep working on it.

For MAC

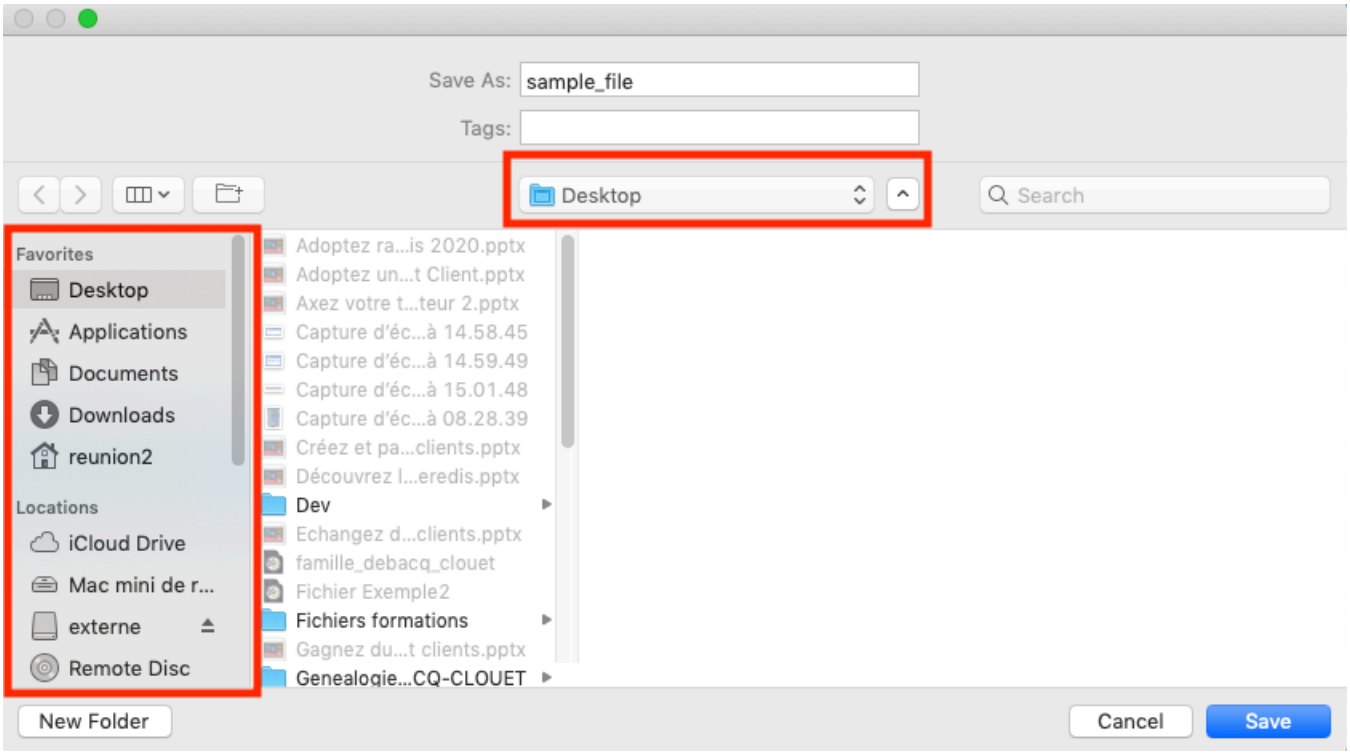
To duplicate the file open on your computer – so you can save or modify it:

- Select **Save As…** from the **File** menu.



- Give a name to this copy. Do not use names with special characters. Click on the arrow

near the storage place to select a destination folder for your duplicated file. Heredis will create a new *.hmw* folder which will include your genealogical data (*.heredis* file) and a folder in which you will find the related media or a *.ha* file (for tree charts). It is safer to choose to store copies on a USB key, a cloud or an external hard drive disk instead of you computer's hard drive disk.



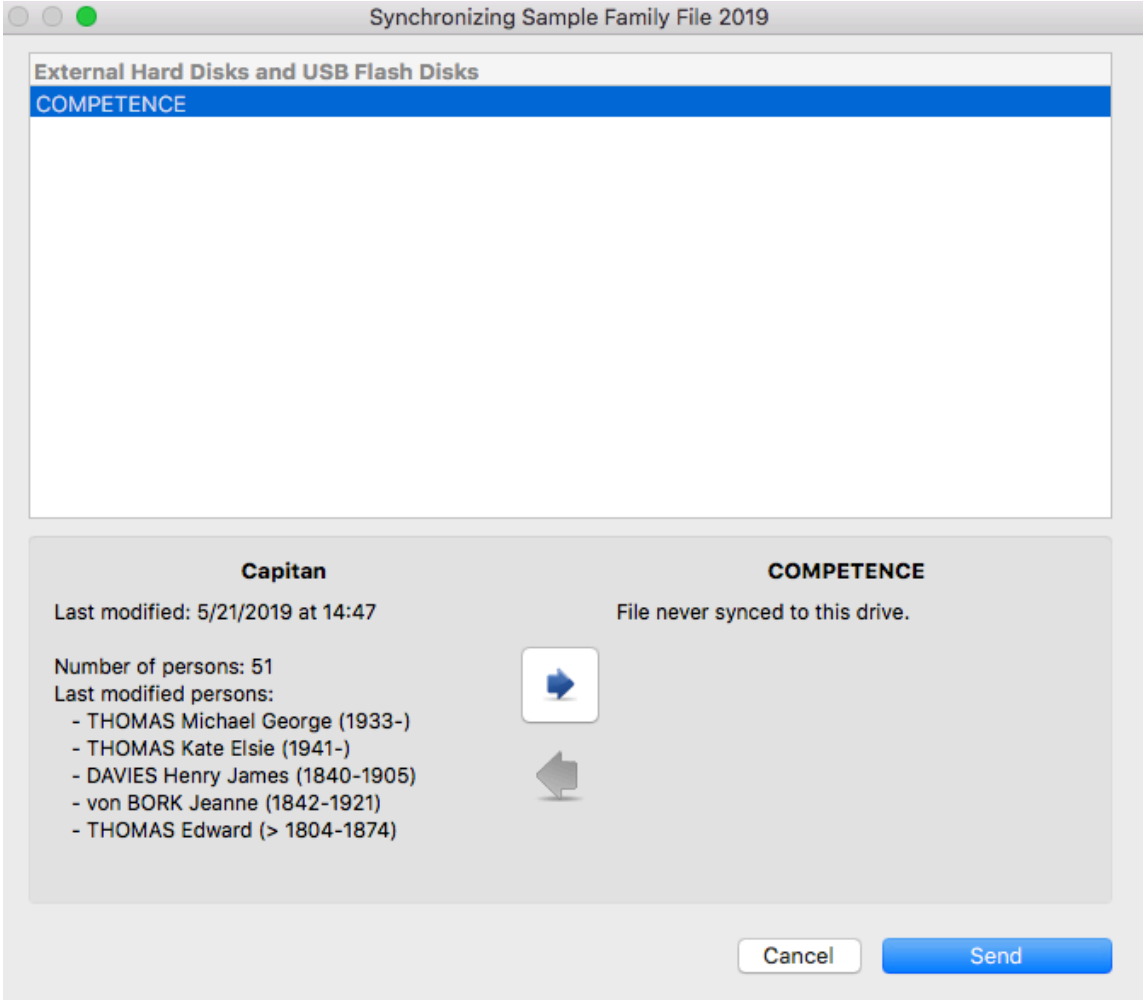
- Click on the **Save** button.
- Heredis will open the newly created file. You can close it and go back to your original file.

Second possibility: Save on a USB flash drive or on an external hard drive

Besides creating a backup file on your computer's hard disk drive, you can synchronize your file on a USB key or external hard drive. It is not like Save as, since it overwrites the previous version of the file.

Users without Wi-Fi or with computers kept at various locations should also sync their genealogy by connecting a removable data storage device (USB flash drive or external hard disk drive) to their computer.

Click on **File** menu > **Sync via USB**



In the synchronization window, select the external device you have connected, check the syncing direction (**Send** or **Receive**) according to your needs, then click on **Send**.
Once the syncing is completed, you are free to connect the storage device to your other computer (Mac or Windows).

Whether you are working in Heredis or launching the program, Heredis will let you know that a new genealogy file – or a more recent version of the opened genealogy file – is available on the external storage device you have just connected; you will be offered to sync this file to your computer.

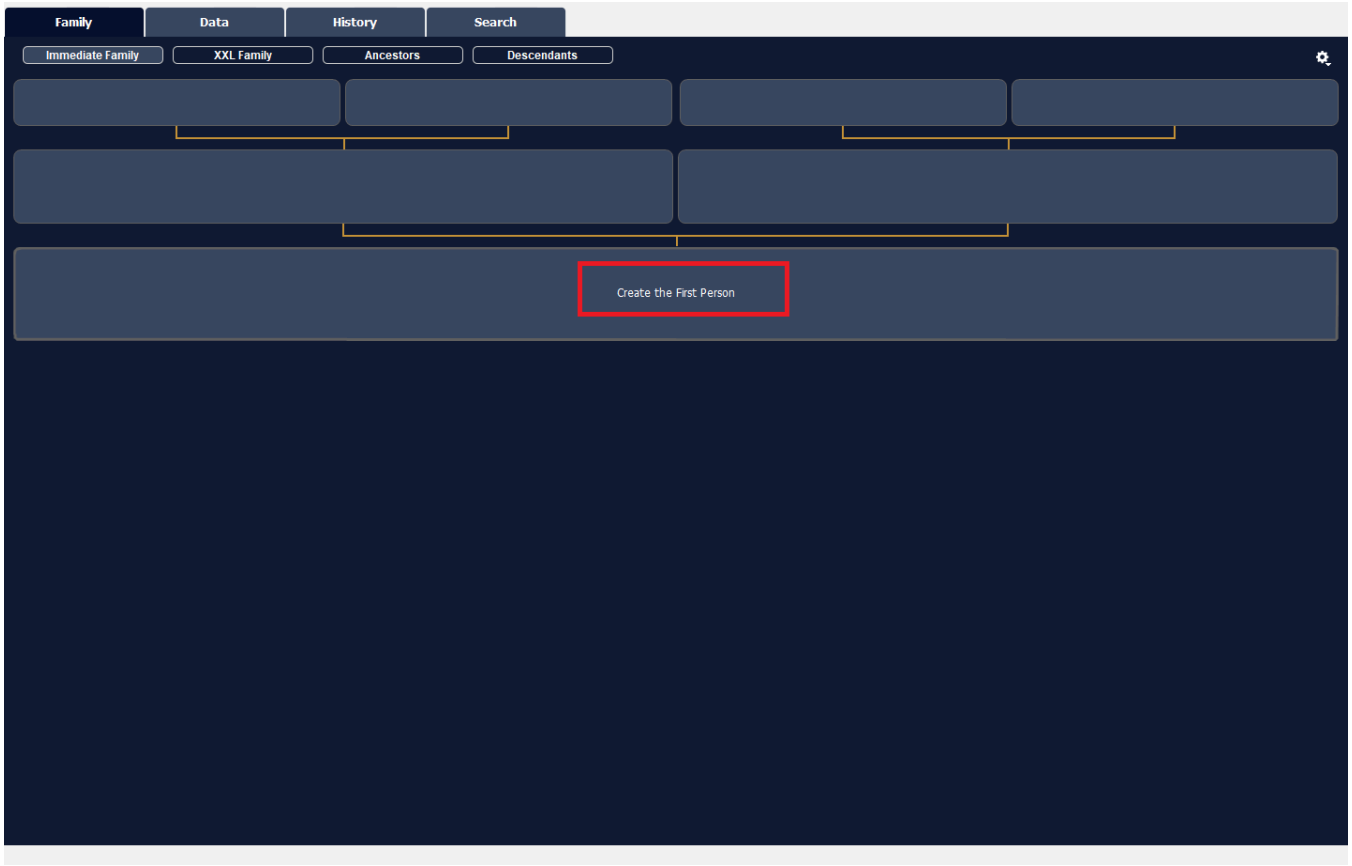
See Synchronizing via USB (see page 831) for more details.

Input data

Create the first person

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

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

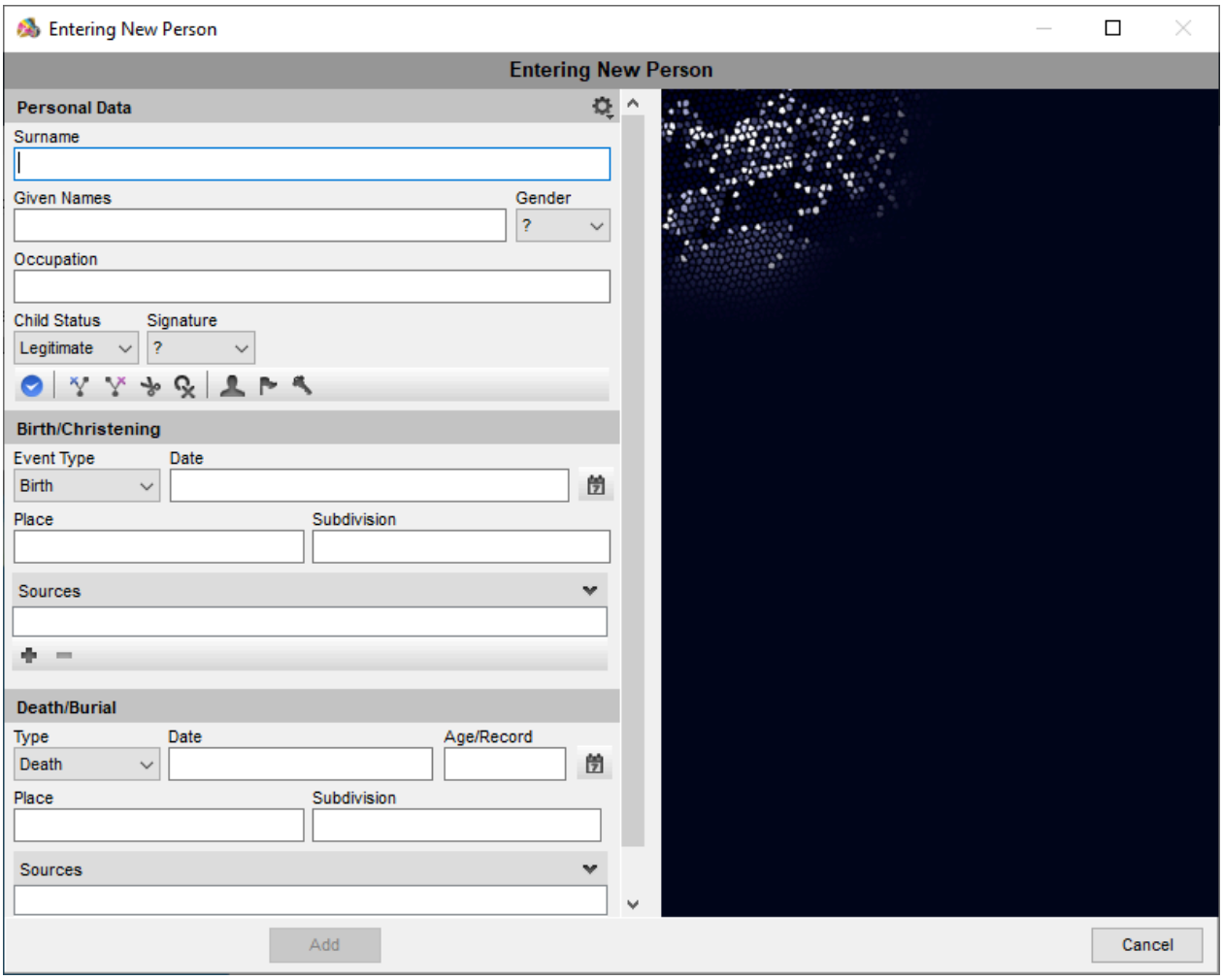


or click on **Add** button of the toolbar **> Add Unrelated Person**

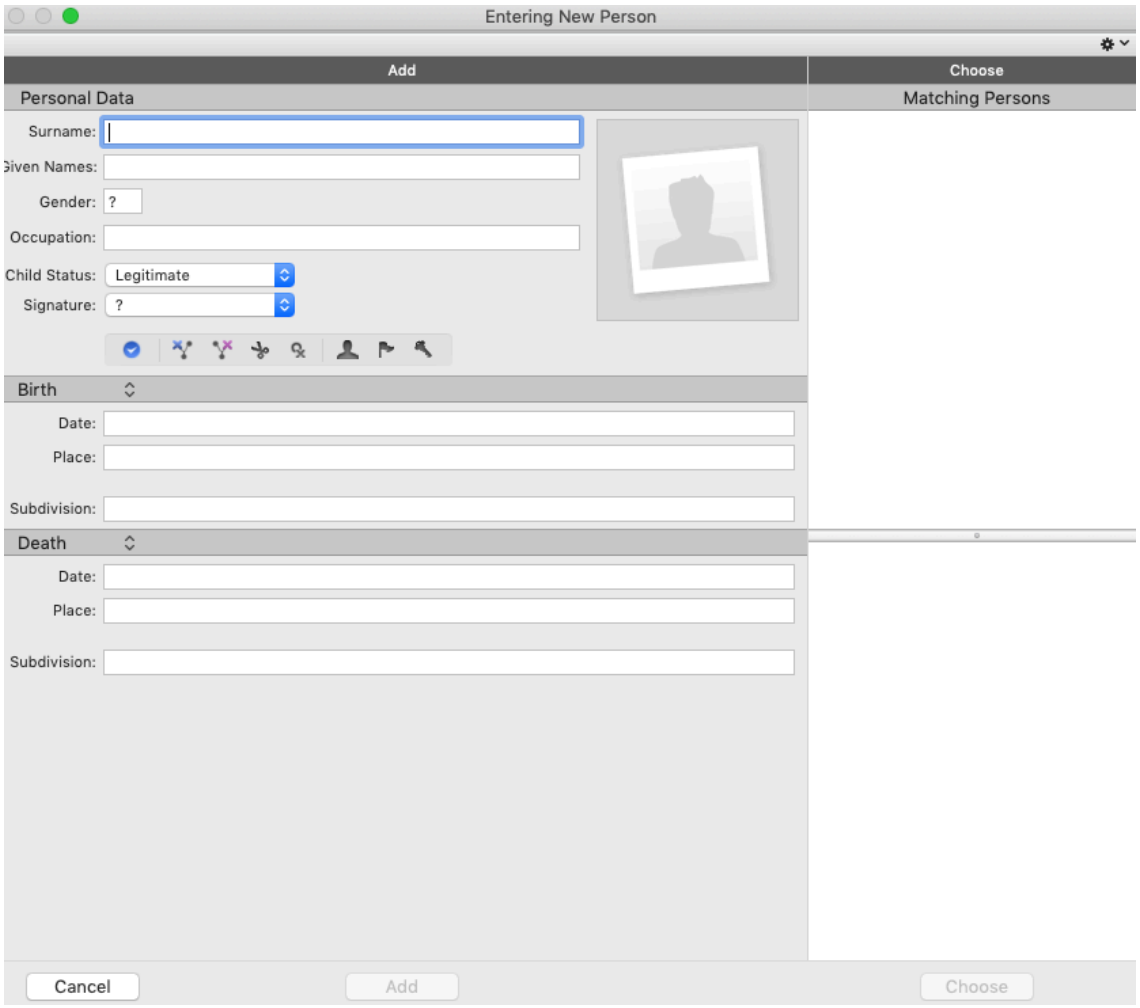
or choose **Person** menu **> Add > Unrelated Person**

The **Entering New Person** screen opens with the data boxes to complete. To move from one box to another, press the **Tab** key or click in the next box.
Heredis includes data entry aids which will save you time and avoid errors.

Windows Entering a new person



Mac Entering a new Person



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

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

Gender
Gender is automatically inserted by Heredis based on the given name(s). If the given name is multiple, Heredis leaves a **?**.
For gender selection, click the arrow or type **M** for Male, **F** for Female. Your choice will be stored for future use of the same given name. If you want to modify it later, you can do so in the **Given Names Index**, without changing the data that you have already entered.

Occupation
Enter the occupation of the person. This section is for the sole or main occupation the person held. You may also enter **Occupation** events, dated and detailed for any other activities. The list of recognized occupations with Heredis appears and is updated as you type. When you see the desired occupation in the list, use the down arrow to select it and tap **Enter** to select it.
In the **Occupation** field, recognized occupations are underlined. If you type a word that is not recognized as an occupation and want to add it as an occupation, with the mouse select the word or group of words and click the arrow to the right in the box. Heredis will create an occupation that is added to the **Occupations Index**. As you leave the field, you will find that it is now a recognized occupation because it will be underlined.

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

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

Flags
They can enter additional information relevant to your genealogy.

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

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

Birth
1. Click the **Birth** event title to bring up the pop-up menu and select **Birth** or **Christening**.
2. Enter the date.
3. To enter the **Place** field, type the name of the town of birth or **Christening**. Once you enter the first letters of the place, Heredis proposes a list of places that may match your entry. Select

a place using the mouse or use the up and down arrows and confirm the location selected with the **Enter** key. If there is no place relating to your entry, select **New Place**. Complete the various boxes for the new location to be saved and confirm its creation by clicking **OK**.

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

Further information

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

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

This individual is the starting point of your genealogy, the person called the Root Person (see page 44) and who will have the Ahnentafel number (see page 44) 1. Continue your genealogy by clicking on the Add Father (see page 141), Add Mother (see page 141), Add Spouse (see page 164) or Add Child (see page 172) links to complete the immediate family.

Later on, you can access the root person by clicking on the button or from the menu: **Find > View Root Person**. The Root Person can be changed at any time, see The Root Person (see page 137) article.

The Root Person

The Root Person is the individual at the base of your genea¬logical research. By default, Heredis defines the first person entered in your genealogical file as the root person and assigns the Ahnentafel number (see page 44) 1 to this person.

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

To access the root person

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

To modify the root person

1. Display the new person to be at the base of the genealogy currently open in Heredis.
2. Select **Person > Define as Root Person**

The new root person will bear the Ahnentafel number 1 and all other Ahnentafel numbers will automatically be reassigned by Heredis based on the new root person.

Enter simple, double-barreled or multiple surnames

Heredis lets you enter a wide range of data. These include surnames.

Heredis therefore includes a **Surname** field in the data entry form for a person.

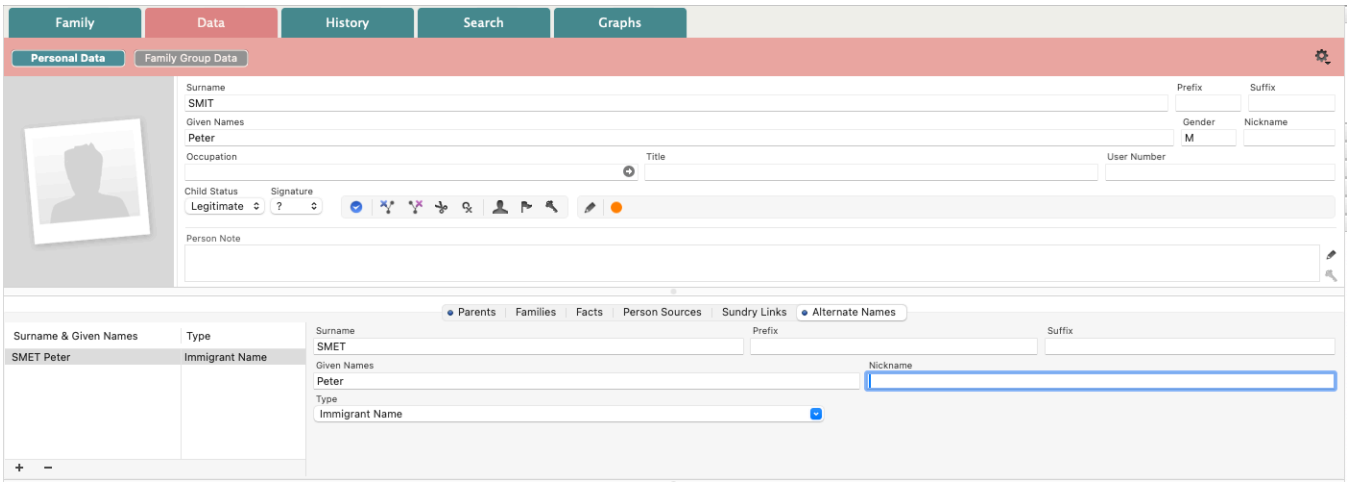
See the following articles for the different types of input:
Add an unrelated person (see page 183), Add spouses (see page 164), Add persons (see page 177), Add other linkedpersons (see page 239), Add witnesses and participants (see page 233), Add children (see page 172), Add parents (see page 141), Input a family group data (see page 280).

Enter a simple surname

In genealogy, you may find several spellings of a surname for the same person.
Choose the spelling you wish to indicate. You can change it if necessary.

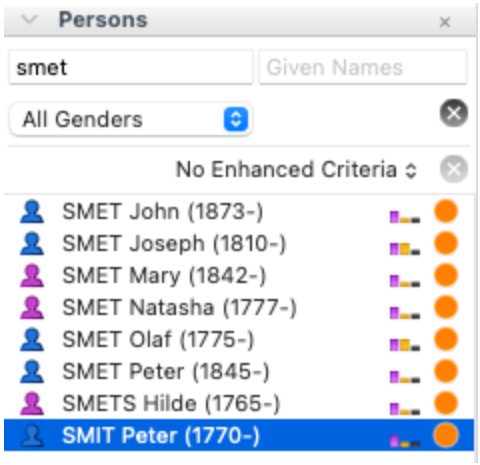
We advise you to use the name the person was born with or the one you found the most.
Then enter the other spellings for this person in the Alternate names section. See Alternate names.

For example, Smit Peter on the birth certificate and Smet Peter on the census.



Heredis considers that there is one entry per surname entered. If you have other names, Heredis will add them to the Surname index.

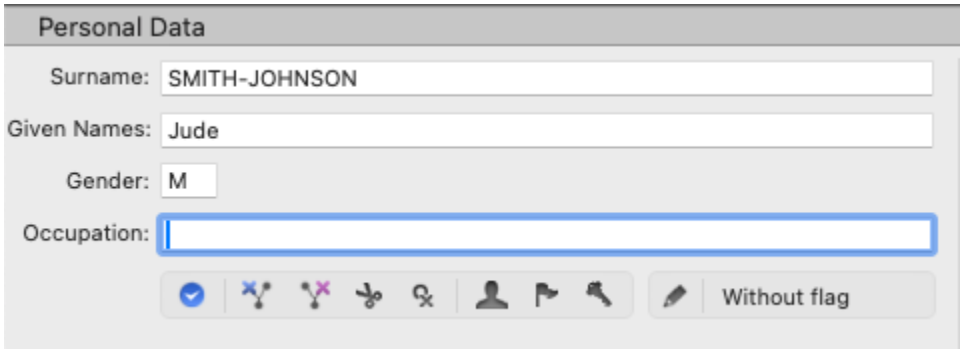
When you search in the Persons panel, in Smart Search or when you add a person, Heredis searches for existing persons with that surname, even if it’s an alternate name.



Enter a double-barreled surname

There are also double-barreled surname.
Heredis allows you to manage double-barreled surnames by inserting a hyphen between the two surnames.

For example, enter Smith-Johnson.



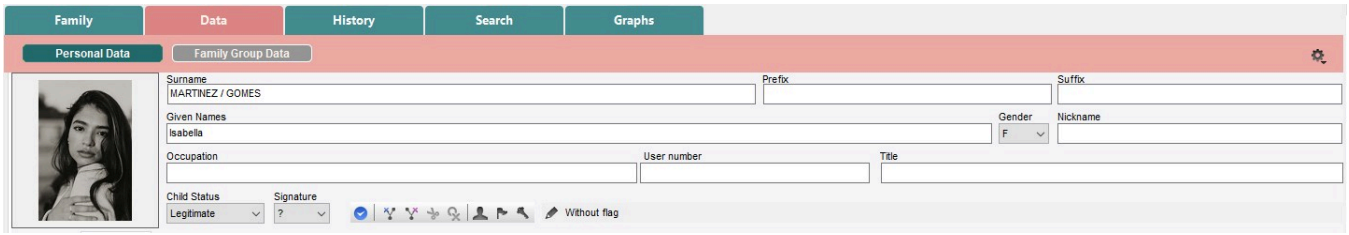
Heredis will treat this double-barreled surname as a single surname, so there will be a single entry in the surname index.

Enter multiple surnames

In Hispanic countries, but also more recently in various countries, it is possible to have several surnames. Indeed, it is possible to have both the father’s and the mother’s surname. This is not always a double-barrelled surname.

Since Heredis 2026, it is possible to enter multiple surnames.
Enter the first surname, then add a slash / to separate it from the second surname.

For example, Martinez/Gomes.



You can enter these multiple surnames with or without spaces between the / and the surnames. Heredis will format them.
In input screens, the / will be visible, but elsewhere it will not appear.

Heredis will consider these to be 2 distinct surnames. There will therefore be 2 entries in the Surnames index.

Note: regardless of the format you enter, a surname is made up of accented or non-accented letters. Don’t add special characters (brackets, punctuation, etc.), only the hyphen can be found in a surname. Don’t add images, emoji, etc. either. Search tools will be confused and these characters could cause problems in GEDCOM export.

Add parents

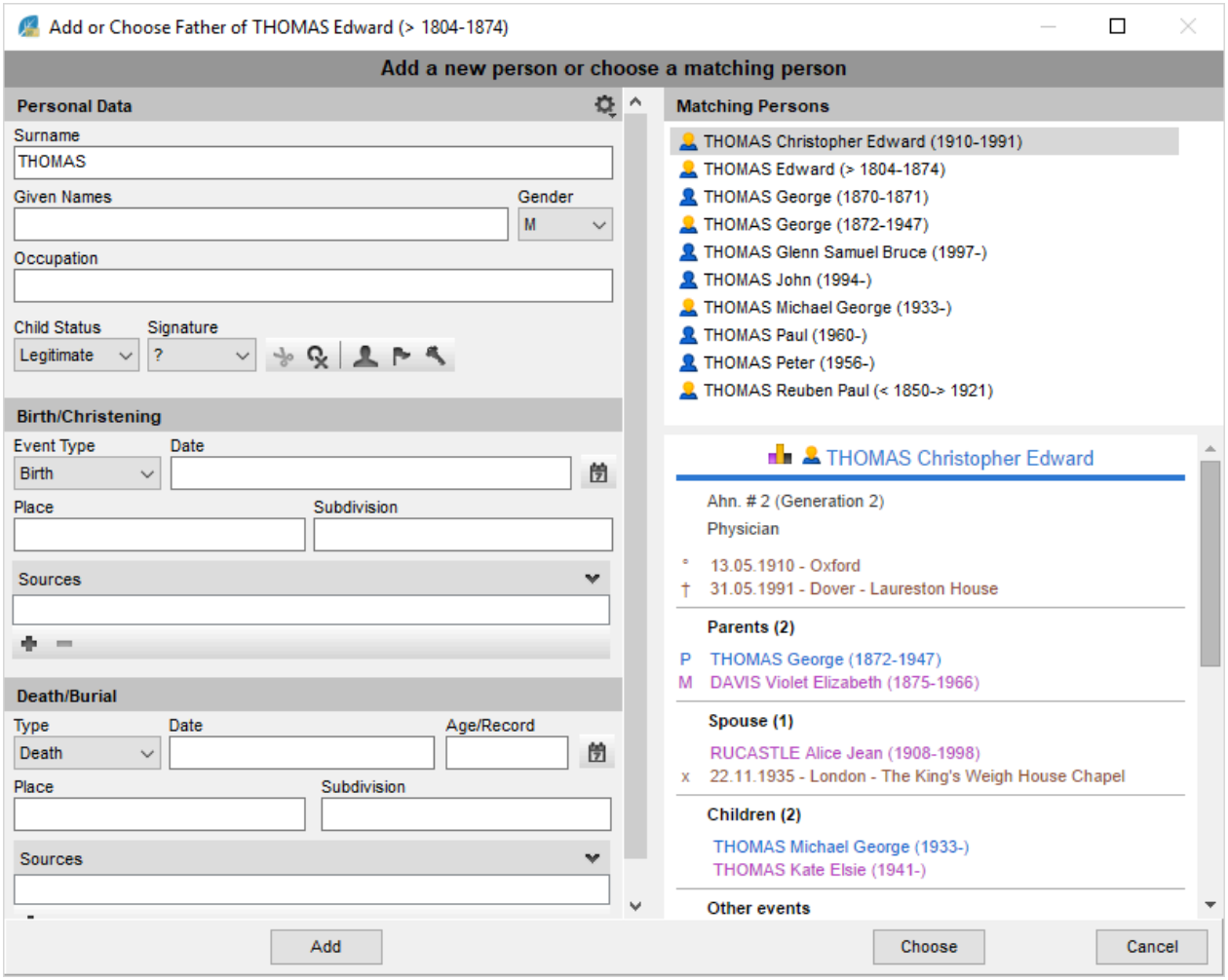
Since Heredis 2026, it has been possible to add multiple parent couples.
See the article Add several sets of parents for more information.

Add a new person

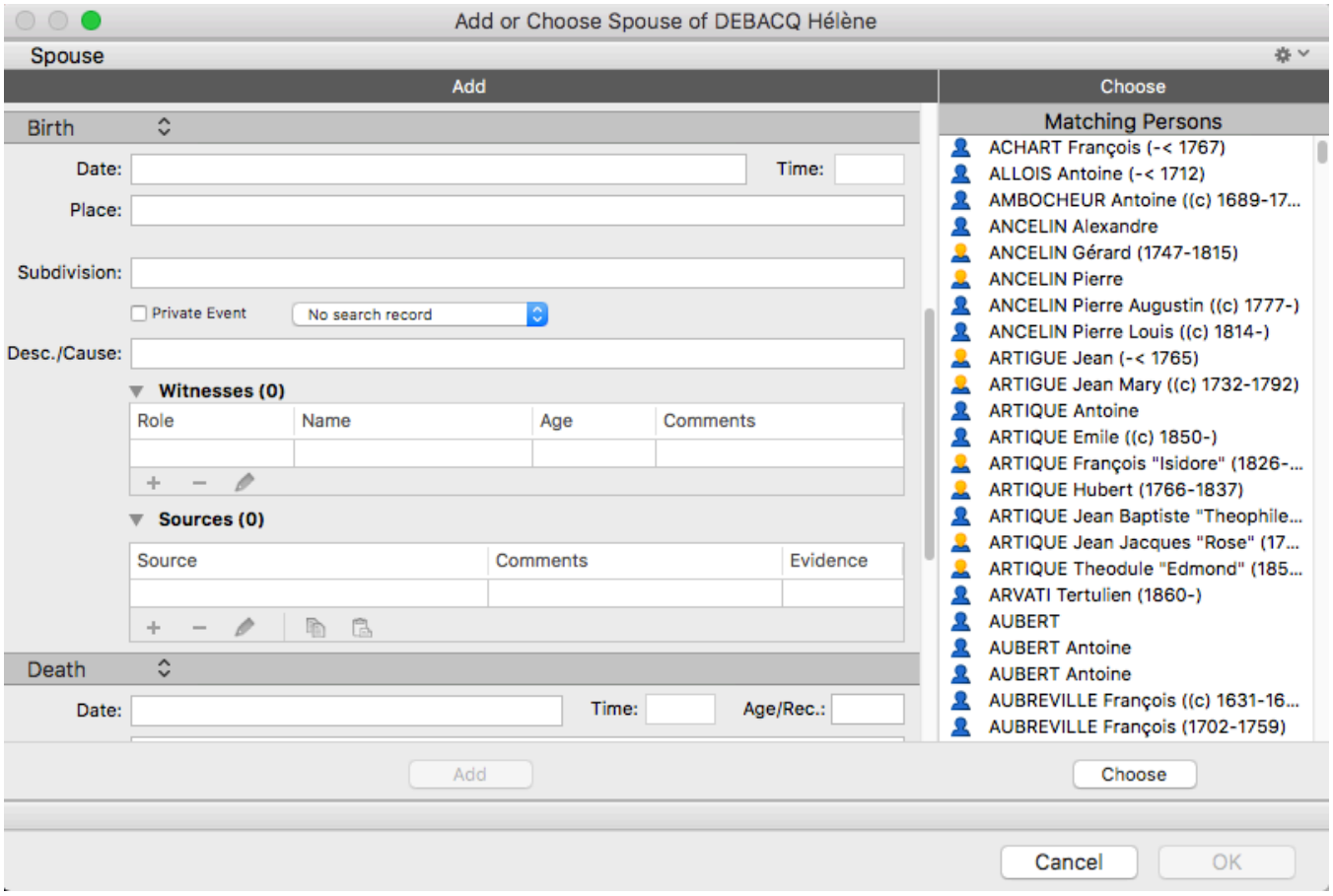
All tabs

1. Place the person for whom you want to add parents, as the primary person.
2. Create the link.
• Click the link in the empty boxes for the father or the mother.
• Choose **Person > Add Father** or **Add Mother**
• Click the button (Add or link persons) on the toolbar and choose **Add Father** or **Add Mother** .
3. Enter the new person.
In the **Add Father** or **Add Mother** window, complete the entry fields with the information you have. Some items are prefilled such as the father's surname or gender of the father and mother.
• To change the surname, click in the field and enter another name. You can change the gender using by clicking in the Gender box and changing it.
• **(Mac)** To change the gender, click the **Do not specify gender** lock.

(Windows) Add father



(Mac) Add father



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

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

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

Family Group Data entry

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

Info • For more information on adding the spouse of a child in the **Family Group Data** tab, see Input a Family Group Data (see page 280).

Link an existing person

During data entry

1 Place the person for whom you want to add parents as the primary person.
2. Create the link.
• Choose **Person > Add Father** or **Add Mother**
• Click the button on the toolbar and choose **Add Father** or **Add Mother** .
• Click the links in the empty boxes for the father or the mother on the **Immediate Family** screen.

In the **Add Father** or **Add Mother** window, select the person to be linked from the list of **Matching Persons** to the right of the screen. To limit the list displayed, you can enter the given name in the **Personal Data** area. Click **Choose** or double-click the name in the list.

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

Drag and drop

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

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

Unlink a person and parents

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

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

All tabs

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

Family Group Data tab

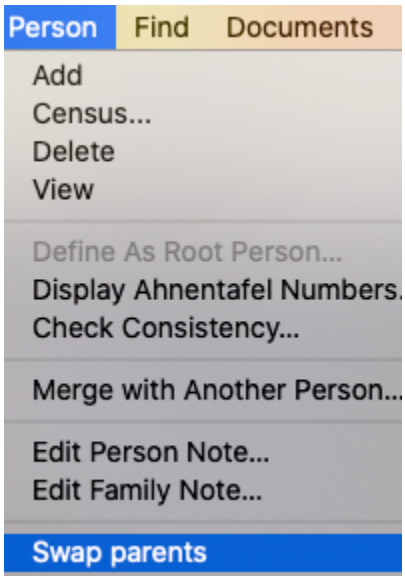
1. Select the parent to be deleted in the **Parents** data entry fields.

2. Click the − button at the bottom of the field, and choose **Unlink Father** or **Unlink Mother**.
Info • If you select the Delete Father and All Links, or Delete Mother and All Links option, this will remove the person from your genealogy, not just the link.

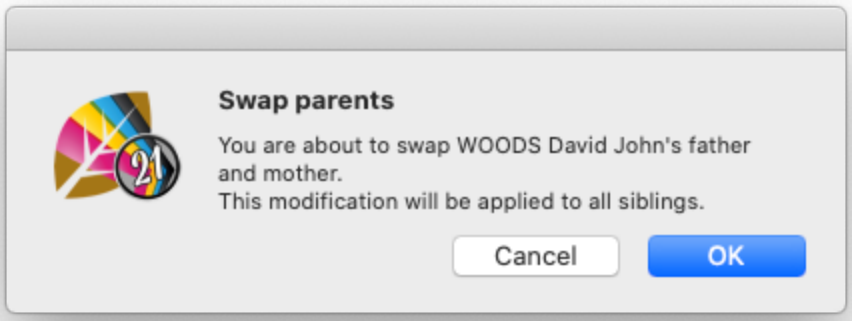
Swap parents

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

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



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



Confirm by clicking on Yes. Et Voila !

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

Add several sets of parents

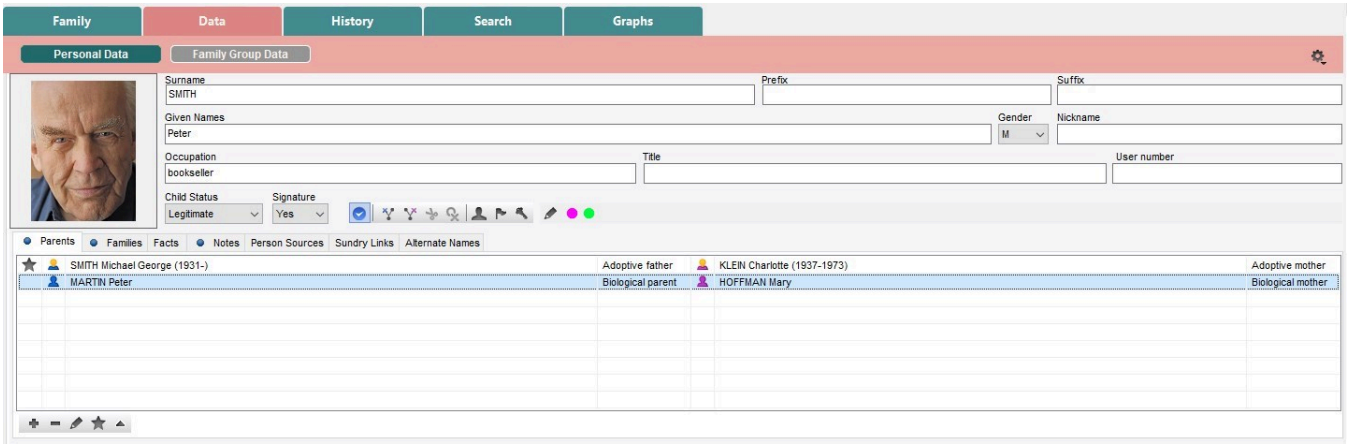
It is common to have several sets of parents. Until Heredis 2025, you had to choose which parents to enter and indicate the other parents as related persons.

Since Heredis 2026, it has been possible to enter several sets of parents, also known as multiple parents.

By default, Heredis indicates the first parents entered (see the Add parents (see page 141) article) as the biological parents. We'll see how to change this in this article.

Add multiple parents

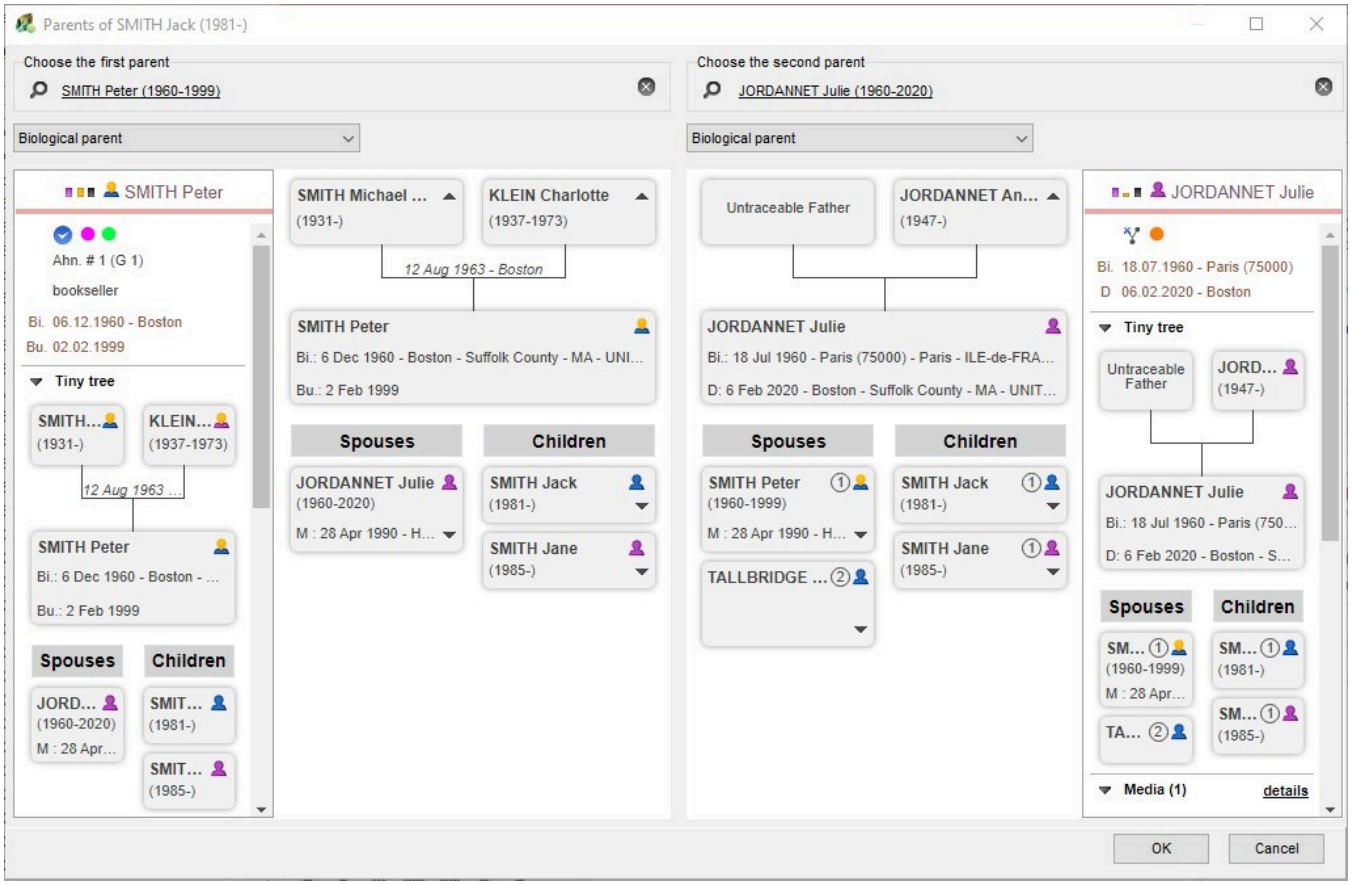
This entry can only be made from the **Data** tab **> Personal Data.**
Click on the **Parents** tab in the central area.



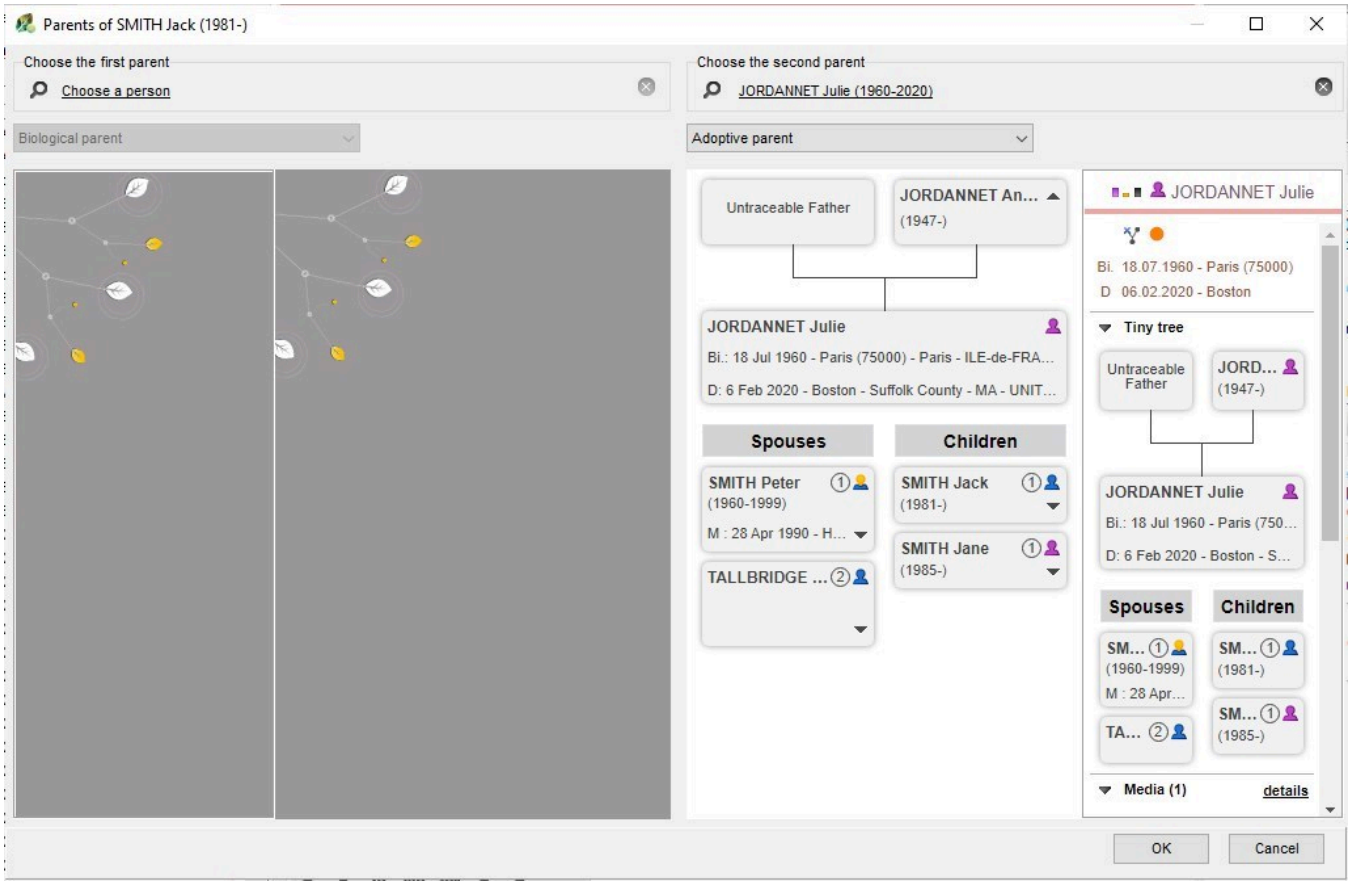
Click on ✚ to add a couple of parents. It can also be a single-parent "couple" if only one parent is added.

A window opens.
Select the first parent by clicking on the link.

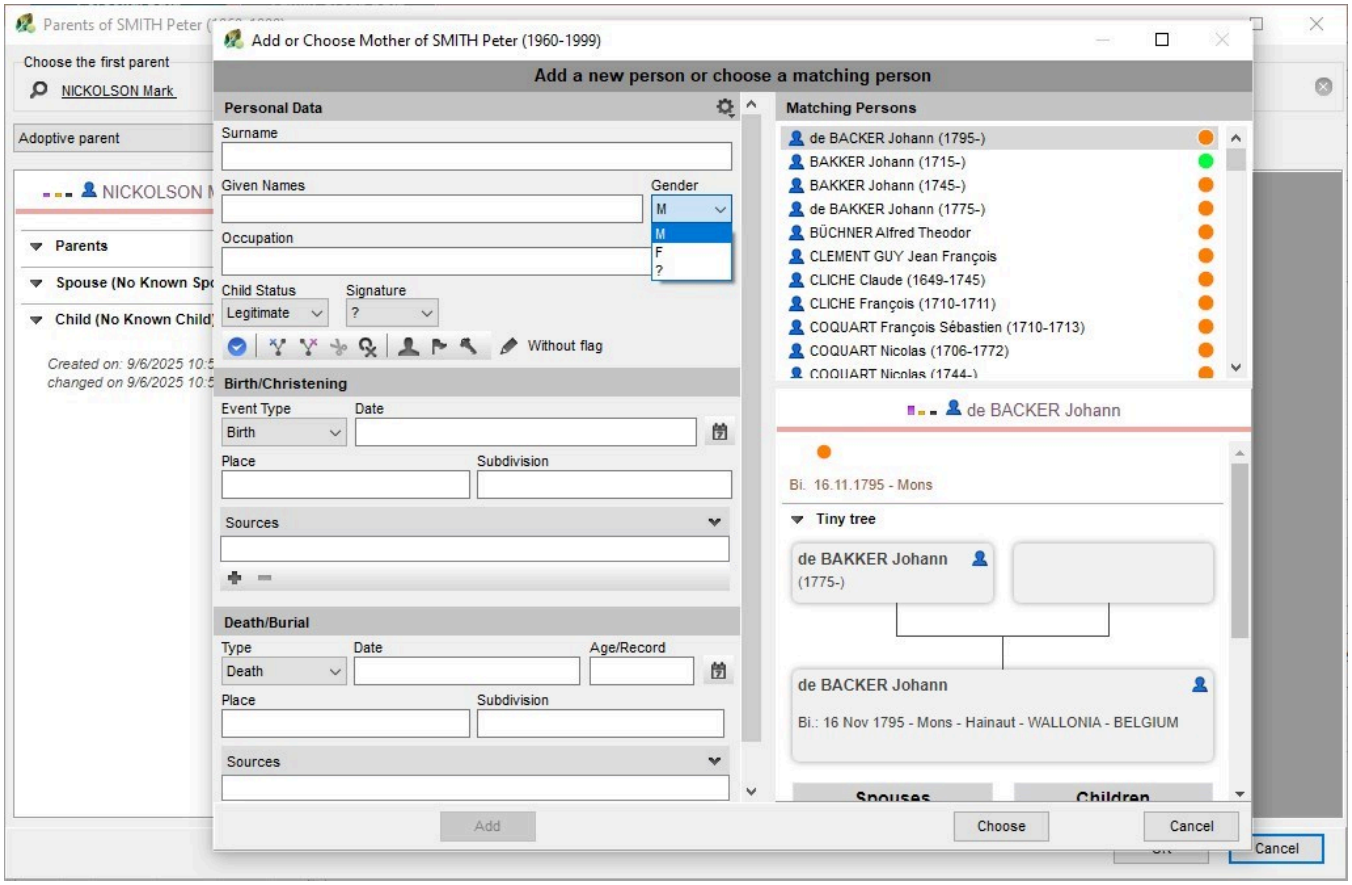
By convention, the father is always placed on the left and the mother on the right.



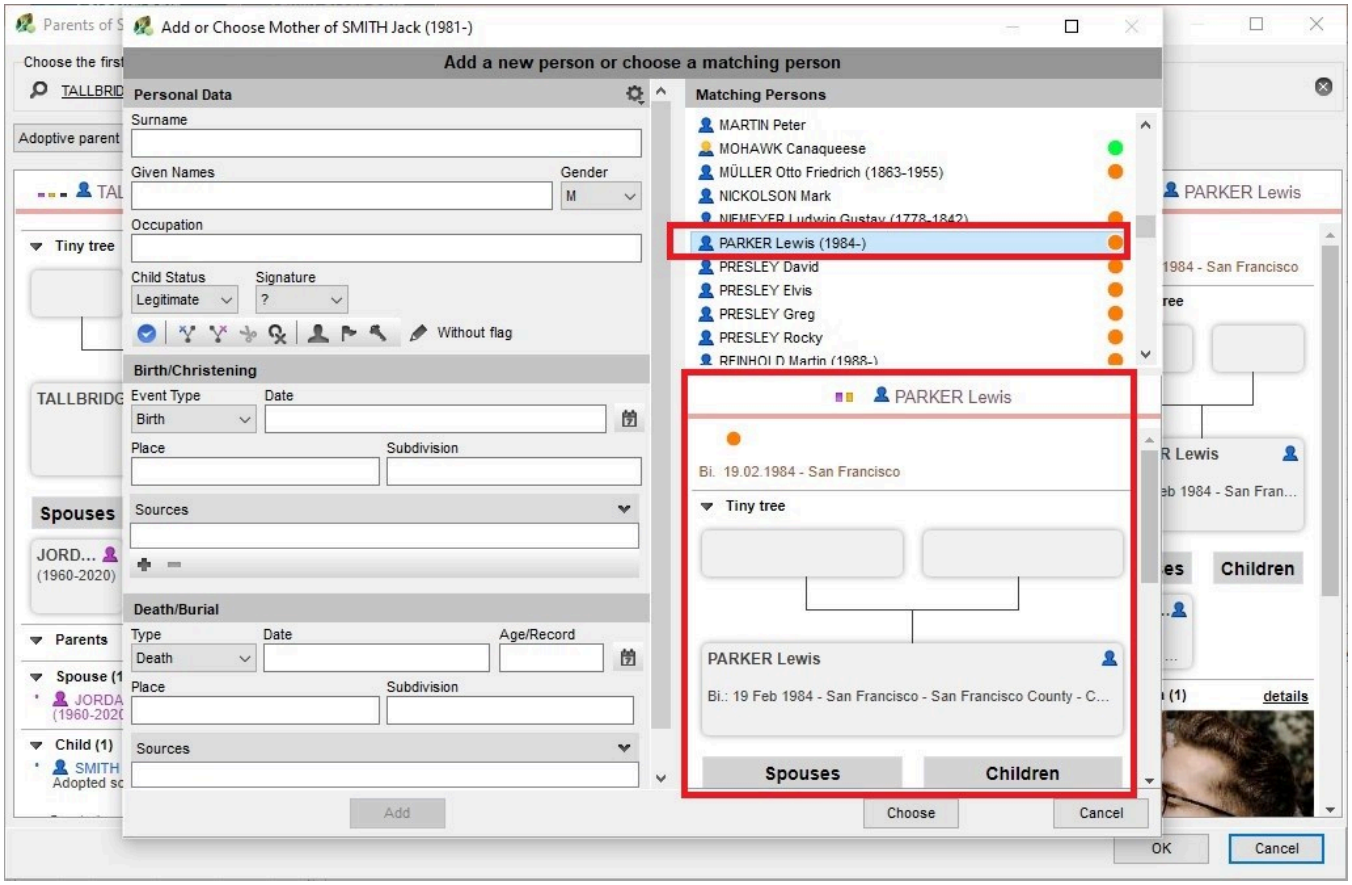
If you are only entering a mother, click on the link on the right.



For same-sex couples, simply change the default gender.



Check the list of persons to see if the parent already exists.
Click on a match to display the summary.



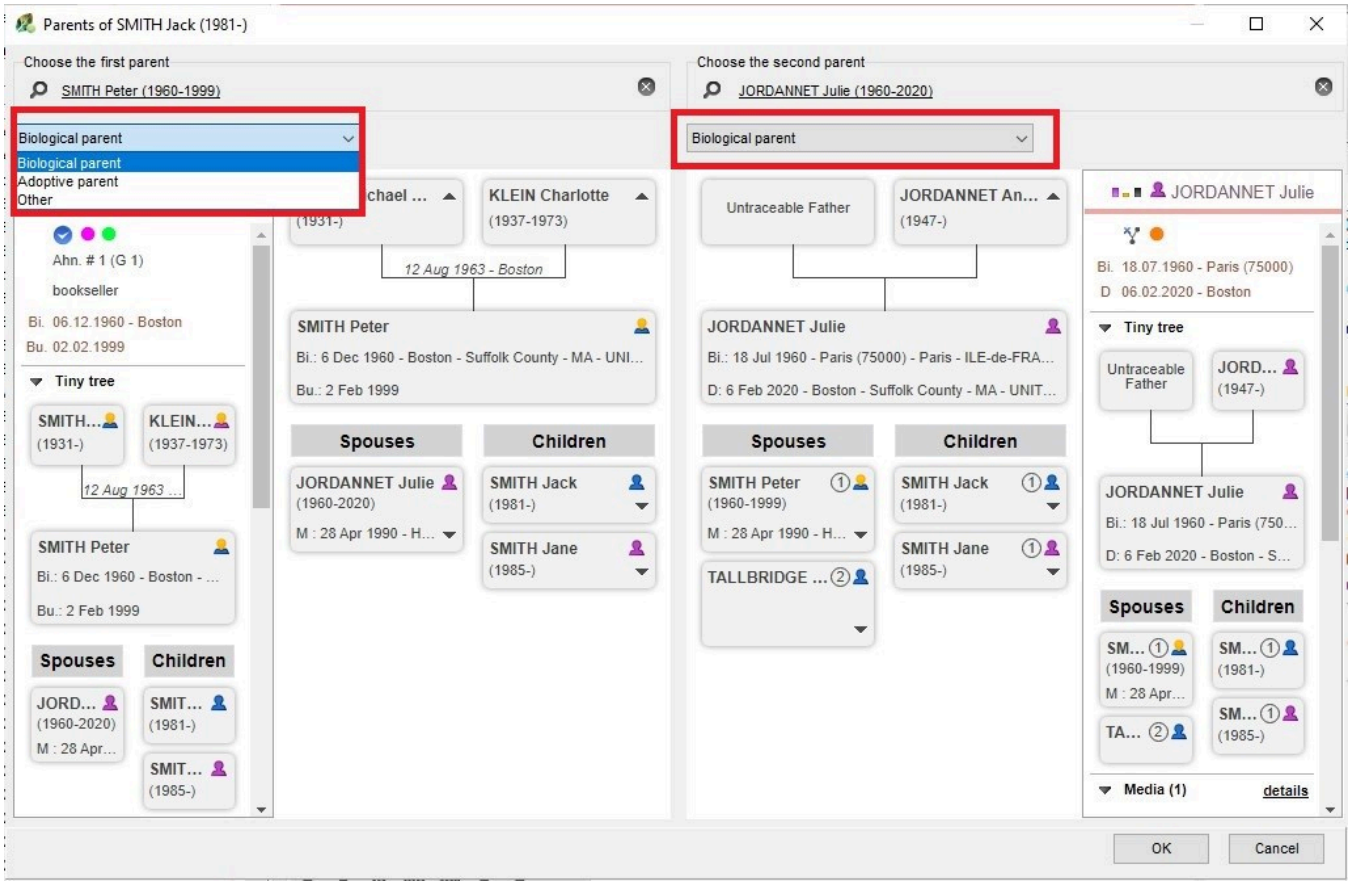
If it matches, click on **Choose**.
Otherwise, enter the known information and click on **Create**.

Indicate parental role

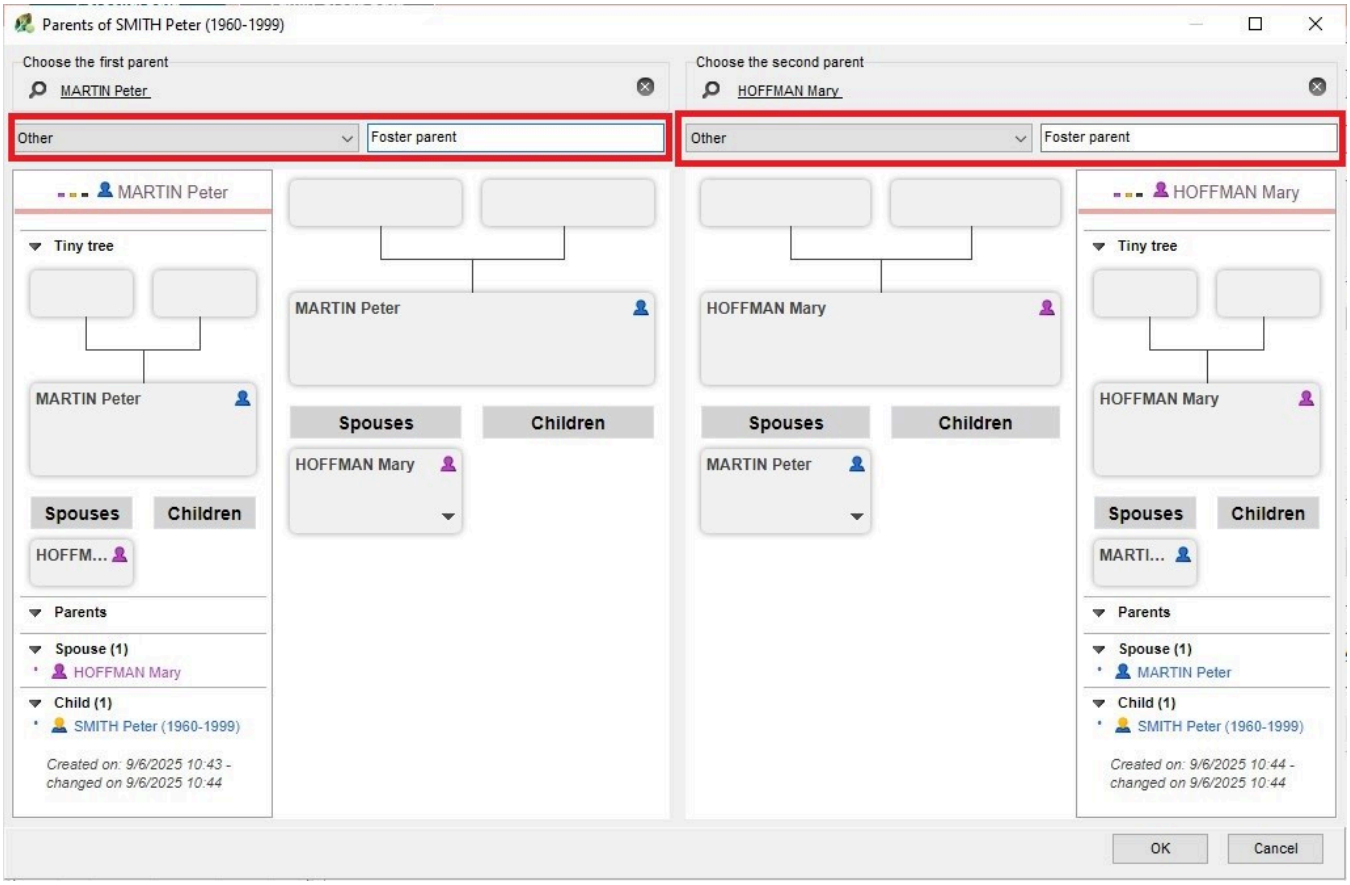
After selecting or entering the parent(s), choose the parental role.

Click on the drop-down menu to choose between :

- Biological parents
- Adoptive parents
- Other



If you choose **Other**, enter the desired text in the blank field.
For example: Tutor or Foster family.



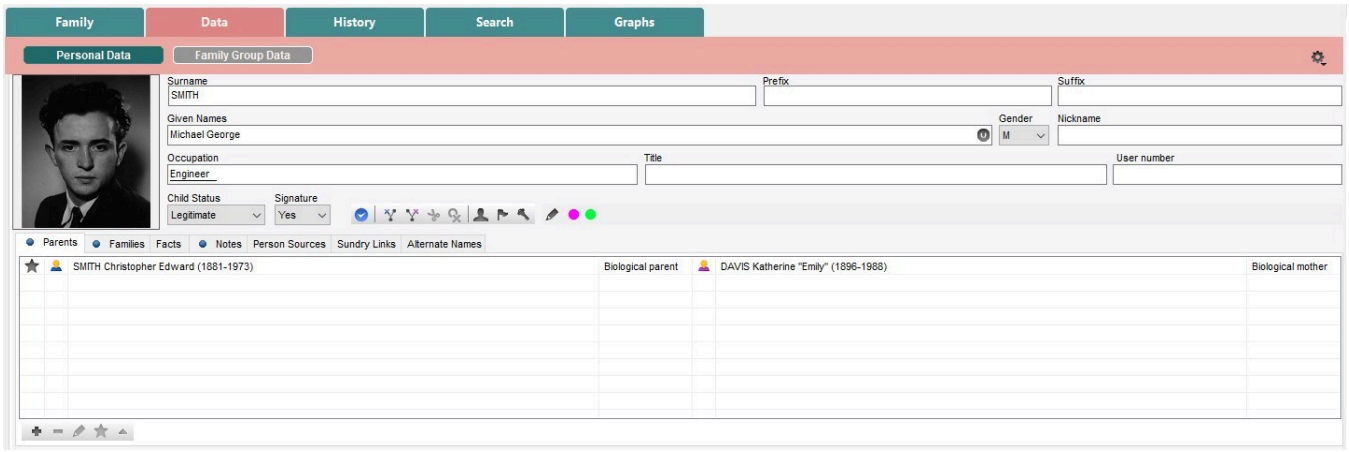
In this way, all situations can be entered.

Changing the role of an existing parent couple

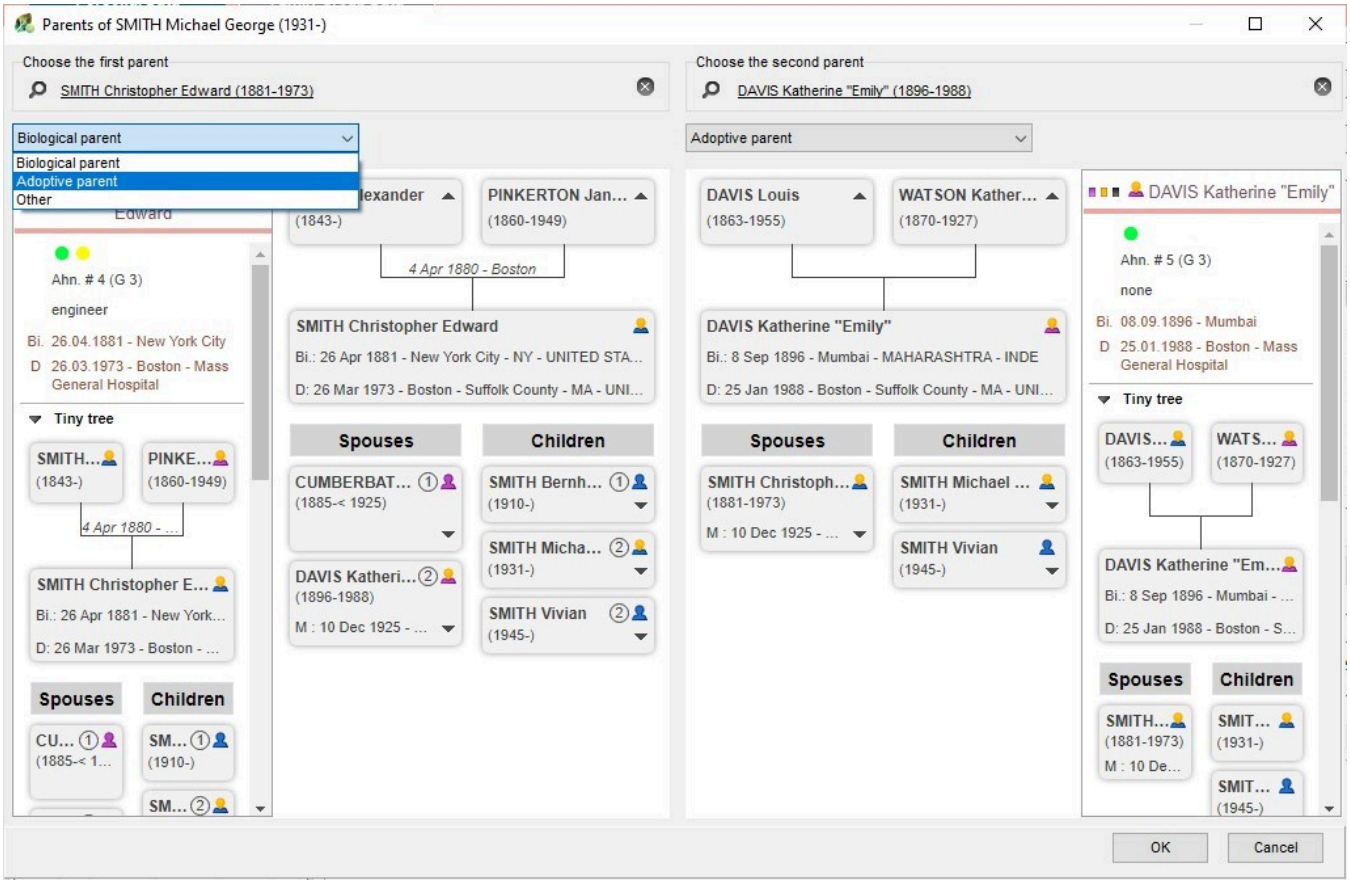
You have entered parents by adding them as described in the Add parents (see page 141) article, or you have validated too quickly and forgotten to indicate the parental role.

By default, Heredis indicates the first parents entered as biological parents.
If you forgot to indicate a parental role when adding a set of parents, Heredis indicates Adoptive parents.

You can modify it.



Click on the **Data** tab **> Personal Data**.
Select the couple to be modified.
Click on the pencil .
Then click on the drop-down menu and choose the appropriate role as indicated in the previous paragraph.



You can mix parental roles, for example, to have a biological father and an adoptive mother if required.

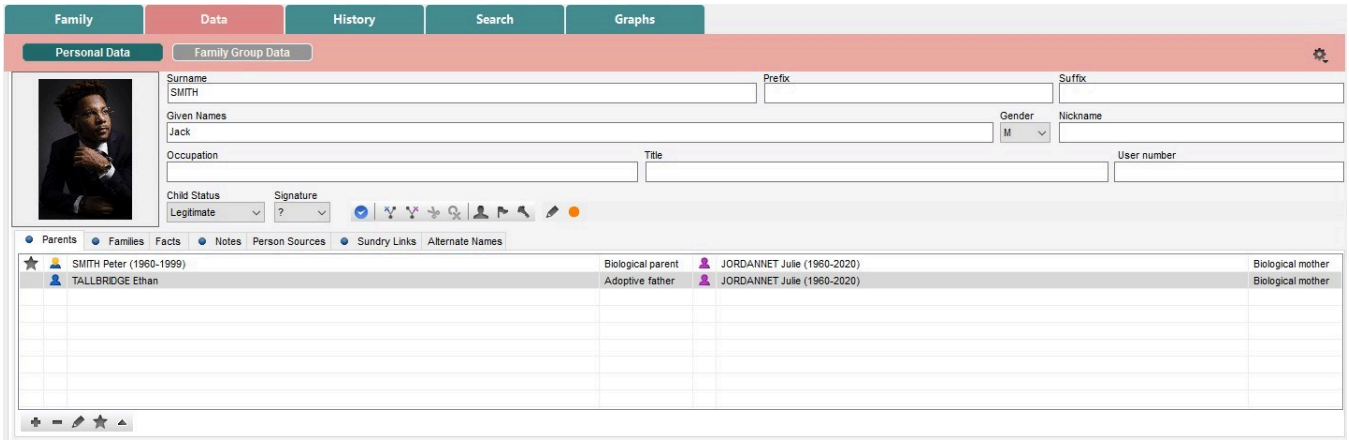
Note: Heredis offers the adoptive parental role if the person already has biological parents entered.

Please note: Heredis will alert you if you have more than one biological set of parents. If you haven't made a mistake, validate.

You can have one parent who appears in several couples.
For example, a biological father and a biological mother. The biological father dies and the stepfather decides to adopt the child. He is therefore the adoptive father.
Create couples:

- biological father and mother
- adoptive father and biological mother

The mother appears in two couples and always has the same parental role.



Please note that if you change the parental role of a parent appearing in several sets of parents for this person, you change it for all couples.

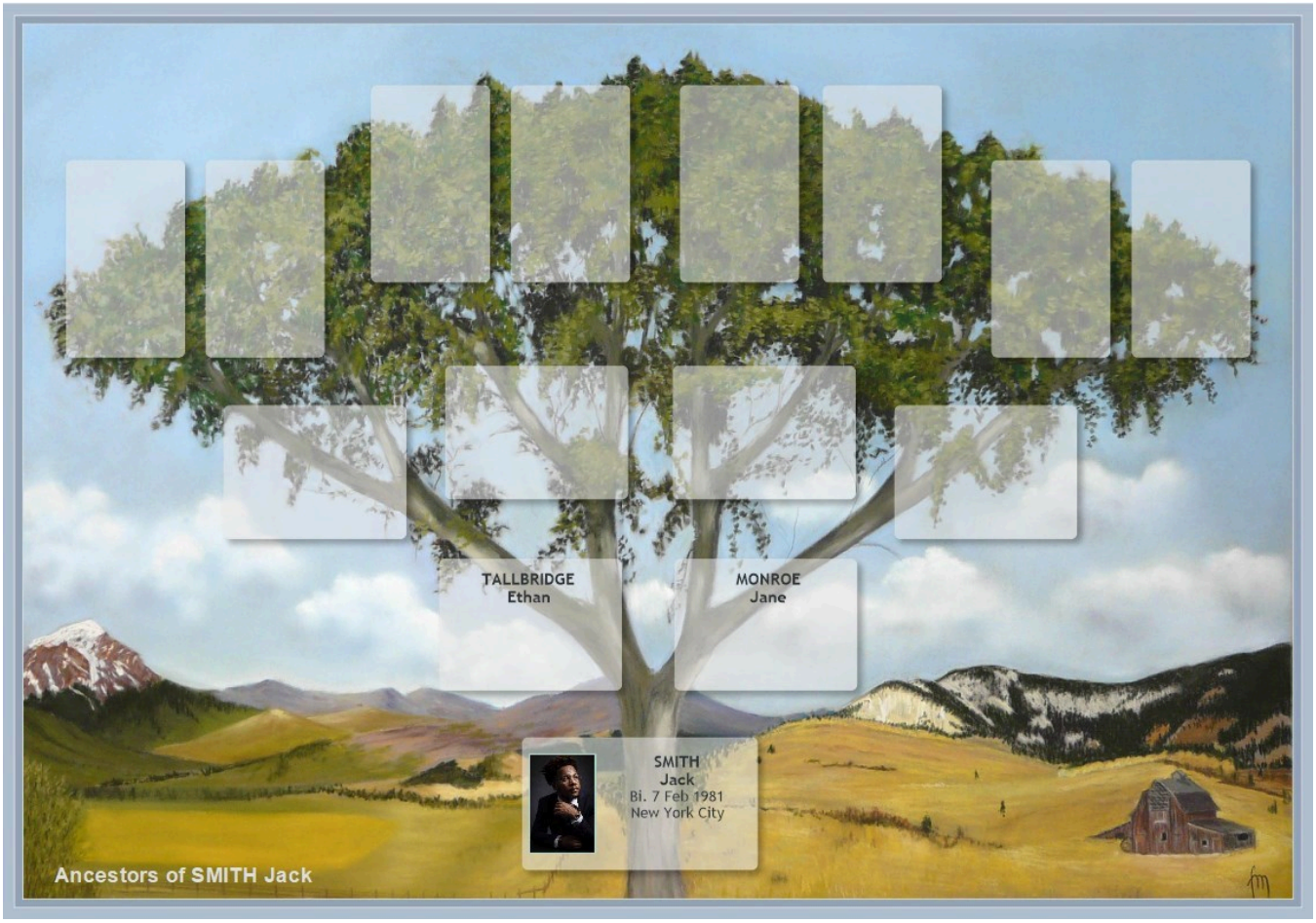
Note: a parent couple entered is shown only for the primary person to which you have added it. If you wish to add an adoptive couple to a sibling, you must repeat the addition for each member of the sibling.

Representation of ancestry

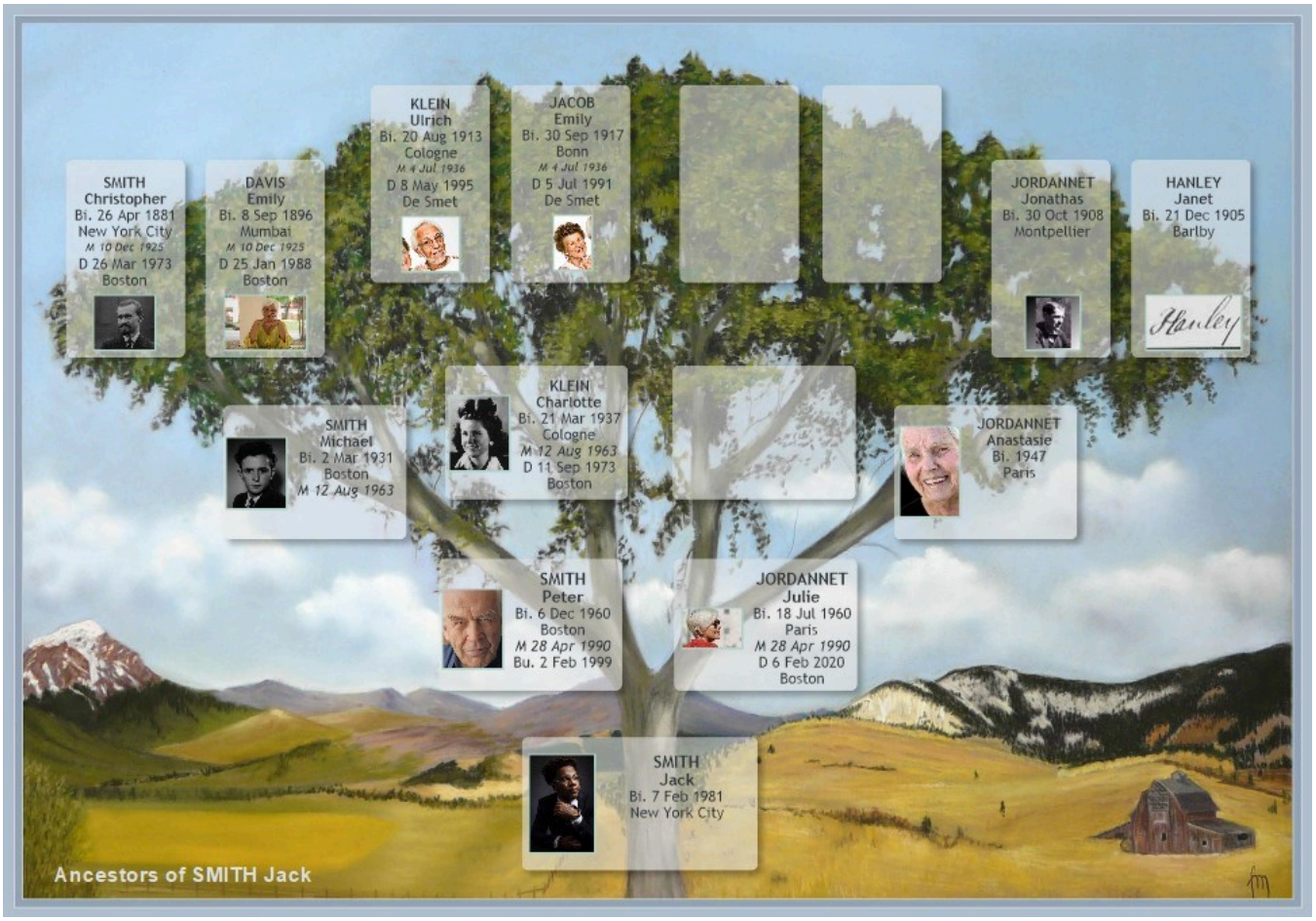
In all graphical representations, Heredis shows the main set of parents.
By default, the first set entered is displayed.

You can modify the main couple to have the Immediate Family, the XXL Family or the trees of the Charts button, etc. corresponding to the ancestry you wish to see.

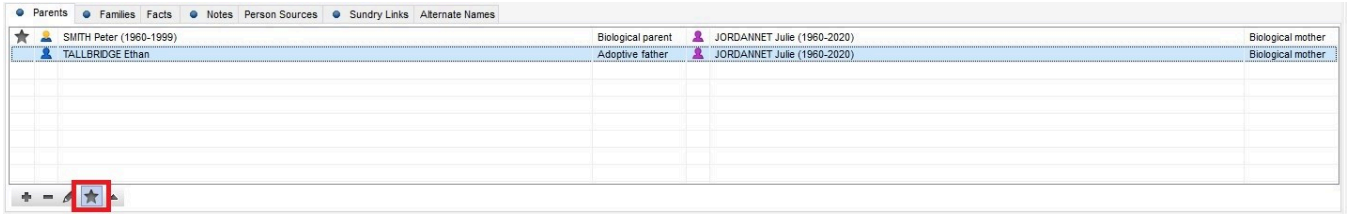
Adoptive ancestry tree



Biological ancestry tree



To change the main couple,
Click on the **Data** tab **> Personal Data**.
Select the couple you wish to be the main couple.
Click on the star.



Note : this choice of a main couple in the ancestor representations is deliberate. It avoids convoluted representations where it is difficult to find one's way through the ancestry of several sets of parents.

If the primary person is from the Ahnentafel line, the calculation is modified to take this couple into account, rather than the one that was previously the main one.

In the Books and Sheets, all couples are listed. However, the ancestry developed is that of the main couple.

Delete a set of parents

Click on the **Data** tab **> Personal Data**.
Select the set to be detached
Click on the .

You detach the couple but do not permanently delete them from the file. They still appear in the list of existing persons and are still indicated as a couple. You can attach them to another person without having to re-enter everything.

Untraceable Parents

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

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

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

Create a new person with an untraceable parent

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

(Windows) New Person input screen

(Mac) New Person input screen

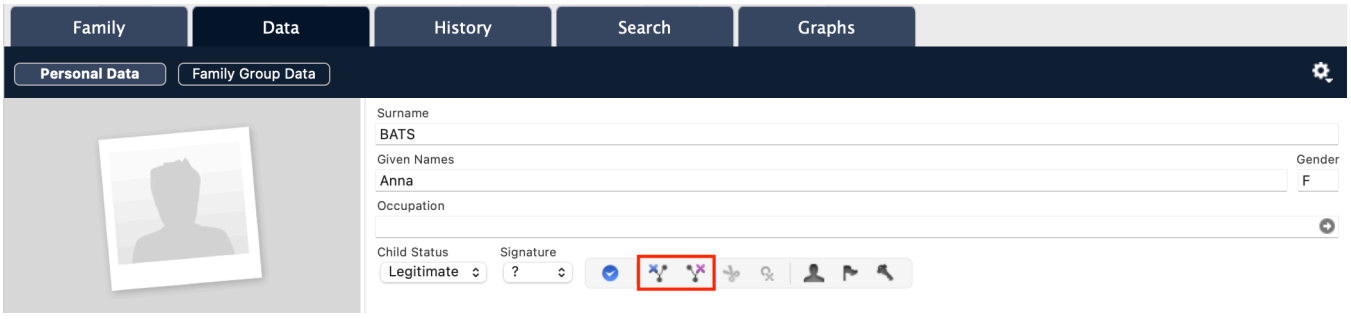
See also: Add Persons (see page 177) and The different data fields (see page 87).

Declare an existing person’s parents as untraceable

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

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

Personal Data



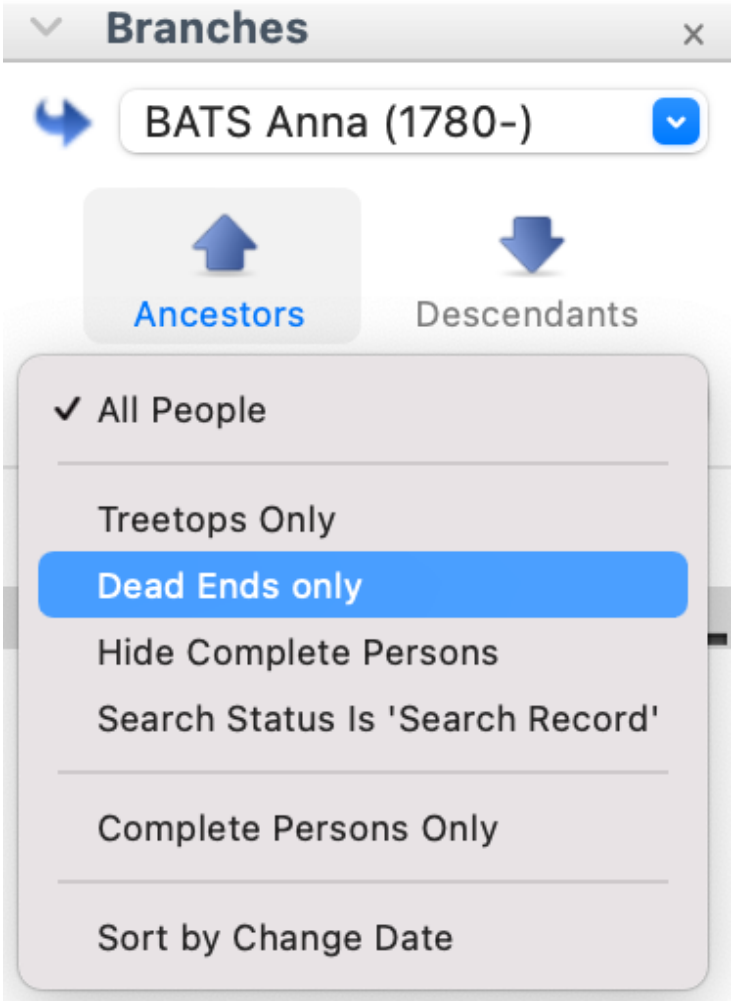
See also The different tabs (see page 76).

Identify Dead Ends

Heredis provides several tools to help you track your searches.

- When you need to know where you are at, feel free to consult **Search tracking**. This tool allows you to identify your “dead ends”. See Search Tracking Tab (see page 365).
- The **Branches** panel also allows you to filter **Dead Ends only**.

Branches Panel



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

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

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

Note: Our earlier printable tree charts do not include this data. Likewise, our automatically

generated Books do not specify when parents cannot be found.

Search persons whose parents cannot be found

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

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

See also Smart Search (see page 371) for more details on this search tool for your file data.

Attach a parent to a child with an untraceable parent

If, by chance, you end up finding one or both missing parents, uncheck the corresponding label in the **Personal Data** input screen for this person.

Declaring a parent as untraceable can easily be cancelled. If you eventually find the parents who were missing, uncheck the box.

Since Heredis 2026, it has been possible to add sets of parents. If you enter them while the Untraceable Father or Mother label is checked, an alert will notify you. However, it is up to you to decide whether or not to disable the label.
See the article Add several sets of parents for more information.

Add spouses

Add a new person

All tabs

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

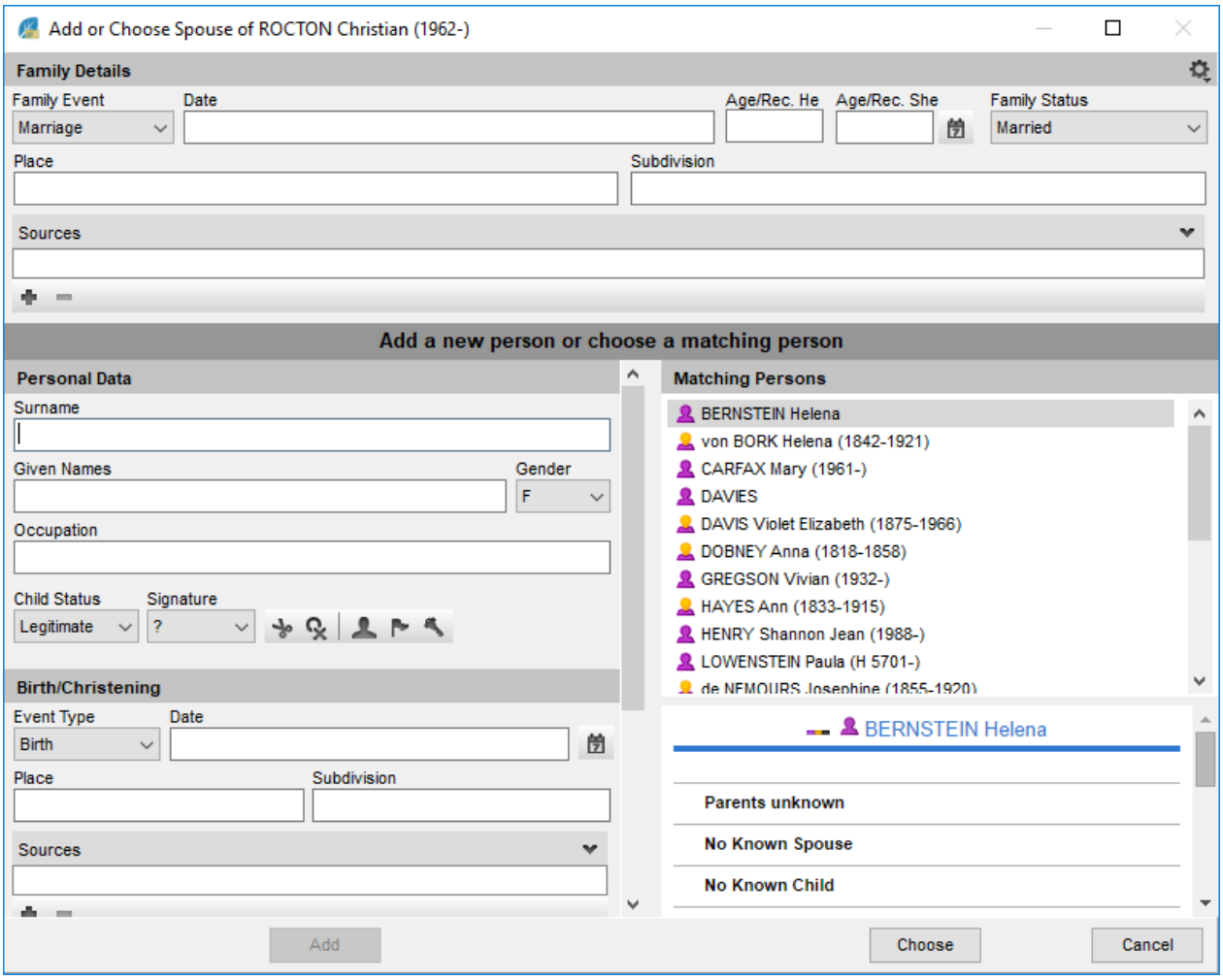
In the **Add or Choose Spouse** screen, complete the input fields with the information you have.

Gender is prefilled. To change the gender in order to indicate a same sex union for example:

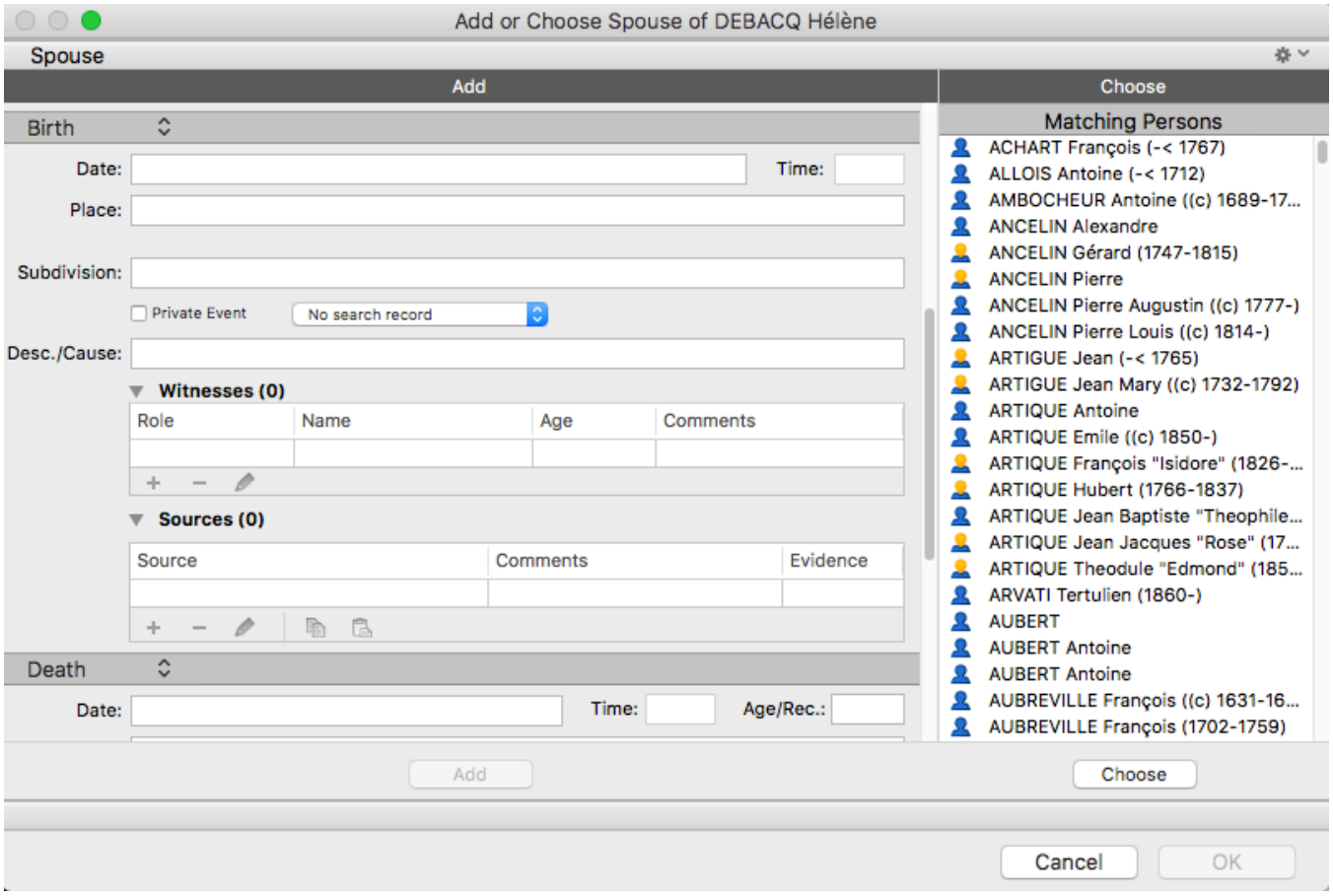
- (**Mac**) click the **Do not specify gender** lock, and change the gender
- (**Windows**) simply click in the gender box and change the gender

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

(Windows) Add a Spouse



(Mac) Add a Spouse



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

Click **Add**.

(Mac) Enter information about the union.

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

Family Group data tab

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

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

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

Link an existing person

During data entry

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

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

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

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

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

Drag and drop

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

Information concerning the family

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

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

See also Family Status (see page 170) article.

Family number

The family number, when there are several marriages, appears in the **Family** tab. It is assigned automatically according to the dates of marriage. To change the family number,

select a spouse and move him/her to the desired position.

Families order

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

Change the families order

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

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

A blue line indicates the destination position.

Windows – Leave Heredis determine the order

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

Mac – To change the order again

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

Delete a family

Heredis allows you to delete:
• Either the person. In this case the person will no longer exist in your genealogy file.
• Or the family link that links two spouses. In this case both spouses remain in your genealogy file.

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

All tabs

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

Personal Data tab

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

Family Group Data tab

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

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

Family status

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

The family status is independent of union events. One may enter a marriage event, but not enter other events for the couple, but clarify the family status as «Separated».
Specify the family status in the **Add or Choose Spous**e screen or **Families** area of the **Personal Data** tab.

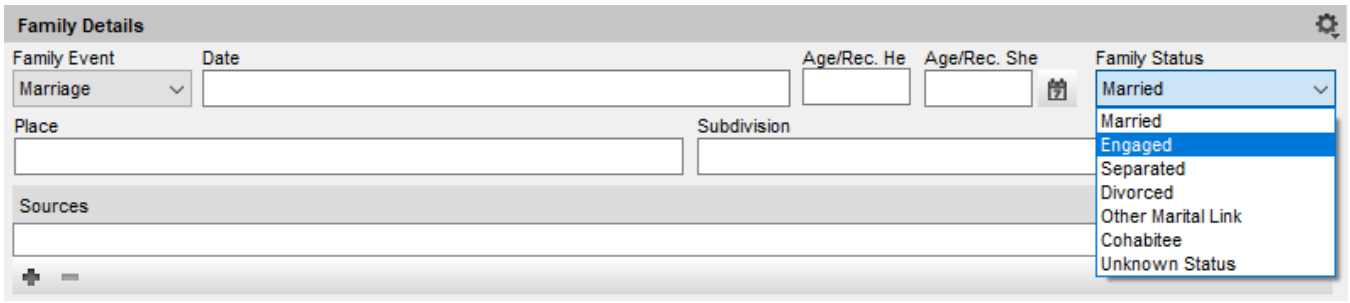
Customize union status

Your ancestors didn't marry and didn't live together, and none of the union statuses proposed by Heredis are suitable?
Starting with Heredis 2025, you can customize the family status.

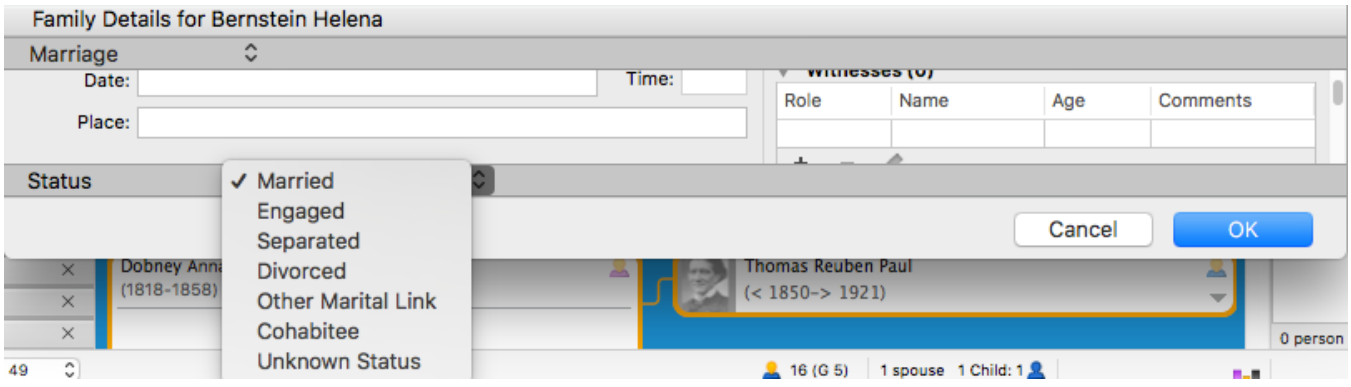
Click on the **Family status**,

- either in the add spouse window,

(Windows) Family Status in add spouse window



(Mac) Family Status in add spouse window

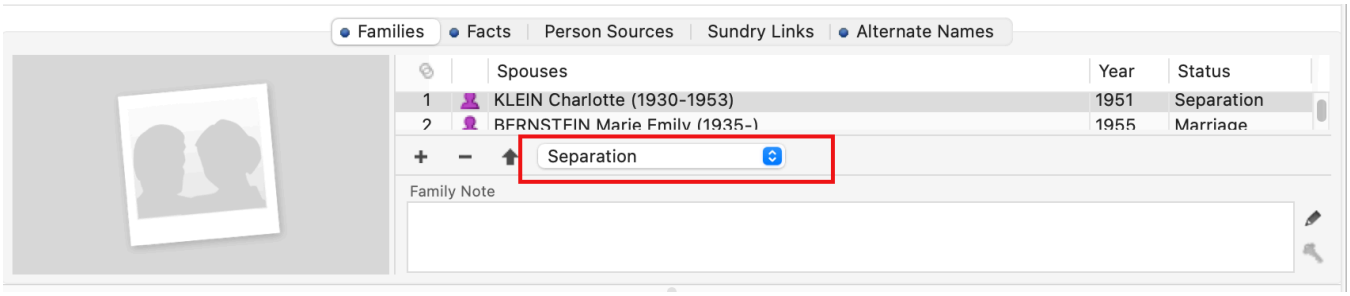


Note: if the family status does not appear, click on the cogwheel to switch the display to Comprehensive mode. If necessary, enlarge the Family Details area by dragging the splitter

downwards.

- either in the **Personal data** tab in the **Families** tab.

(Mac) Family Status in Personal Data tab



(Windows) Family Status in Personal Data tab

Choose **Other status**.

Enter your preferred term in the blank field on the right. For example, war lovers or childhood sweethearts.

Add children

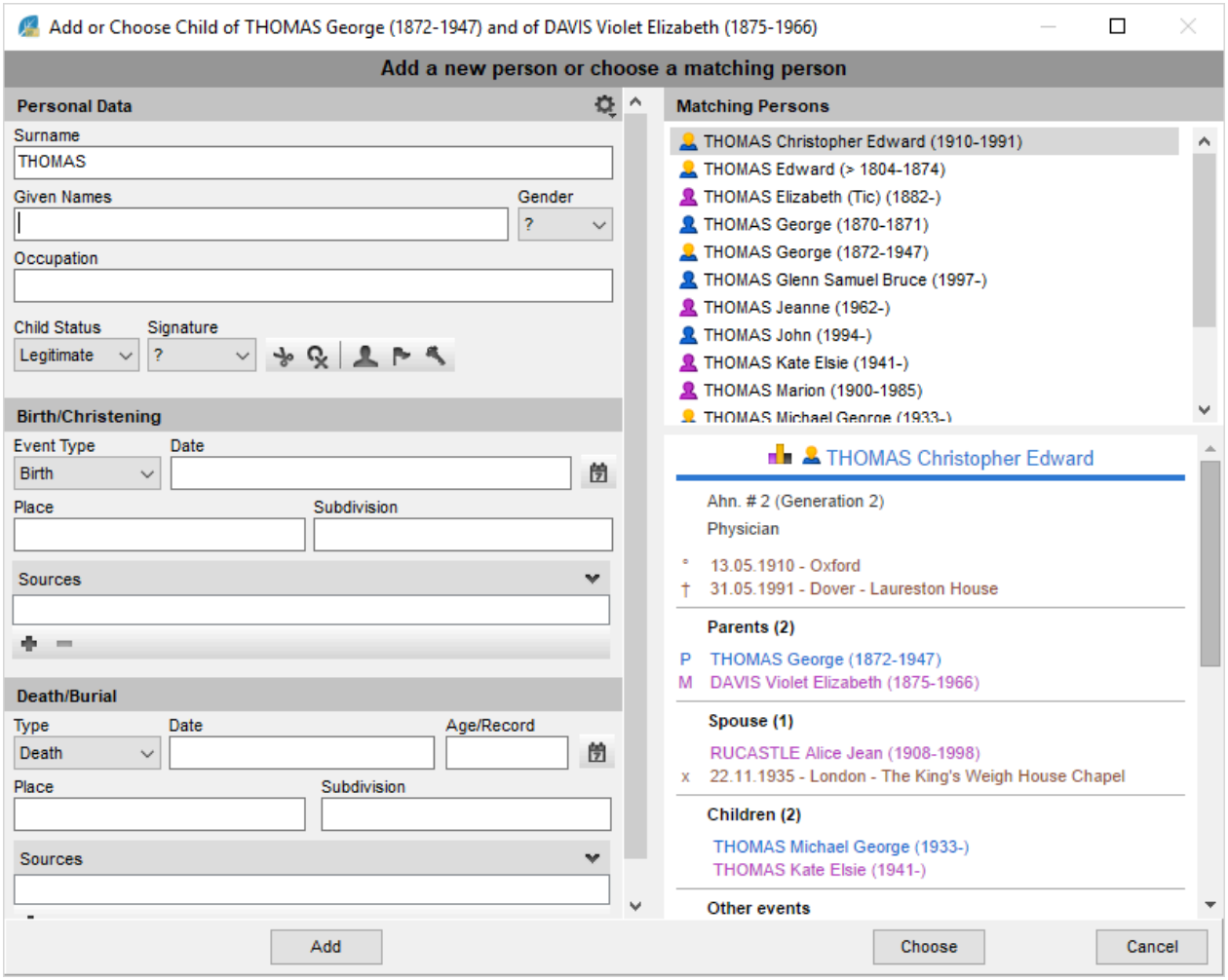
Add a new person

All tabs

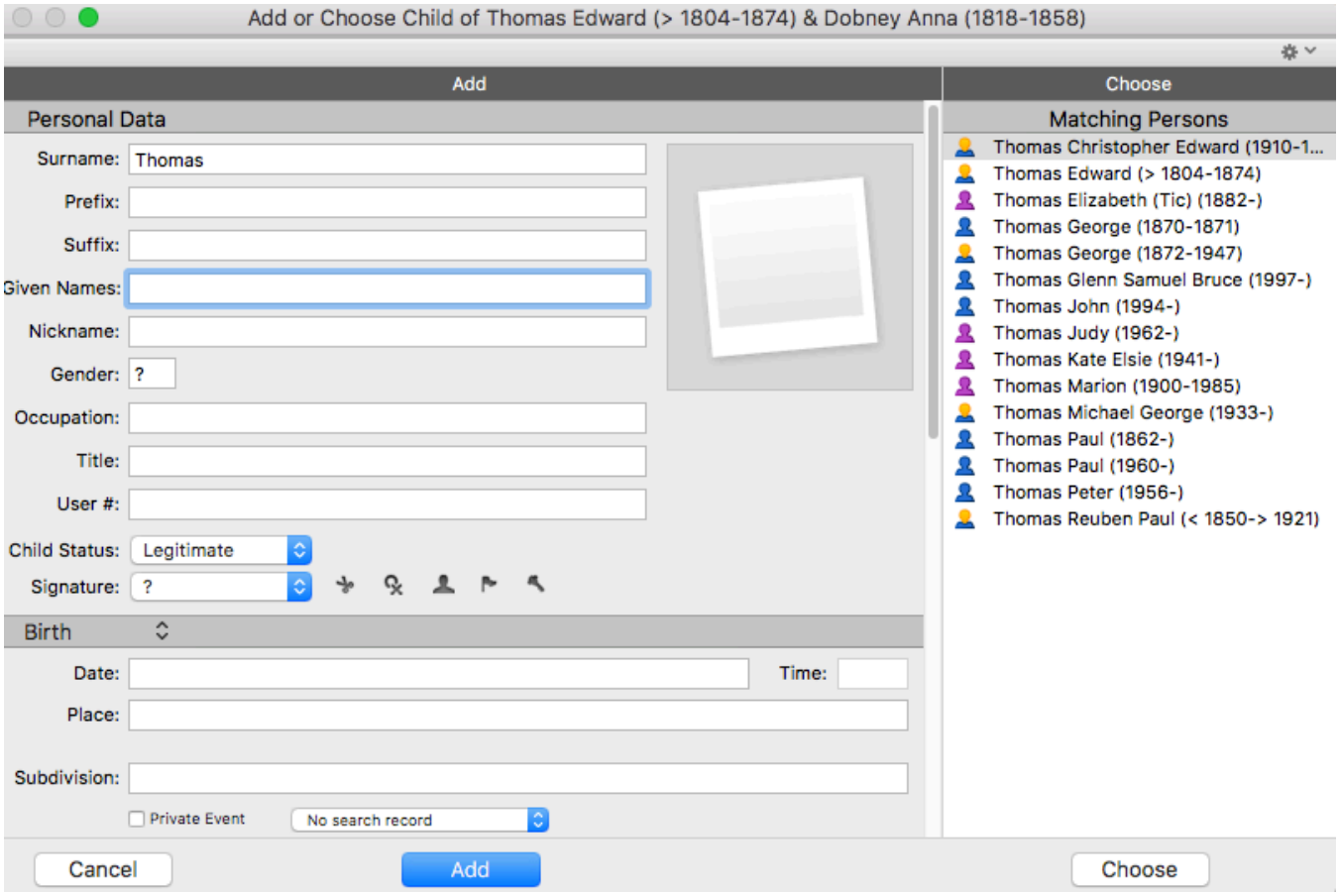
- Place the person to whom you want to add a child as the primary person. Select the other parent.
- Create the link.
  - Click **Add Child** in the display screen of the primary person in the **Immediate Family** tab.
  - Choose **Person > Add Child**.
  - Click the button on the toolbar and choose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

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

(Windows) Add a Child



(Mac) Add a Child



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

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

Family Group Data tab

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

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

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

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

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

Link an existing person

During data entry

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

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

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

Drag and drop

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

Order of children

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

Change the order of children

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

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

Windows – Let Heredis determine the order

You may cancel a manual order change of children if you have made mistakes or entered new

dates. To do this, right-click the list of children and choose **Order of Children**, then tick the box **Leave Heredis to determine the order/ Let Heredis determine the order.**

Mac – To change the order again

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

Unlink a child and his/her parents

All tabs

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

Family Group Data tab

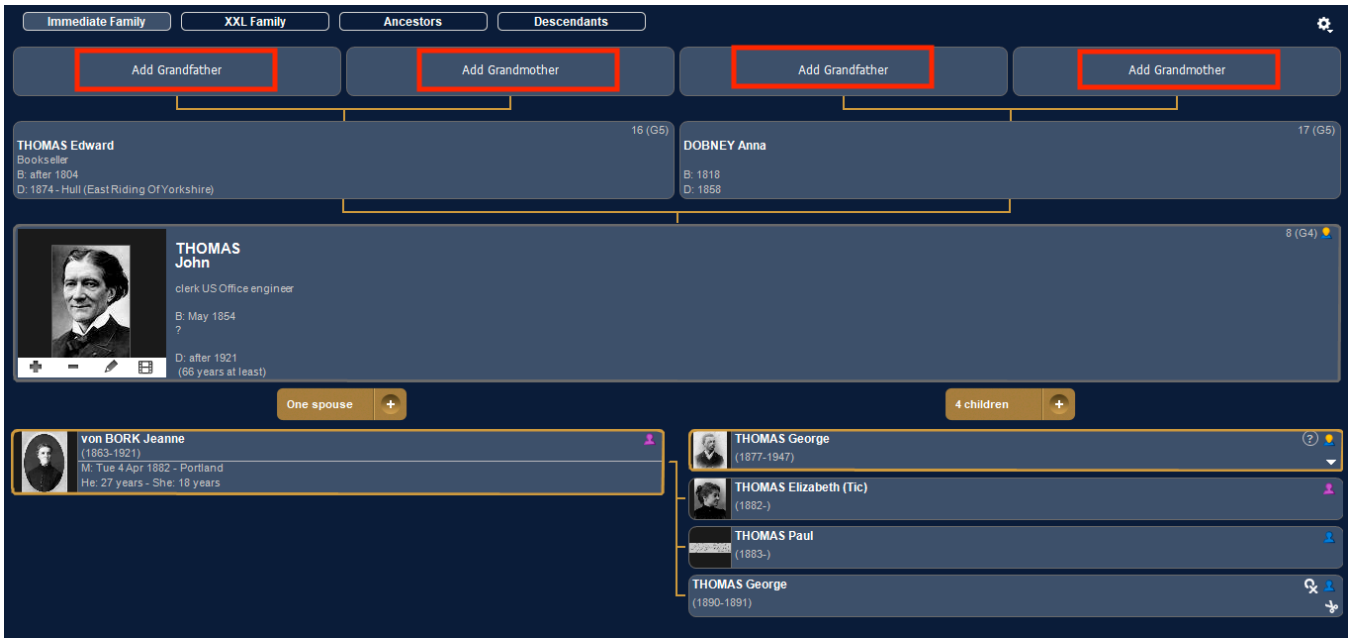
- Select the child to be unlinked from the **Children** fields.
- Click the − button at the bottom of the field, and choose **Unlink Child**.

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

Add persons

Add a person in general

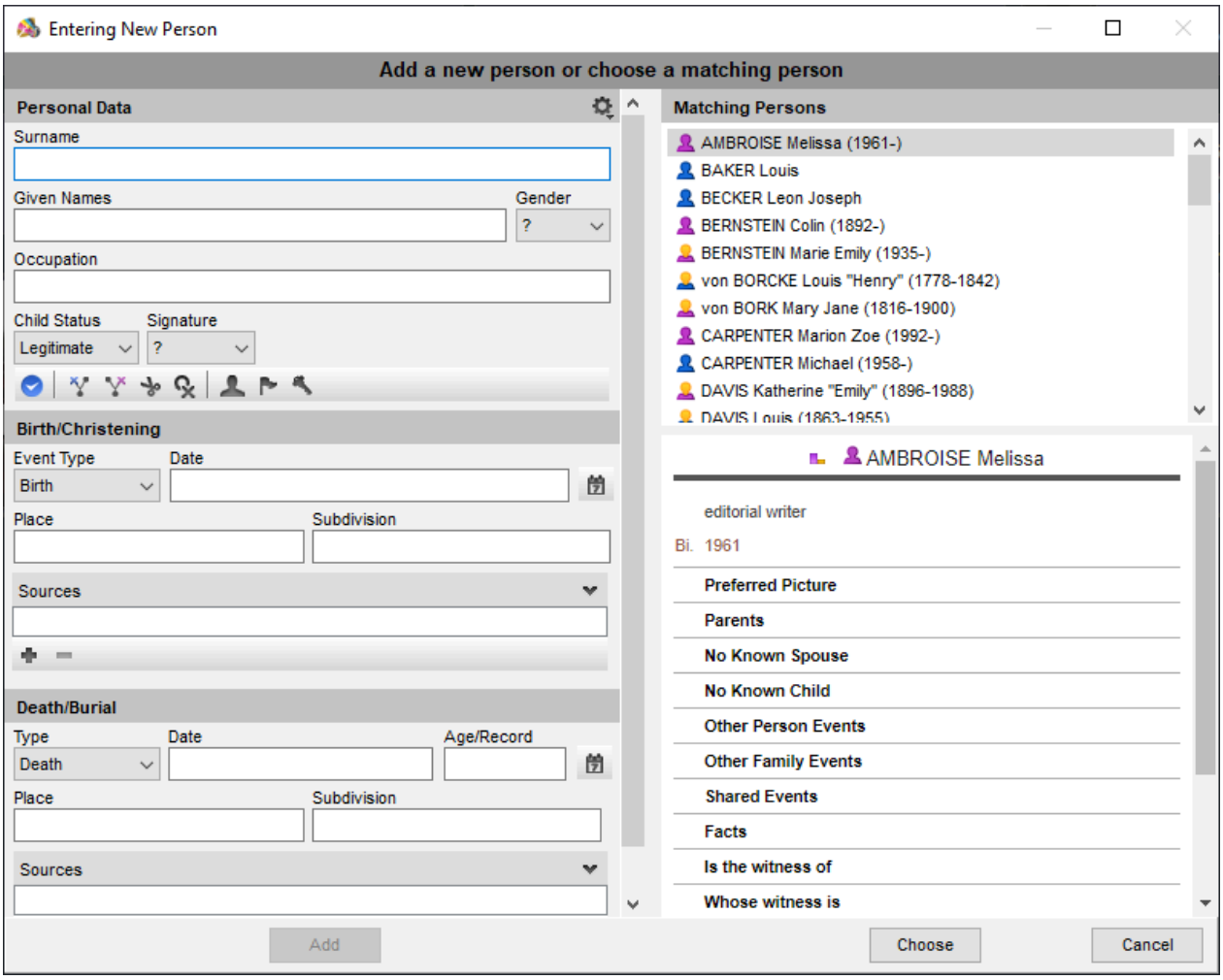
A click in the **Immediate Family** is enough to create the father, mother, spouses, children and even grandparents.



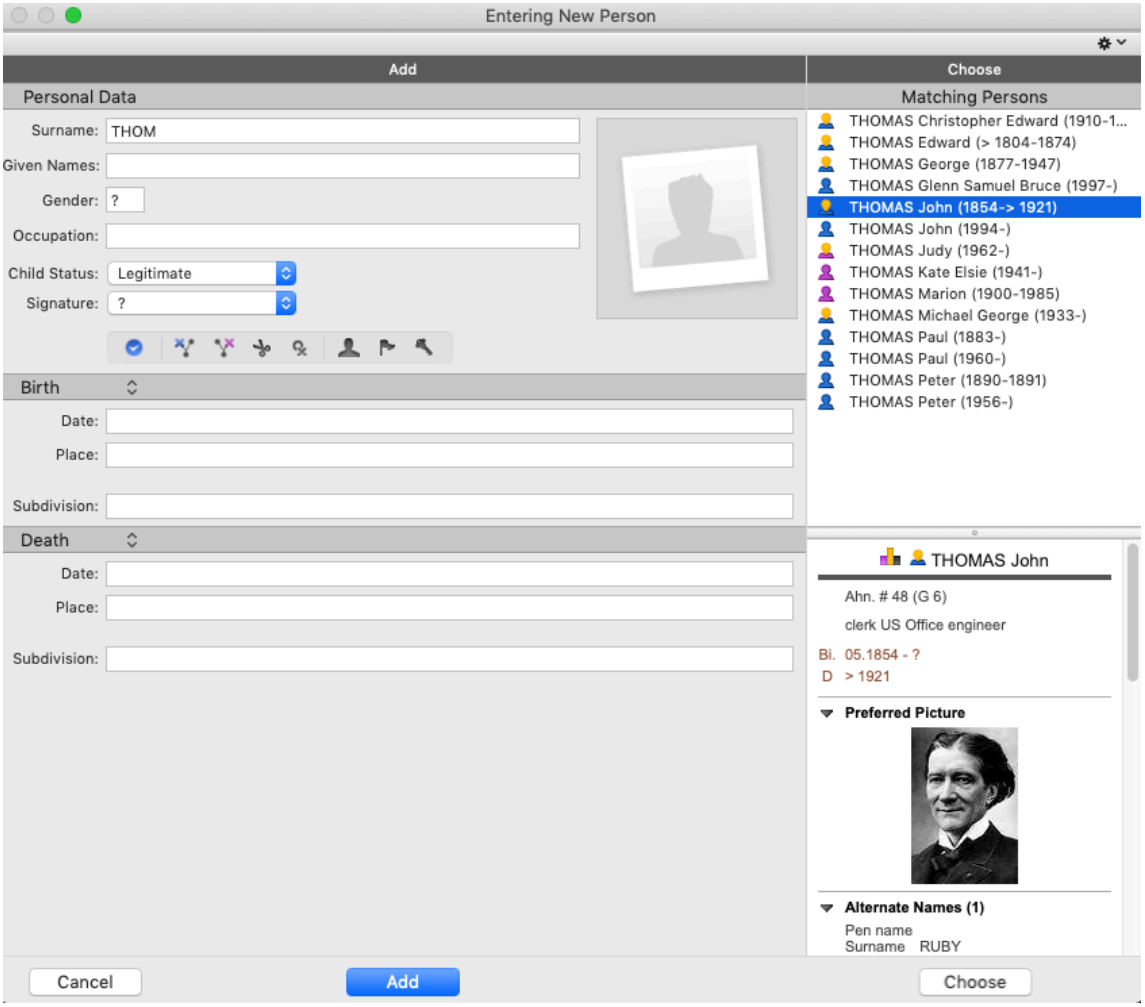
The family is simply growing.
A new person's input screen displays the most common information. Enter the name and first name to begin with. They get in shape automatically.
As you input, you'll see a list of persons with the same name and first name appear in the right side of the screen. Heredis does everything to prevent you from creating duplicates. Check the matching persons' list on the right and take a look at the summary of the selected person. If you think you've spotted the person you want to add, don't keep imputing, but select it from the list and click **Choose** .

See also Add Parents (see page 141), Add Children (see page 172) and Add spouses (see page 164).

(Windows) Enter a new person



(Mac) Enter a new person



For more information on duplicates, see Find duplicates (see page 324) and Merging Two Persons (see page 330).

If no one in the list of matching persons matches, continue filling in the fields.
Dates are displayed in full regardless of the entry format. Most locations in Western Europe or North America are proposed while inputting. Select the location with the **Enter** button or create a new location.

See also Heredis' Preferences/Choose the recognized places (see page 107), Dates (see page 219) and Places Index (see page 472).

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

You can also work with other tabs in the method that suits you. Add parents in **Ancestors** tab,or other family members in **Family Group Data** tab and **XXL Family** tab. See also Add Parents (see page 141). Complete or modify known information in **Personal Data** tab.

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

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

Add a person with no direct connection

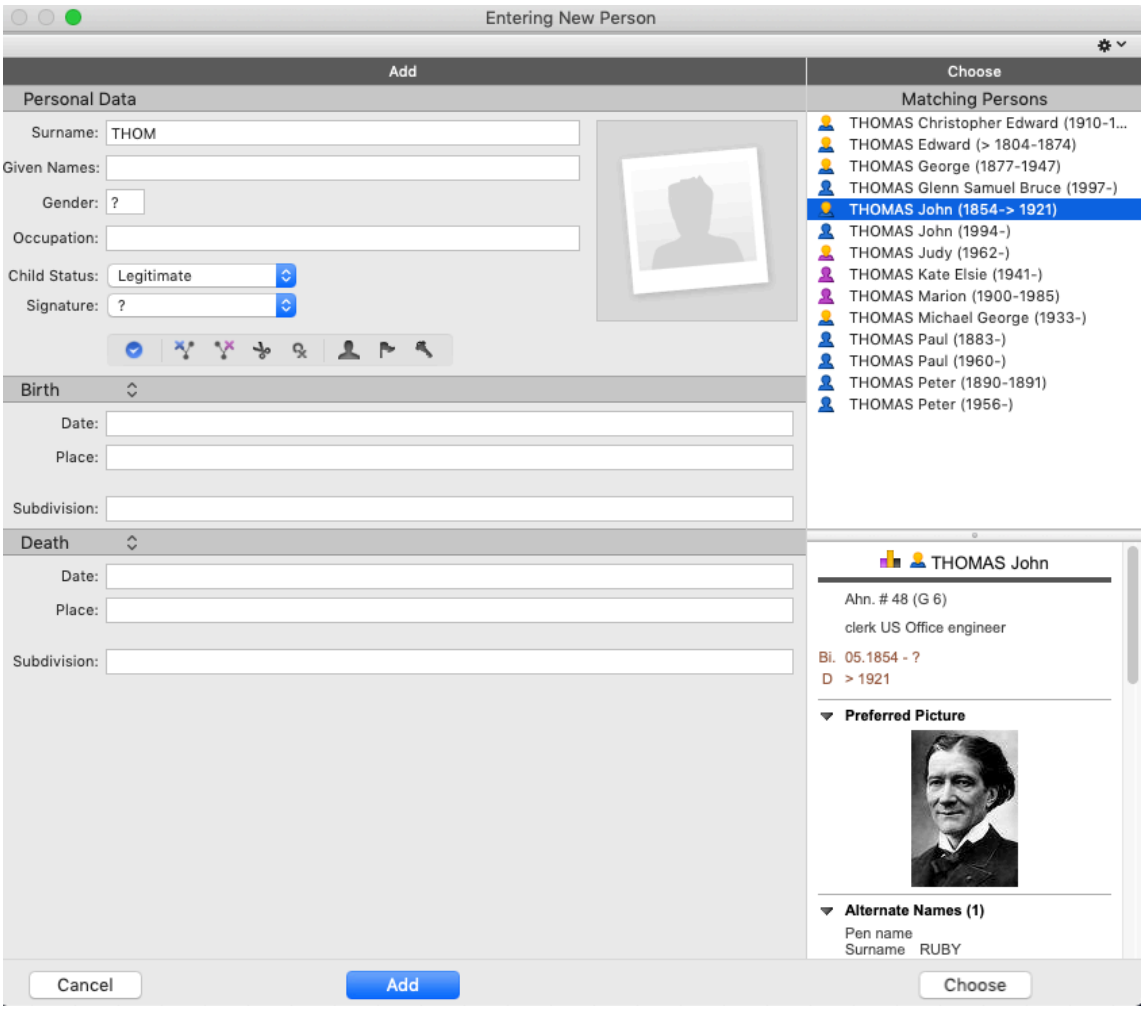
Each person in the genealogical file may be linked to other people by kinship, as a witness to an event, or as a related person in another way.

Check out Add other linked persons (see page 239) to find out all about Heredis' other links.

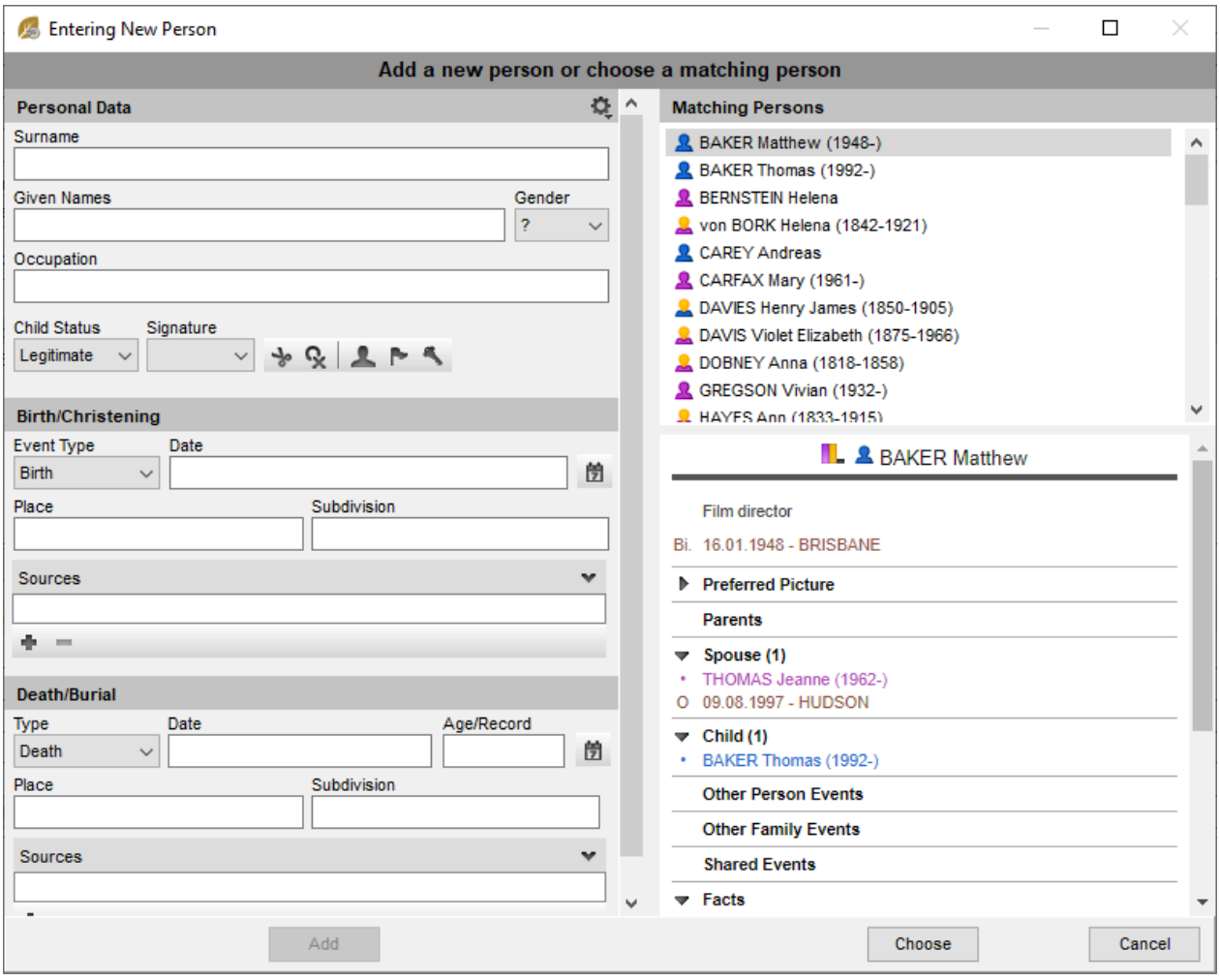
Heredis allows you to attach an existing person to the genealogical file or create a new person with their kinship.

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

(Mac) Entering New Person



(Windows) Entering New Person



Select a person from the list and see their summary. It allows you to better compare the different persons found.
If it turns out that the individual you want to add already exists, use the person already created by clicking **Choose.**
If you don't detect duplicates, you can then create a new person by completing the other input topics and then click **Create.**

Automatic filling of fields

Heredis provides databases of thousands of given names and occupations. On the other hand, Heredis memorizes the information you have already entered, field by field.
Type in the first letters: immediately appears the list of data already saved that may match your input.
Continue with new letters, the list is becomes thiner.
Use the arrow buttons on the keyboard to select the desired value, and validate with the **Enter** button or click on the chosen proposal with the mouse.
The auto-entry tool is available in all input fields, with the exception of notes and comments.

Delete a person

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

Info – The root person of the file, meaning the person with the Ahnentafel (see page 44) number 1, cannot be deleted. To remove this person, you must first reallocate the number 1 to another person.

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

For more details, check out the articles Add Parents, (see page 141) Add Children, (see page 172) Add Spouses, (see page 164) Add Witnesses and Participants, (see page 233) Sundry Links.

Add an unrelated person

When you want to create a new person without it being attached to the family displayed:
Select the **Person menu- Add – Unrelated Person.**
or click the button and then the button in the toolbar.

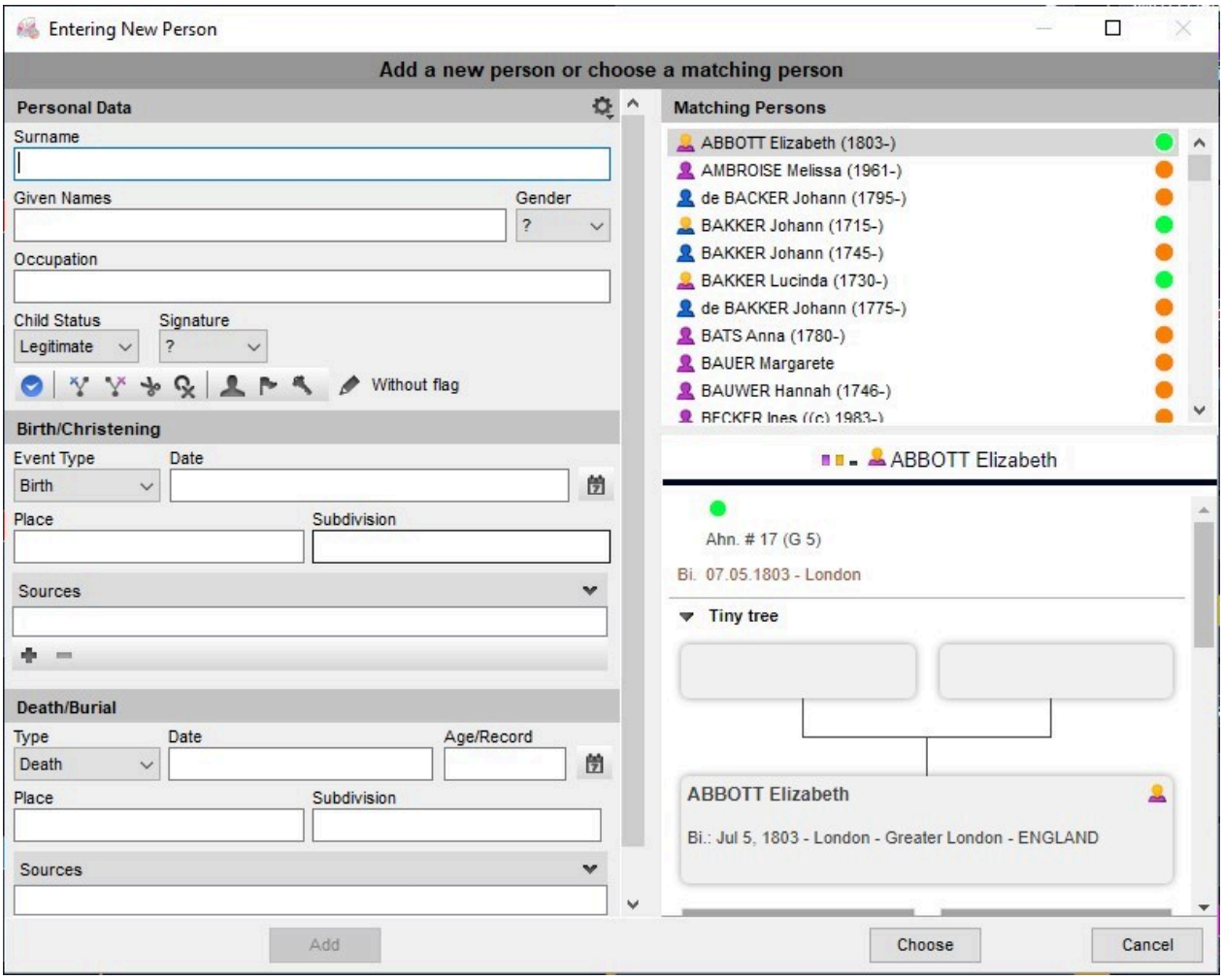
Type in his surname and given names.
Make sure the new person to be created doesn't already exist in your file by looking at the list of matching persons in your file and the summary of any homonym. You can click on a person in the list of matching persons to see the information about him/her in the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

Once the person has been identified, select him/her with a simple click and then click the **Choose** or double-click on his/her name in the list displayed.
He/She then appears as the primary person of a new **Family** screen.

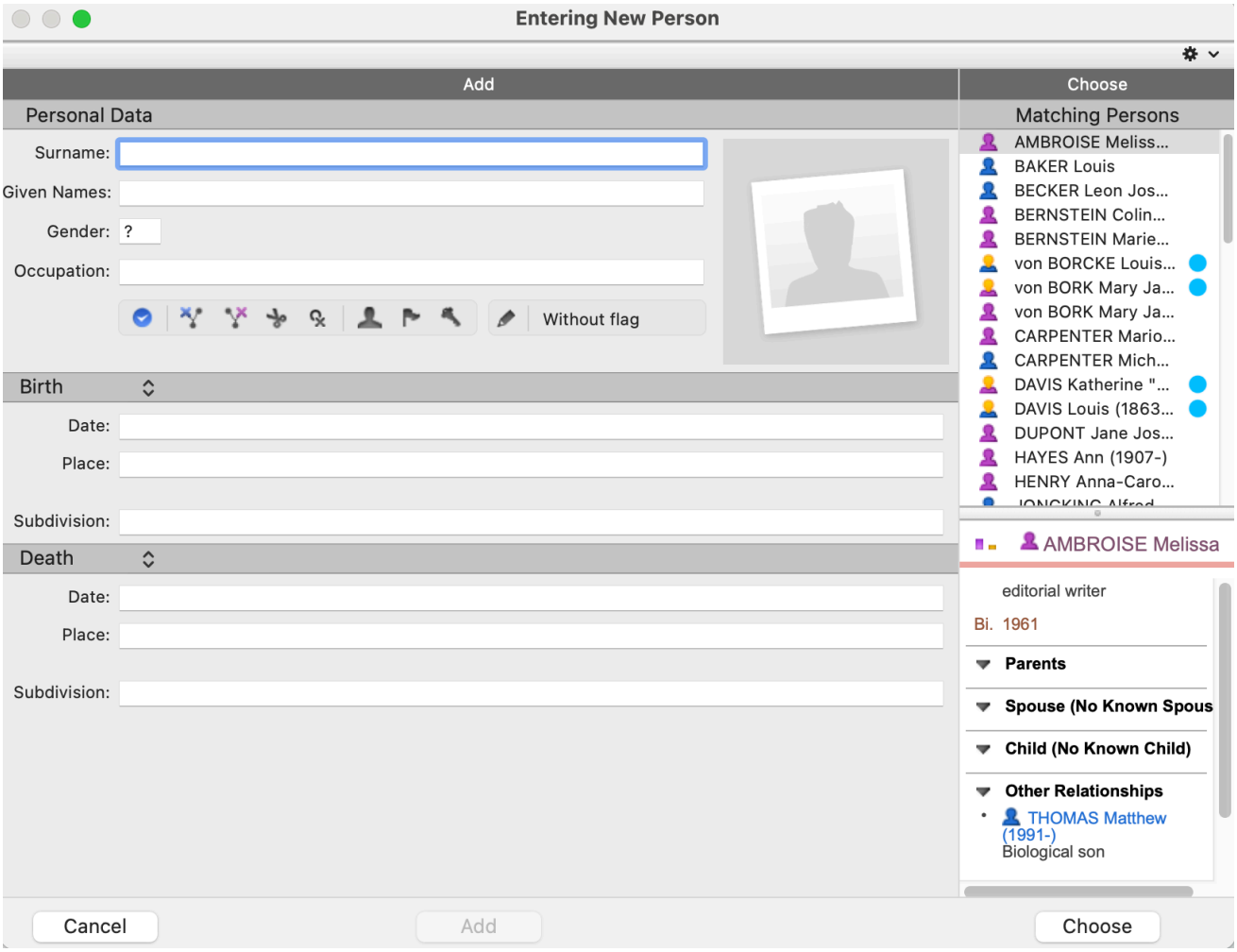
If the new person is not on the list of matching persons, continue to fill the entry window with the information you have and click the **Add** button.

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

(Windows) Add an unrelated person



(Mac) Add an unrelated person



Starting with Heredis 2025, you can also add personalized flags while creating a person. See the article Personalized flags (see page 188).

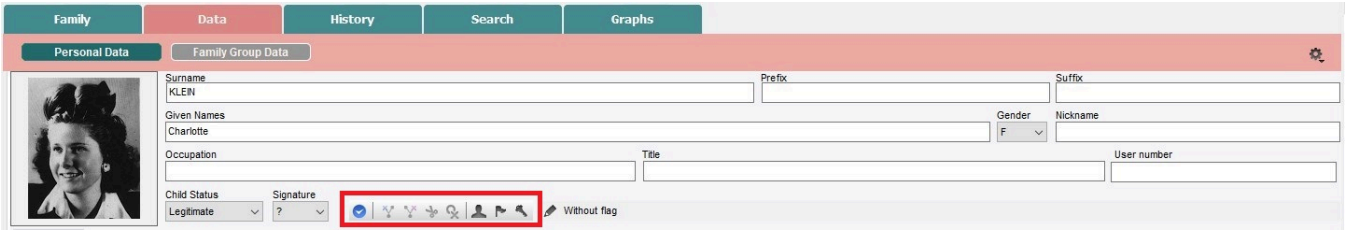
Flags suggested by Heredis

There are several types of flags.

- Flags suggested by Heredis to attach information to a person
- Personalized flags to attach information to a person, an event, a fact or a media.

Flags suggested by Heredis are clickable icons, corresponding to characteristics of the person. They allow you to enter other information useful to your genealogy.

These flags cannot be modified.



A click on the icon activates it, a second click deactivates it.

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

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

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

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

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

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

Secondary Person 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. You may, for example, declare secondary all children who died in infancy so that they are not in your tree charts.

Marked Person icon to highlight a person 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 icon to avoid publishing information on this person in your printouts, exports and publications.

See Personalized flags (see page 188) for all you need to know about the second type of flags.

Personalized flags

Flags allow you to attach a visual marker to a person, or an information to an event, a fact, or even to a media.

There are several types of flags:

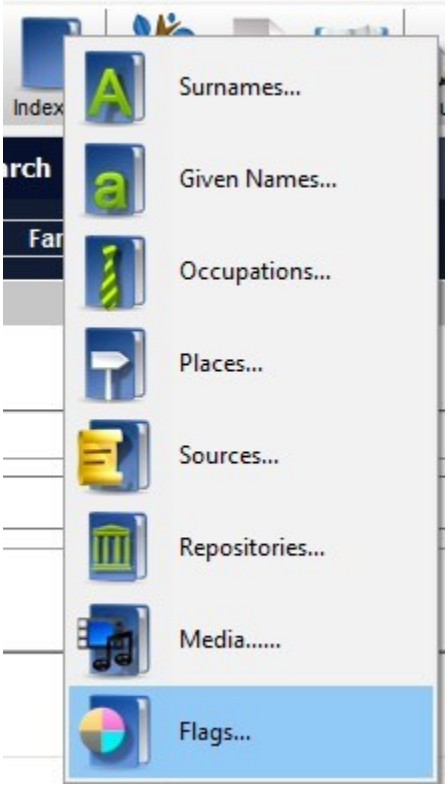
- Flags suggested by Heredis (see page 186) – please see related article.
- Personalized flags.

Create a flag

There are several ways to go about creating a flag.

From the Flags Index:

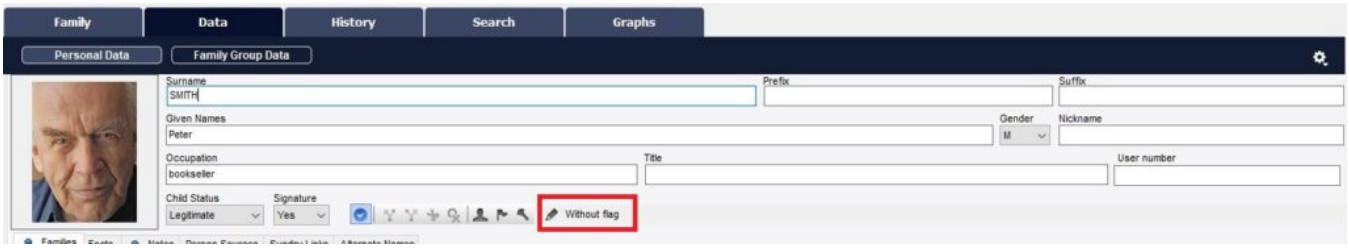
- Click on the **Tools** pull-down menu **> Flags Index** or use the **Indexes** button **> Flags Index** in the toolbar.



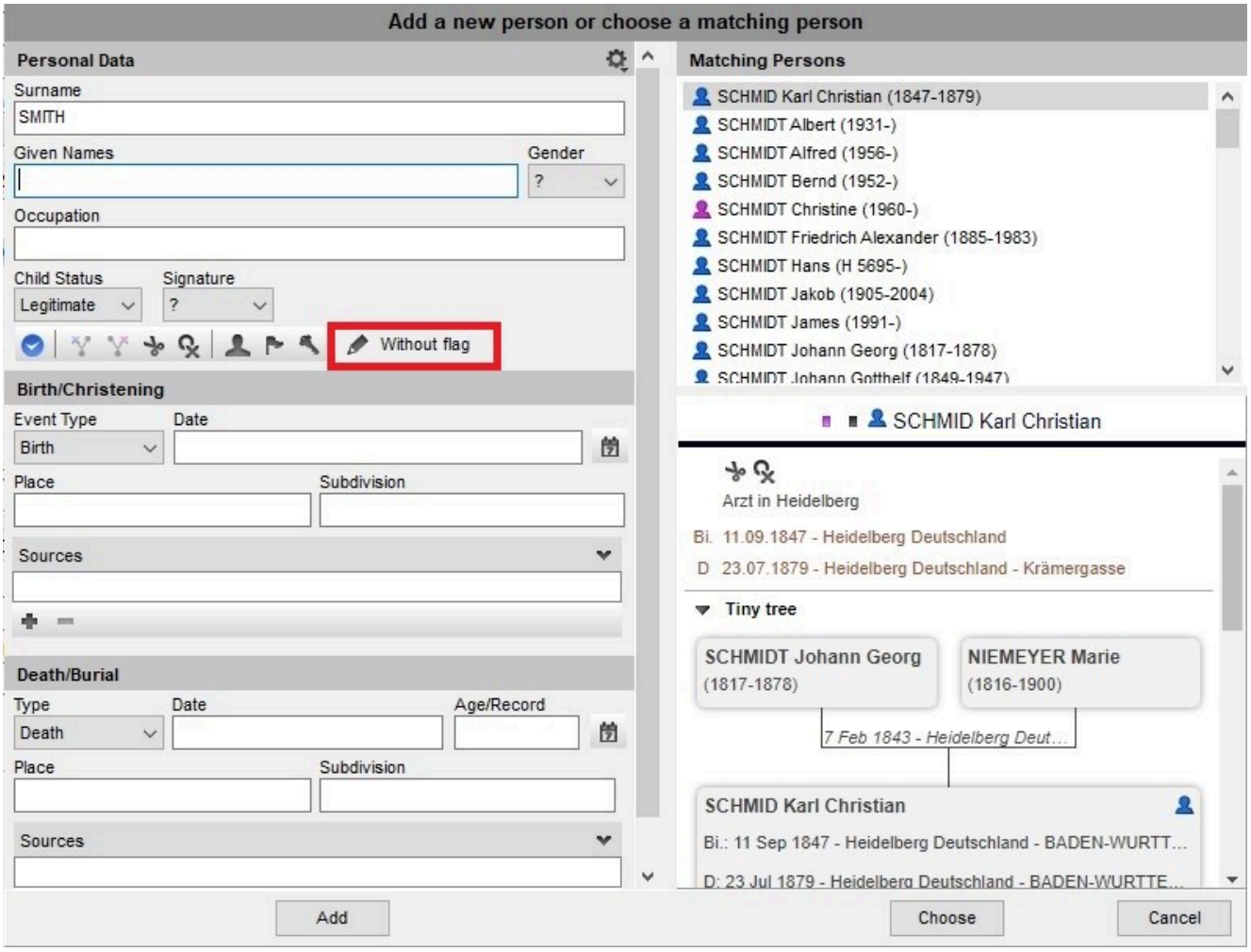
From the **Data > Personal Data** or **Family Group Data** or even from a new person's input screen:

- Click on the pencil located to the right of the Heredis flags buttons

Personal Data



New Person input screen



- Click on **Flags Index** then on the ✚ sign to create a flag.
- Enter a name for your flag.
- If necessary, under **Description**, specify the purpose of this flag.
- Click on the color box to select the color of your choice.
- Check the **Private flag** box if you don't want this flag to show in your Heredis/ GEDCOM exports.

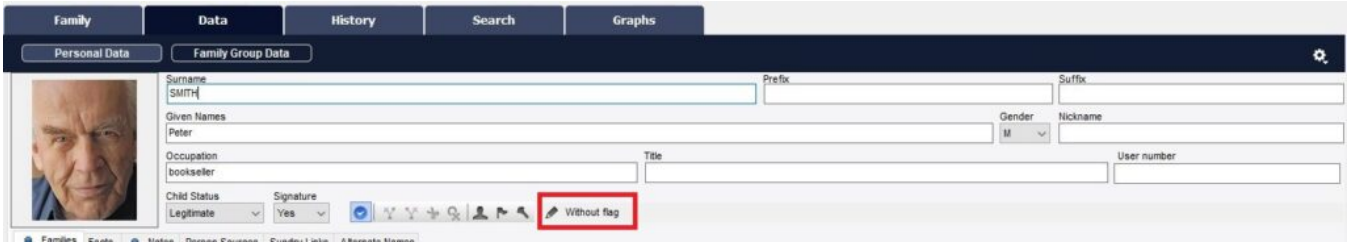
Add flags

One at a time

To a person

You can add them to a person under the Data tab.

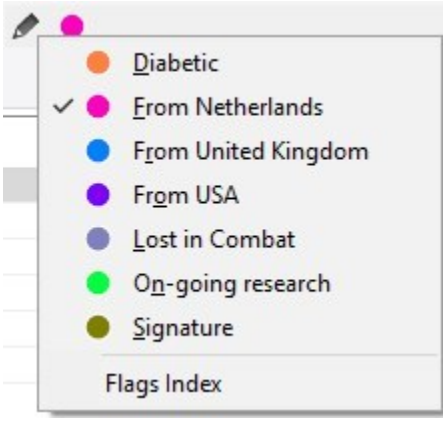
- Click on the pencil in the person's identification area.



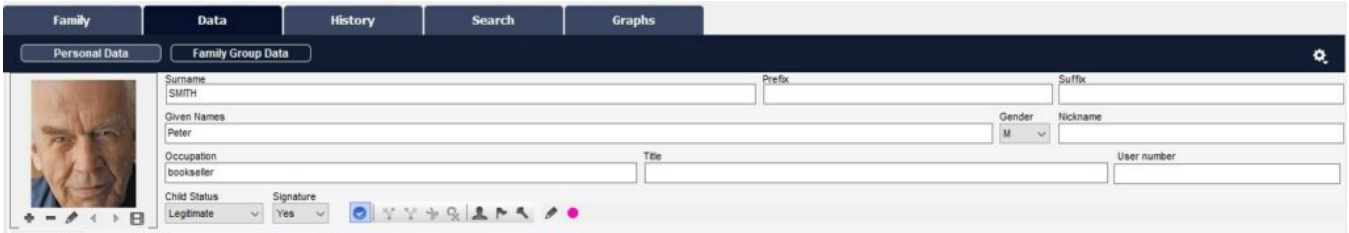
- Select one of the pre-existing flags.

Note: if the flag you need doesn't exist, then follow the directions to create a flag, as described above.

- A check mark indicates that the flag is attached to the person. For instance, in the screenshot below, you can see the flag entitled "From Netherlands" has been assigned to this person.



Once a flag is selected, a colored dot will be displayed. Hover your mouse over the dot, without clicking, and read the tooltip to find out the meaning of the flag.

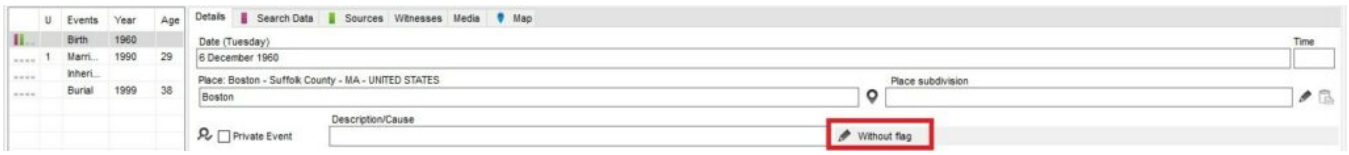


A person's flags are displayed :

- in the Immediate Family, XXL Family, and Ancestors views (under the Family tab),
- in all the wheels under the Graphs tab,
- in the Persons panel,
- in the list of Matching persons when you add a person,
- in the summary of a selected person,
- and in Isolated Branches.

To an event

- Click on the pencil in the event and select a pre-existing flag.



- Select one of the pre-existing flags.

Note: if the flag you need doesn't exist, then follow the directions to create a flag, as described above.

- A check mark indicates that the flag is attached to the event.

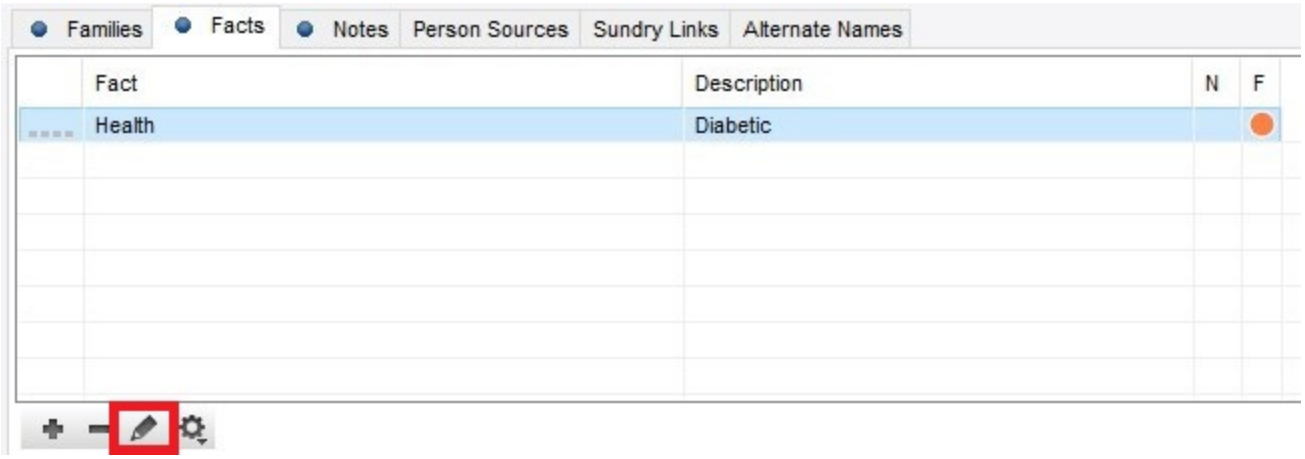
Events flags are displayed in the event selected (under the **Data tab > Personal Data**), as well as in the summary of an event selected in the Smart Search and if you click on the event in a person's summary.

To a fact

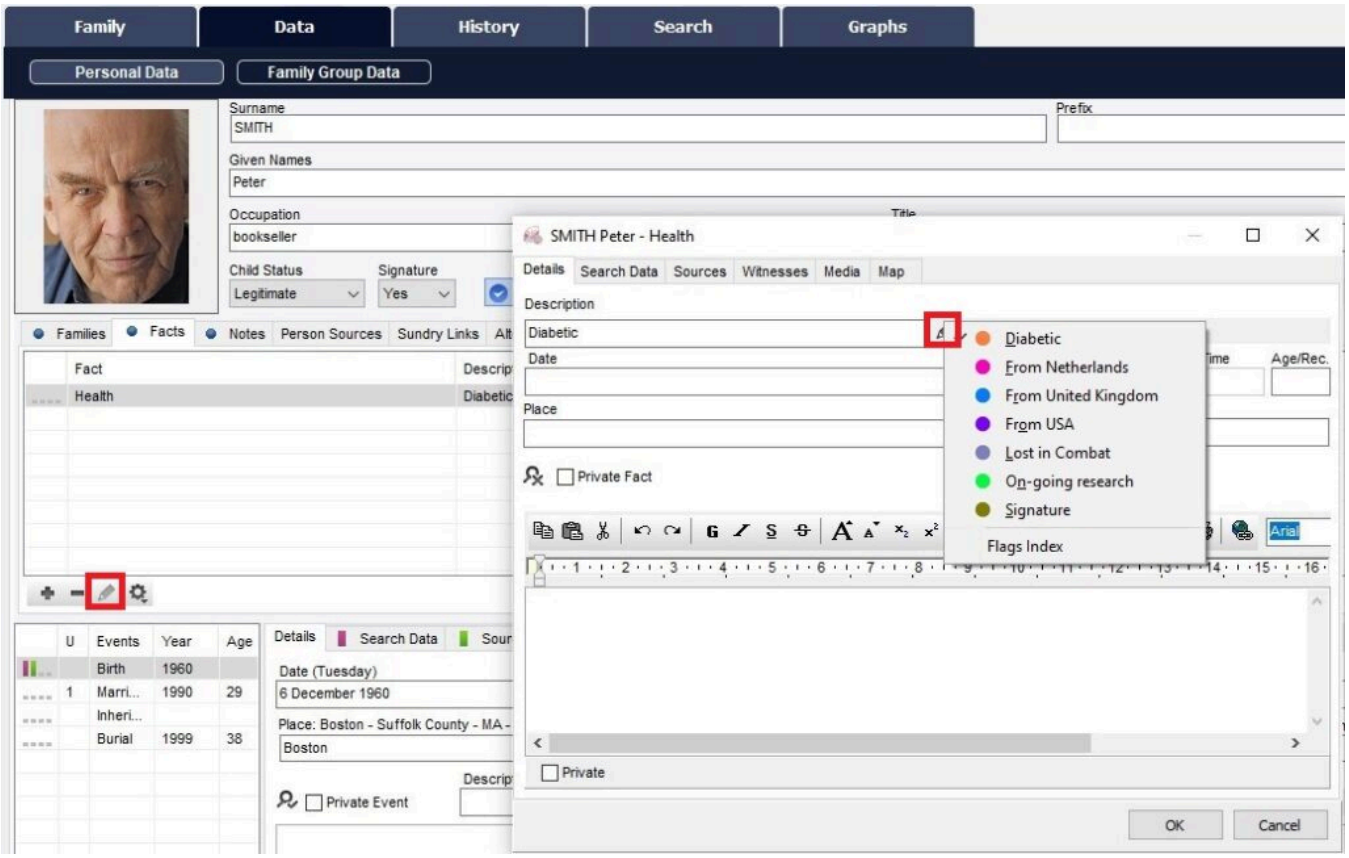
Flags can also be attached to facts.

To be able to do so, you'll need to modify the fact:

- Select the fact to which you wish to attach a flag
- Click on the pencil to edit the fact



- A window pops open, click on the add/unlink a flag pencil.



- Select one of the pre-existing flags.

Note: if the flag you need doesn't exist, then follow the directions to create a flag, as described above.

- A check mark indicates that the flag is attached to the fact.

Flags for facts are displayed under the **Data tab > Personal Data > Facts**, as well as in the summary of the selected fact.

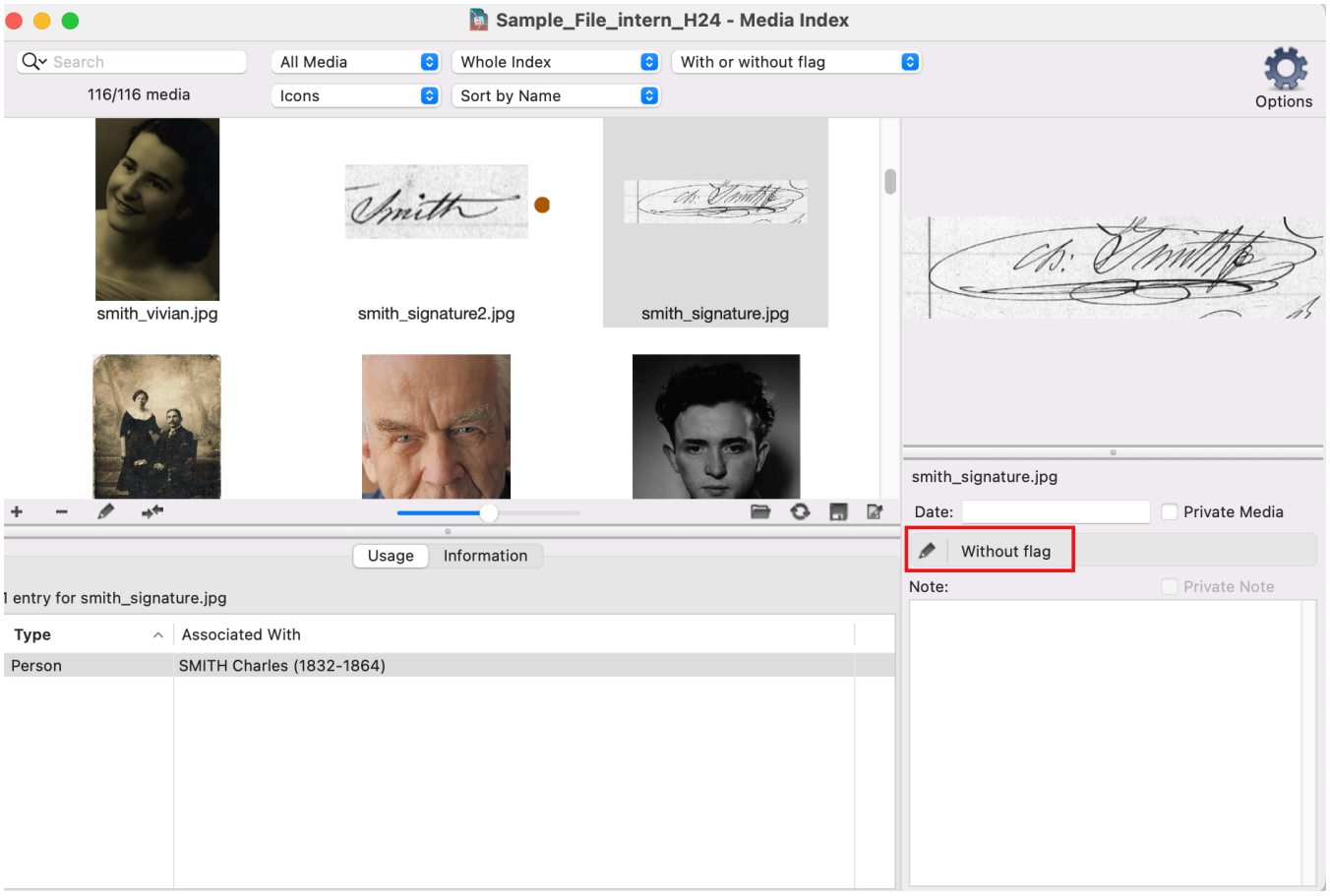
To a media

From the **Media Index** or from the **Media panel**, select the media to which you wish to add a flag.

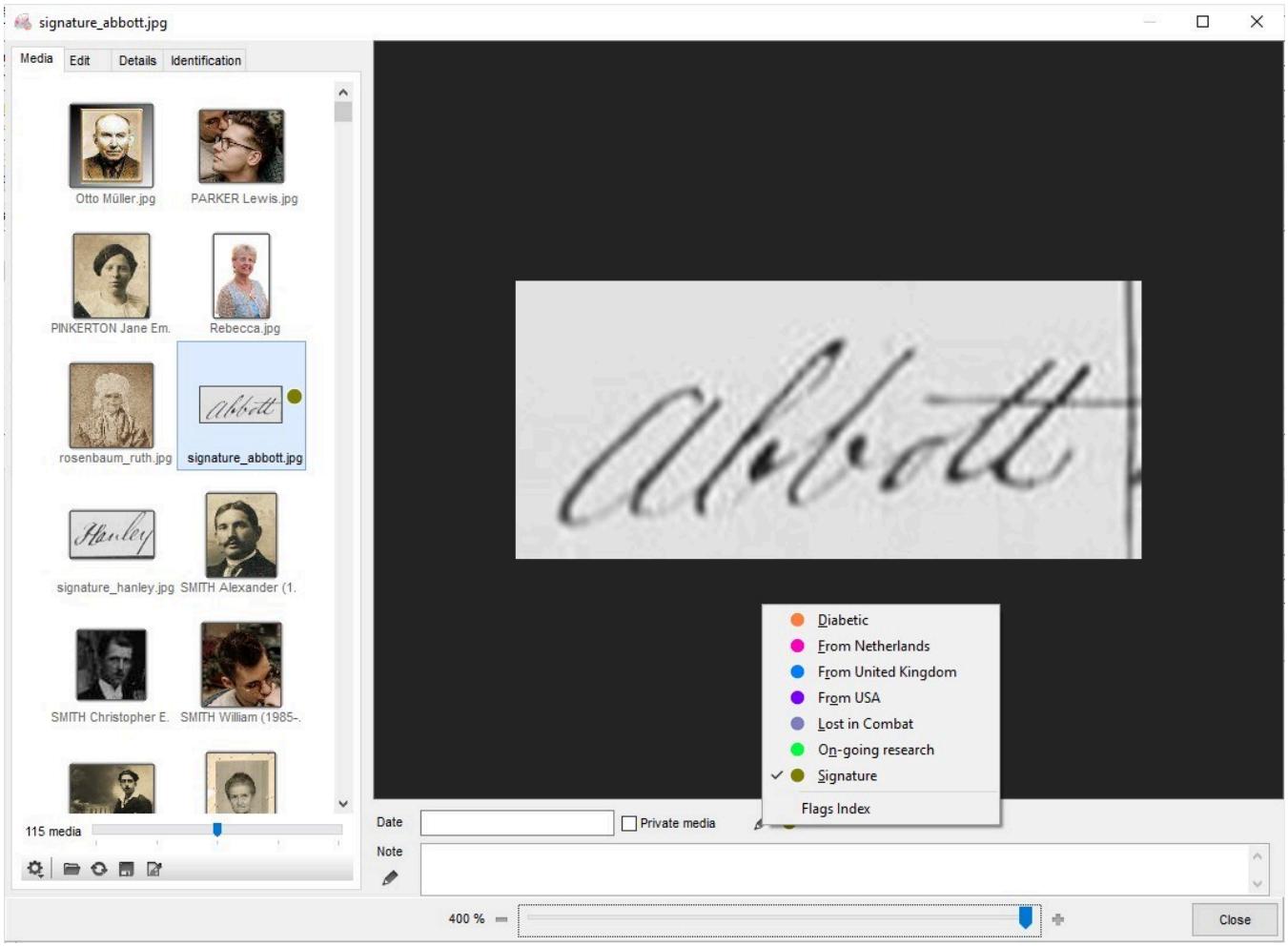
- Select the media from the **Media panel** or from the **Media Index**.
- Click on the pencil to be able to edit the media.
- Click on the add/unlink a flag pencil to select the flag.
- A check mark indicates that the flag is attached to the media.

Note: if the flag you need doesn't exist yet, then follow the directions to create a flag, as described above.

Mac Media Index



Windows Media Index



Media flags are displayed in the Media panel, in the Media Index (see page 422) and in Photo Tool (see page 540).

Add flags in batches

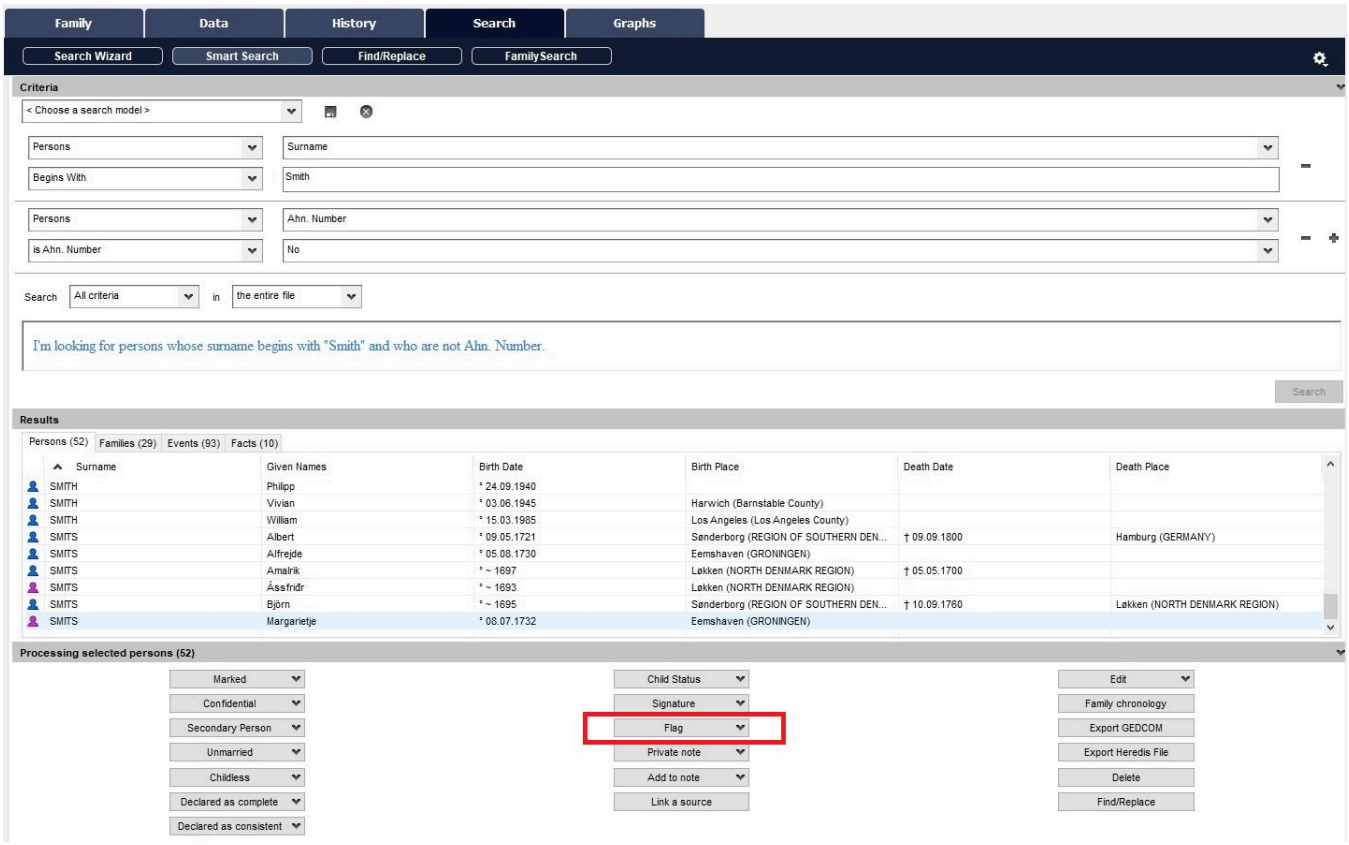
Use the **Smart Search** to add flags to several persons, events, or facts at the same time.

- Click on **Search > Smart Search**.
- Proceed with your desired search.
- Click on the **Flag** button **> Add >** Select your flag.

Here is an example : I am looking for all the Smiths who are not direct ancestors/descendants so I can assign to them a flag entitled “Smith Collateral Relatives”.

- I set up the search as such: Persons > Surname > Is Exactly > Smith + Persons > Ahn. Number > Is Ahn Number > No.
- I click on Search.
- Since I have registered variants for the Smith surname, Heredis includes those and displays them in the search results as well.

- In the **Processing selected persons** area, I click on the **Flag** button **> Add >** Smith Collateral Relatives.



Now you can proceed in the same way to add flags to persons, events, or facts. Just make sure to select the appropriate tab in the search **Results** area.

Unlink flags

The same way you added a flag, by clicking on the pencil in the person's identification area, in the event, fact, or media. (Please read the part entitled: Add Flags.)

Click on the flag to unlink it. The check mark disappears and the colored dot is no longer displayed.

You can also do a Smart Search and unlink flags in batches: either by using search criteria (as seen above), or by searching for all the data the flag you wish to unlink has been added to.

- Click on **Search > Smart Search.**
- As an example, enter the type of data (Persons, Events, or Facts) > Flag > Name > Is Equal to > select one of your flags. This way you'll be able to unlink this flag from all persons, events, or facts it's been added to.

- Select the appropriate tab (Persons, Events, or Fact) and check the results.

- Click on the **Flag** button **> Unlink >** select the flag you wish to unlink.

Please also see the following articles: Search for data linked to flags (see page 319) and Flags Index (see page 441).

Persons icons and their color coding

Each person present in Heredis is represented by an icon in the shape of a man.

In 👤 blue for men
In 👤 pink for women
In 👤 green for persons of the undetermined sex (e.g. stillborn child without specifying the gender)

You've probably noticed the icons 👤👤👤.
In addition to determining the gender of the person, the icon has a yellow head. This indicates that the person is part of the Ahnentafel lineage. He or she is therefore the direct ancestor of your root character.

Media

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

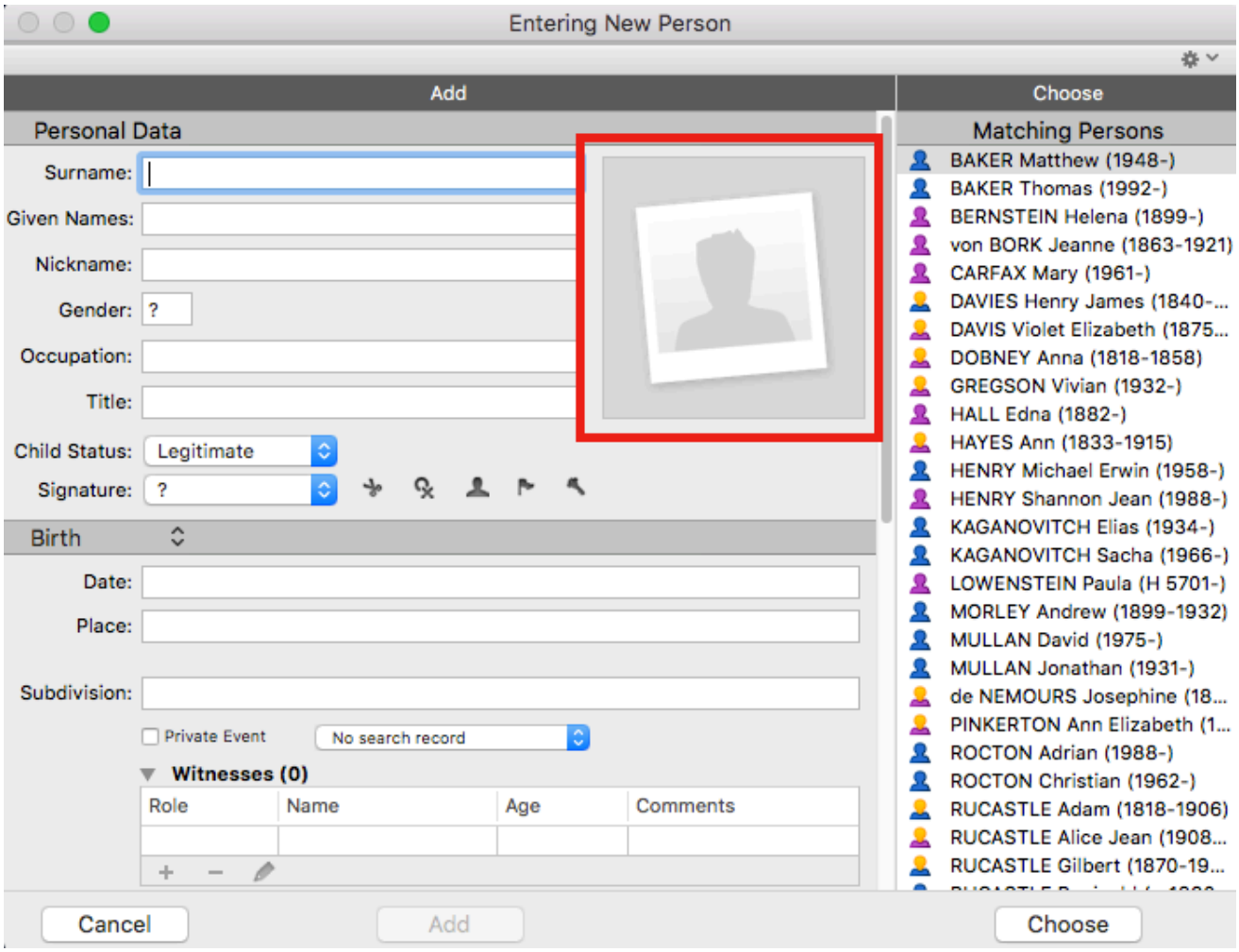
What data can be illustrated?

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

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

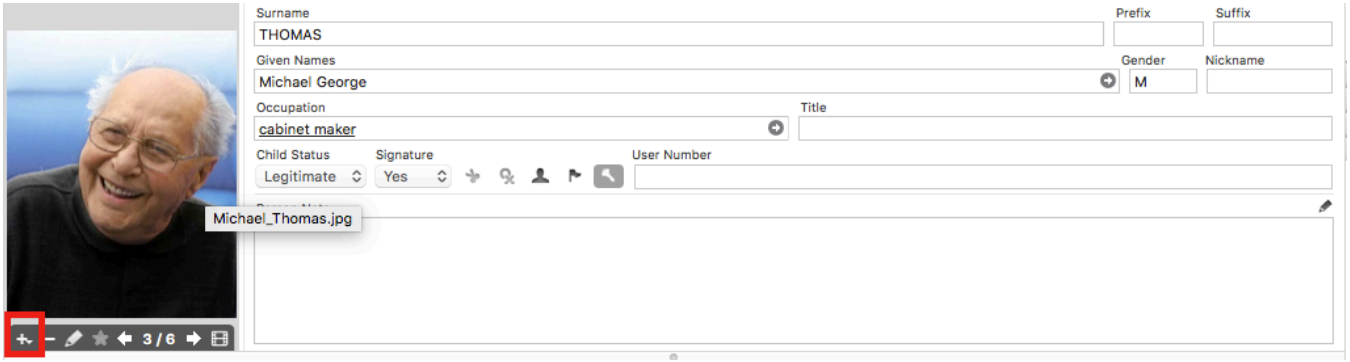
For example:

In the input data file



In the Immediate Family screen

In the Personal Data 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 and in the **Media Index**.
A date and/or a note may be added to the media if you edit it by double-clicking on it.

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

In the media of an event, a source or a quote, enlarge or reduce the media directly in the media area. You no longer need to double-click to zoom in. Zoom in or out with the mouse wheel, or the buttons (magnifying glass on Windows and zoom bar on Mac) under the media.

What media for your genealogy?

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

- Assign a text file created with your word processor and Heredis opens your word processor to read it.
- Assign a numbers document and either Excel or another spreadsheet program on your hard drive will open it to read it.
- Integrate PDF files. (**Windows**) Click on the **Open Document** link to open it with your PDF software.
  On Mac or Windows, you can directly view the different pages of the PDF in the person's summary area or in the media area for events and sources.
- A Heredis tree chart effectively illustrating a branch? Assign the tree chart file to your ancestor. This tree chart may be opened from the **Media** tab of the person displayed.

Note: files that are not image formats (.jpg, .jpeg, .png, etc.) will not be taken over when creating a document (Book, Sheets, etc.).
The more heavy media you have, the heavier the file will be. This can slow down Heredis.

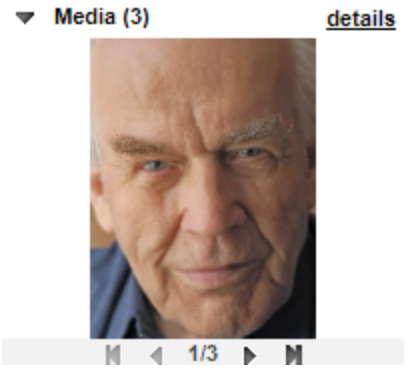
Main image of the person' profile

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

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

To choose your main media of the person:

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



Note: Since Heredis 2023, all profile media can be viewed in the summaries, use the arrows to view other available media.

Import media to your file

With the Media field buttons

In the Media display field for each data item:

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

Or, starting with Heredis 2025, drag the image from your Windows Explorer or Finder on a Mac and drop it into the slot reserved for adding media.

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

In the Media panel or in the Media Index

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

Or, starting with Heredis 2025, drag the image from the Media panel and drop it into the slot reserved for adding media.

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. See the Photo Tool (see page 540) article.

Photo Tool for Windows

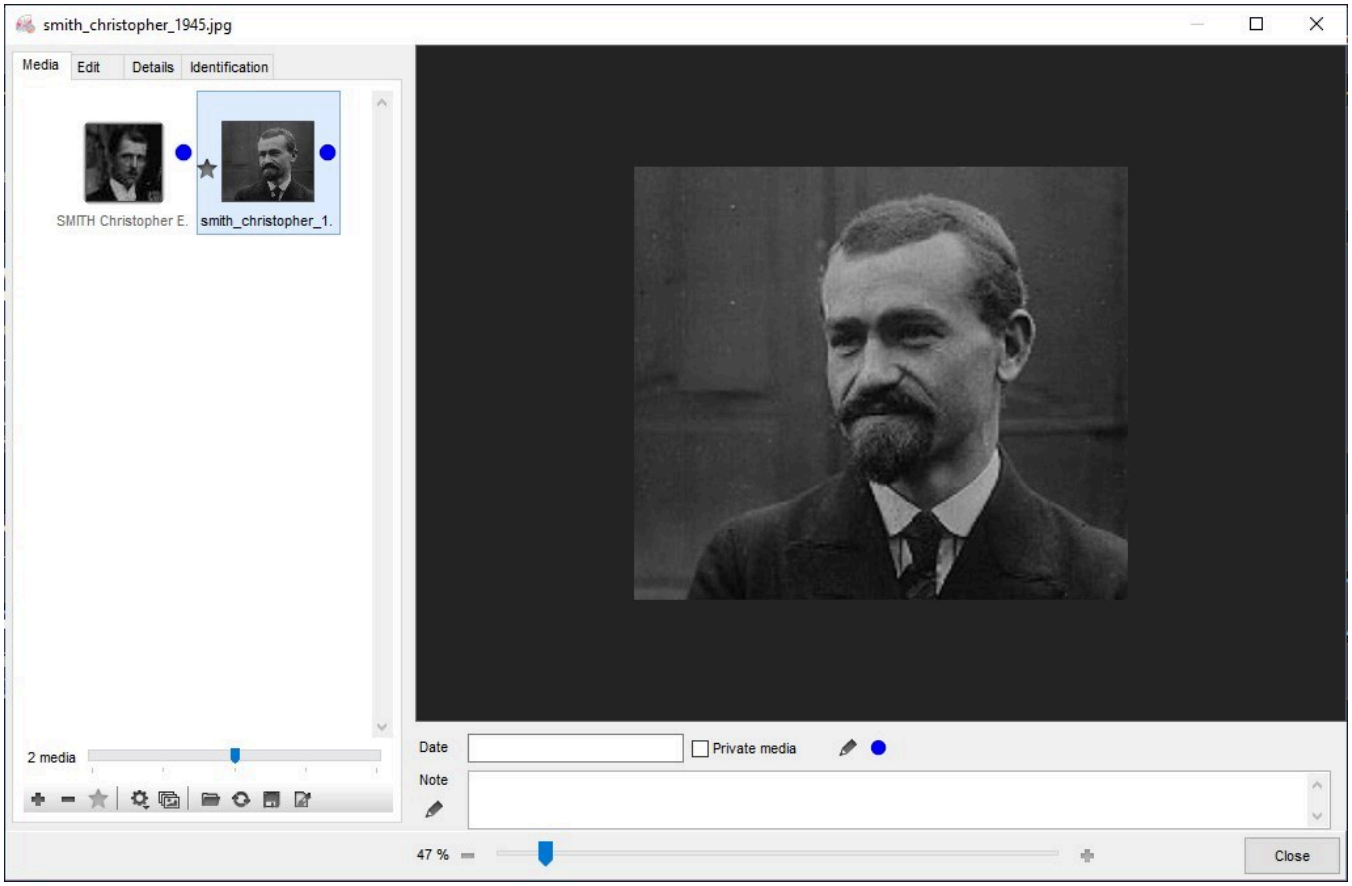
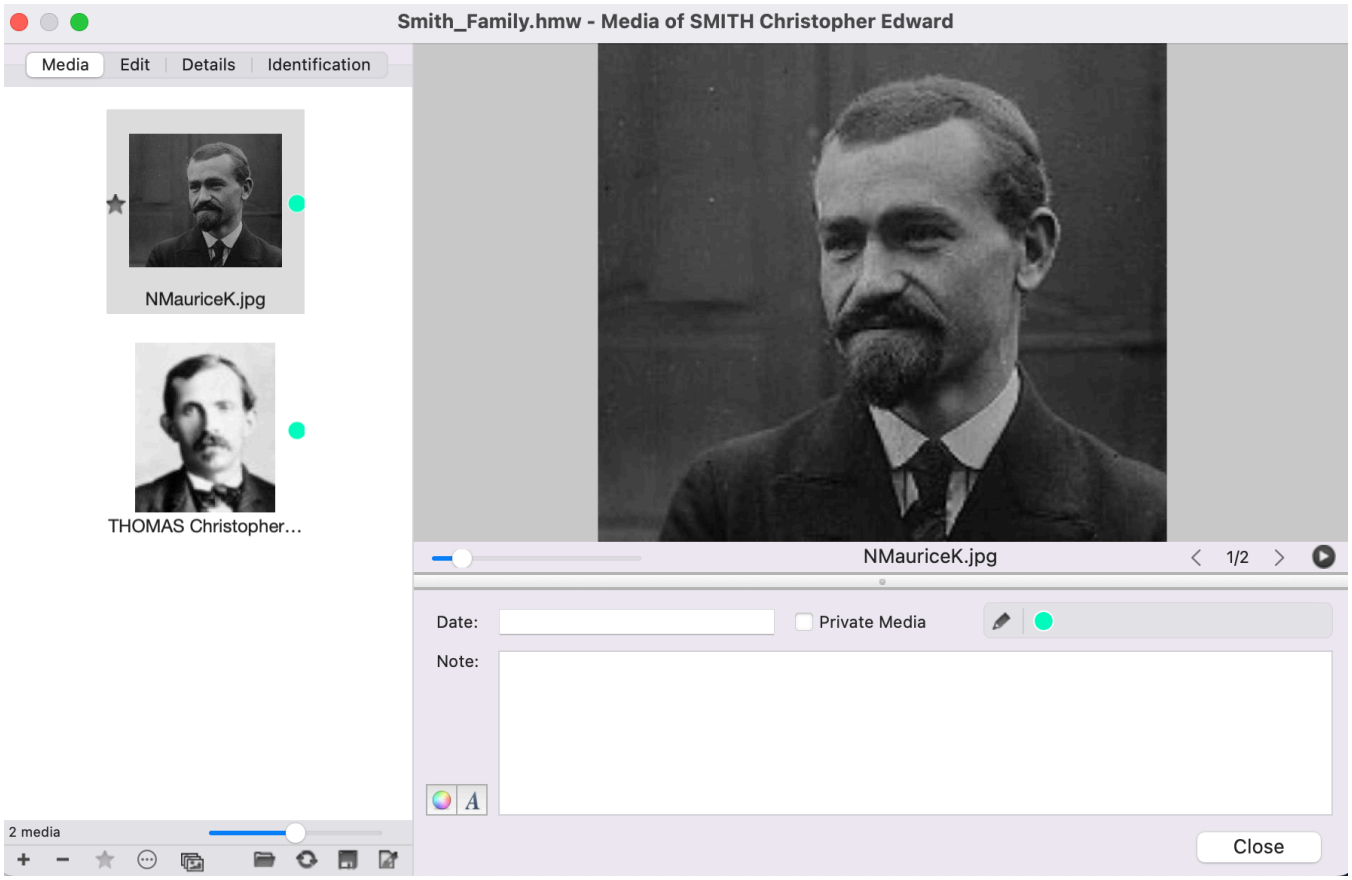


Photo Tool for Mac



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.

Add a Flag: Identify the type of media. For example, if it's a portrait photo or a signature, etc. See Personalized flags (see page 188) for more information.

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

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. See also Media Index > Searching for missing media (see page 422).

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 (Mac only) 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** (windows icon, mac 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 (see page 540).

PDF Media (Windows)

Since Heredis 2023, PDFs now display all pages in all media areas. A specific toolbar appears.

The first button allows you to display the pages one below the other. The + allows you to zoom in, and the – to zoom out.
The following buttons change the layout on the PDF screen.

The buttons allow you to change pages one by one or to go to the very beginning or to the very end.

PDF Media (Mac)

Arrows on either side of the number of pages can be used to change pages.

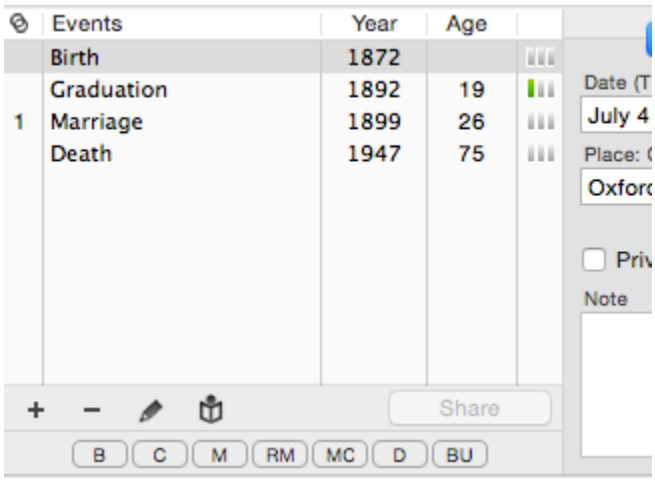
The PDFs that appear in the summary allow you to scroll through all pages one after the other, zoom in or out.

Input events

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

Add a person event

Add a person event



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

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

Add a family event

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

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

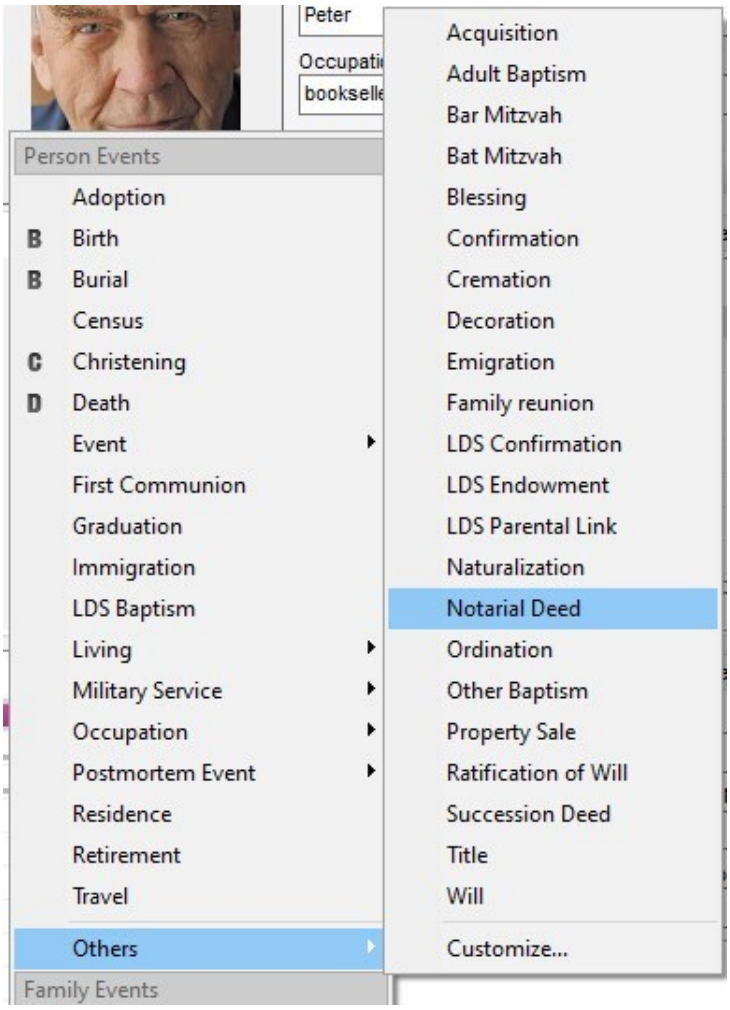
- Select the desired event, such as Engagement. Engagement is added to the list of events of the person.

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

Heredis 2025 introduces 2 new event types:

- **Notarial Deed**, available as a person or union event,
- **Succession Deed** available as a person event.
  Adding a Succession Deed event creates no inconsistencies, either for the person concerned or for the heirs with whom you can share the event.

If the event has never been used before, it can be found under **Other**.



If you can't find the event you're looking for, you can customize the events. See the article Create customized events not proposed by Heredis (see page 216).

Share a person event

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

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

It is possible no longer to share an event. With this operation, the event no longer to be shared remains associated with the primary person on the screen. Other participants become mere witnesses and the "unshared" event no longer appears in their list of events.
In the list of events for a person, the letter **S**, displayed in front of an event, indicates that this event is shared.

Info • the major person events Birth, Baptism, Union, Death and Burial are not shareable. The

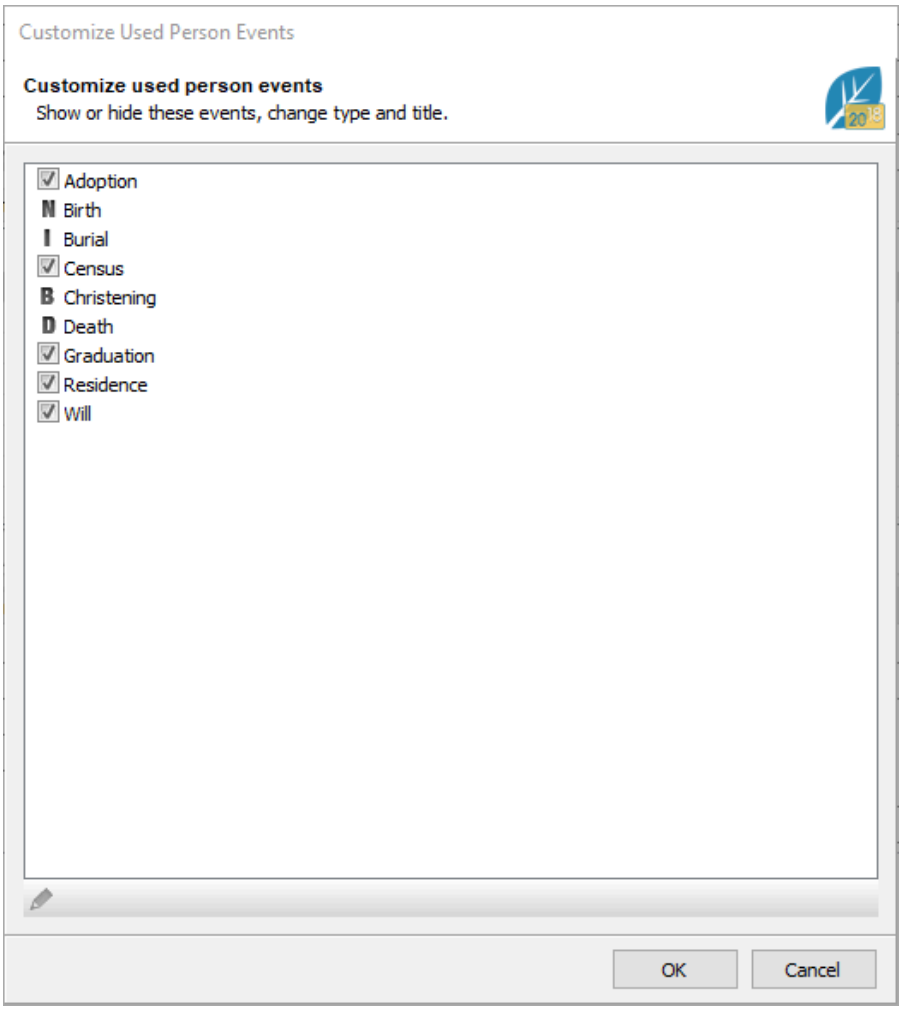
Domicile couple event is also shareable.

Customize the display of events

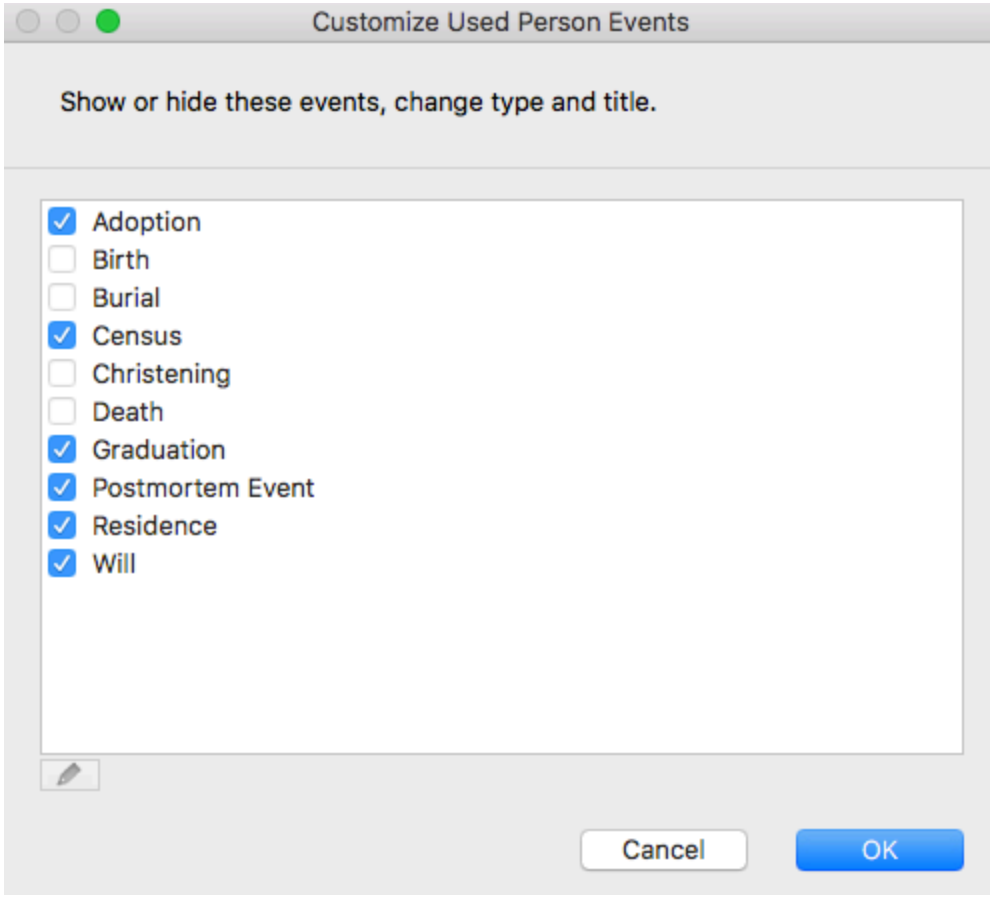
Heredis can present the list of available events according on your work habits. Thus, you will have easy access to the events that you create most often.
The customization affects only the list of events to create and there is no risk to your data, events already created remaining always displayed.

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

Windows Customize Event



Mac Customize Event

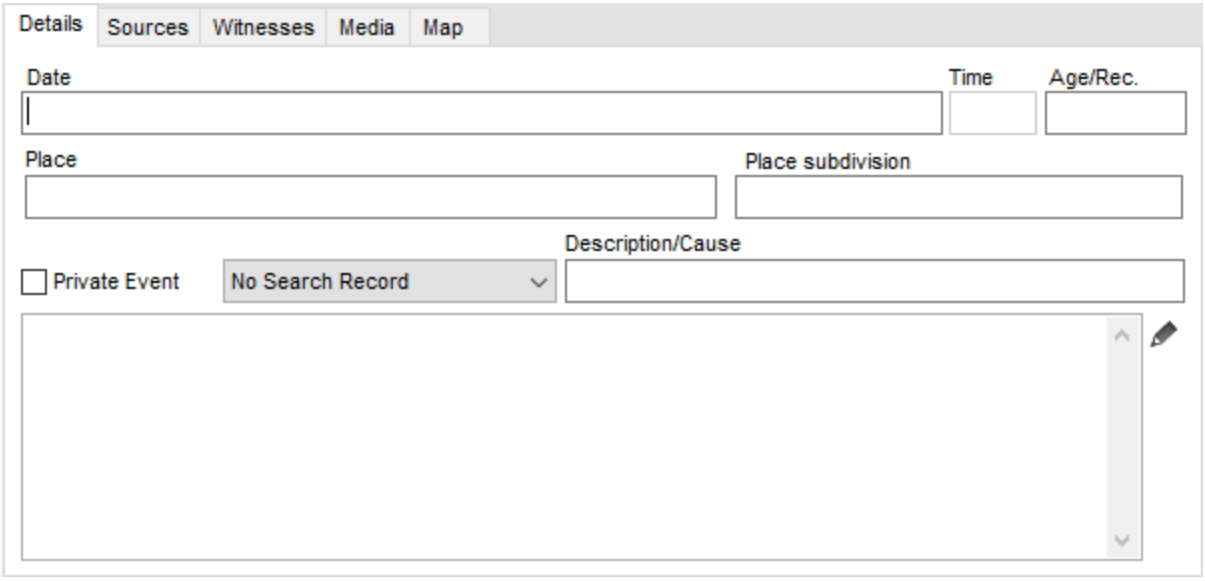


Heredis always shows events which you have already used at the top of the list, and events that you have not yet used at the bottom of the list. You see now that the other used events part no longer contains the items you have unticked.
You may always tick any new hidden events to make them reappear.

Information on the event

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

Information of the event



Date

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

See also Dates (see page 219) article for further details on Date format and calendars.

Time

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

Age on record

Enter the age stated on the deed or record, if it is mentioned. You may specify the age with the words: years, months or days (or y, m, d). No other word will be accepted. An age with numbers only will be considered as years.
If the birth date of the primary person is known, you may compare the age on the deed with the actual age shown in the list of events.
If the date of birth is unknown, Heredis will automatically complete the field with an approximate date calculated from the age on record that you entered.

Place

Indicate the location where the event took place.

Entering a new place
1. Type the name of the city in the **Place** field, not bothering about upper or lower case. With the first letters, Heredis proposes a list of places that may match your entry.

2. Select a place using the mouse, or use the up and down arrow keys and confirm the location selected by pressing **Enter**.
3. If no proposed location matches, **(Windows)** fill in the case and click on the tab key to add this new place to the index; **(Mac)** select **New Place** in the list.
4. Complete the information on the new place to be recorded, and press **OK**. The new location will be added to the **Places Index**. You may geolocate this place. See the articles Places Index (see page 472), Geolocating places (see page 489) and Heredis' Preferences (see page 107).

Assigning a place already in use in your genealogy
1. Unfold the **Places** panel.
2. Drag the place of the event and drop on the event being entered.

Info • Be sure to visit the place of your ancestor's life by clicking the **Map** tab of the event.

Place Subdivision

The **Place Subdivision** field is to specify a more precise location than the city: the hamlet, parish, district or borough of a large city. Since Heredis 2020, you can geolocate the subdivision, see the details on Geolocating Place Subdivisions (see page 495).

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

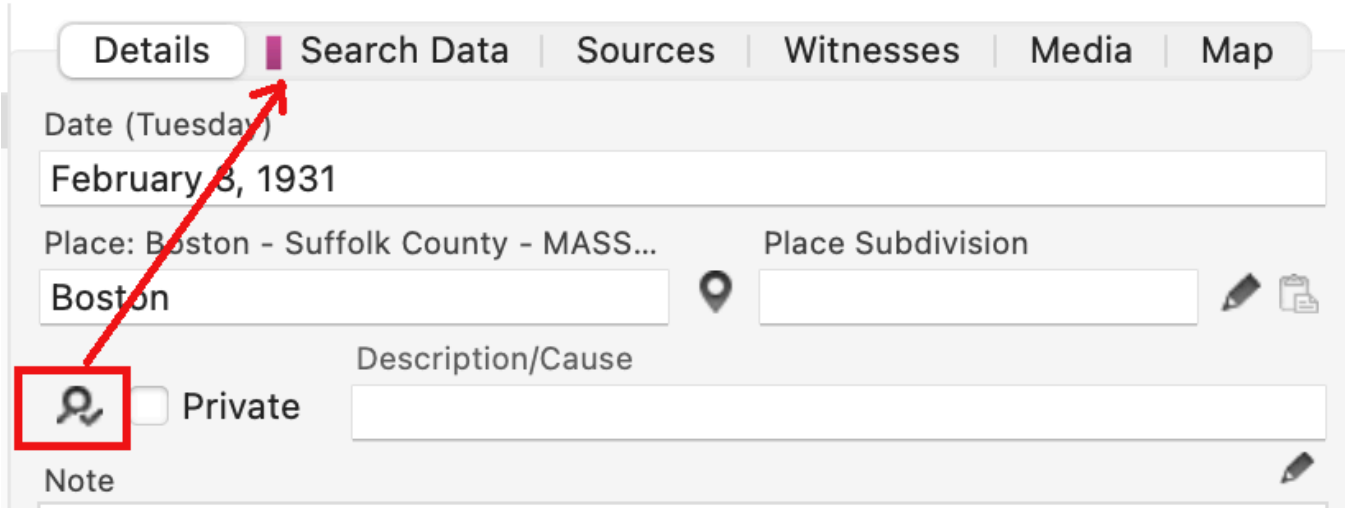
Enter your comments about the event directly into the note field. To embellish the entered text, click the pencil icon. Heredis opens the note in a separate screen containing all the formatting tools. Tick the **Private Note** box to exclude the event note from exports or printed documents.

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.
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.

See also Add witnesses and participants (see page 233), Sources (see page 261), Media (see page 198).

Click on the magnifying glass or or or to open the Search Data tab and complete the search status. (see the article Search Data tab of an event (see page 214))



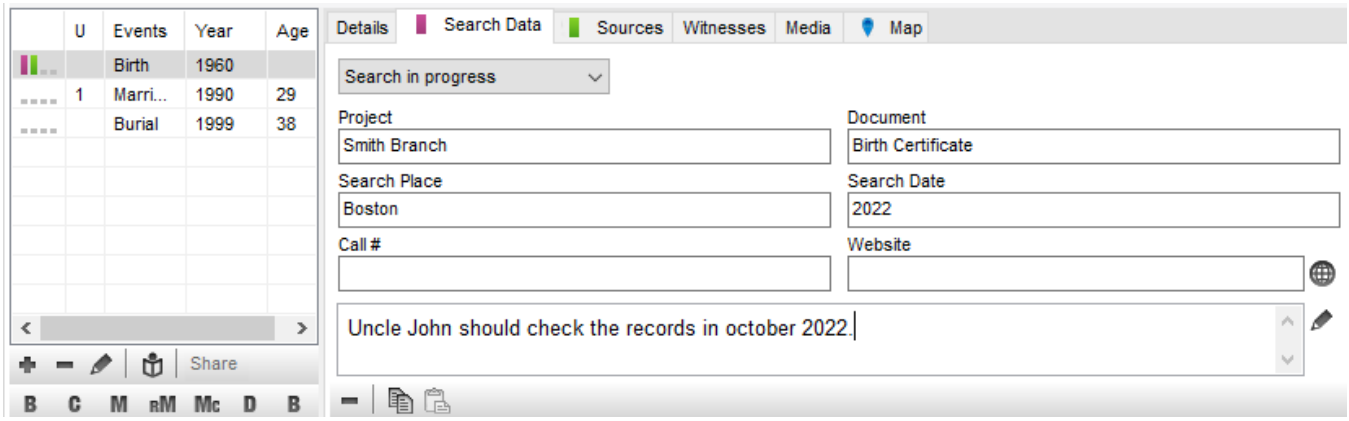
Delete an event

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

Search Data tab of an event

This article complements Input events (see page 206).

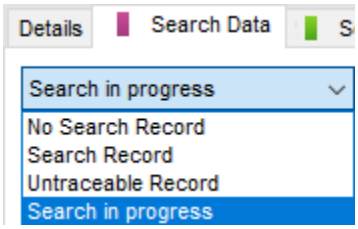
To help track your searches, fill in the **Search Data** tab, indicate which search action you need to take.



You can identify if an event has search information entered using the pink icon in front of the event name or in front of the **Search Data** tab. If nothing is entered, the icon is greyed out and small in the list of events and not displayed in the title of the tab.

Select the search status to indicate where you are with the search for this event.

- **No Search record**: if you do not need to search data for this event.
- **Search record**: if you need to search for more data on this event.
- **Search in progress**: if you already started the search for more data on this event.
- **Untraceable record**: if you have search for more data but can not find anything on this event even though you are sure of the info you already entered.



Note: You can choose the default option for each new event in (Mac) **Heredis** menu **> Preferences > Format,** (Windows) **Tools menu > Preferences > Heredis Preferences > Format**.

Heredis offers you to specify useful information for your research that can be published in the research journal.

The **Project** field allows you to manage different projects and give them a name. Example: I

would like to have a “Tommies” project that identifies all the persons in the file who died fighting during the World War I. Or, I do my research by branch, so I have a project by branch and names, for example, Smith branch my paternal branch.

The **Document** field allows you to put the type of document to search for, example: Civil records, Court records etc.

In the **Search Place** indicate where you should search for the document, for example, in the attic of Aunty Jacqueline, National Archives etc.

The **Search Date** is useful to indicate when or on what specific day you plan to search. This allows you to organize your trips.

In the **Call #** field, indicate the document number to check. Many Archives centres have put their inventories online, which allows you to anticipate and forecast the documents to be consulted without having to search on site the call number of the records. Thus, you can, on some websites, order the document by internet so that it is ready the day of your arrival and not waste any time.

The **URL** field allow you to enter the website on which to search for the information. If you click the button (Mac) , (Windows) while a URL is entered, your default web browser opens and you navigate to the site in question.

Finally, the **Note** block below the search data fields allows you to comment on the search. For example: record not found in the records of Boston from 1800 to 1850, see Cambridge.
Click on the pencil to the right of the note to have the note editing tools and format or indicate that the note is private.

Thanks to the search status, you can edit lists of acts to search for or make an smart search to identify them, which will guide your genealogical searches and save you time.

You can also, from Heredis 2023, edit a Research journal with all the data you were able to enter.
See the Research Journal (see page 608) article. To focus the Research journal on some of the information, use the Smart search or filters in the Research Journal with the **Options** button.

Copy research information

The search data you entered on one event should be transferred to another?
Save time and click the button to copy all the information, navigate to the event where you want to copy the information and click the paste button.

Delete Search Information

You have completed your searches for an event, so you can change the search status to **No Search Record** and click the button to delete the search data.

Create customized events not proposed by Heredis

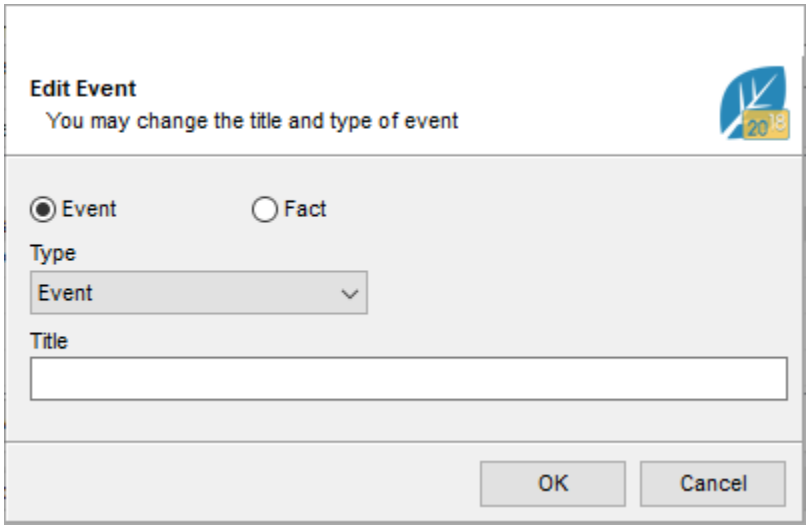
You may add events that are not mentioned in the list of events proposed by Heredis.

- Click the button ✚ on the bar bellow the list of events.
- Choose **Others**, then the neutral event called **Event** or **Postmortem Event** (Heredis won't check the consistency of the data, it can be used for event like Inventory after death etc.)

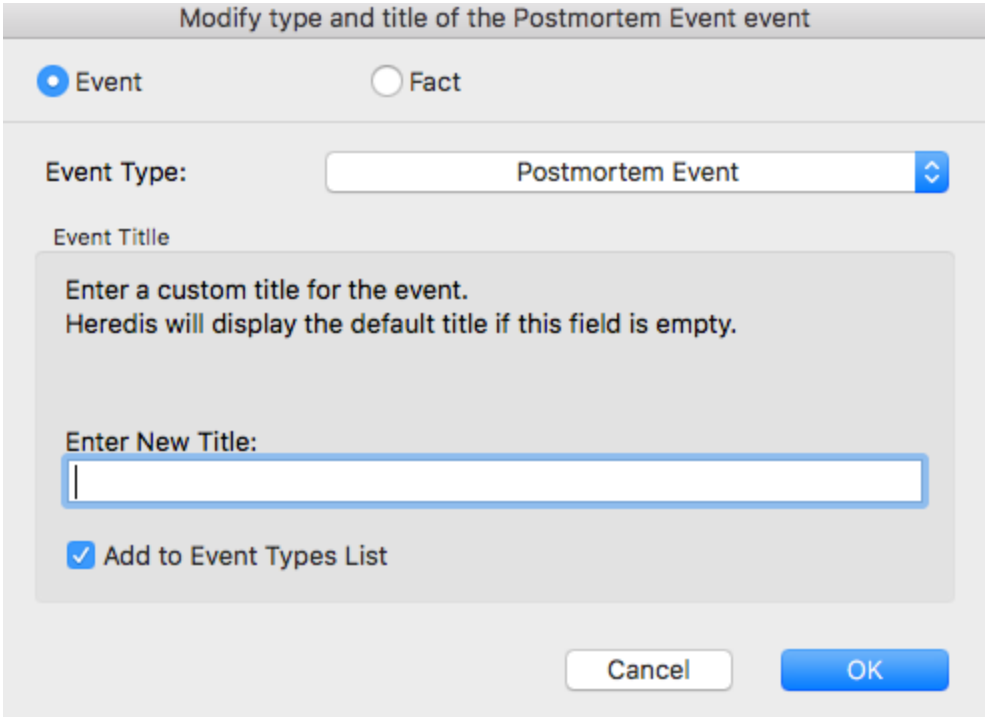
Note: If you already have used **Event** or **Postmortem Event**, it won't be in Others but in the first list.

- Double-click on the name of the event that has appeared in the list of events, or after selecting it, click on the ✎ button. A window opens where you can rename the event.

Windows Customize event

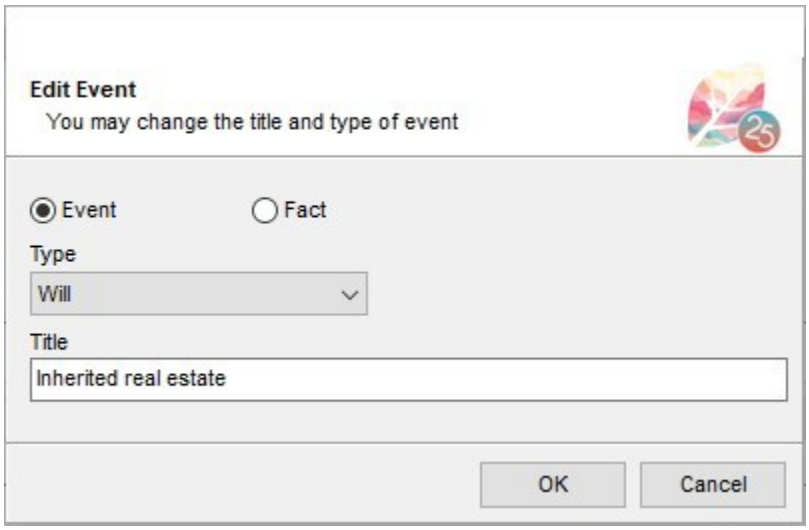


Mac Customize event

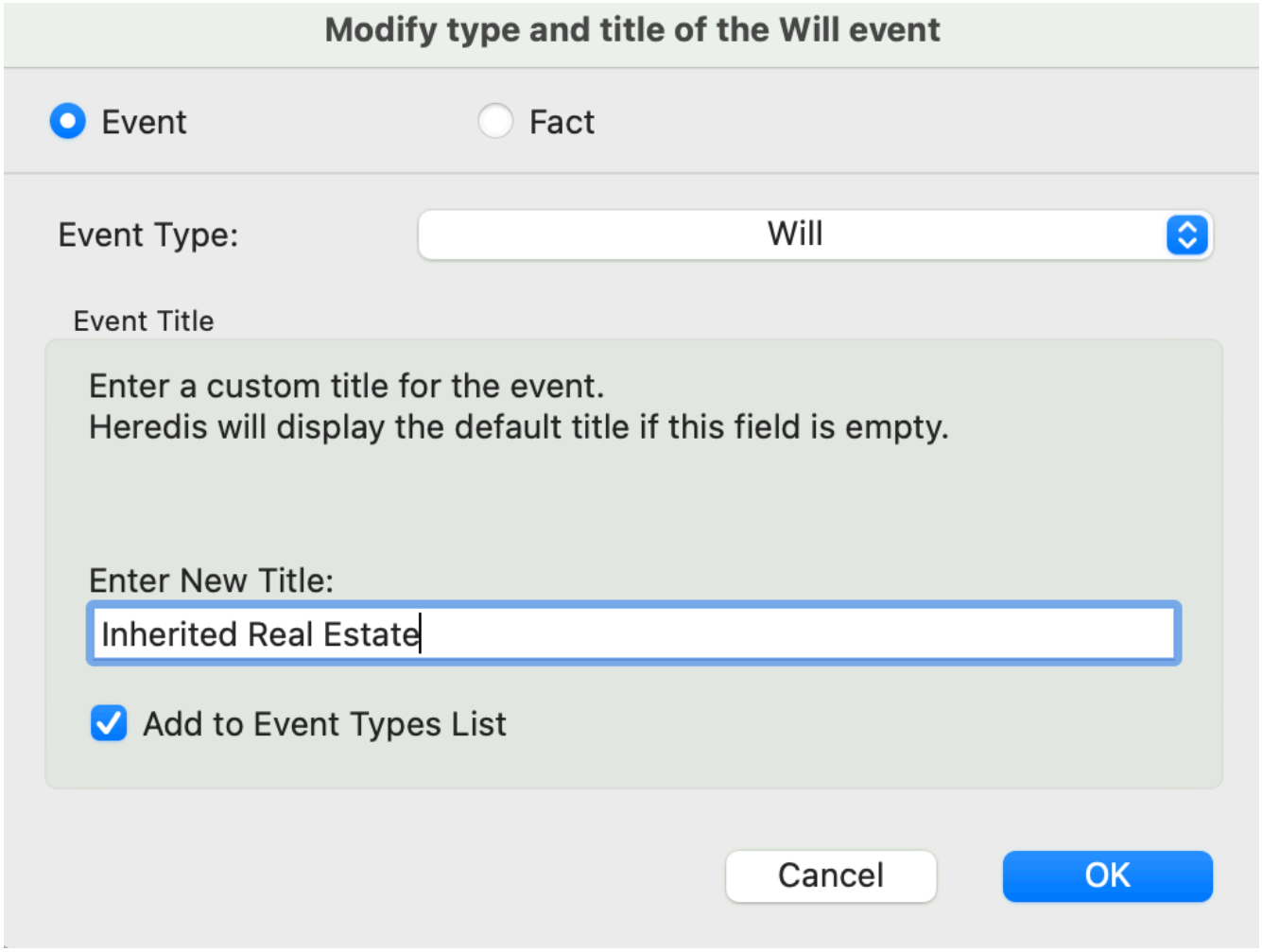


- Enter the new name of the event. Give the event a generic name so that it can be reused. For example: Inherited Real Estate, not Inherited Real Estate from Mr. X.

Windows Customize event



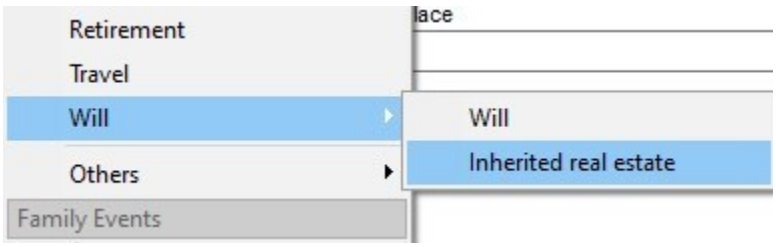
Mac Customize event



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 Events 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 inherited real 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 Inherited real estate.



Dates

Recognized calendars

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

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

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

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

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

Entry of dates

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

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

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

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

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

Recognized formats

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

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

Gregorian calendar

• 2 February 1794
• 2 Feb 1794
• 02/02/1794
• 02.02.1794

Julian calendar
• 22 January 1794
• J 22 Jan 1794
• J 22/1/1794
• J 22.01.1794

Hebrew calendar
• 2 AdarI 5554

French Republican calendar
• 14 Pluviôse an 2
• 14 pluv an II
• 14 pluv 2
• 14 pluviôse II

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

Interval of dates and approximate dates

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

Before
Type the word **before** or the symbol **<** followed by a space or the symbol */* with no space and then type the full date or not, in numbers or in words.
• before 23 August, 1845
• < 23/8/1845

After
Type the word **after** or the symbol **>** followed by a space, then type the full date or not, in numbers or in words. Or type the symbol */* with no space after the date.
• after 6 June, 1774
• after 6/6/1774

About
Type the word **about** or the word **circa** or the abbreviation **ca** or the symbol **~** followed by a space, then type the full date or not, in numbers or in words.
• about February 1811
• circa 2/1811
• ca 2.1811
• ~2.1811

Between / and
Type the words **between** and then **and** or the symbols **<>** and **&** and then type the full date or not, in numbers or in words or type the symbol **//** between the two dates with no spaces.
• between 11 October 1914 and April 1917
• between 11/10/1914 and 4/1917
• <> 10 November 1914 & 04 1917

From to
Type the word **from** followed by a space and then type the full date or not followed by a space and then type the word **to** after the full date or not.
• from 1845 to 1846
• from 8/1845 to 9/1845
• October to September 1845
• from 23/8/1845 to 31/8/1845

Before Christ
Type the abbreviation B.C. after the date or type a minus sign before the date to indicate periods before Christ.
• 125 B.C.
• -125

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 cogwheel .

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 preceeded by a (c) in the list of events on the **Personal Data** tab.

See also Calculate or convert a date (see page 223).

Calculate or convert a date

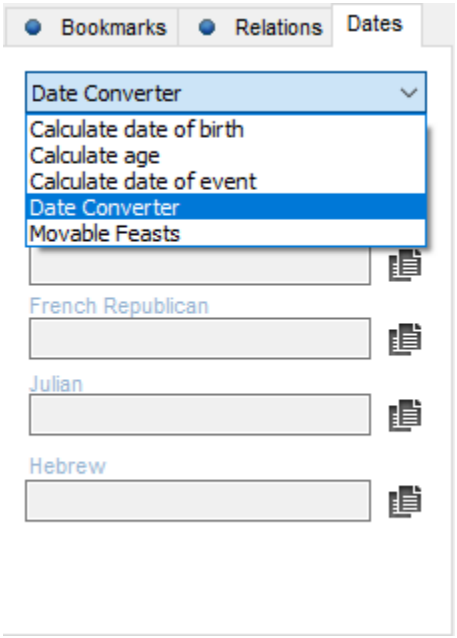
In addition to the automatic calculation when entering an event by adding the age on the act, Heredis has a date calculator/converter.

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

Automatic date calculation

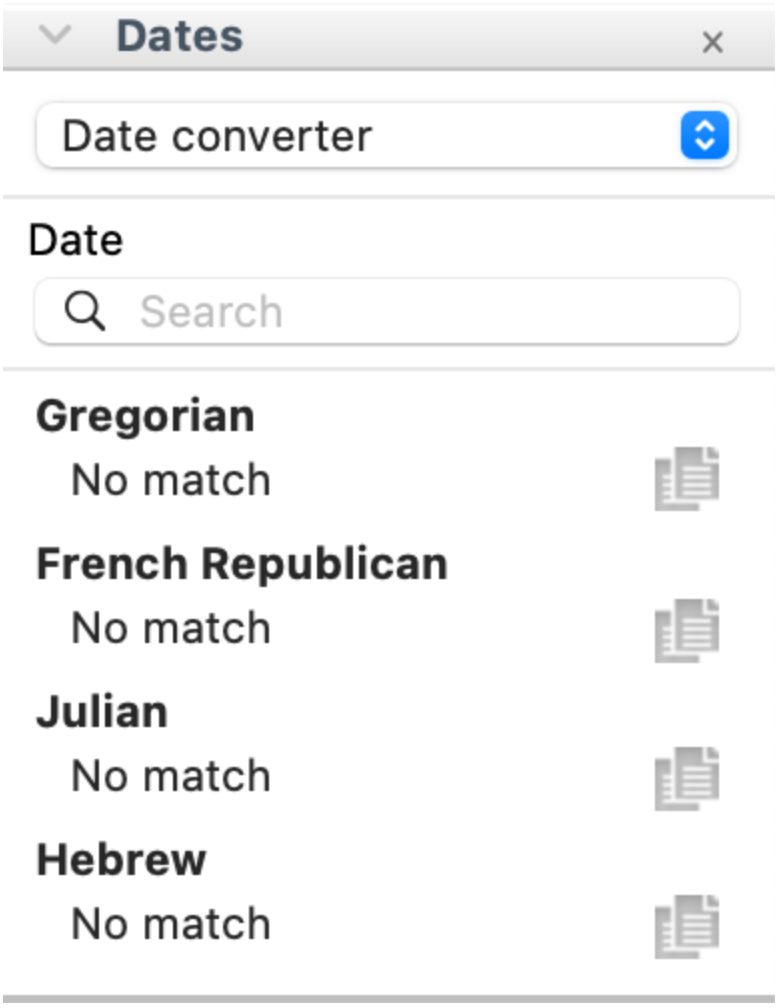
The date management module allows you to calculate the date of an event or the age at the event based on two other parameters.
Click the **Dates** tab of the Tools Panels and select the **Calculate Date of Birth, Calculate Age,** or **Calculate Date of Event** in the drop-down menu.

(Windows) Dates tab

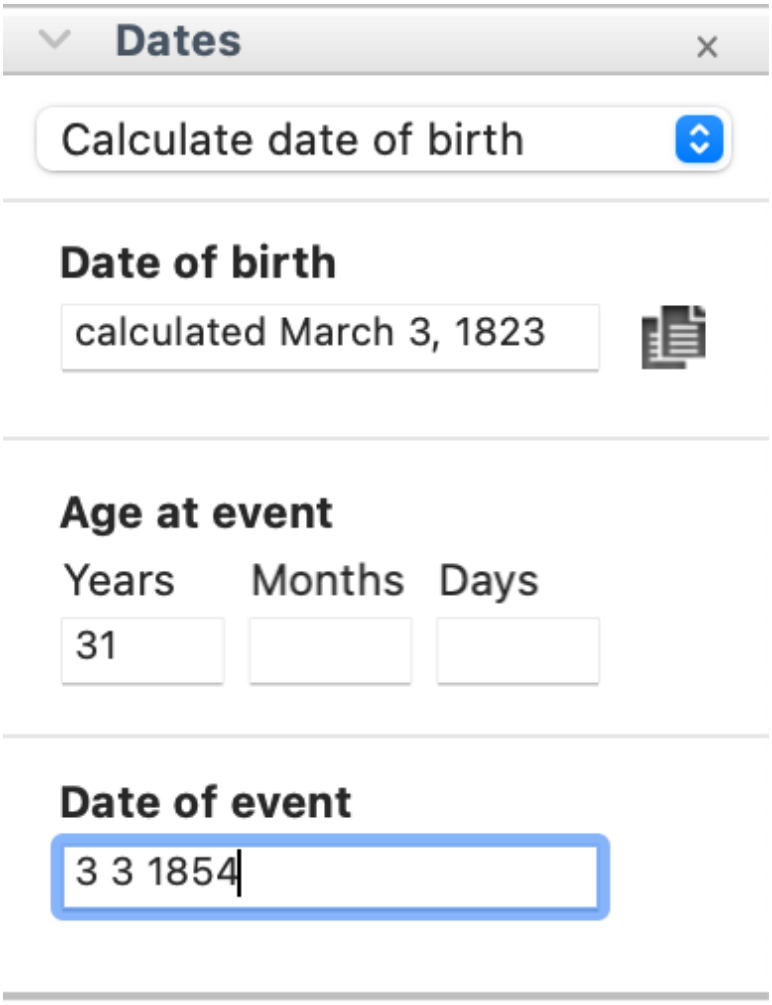


(Mac) Dates tab

Input data



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

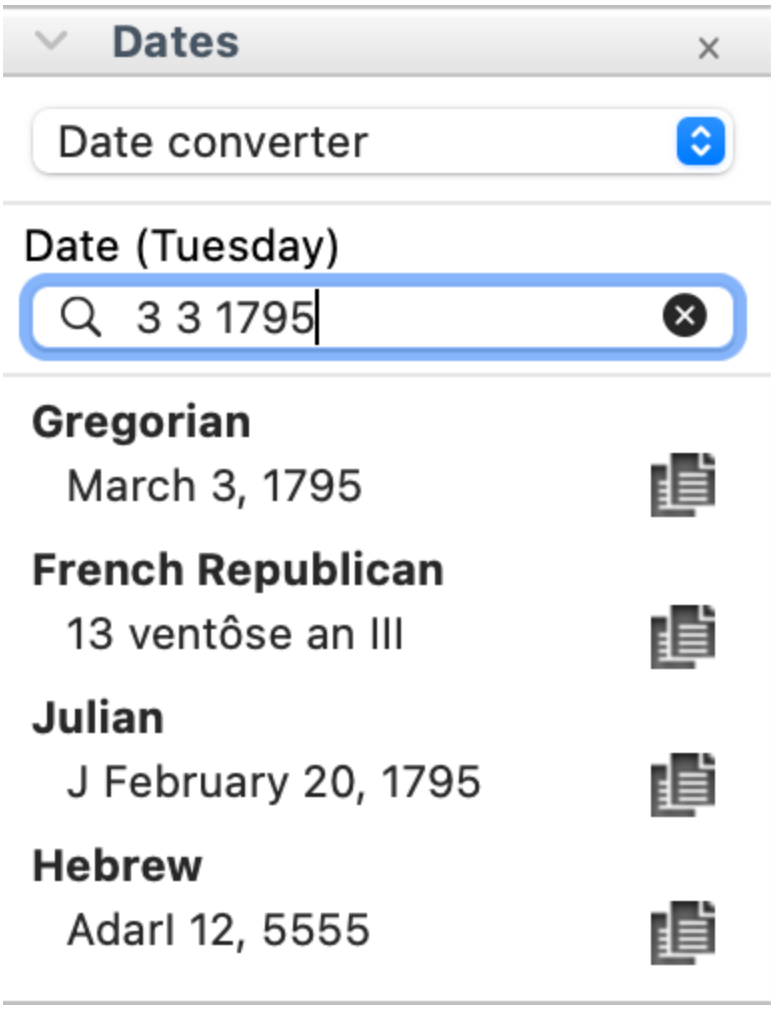


To copy the result found by the date calculator and report it to the event entry screen:
• Select the date and use the **Edit – Copy** menu.
or Click the button.

To paste the date or age into a **Personal Data** field**:**
• Right-click in the **Date** or **Age/Rec** section and select **Paste.**
or Click in the topic and select the **Edit – Paste** menu.

The date converter tool

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



2. Type the date as you found it, regardless of the calendar in which it is expressed. Heredis displays equivalencies in other calendars.
3. To use one of the displayed dates, click the Copy button to the right of the date you are interested in.
4. To insert this date expression into an personal data field or note, click at the insertion point and choose the **Edit** menu **> Paste.**

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

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

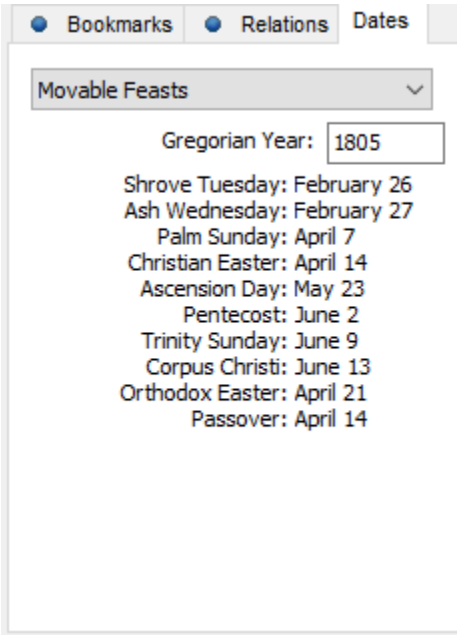
Enter the date you want to convert and copy the converted date into the calendar you are interested in in order to paste it into the event entry field.

Movable feasts dates

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

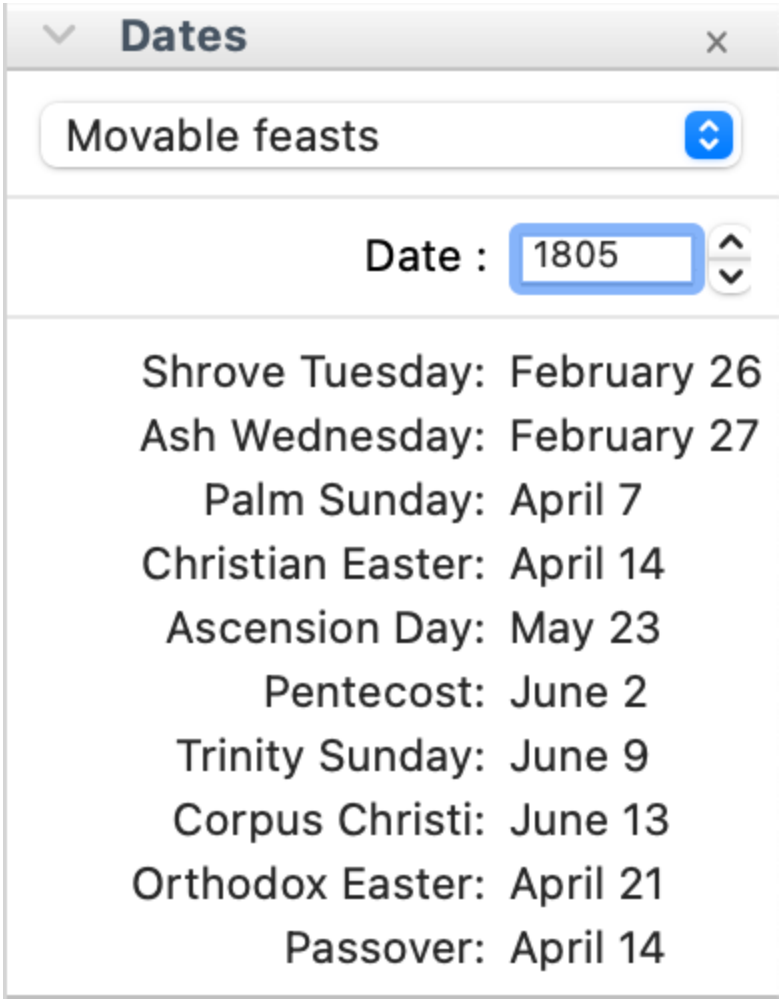
1. Select the Movable Feasts of the **Dates** tab.

(Windows) Movable Feasts



(Mac) Movable Feasts

Input data



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

The places

Each event entered can be localized to a given location.
Add an event to the person's data entry form. See Input events (see page 206).

As soon as you enter the first few letters, Heredis suggests places that might match your entry. The list depends on the countries selected in Heredis Preferences. See the article Heredis' Preferences (see page 107) paragraph The "Countries" tab.

Heredis has the right place for you

After entering the event date, add the location.

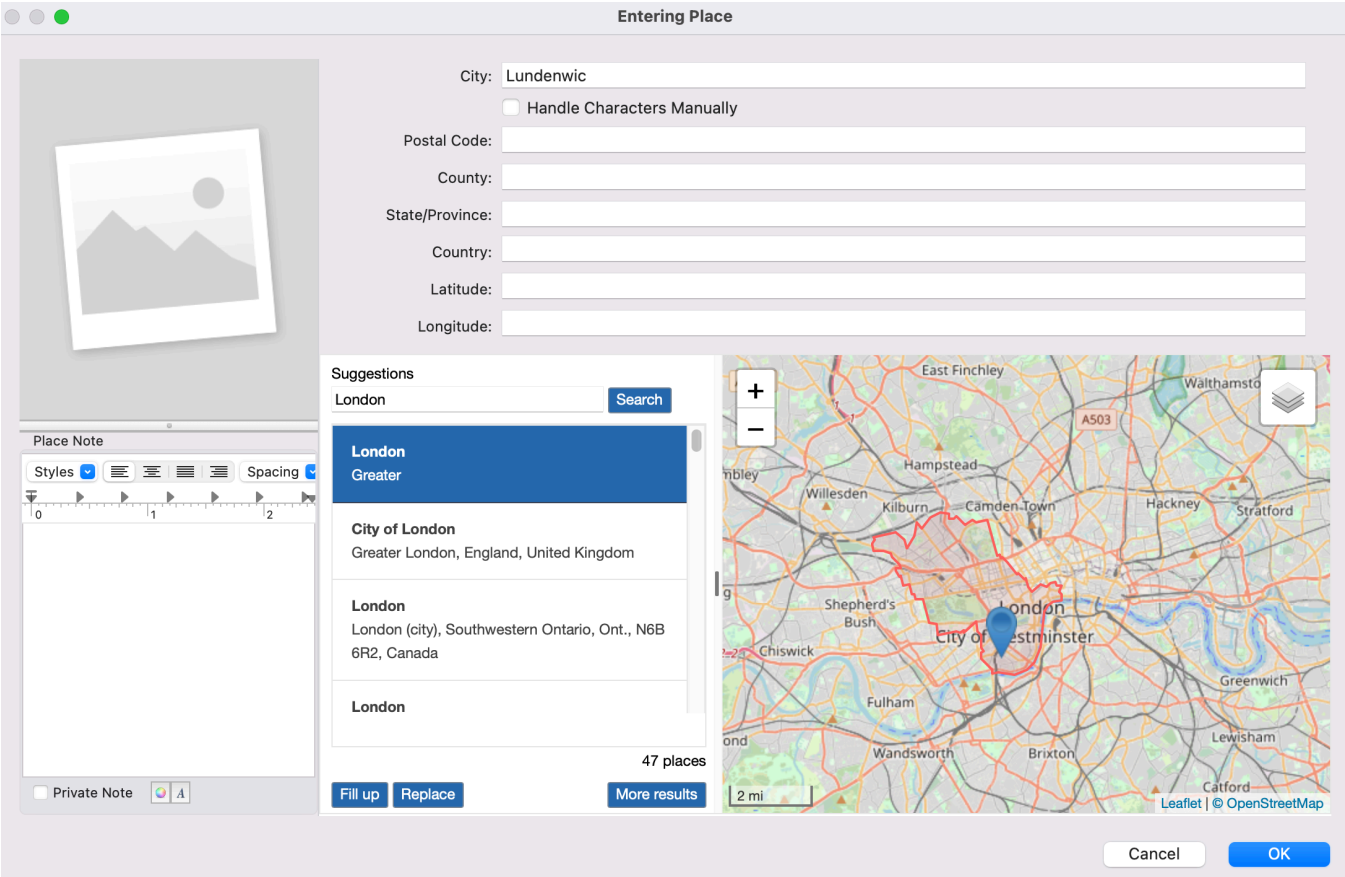
Heredis first suggests the places already used in the file, then all the towns that might match. The more you write, the smaller the list becomes.

If a location is suitable, click on it to confirm.
You can also use the arrows on your keyboard to scroll down to the one you're interested in. Then press the Enter key on your keyboard.

The location is not offered by Heredis

There are several possibilities:

- the location is in a country not selected in Heredis' preferences. Heredis therefore does not offer you the locations of this country. See the article Heredis' Preferences (see page 107) paragraph The "Countries" tab to learn more about selectable countries.
- the location is in a country not included in the list of selectable countries in Heredis' Preferences (see page 107). In this case, you'll need to create the location and geolocate it. See the article Geolocating places (see page 489) for all you need to know on this subject.
- the site is a former town that has now disappeared. Indeed, the databases consulted by Heredis offer current locations only.
  In this case, create the location as a new location. Finish entering the location and move on to the next field. A window opens to create a new location.



In the **Suggestions** section (**Map** tab on Windows), enter the name of the current location to launch the OpenStreetMap search.
Once you've found the location, check the map. If it's the right place, click on **Complete** to automatically fill in the missing information.
Note: If you click on Replace, the location will have the current information and not its old name.

If the location does not appear in the list, it has been entered differently in OpenStreetMap. Try different formulation. Try searching with the name in the local language. –

If it doesn't appear in the local language, it hasn't been entered into OpenStreetMap. Enter the information manually after using a search engine.

OpenStreetMap is a database of places accessible to all. This database is completely independent of Heredis. We can therefore not guarantee that all locations are present and correctly indicated.

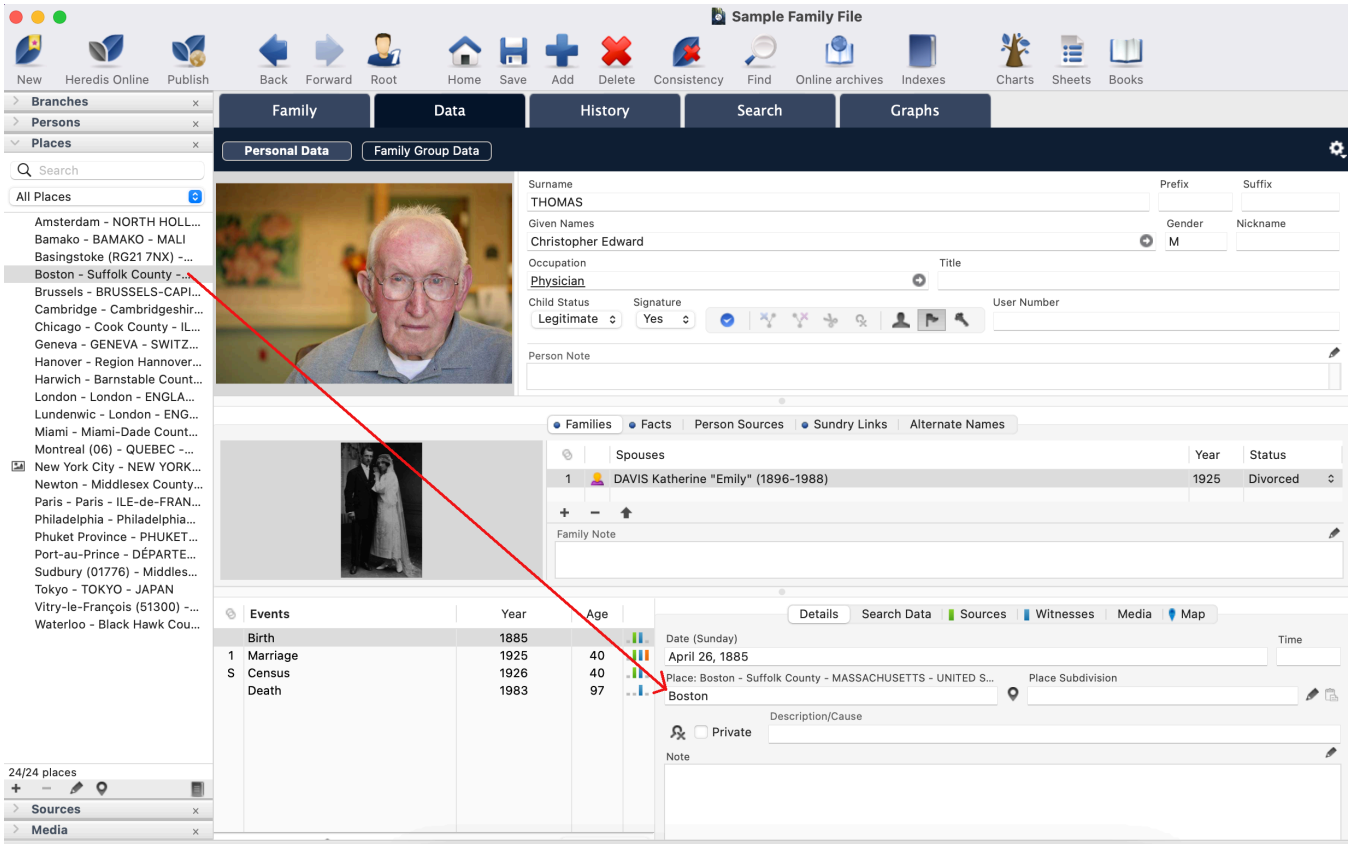
Each time a location is created or used, it is added to the places index. See Places index (see page 472) for more details.

Associate an existing location with an event

- Select the event in the **Personal data** screen.
- Take the location from the **Places** panel and release it on the event display area. The

town is displayed in the event **place** section. Other location information is displayed in gray under the **Place** heading.

Drag from places panel > drop into an event



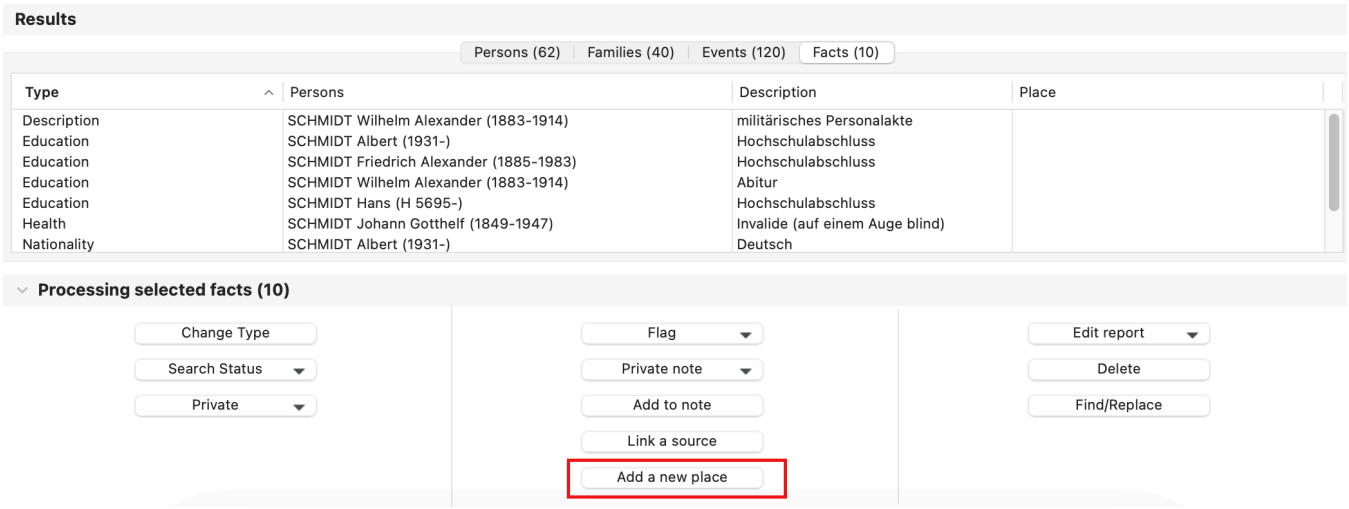
Associate an existing location with several events or personal entries

From Heredis 2025, you can add the same place to several events or facts.

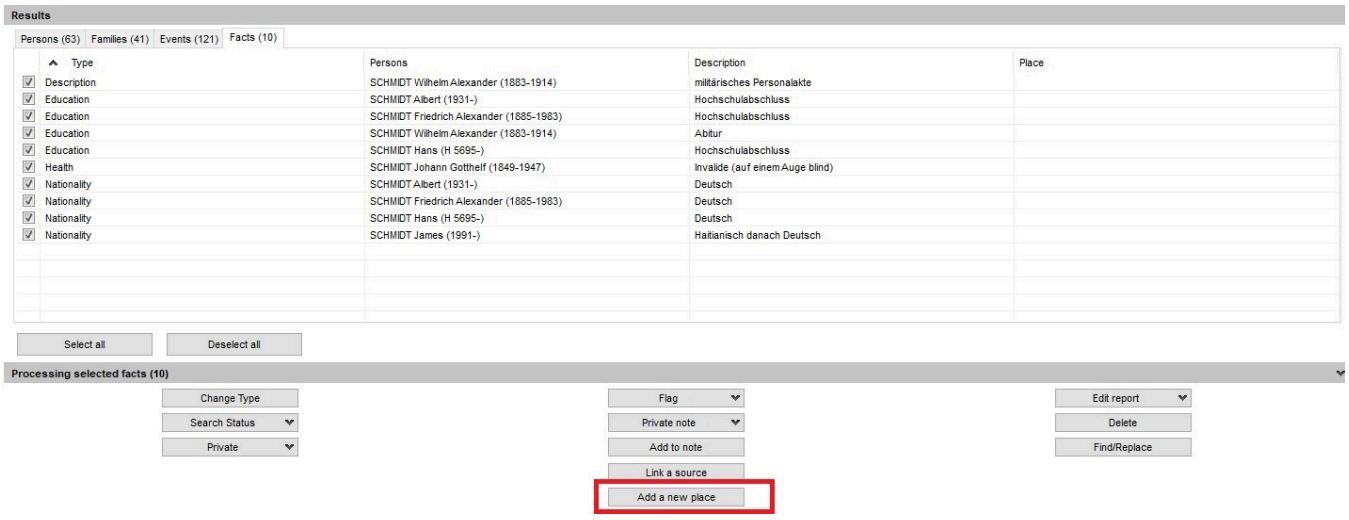
Start the Smart Search with the desired criteria. See Smart Search (see page 371) for full details.
Select the **Events** or **Facts** tab in the search results area.

Then click on **Add a new place**.
Select the location from the newly opened location dictionary.
Click on (Windows) **Choose** / (Mac) **OK** to confirm.
Heredis informs you of the number of modifications. Click **OK** to confirm, or **Cancel** to cancel the changes.

(Mac) Add a new place



(Windows) Add a new place



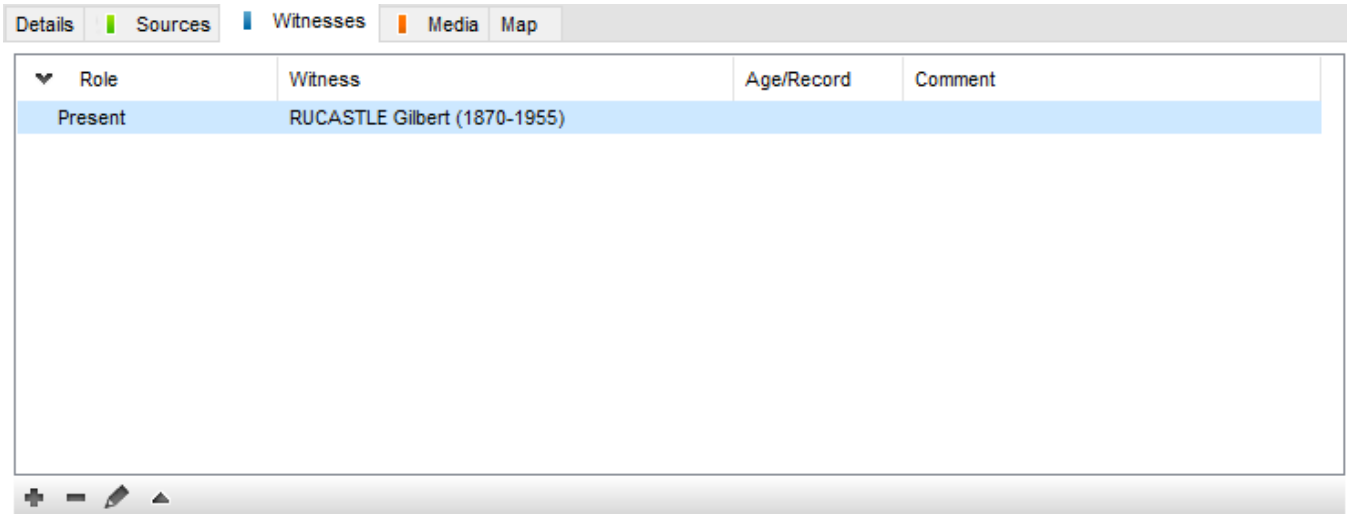
Add witnesses and participants

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

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

Add a new person

Add a witness



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

Link an existing person

During data entry for an event

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

4. Complete the information field on the link and press **OK**.

Drag and drop

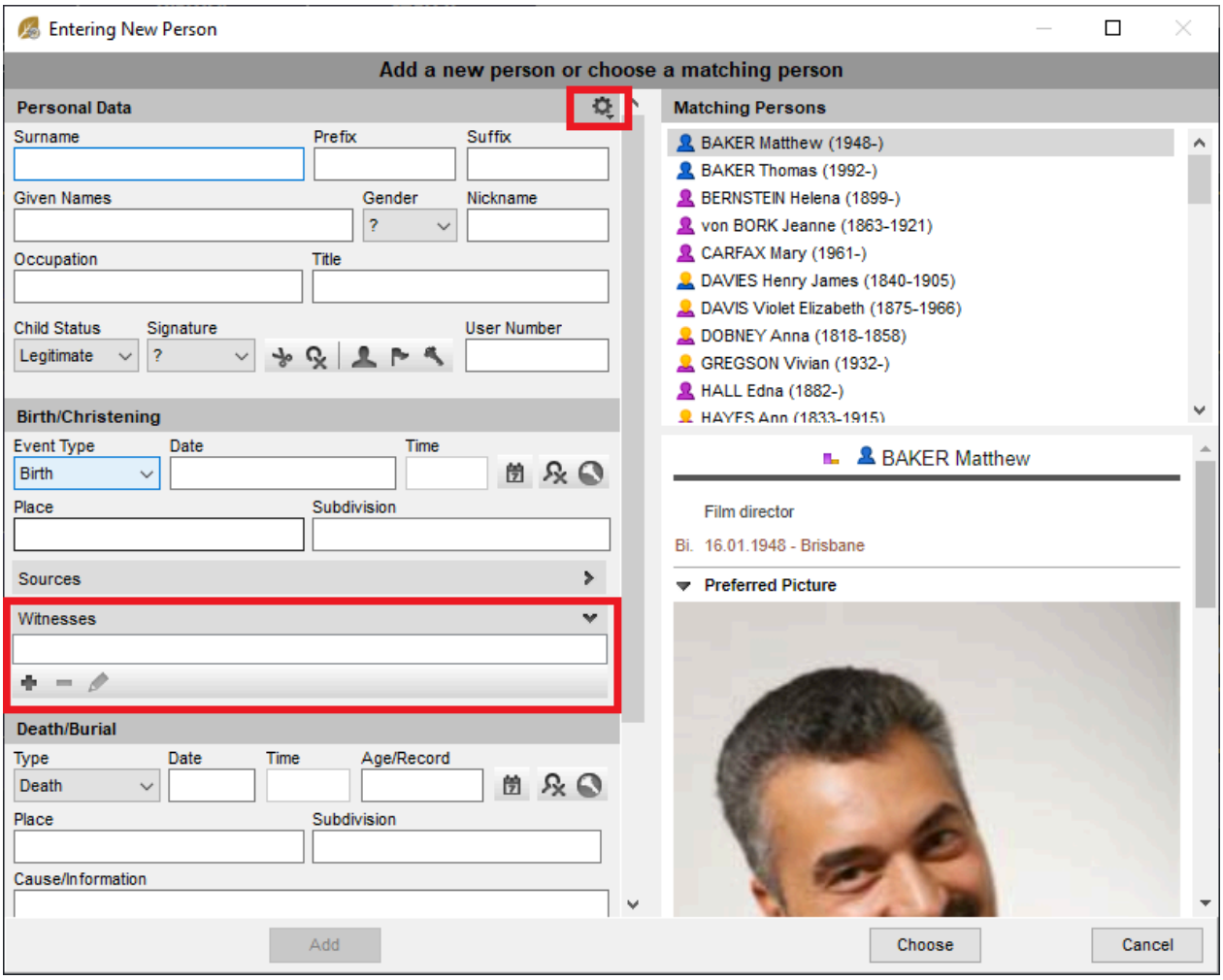
1. Select the event concerned on the **Personal Data** tab.
2. Take the person to be linked from a side panel (**Persons, Bookmarks, Relations…**), and release him/her on the information fields of the event.
3. Complete the link information fields and press **OK**.

Add a new person with his/her witnesses

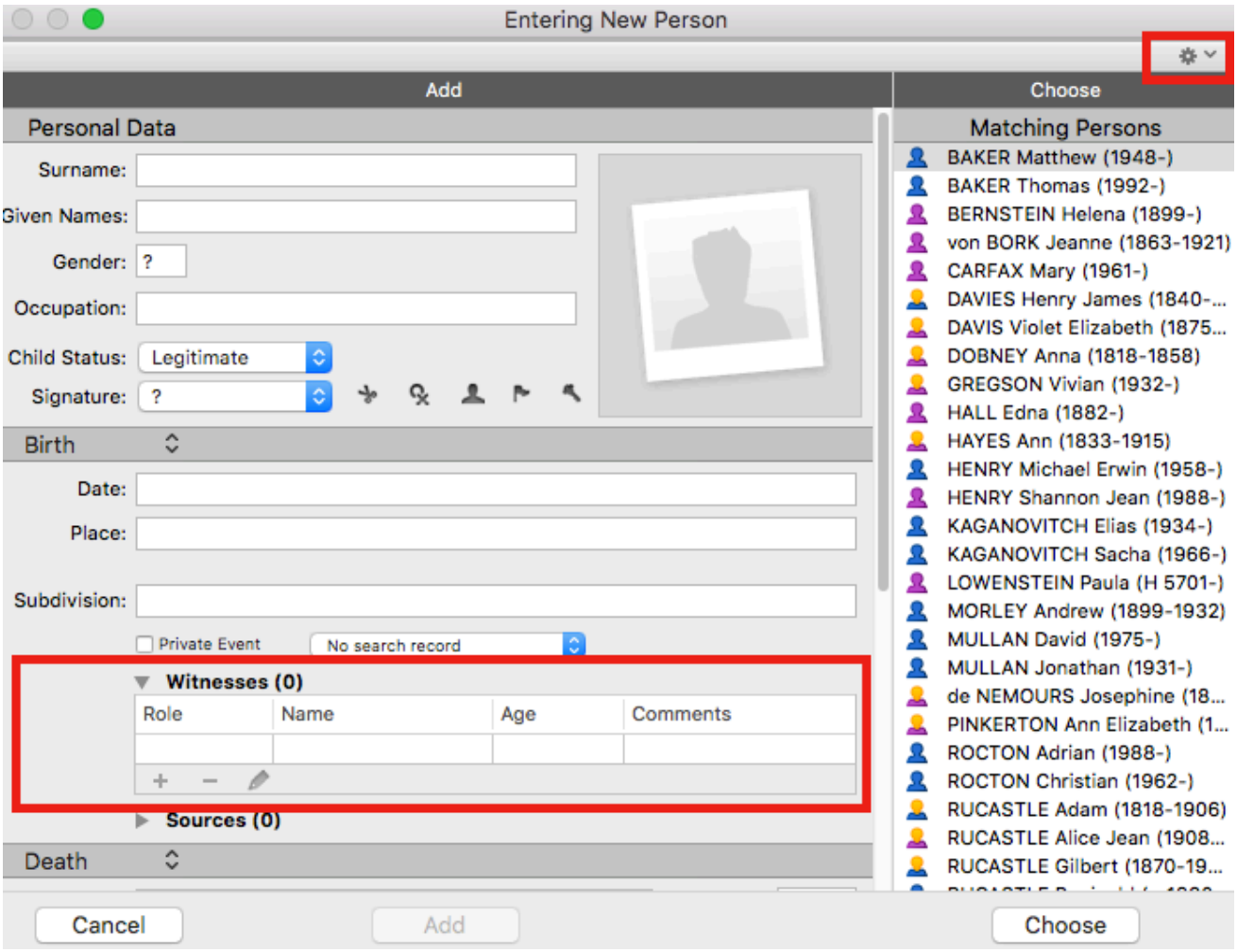
To add witnesses to an event during the data entry for a new person, use the **Comprehensive** or **Customized** display mode by clicking the cogwheel ⚙ icon at the top right of the **Add or Choose…** screen. See also Customize Heredis – Heredis Preferences article.

1. Add the person you want (see also Add persons (see page 177))
2. Disclose the **Witnesses** field (click the disclosure triangle if it is folded).
3. In the button bar at the bottom of the **Witnesses** field, click the **+** button.
4. The **Assign a Witness to…** screen opens. Enter the information you know about the witness and click **Add**. Or select an existing person and click **Choose**.
5. Provide information on the link with the witness and press **OK**. The witness is added to the **Witnesses** fields of the input screen.
6. Enter another witness or continue typing the data for the primary person.

(Windows) Add a witness while adding a new person



(Mac) Add a witness while adding a new person



Change a Witness or Participant link

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

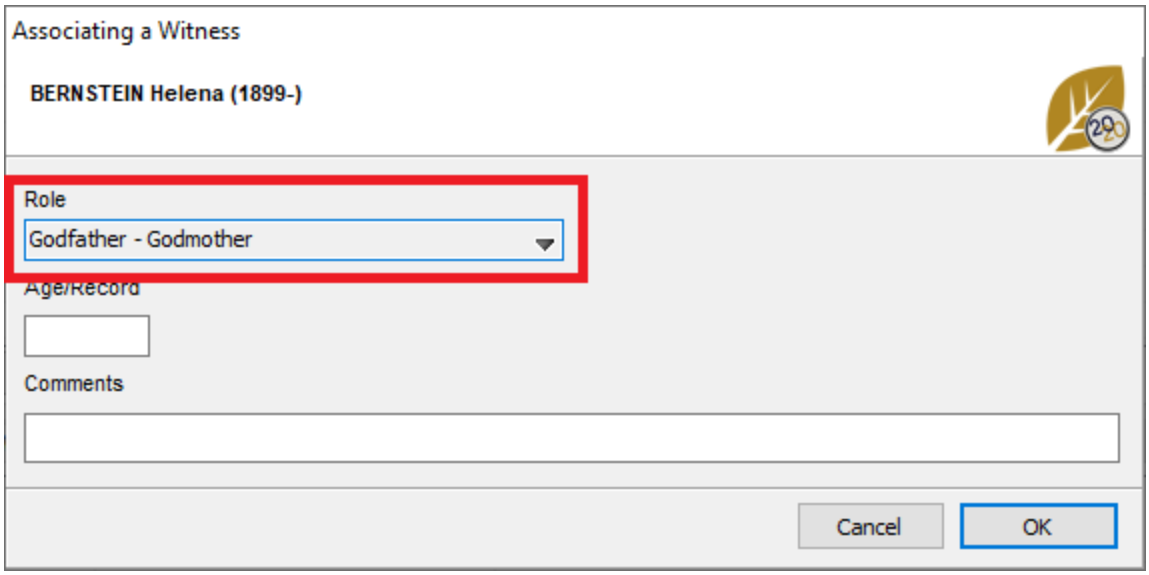
Change or supplement this information on the **Personal Data** tab.

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

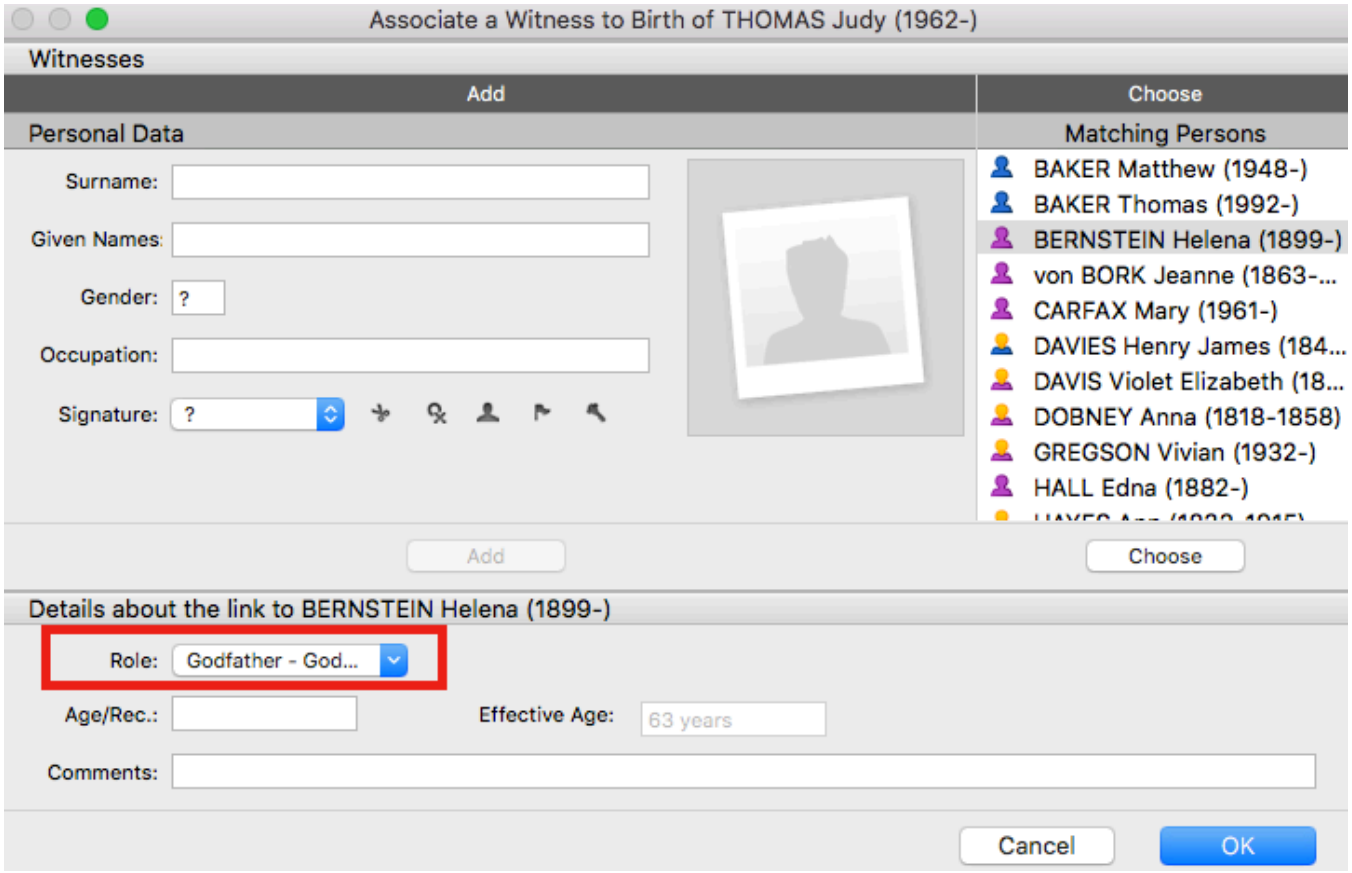
Role

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

(Windows) Witness role



(Mac) Witness role



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 paticipant has no known date of birth, the age on the record allows Heredis to calculate the date of birth automatically.

Comments

Type a comment on the link between the person and the event. In most cases, you will use here references to occupation, residence and kinship as shown on the acts.
Once you have validated the entry or modification of the witness or participant, the comment appears in the list of witnesses or participants.

Unlink a witness or participant and an event

1. On the **Personal Data** tab, select the event and click the **Witnesses** or **Participants** tab.
2. On the bar at the bottom of the event, click − (Unlink the selected witness or participant from the event).
3. Press **OK** to validate.

The person is detached from the event but remains available in your genealogy file.

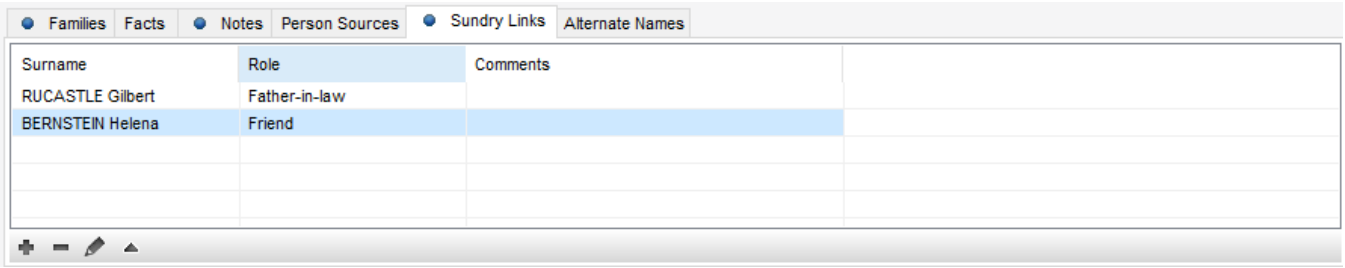
Add other linked persons

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

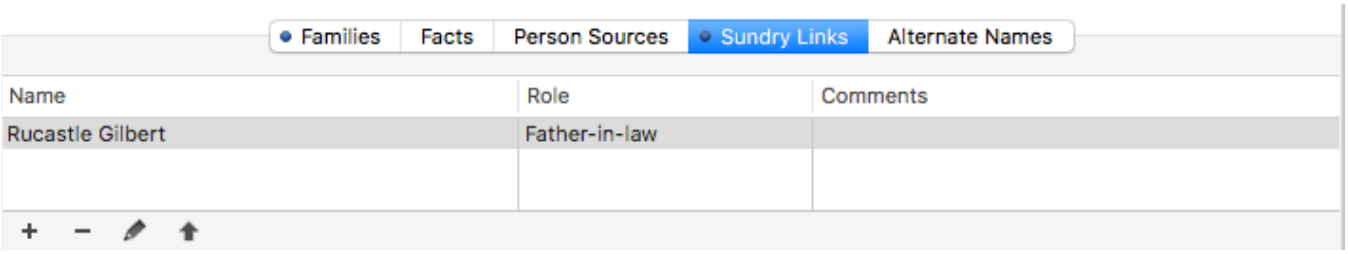
- The kinship is uncertain. You know that Paul is the uncle of John, but you do not know if he is the paternal or maternal uncle, or the husband of an aunt. Create a personal link between the two individuals until the exact kinship may be determined.
- There are no events to link the two persons. You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

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

(Windows) Linked Persons



(Mac) Linked Persons



Add a new person

Put the person you want to add a related person as the primary person.

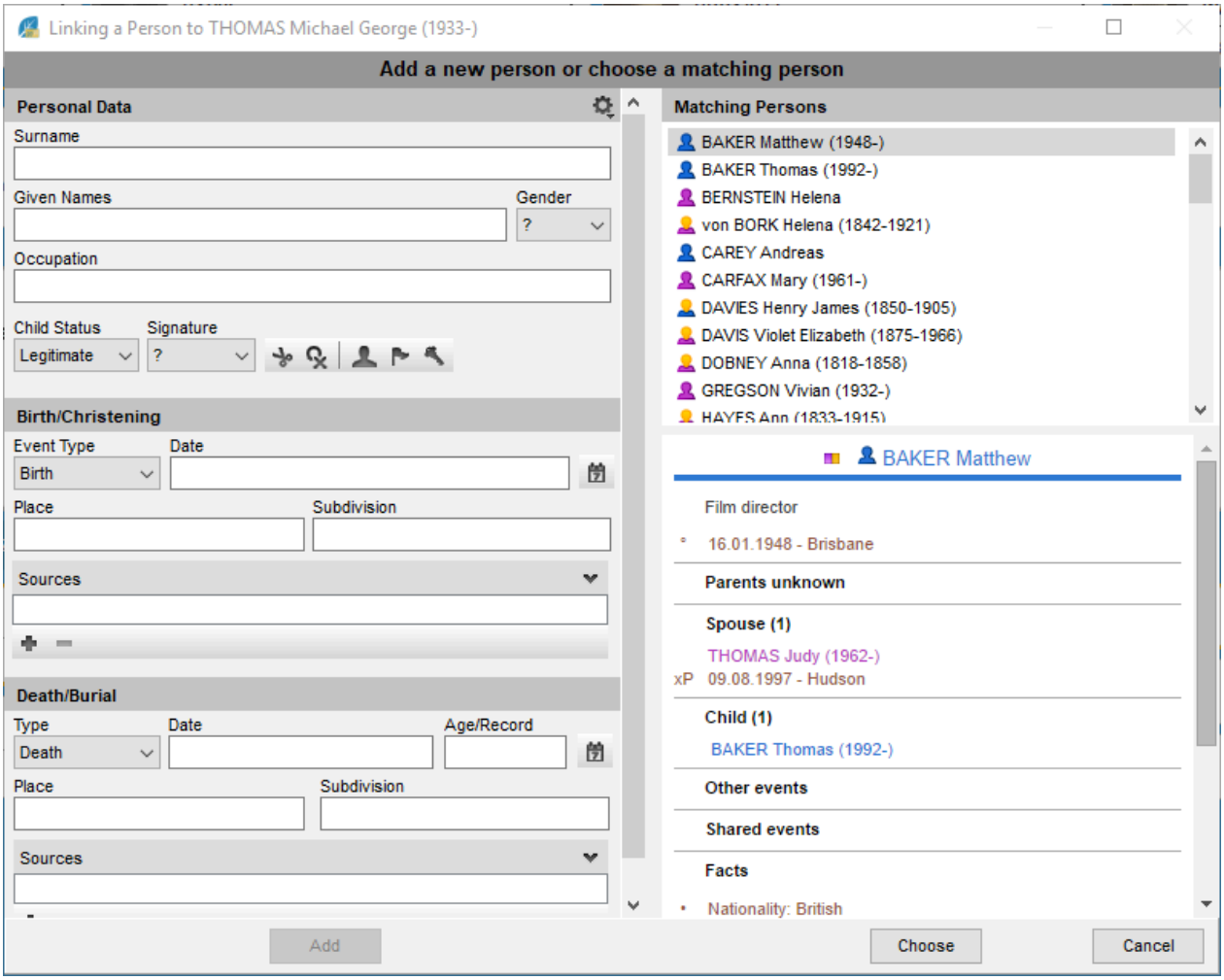
Click on the **Sundry Link** tab in the **Personal Data** screen. In the button bar of this tab, click the button ✚ (link a person to the primary person).

or Click the **Add** / **Add Link**

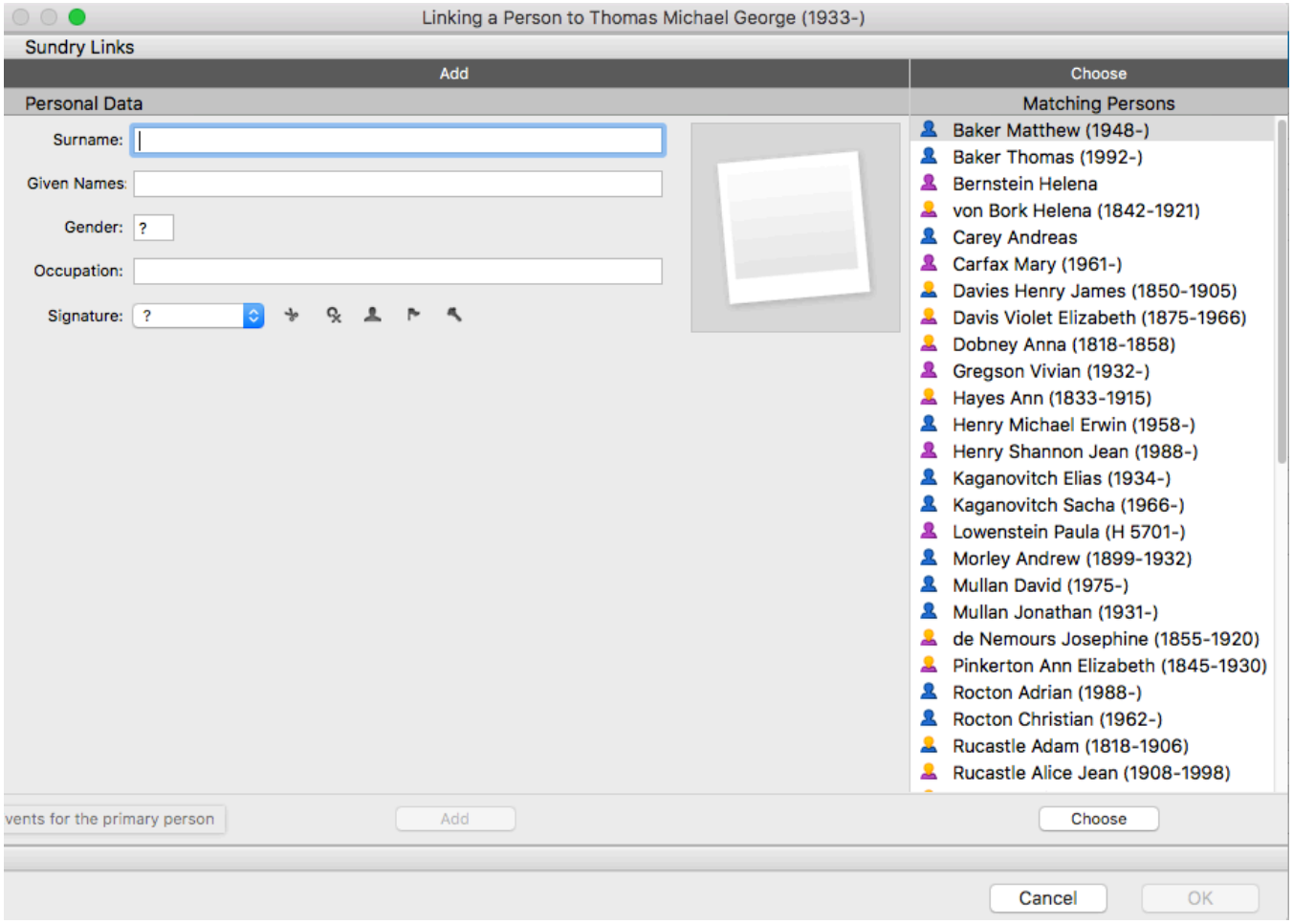
The windows **Linking a person** opens. Enter the information you know about the person. Make sure the person doesn't already exist in the matching persons list (in the list on the right).

Select the possible duplicate and check out the summary. Click on **Add** or select the matching person and click on **Choose** if the person is already in your file. You may access the detailed data of that person later if you wish to expand on the information about the person.

(Windows) Linking a Person



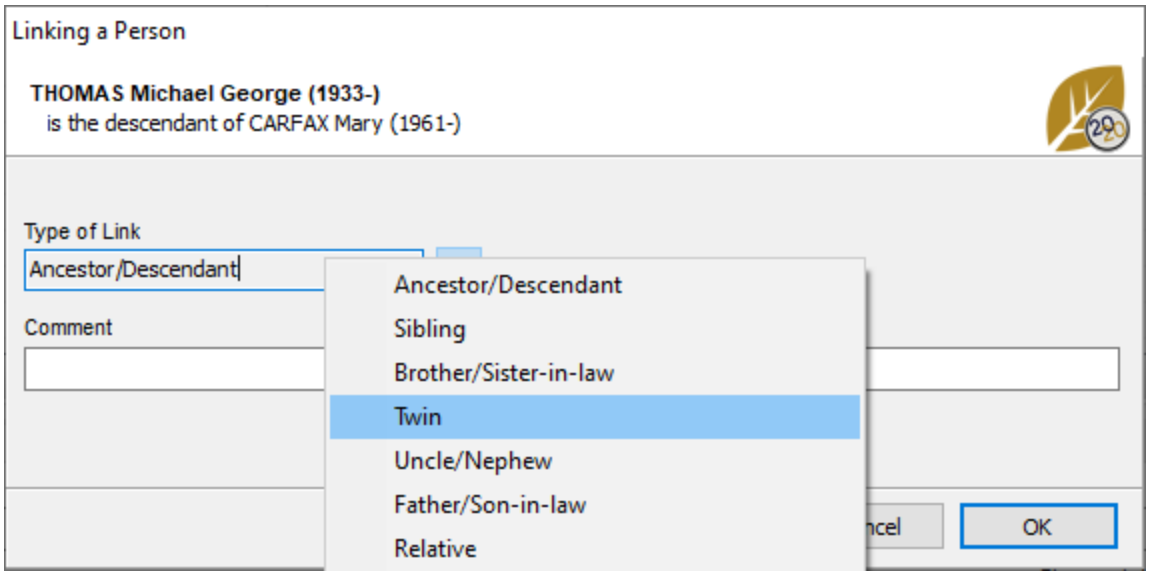
(Mac) Linking a Person



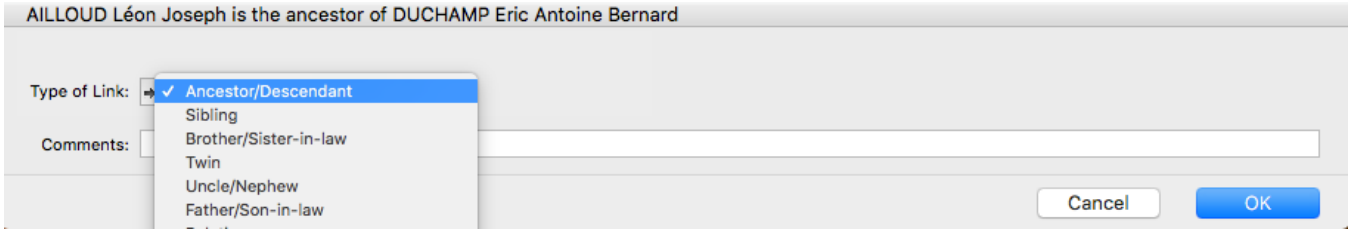
In the **Linking a person** window,

- Precise the link by unrolling the **Type of Link** menu and select friend, heir, cousin, etc.
- Complete with a possible **Comment** of the link to indicate the nature or origin of the bond that unites these two people as for example “maternal side”.
- Check the wording of the link at the top of the window and, if necessary, reverse the terms of the link with the ⇄button. The related person then appears in the **Sundry Link** tab in the **Personal Data** tab. Its link will depend on its gender, if you choose Uncle for example for a woman, then the bond will be Aunt.
- Click **OK** to validate the creation.

(Windows) Creation of the link



(Mac) Creation of the link area at the bottom of the Person information section window



Personal links with an existing person

Personal Data tab

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

Drag and drop

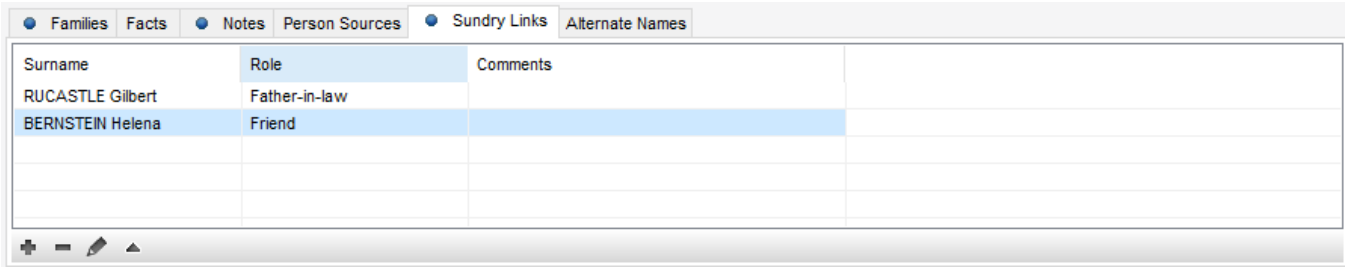
1. Click the **Sundry Links** tab.
2. Take the person to be linked from one of the side panels (**Persons, Bookmarks, Relations…**), and release on the **Sundry Links** tab.
3. Complete the information fields on the link and press **OK**.

Change a personal link

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

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

Windows' Links



Mac's Sundry Links

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

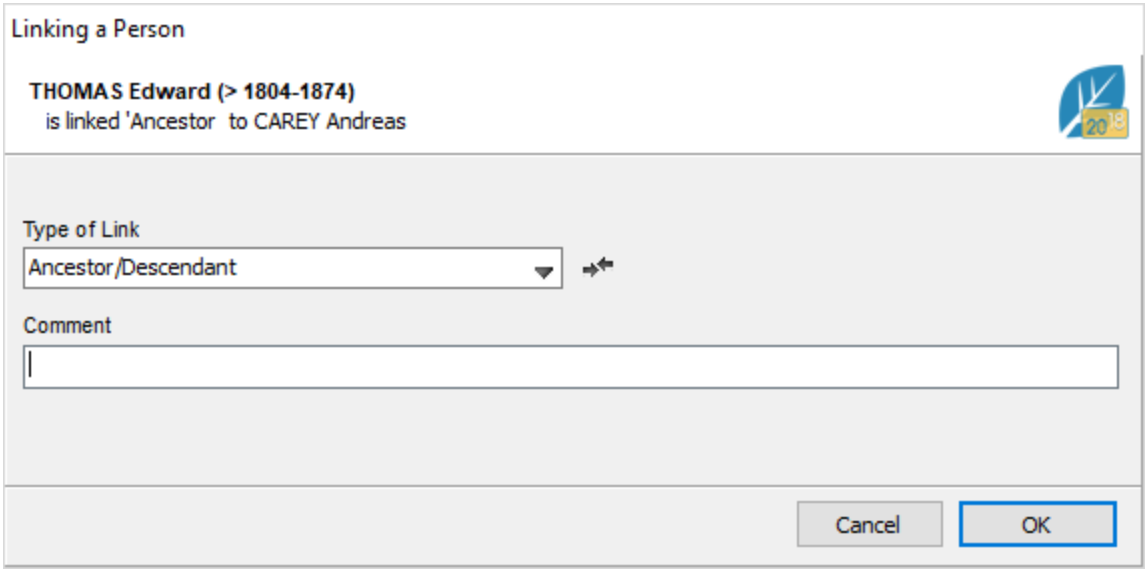
Type of link

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

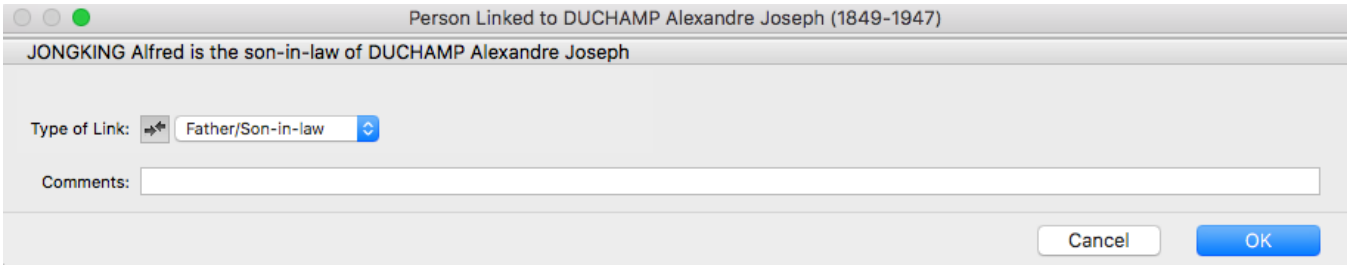
Info • The position of the two persons may be meaningful (Mark is the heir of Peter therefore Peter is the testator of Mark), or non-differentiating (Maya and Brenda are friends).

Meaning of the link

(Windows) Meaning of the link



(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 appears in the list of linked persons.
The appropriate type of link is specified in the **Sundry Links** tab for each of the two persons and the comment of the link is identical.

Unlink a person

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

2. On the button bar at the bottom, click (Unlink the selected person).
3. Validate with **OK** and the personal link between these two people no longer exists, but both persons remain available in your genealogy file.

Facts

With **Facts**, enrich your genealogy with new data and attach witnesses, places, sources, medias and dates to it.
You can add as much as you wish, unlimited number, and you can organize them.
These facts are displayed in the central part of the screen **Data > Personal Data** in the **Facts** tab.
When a **Fact** is filled, the tab is marked with a blue spot.

Facts

- 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, search data… click on the pencil button displayed in the tab. See the article The Places (see page 229) to add a place with several facts.
- 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.

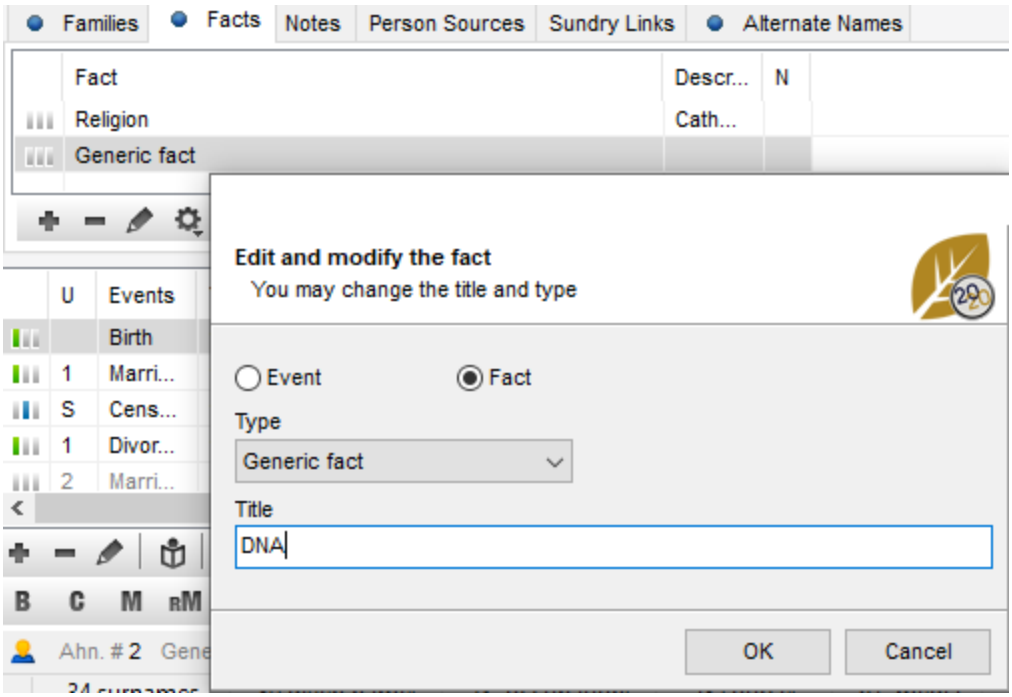
- To organize the display of the facts of your genealogy, click on the cogwheel . Select the facts then click on the **Before** and **After** to change the order of this field.

Create customized facts

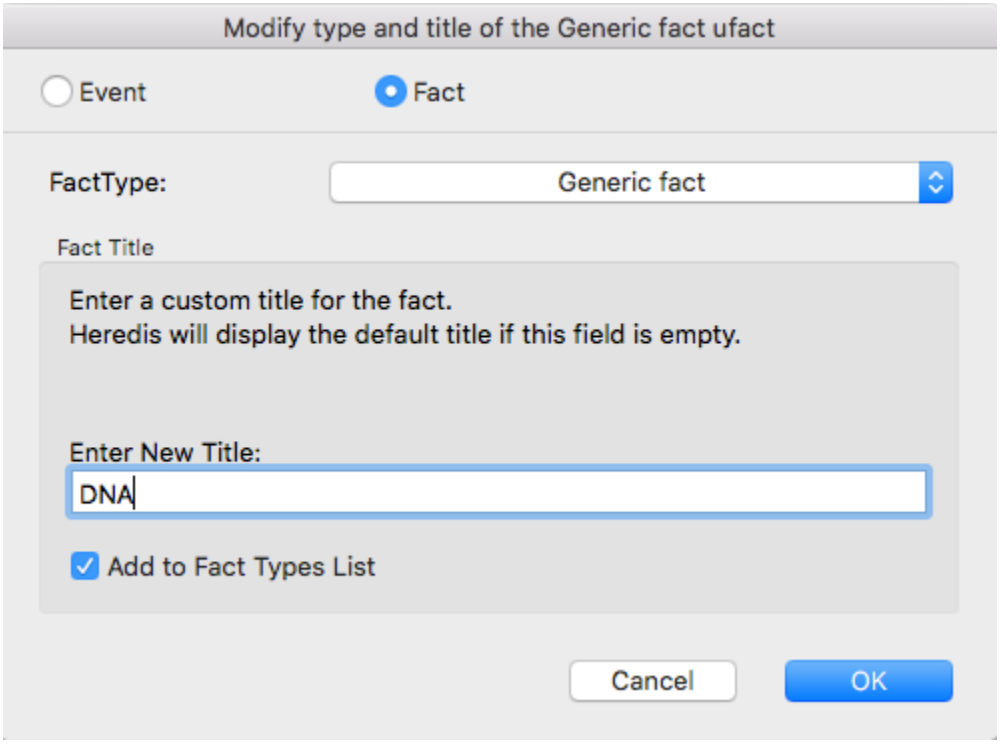
You can add facts that are not already in the list proposed by Heredis.

1. Click on ✚ button.
2. Choose **Other** and select **Generic fact** or an other fact you wish to add a subcategory to. (for example, Health to add Surgical intervention)
3. Double-click on the name of the new fact in order to customize it. A window opens to edit and rename the fact.

(Windows) Customize facts



(Mac) Customize facts



4. Enter a new title.

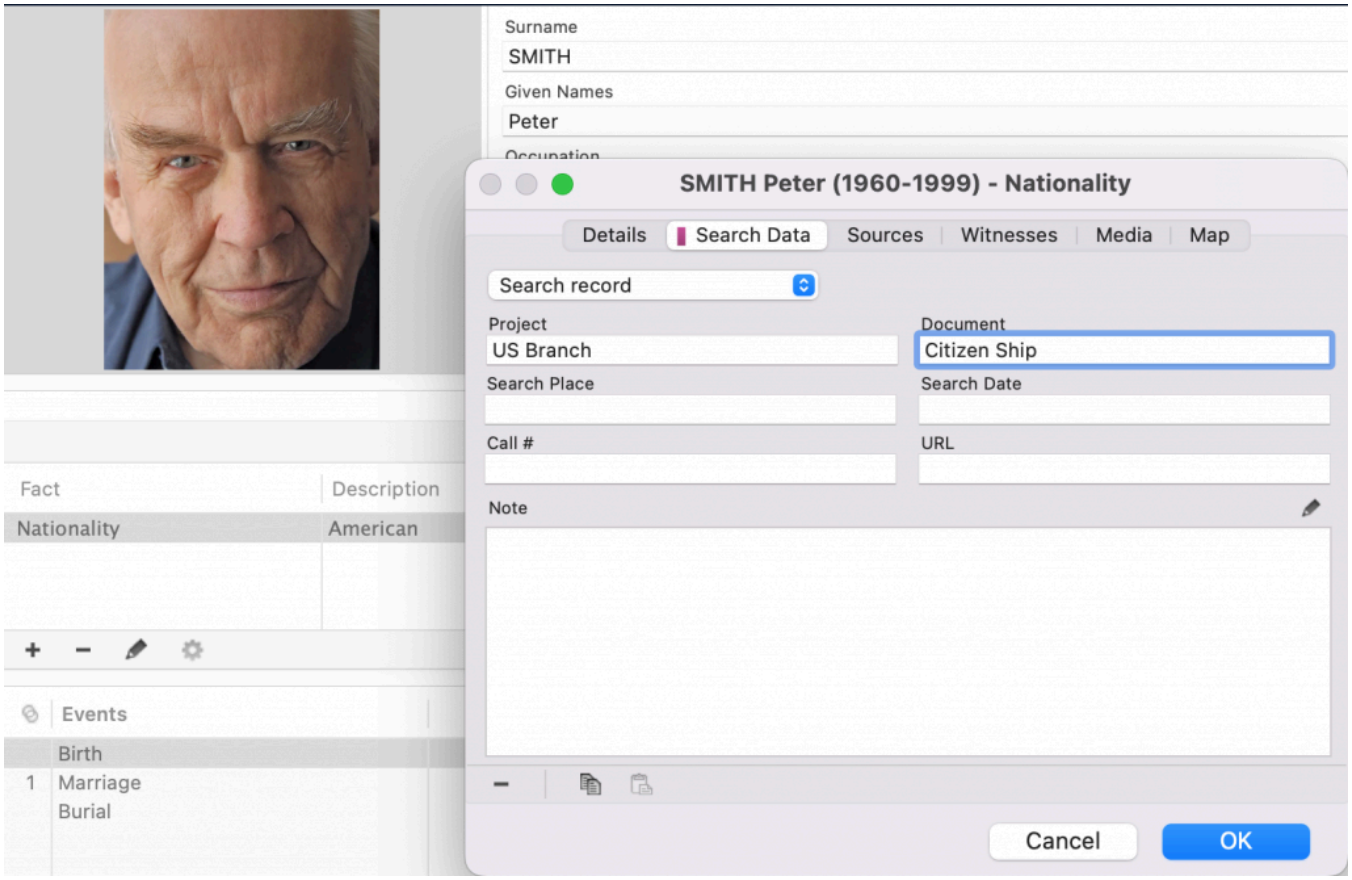
Now this new type of fact will automatically appear in the list of fact to be created. You will now be able to use this fact anytime you need it.

Search Data

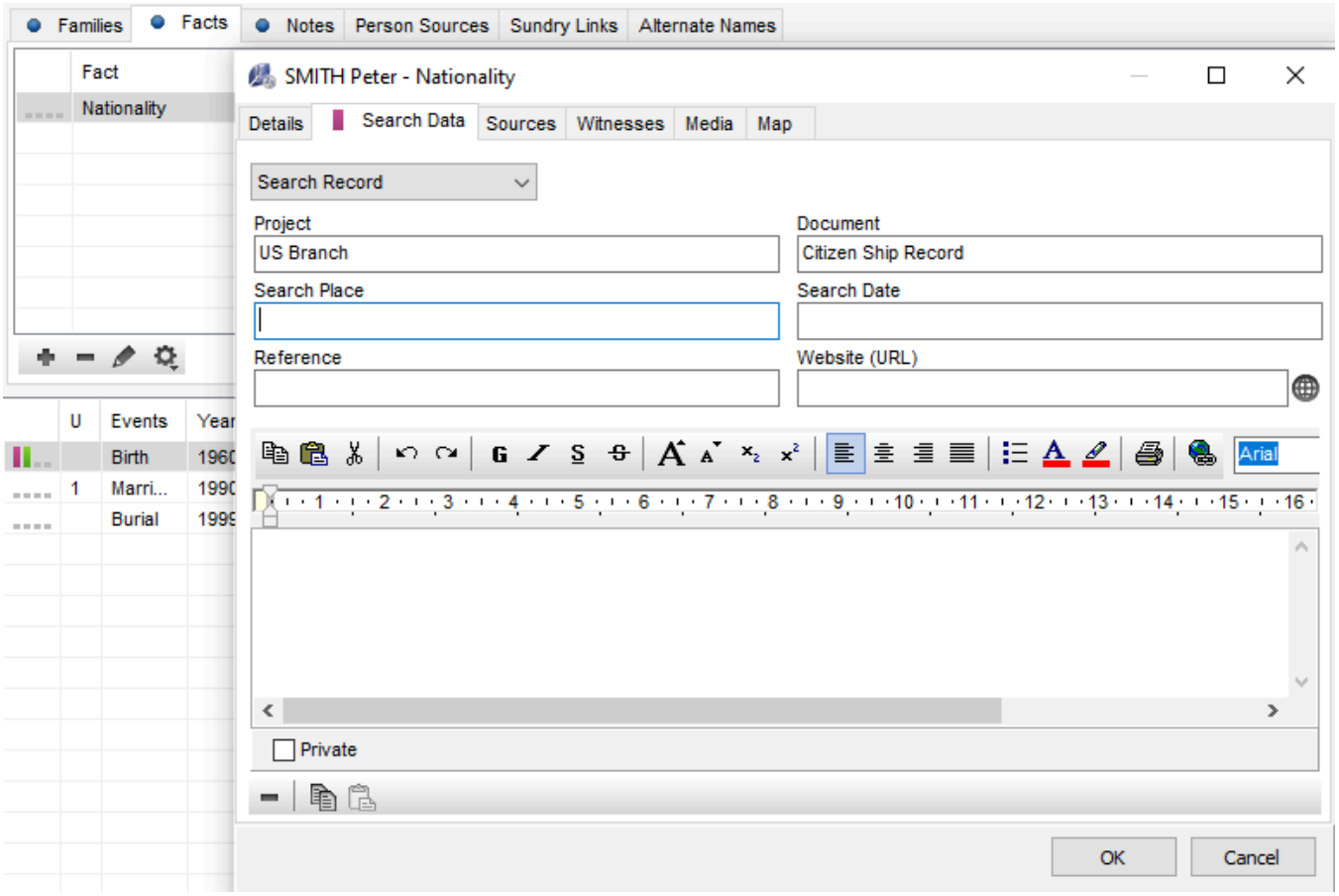
Since Heredis 2023, you can, as for events, add search data.

- Select the fact for which you want to add search data.
- Click the button to edit the topic.
- Click the **Search Data** tab.

(Mac) Facts Search Data Tab



(Windows) Facts Search Data Tab



- Choose the search status that suits you: **No Search Record, Search Record, Untraceable record, Search in progress.**
- Indicate:
  - the name of the project if necessary.
  - the type of document,
  - the place of search,
  - the expected date of search,
  - the call number of the document to search for,
  - the URL of the website concerned by the search
  - a note in the notepad that you can make private with the **Private** box. (**Mac**) Edit the note with the pencil button to tick the Private Box.
- Validate by clicking **OK**.

The search data will appear in the Research Journal.
See the articles Research Journal (see page 608), Input Events (see page 206).

Create a custom report of facts

Starting with Heredis 2025, you can edit a custom reports of facts. See the article Custom Reports (see page 598) to understand how they work.

Alternate names

Our ancestors may have had several first and last names. It is not uncommon to have a first or last name at birth that is different from the first or last name used.
Here are some examples of the reasons for this:

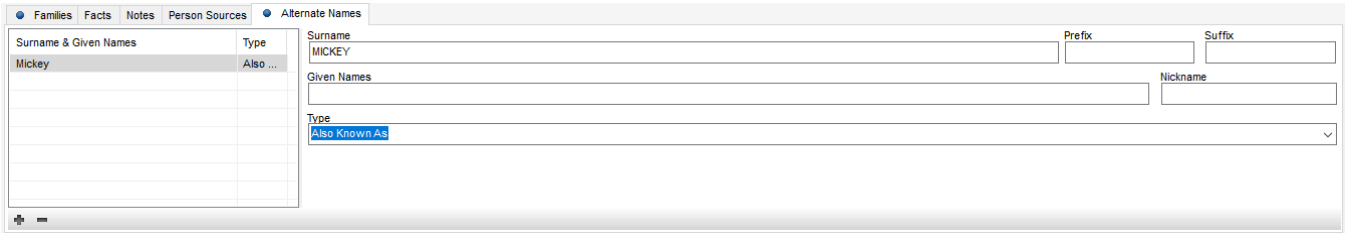
- voluntary change of name on immigration
- change of name on immigration to adapt to the new country
- change of spelling because our ancestors relied solely on spoken language, i.e. with an accent, or if the priest was not from the region, there may have been differences in the way the name was written
- the desire to change one's name in the event of adoption or a change of sex
- etc.

To learn everything you need to know about entering a surname, see the article Enter simple, double-barreled or multiple surnames.

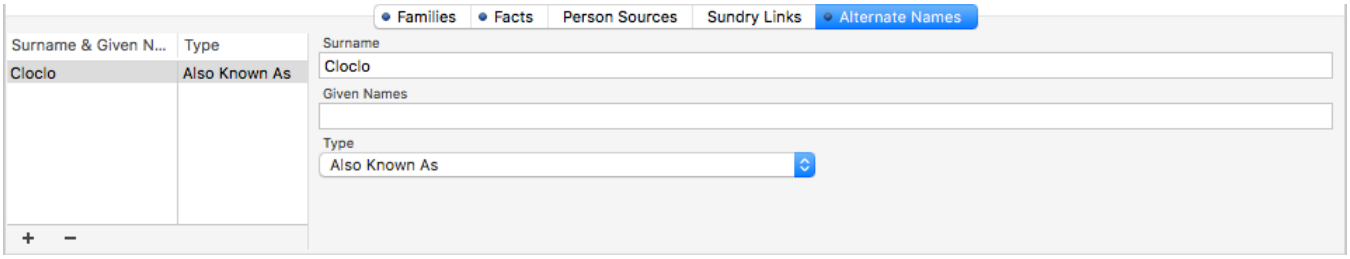
How do I enter other surnames/givennames?

Place the person concerned in the primary person.
Click on the **Data** tab **> Personal Data**.
Click on the **Alternate names** tab in the centre of the entry screen.
Click on the ✚ to add another name.
Enter the surname and givenname.
Select the type of other name. If you can't find what you're looking for, choose **Other** and change the type.
On Windows, replace **Other** with the name you want.
On a Mac, enter the other name type in the empty field provided.

(Windows) Alternate names



(Mac) Alternate names



When alternate name is entered, the tab is marked with a blue bullet.

Spelling changes

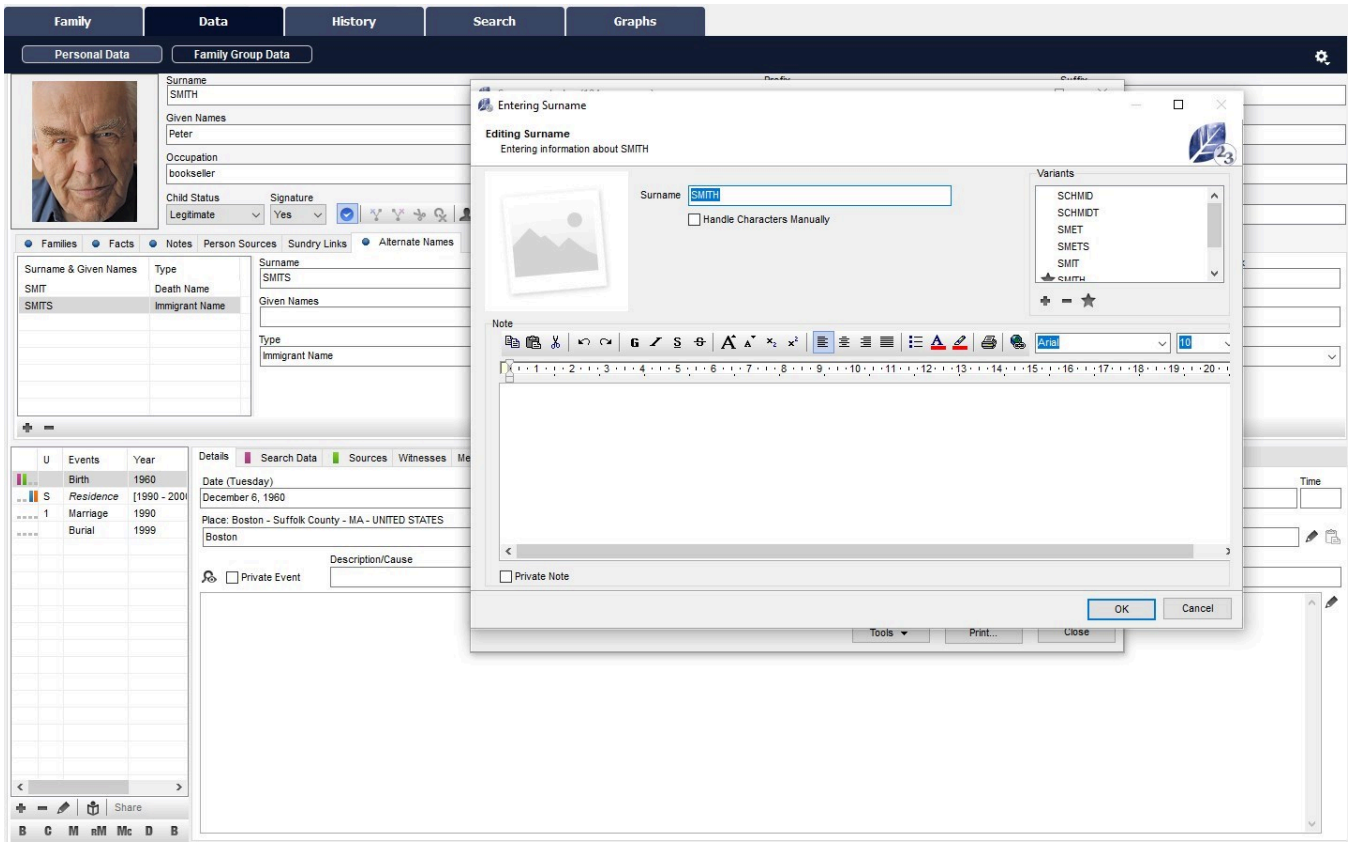
In the **Alternate names** field, indicate the different spellings of the name you have found and to which type of record. For example: Smith as a married name and Smit as a name at death. This will allow you to see the spelling differences for a person. However, it is also useful to indicate in the Surnames index that this spelling is a variant of a main name. For example, Smith is a variant of Smit.

Indicate variant spellings in the names index.

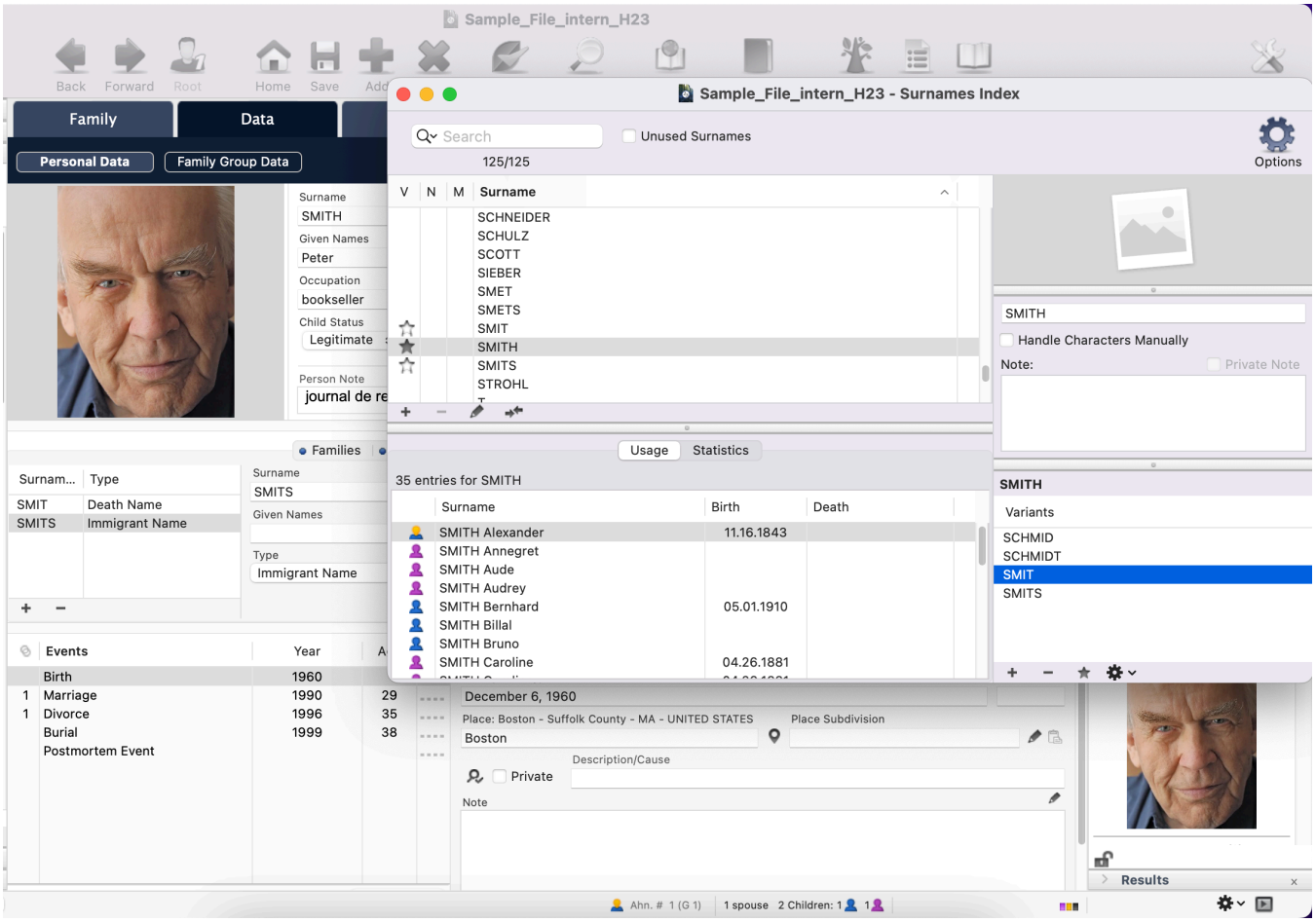
Use the Surnames index to indicate spelling variants.

- Open the Surnames index.
- Select the main name.
- Click on the pencil to edit the main name.
- Click on the ✚ in the variants area.
- Select the spelling variant.

(Windows) Name variants

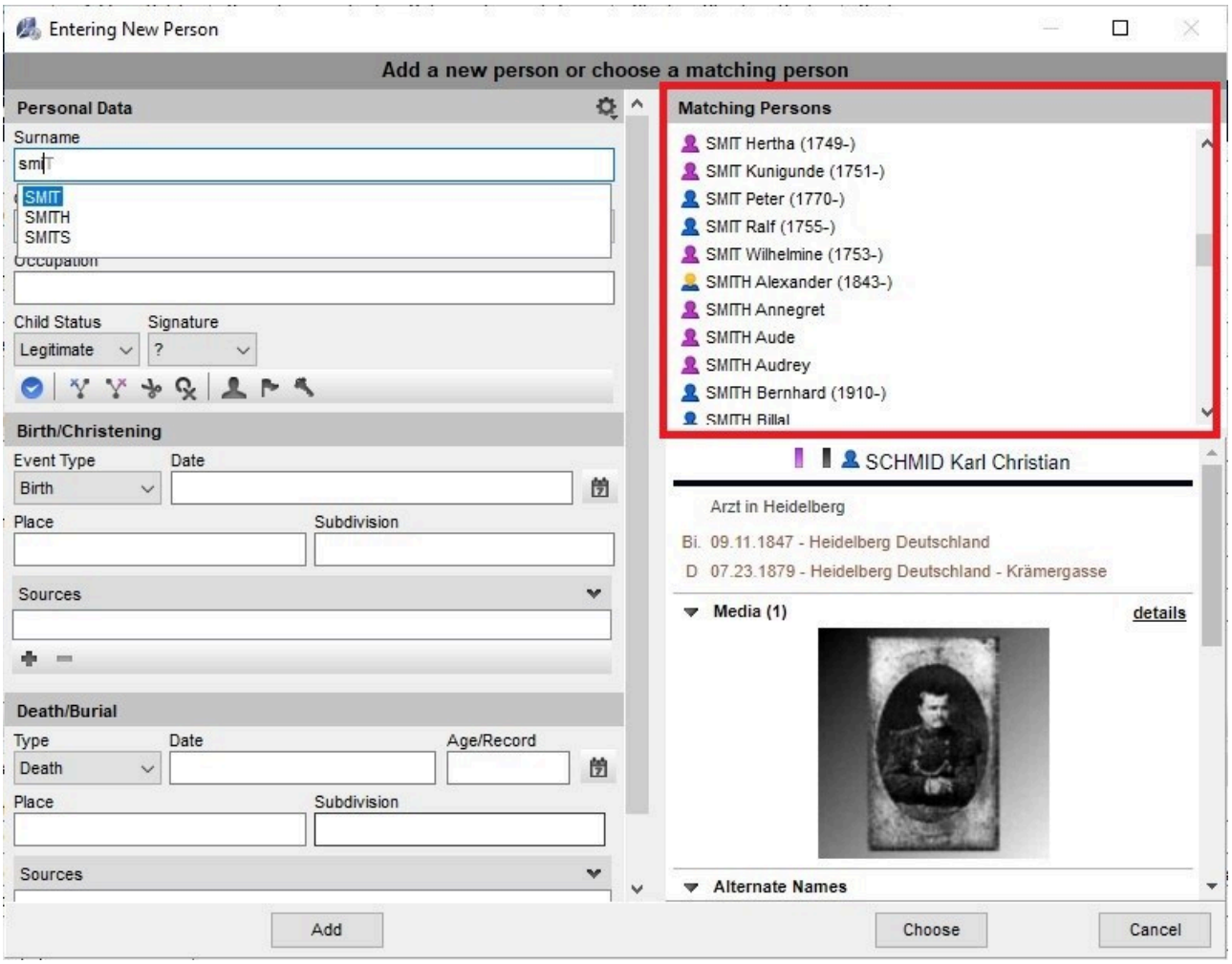


(Mac) Name variants

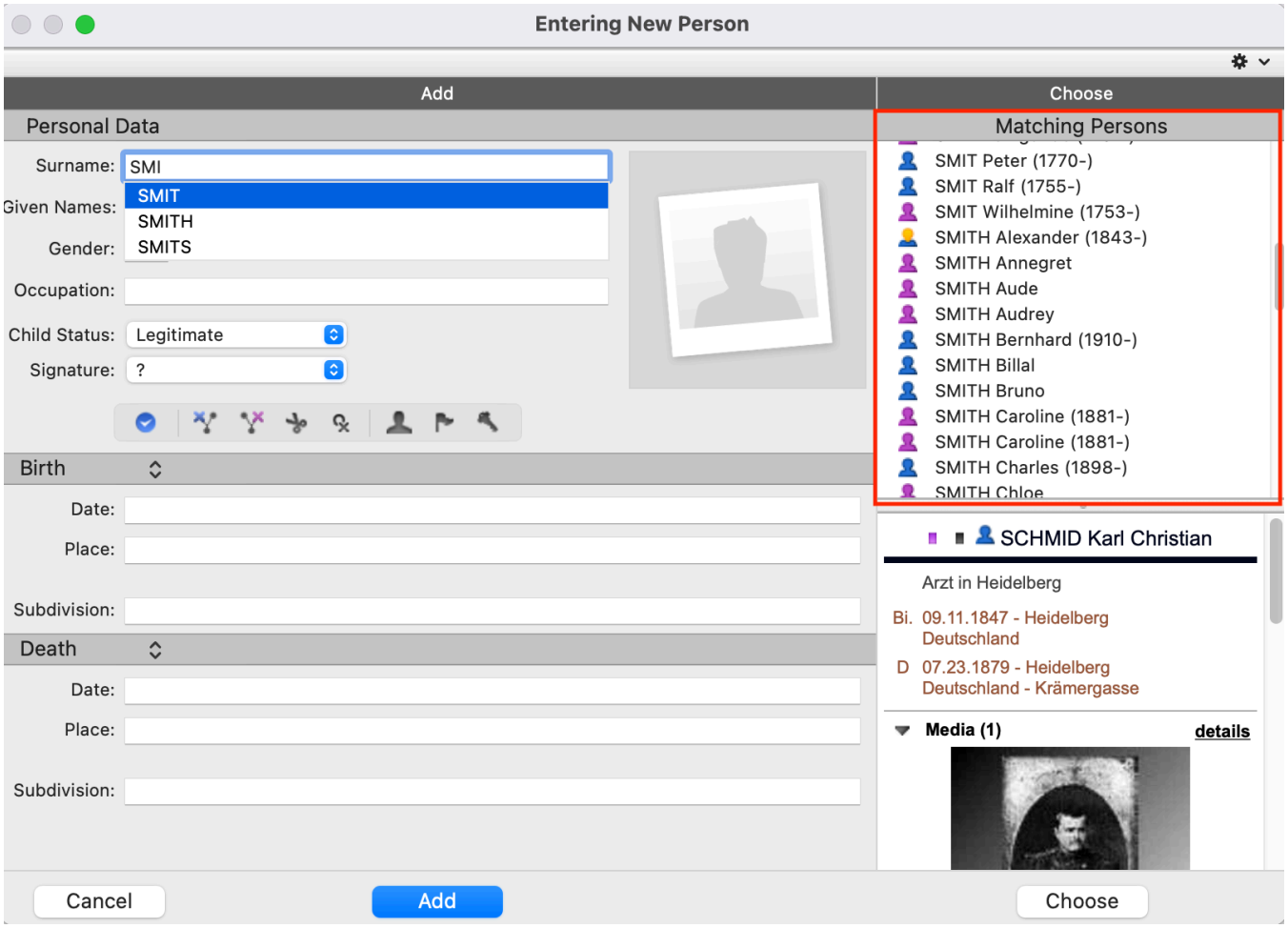


It is possible to have several spelling variants for the same name.
Indicating the variants will allow Heredis to include the spelling variants in the list of existing persons when you add new person. In this way, you can avoid entering a duplicate entry.

(Windows) Add a person



(Mac) Add a person



Deleting another name

To delete another name, select it from the list and click the − button.
Note: in the index of surnames and givennames, you will not be able to delete these other surnames and givennames as long as they are used by a person in your genealogy.
The alternate names associated with the persons in your genealogy are automatically managed in the various import and export operations in GEDCOM or Heredis format, as well as in mergers.

Using alternate names

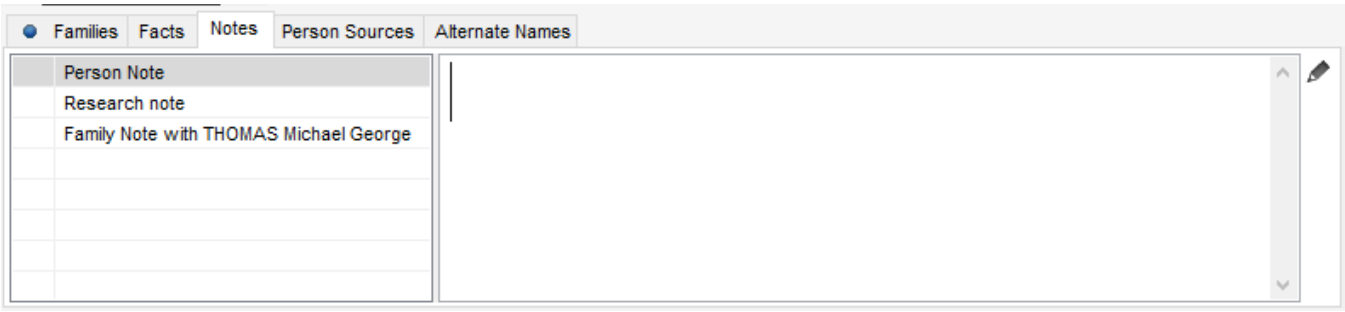
When you add a person, Heredis also checks alternate names and displays a list of existing persons. Heredis also checks for matching persons, even if it's just an alternate name. So you can avoid duplicates.

Starting with Heredis 2025, alternate names can appear in Books and Sheets if you tick the corresponding box.

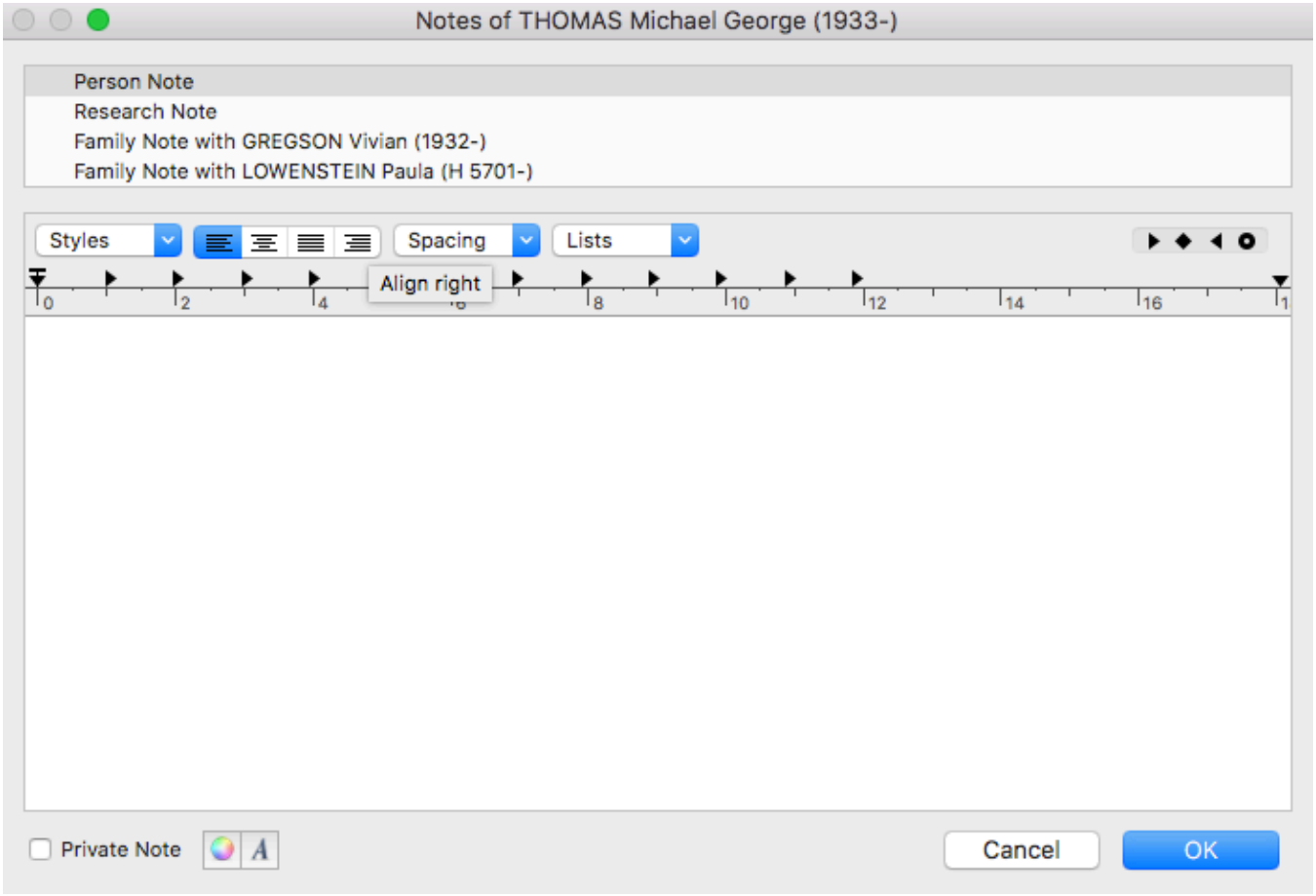
Input notes

Add specific details to your genealogy by using the available notes. You will find entry boxes for notes on persons, families, events, media, sources, surnames, given names, occupations and places. The notes are equipped with formatting tools integrated in the Heredis software. One may also paste formatted text from other applications (word processors, browsers, desktop publishing tools, etc.) though images are ignored. A note is a text block, it is not made to integrate images.

(Windows) Input Notes



(Mac) Input Notes



Individual, family and research notes

1. Display the notes:

- (**Mac**) Choose **Person** menu **> Edit Person Note** or **Edit Family Note**.
- **(Windows)** Choose **Person** menu > **Edit Notes**
- or Click the ou button in the toolbar if it is displayed.
- Click directly in the Note field when displayed on the navigation or data input screens (input tabs, indexes, media, etc..).
- In the **Data** screens, click on the pencil to access the note.

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

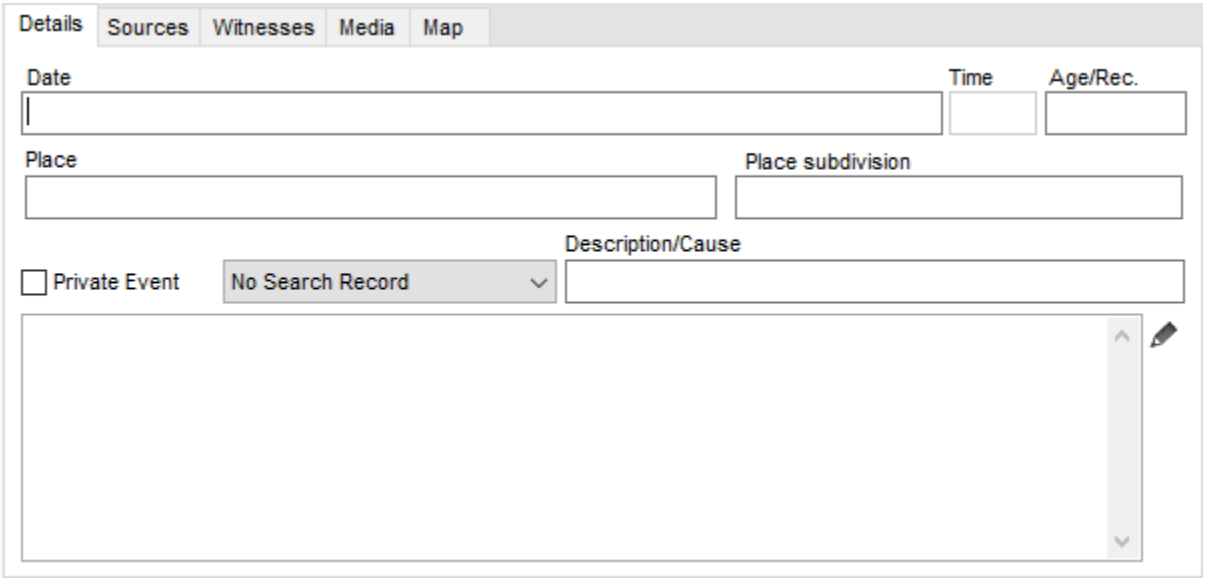
Windows Info • When a note is filled in, the **Notes** tab is preceded by a blue bullet and the button displayed in the toolbar changes its appearance to .

Mac Info • When a note is filled in, the **Notes** tab is preceded by an icon and the button displayed in the toolbar changes its appearance to .

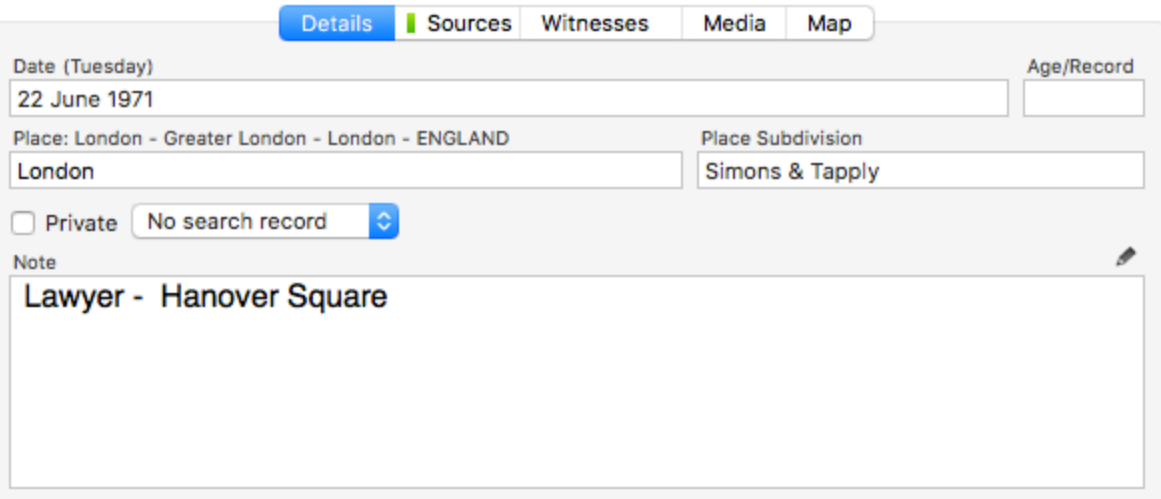
Info • If the note is not visible on the data input tabs, change the data display mode. See Customize Heredis > Select data entry method for further details.

Note of an event

(Windows) Note of an event



(Mac) Note of an event



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

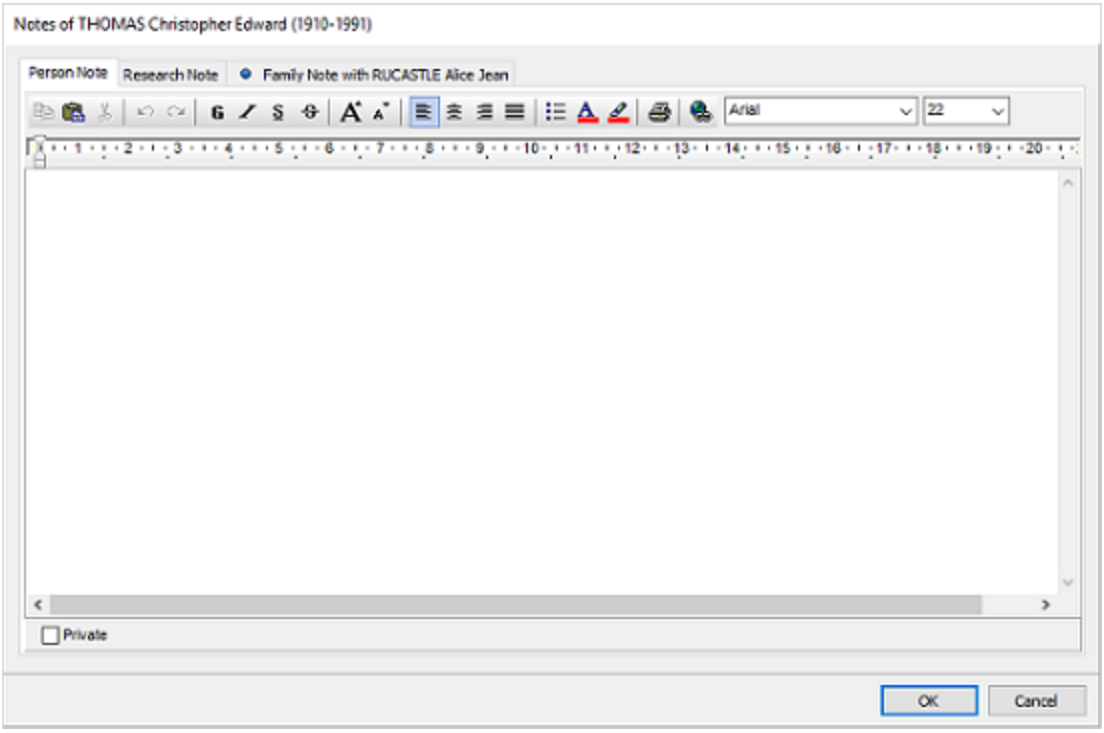
They can be formatted with the usual word processing tools.

Info • If the note is not visible on the data input tabs, change the data display mode. See Customize Heredis > Select data entry method for further details.

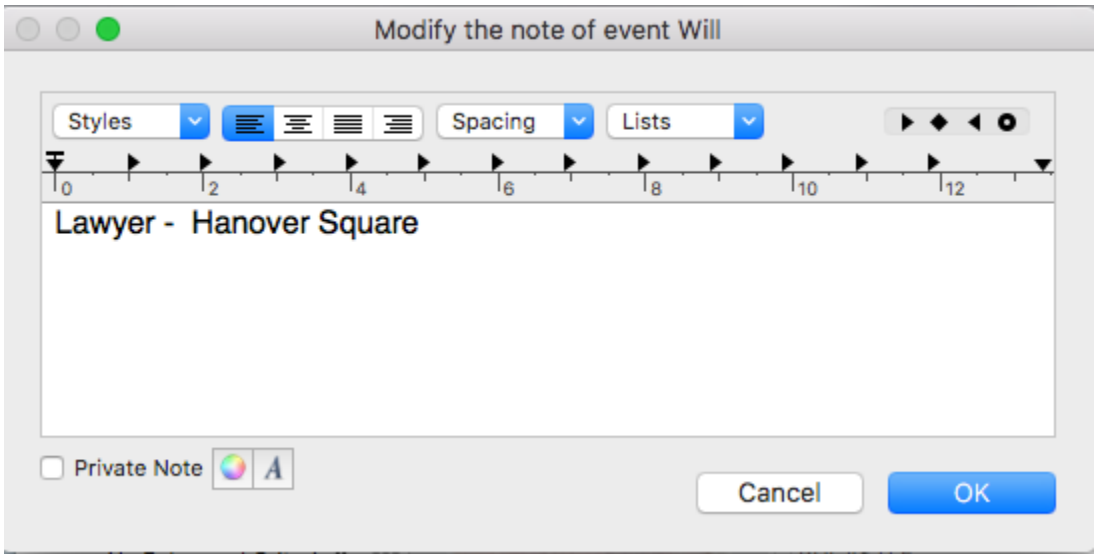
Options of notes

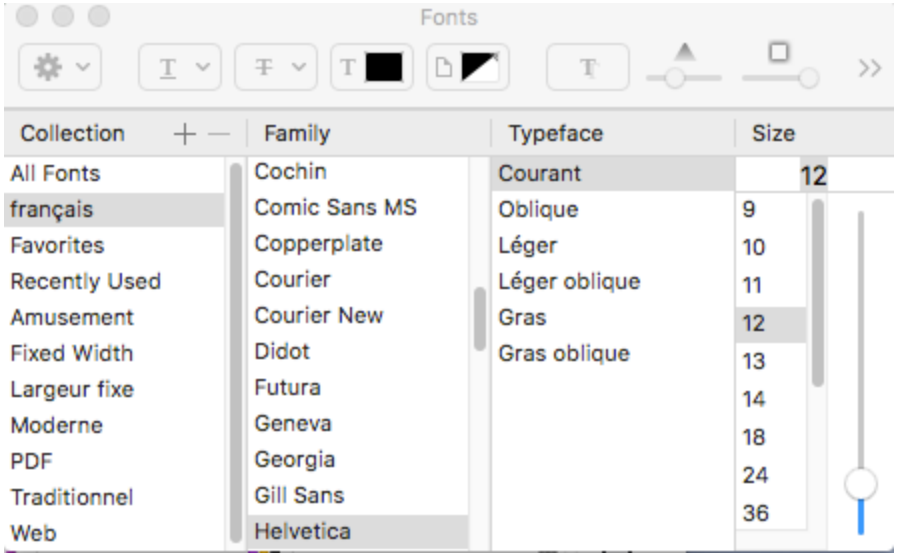
For each notes, you can add a specific format with the text editor:

(Windows) Options of notes



(Mac) Options of notes





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

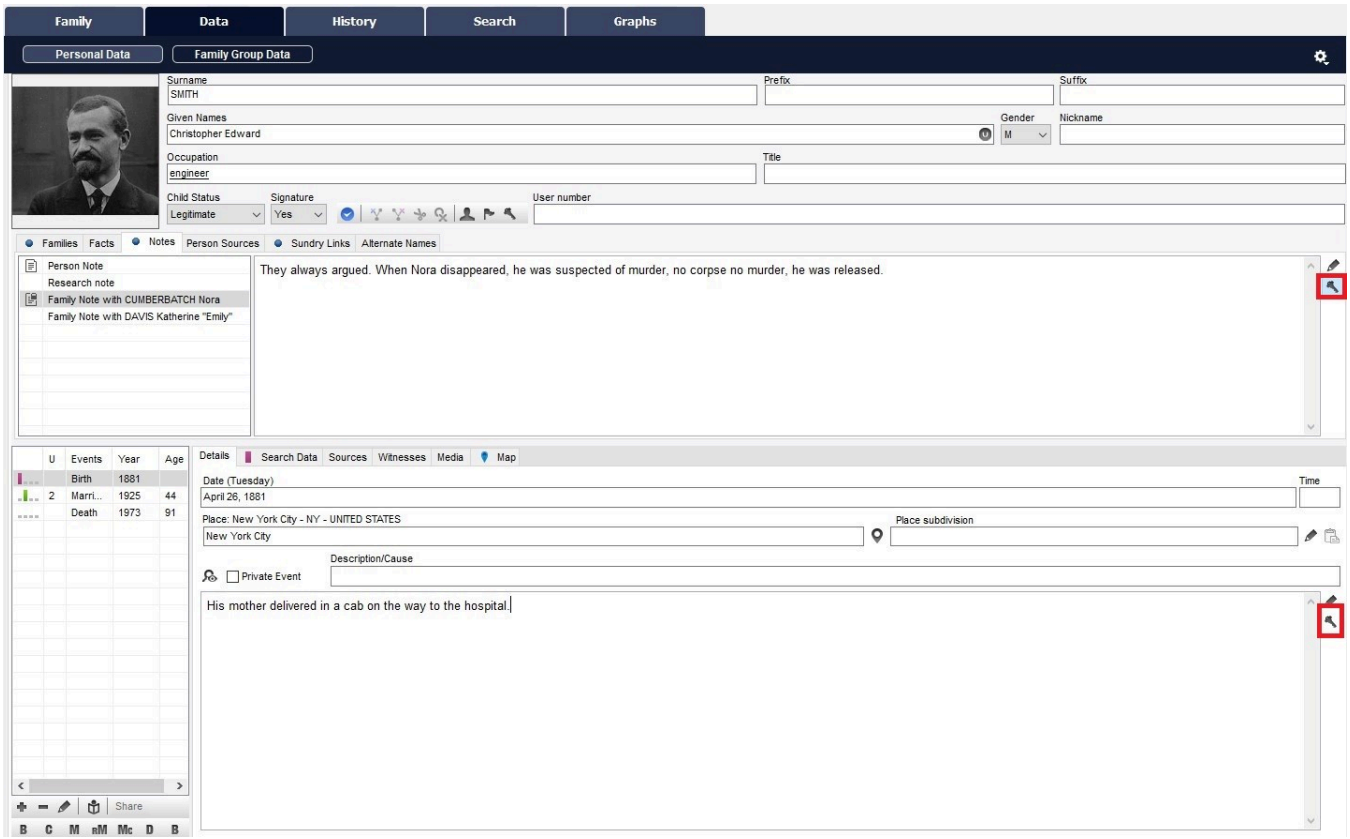
Text formatting tools are similar to the usual tools in your operating system.

Make a note private

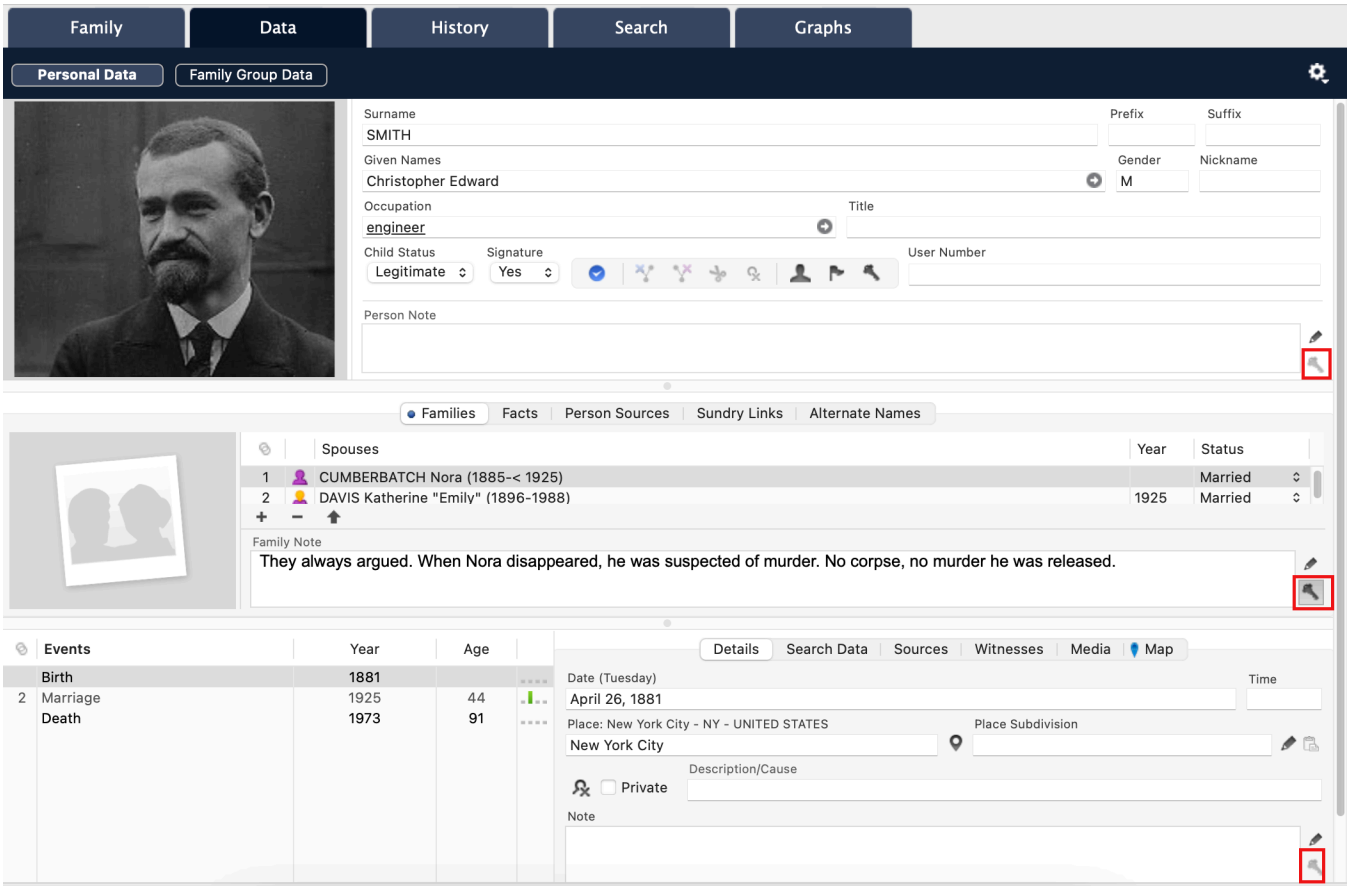
Check the **Private** note box to prevent the note being exported or published if it contains information you do not wish to pass on.

The private box is available when you edit the note, or by clicking on the key under the pencil.

(Windows) Note privacy in Personal Data tab



(Mac) Note privacy in Personal Data tab



Sources

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

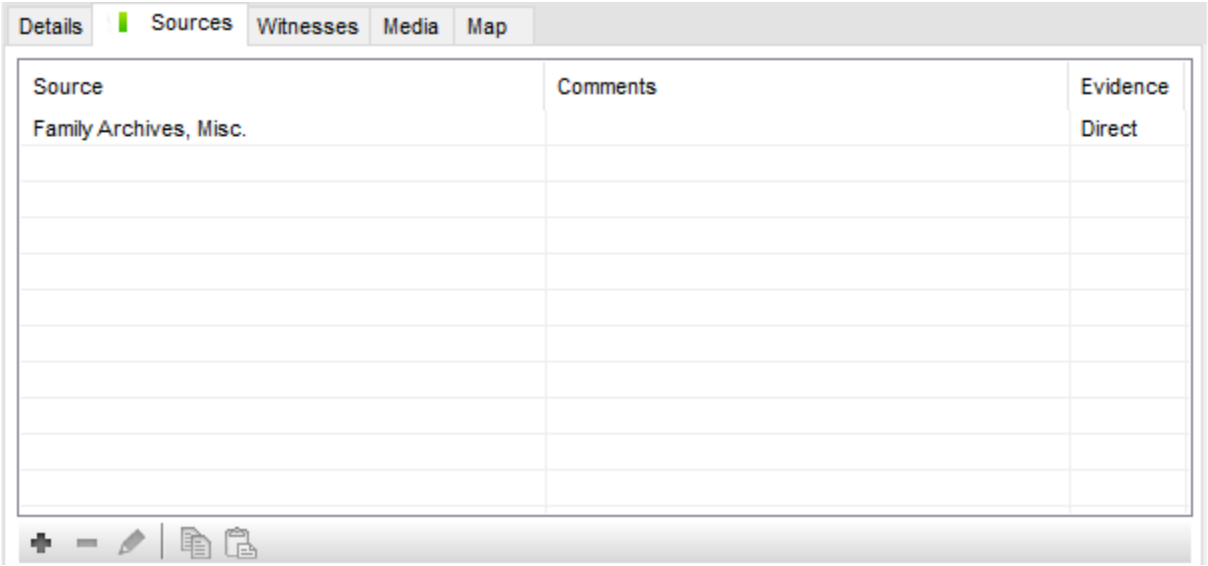
Each source (an act, a website, a historical work…) may be detailed and illustrated at the time of its creation or later.

- For each source, specify in the proposed boxes, the title, reference, author, quality of data…. A free text box allows you to enter a note or record the transcript of an act.
- You can mark a source as private in order not to export it when exchanging files, nor to publish it.
- Each source may be illustrated with media.

Once a source has been created, you may assign it to one or more events. Each event can have one or more related sources. When you assign a source to an event, add a comment indicating the link between the event and the source.

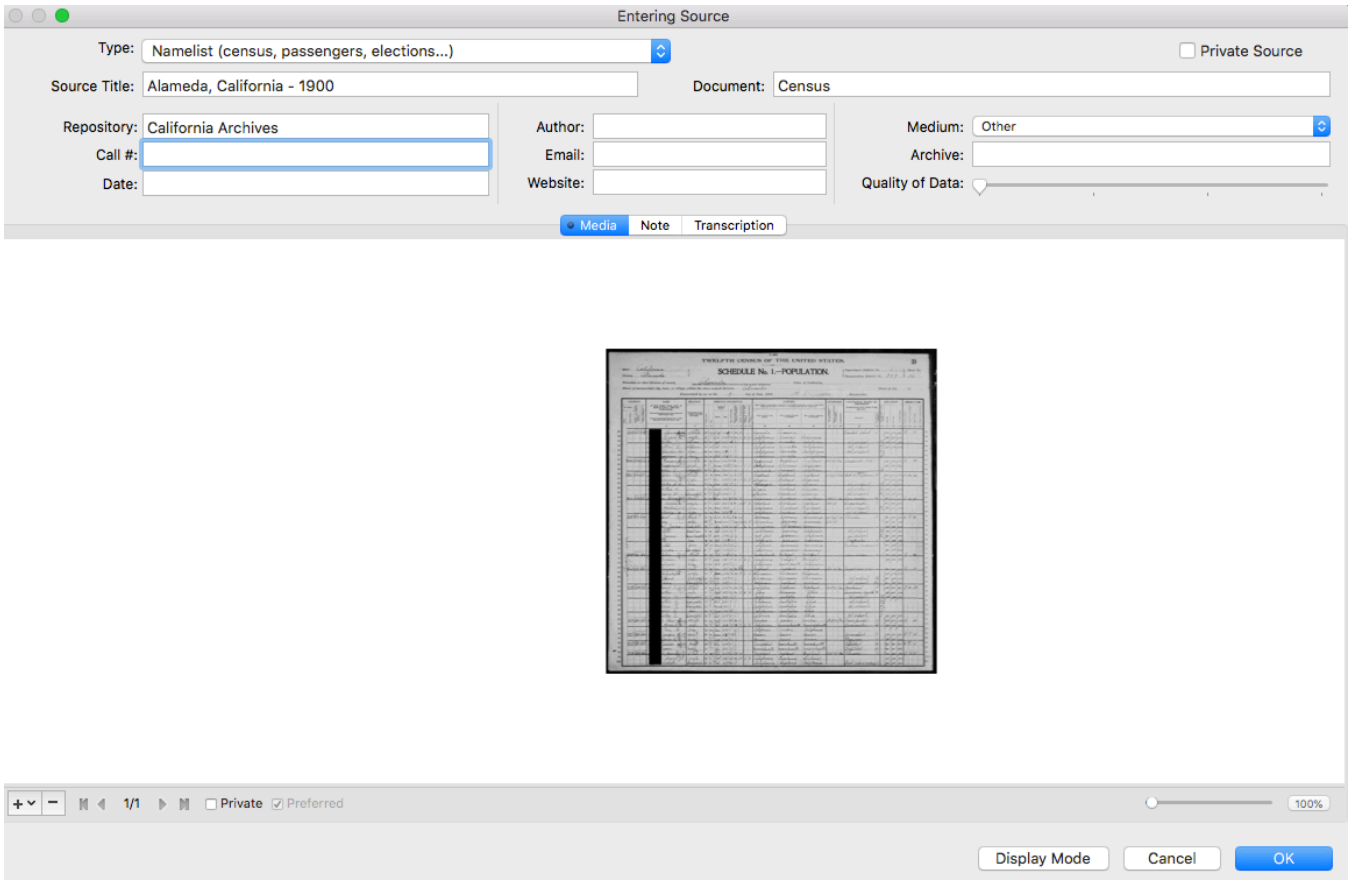
Create a new source and assign it to an event

Source tab

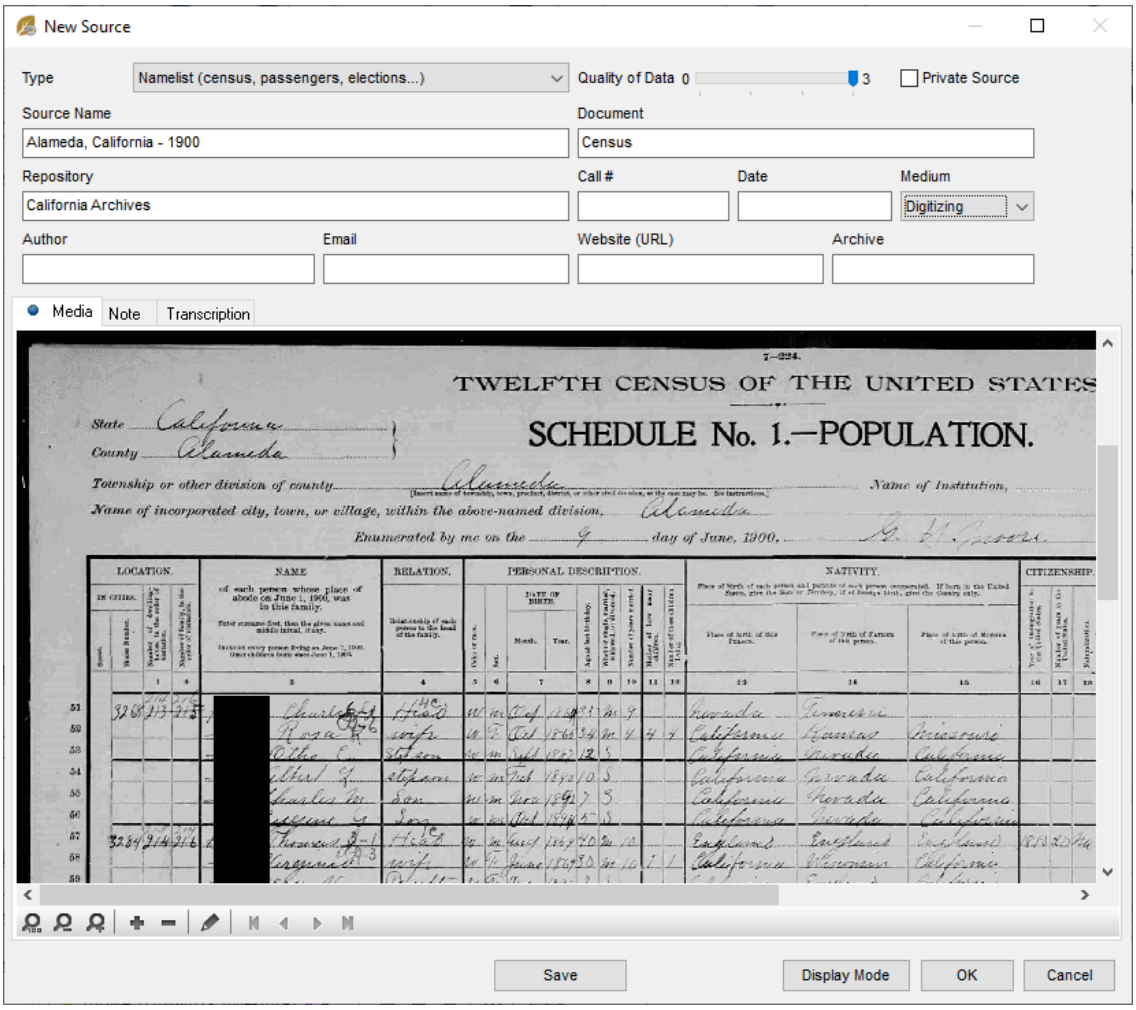


1. Select the event from the **Personal Data** tab.
2. Click the **Sources** tab.
3. Click the ✚ button.
4. Click the (Mac) **New Source** button or (Windows) the ✚ button in the **Source index** screen.
5. Enter the information for the source and press **OK**. The new source is assigned to the event.

(Mac) Create a source



(Windows) Create a source



At least enter : Source type, Title, Call#, Repository and Certainty.

Add media, note, transcription, make the source private by ticking the Private Source box.

Create a source from the source index to attach it later

Open the Source index, click the (Mac) **New Source** button or (Windows) the ✚ button in the **Source index** screen.

Note: To save time, you can duplicate a source. Select the source you want to duplicate and click . Edit the source with to edit the fields you want to edit. So if you have the same source but just a reference that is different, you can duplicate the source and only change the reference. This is very useful when you create a source for a complete registry. See also The different modes for Sources & Citations (see page 272) or see below.

Assign an existing source by drag and drop

1. Select the event from the **Personal Data** tab.
2. Drag the source in the **Sources** panel and drop it in the display field of the event. The source is then assigned.

Assign an existing source from the Sources tab of the event

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

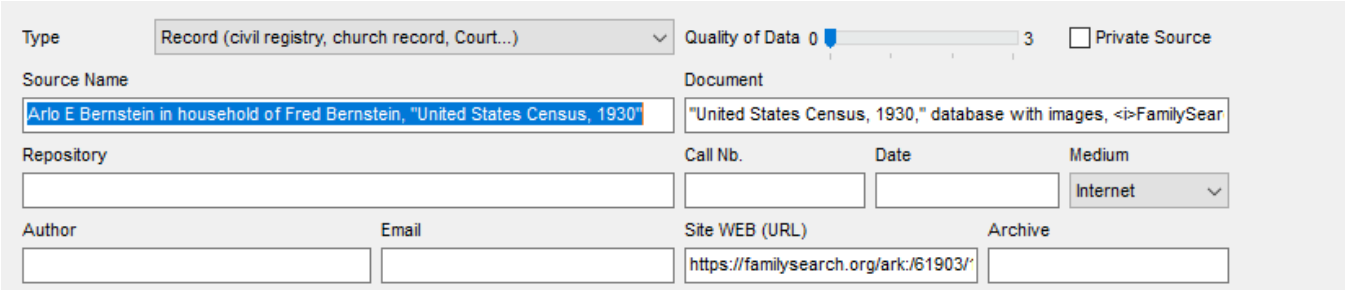
Create Person Sources

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

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

Information for the source

The input/modify screen for a source is composed of fields to be completed, a Note field that can be used for full or partial transcription of the document and a display field for the media assigned to the source.



- **Type:** 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.

Transcript your sources

Heredis understands the difficulty of your work in deciphering the acts and proposes a **Display mode** get the best possible display of the media and of the note. Click on Display mode button of a source or citation to view the media next to the transcription text block.

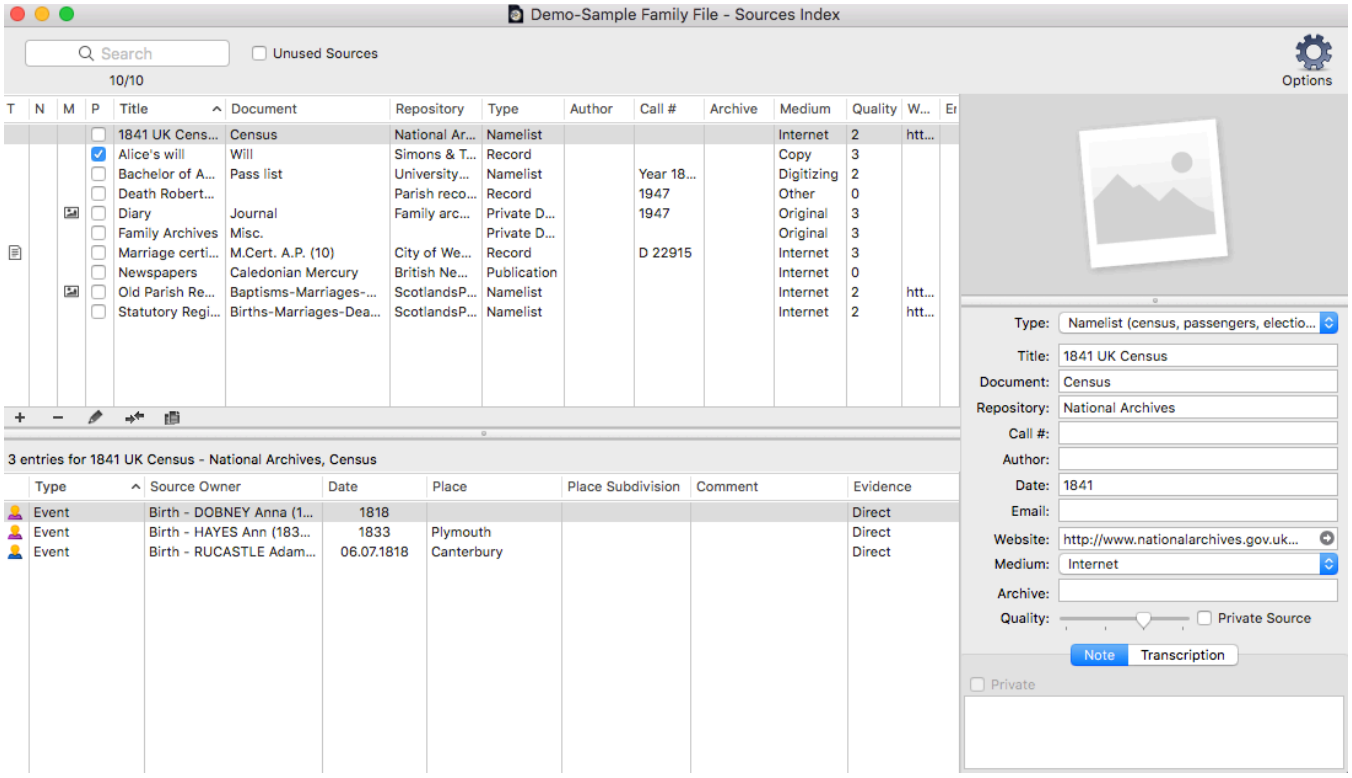
Click the **Horizontal Display** button to visualize the entire width of the scanned document, even if you have zoomed the image. You may enter text below the displayed lines.
Click the **Vertical Display** button to visualize the document as a whole, including marginal notes. You may enter text to the right of the displayed image.

Generalities

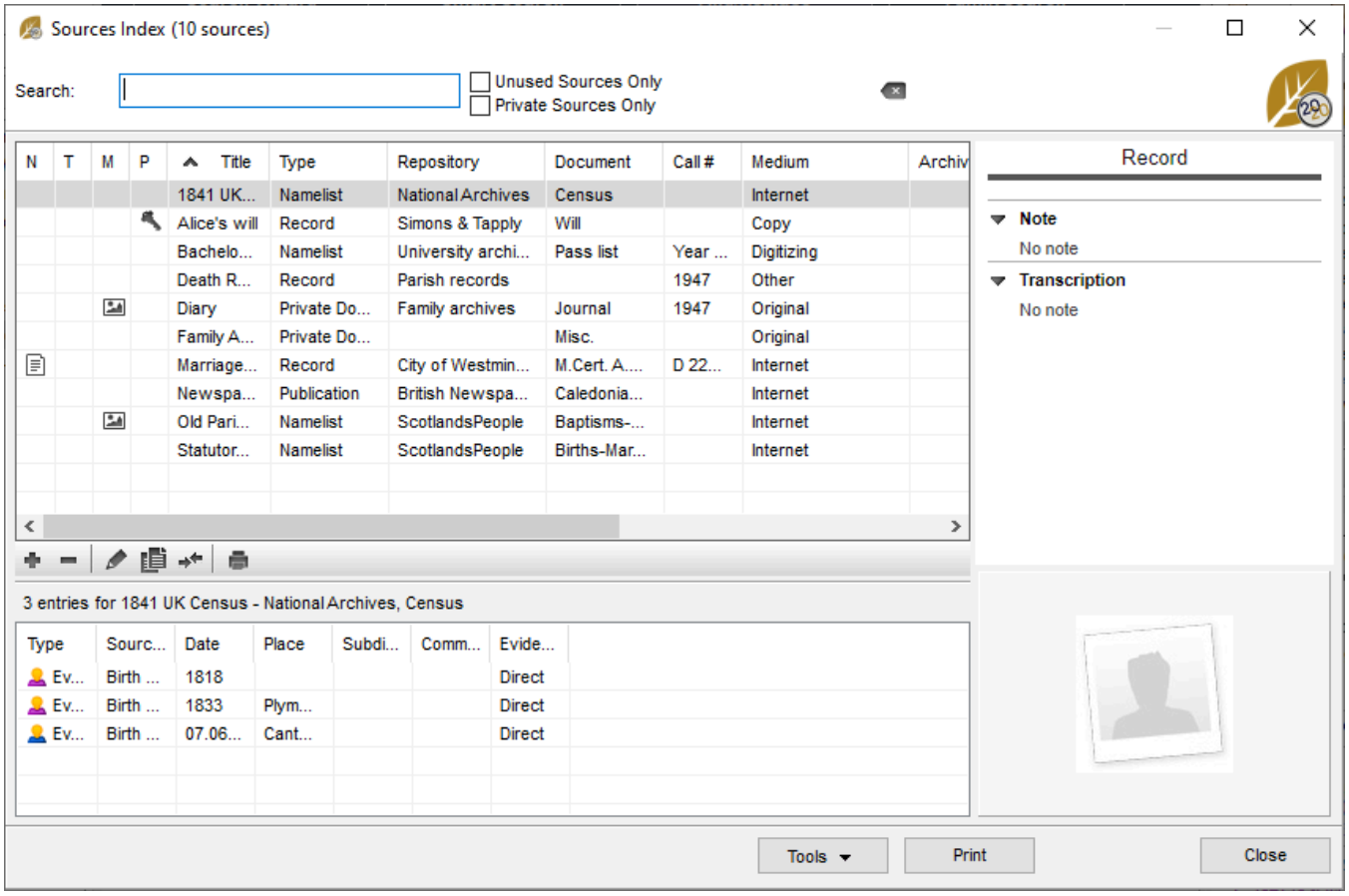
All sources entered are managed by the **Sources Index** .

Warning: Any modification in a source will be applied to all its uses.

(Mac) Source index



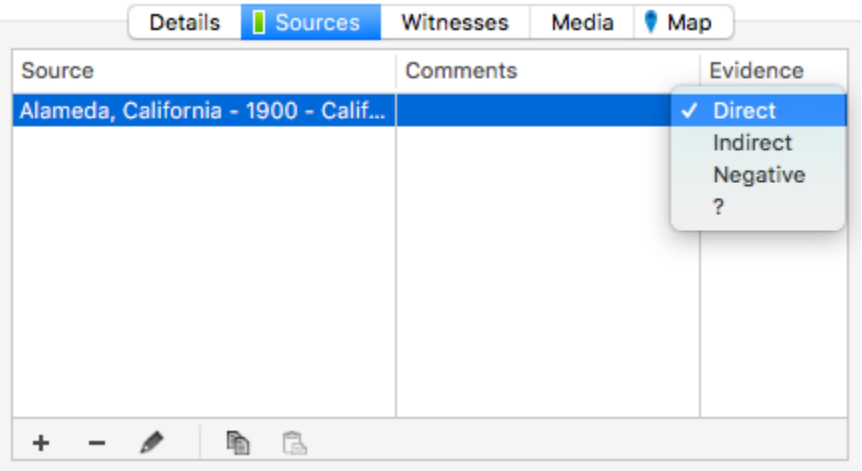
(Windows) Source index



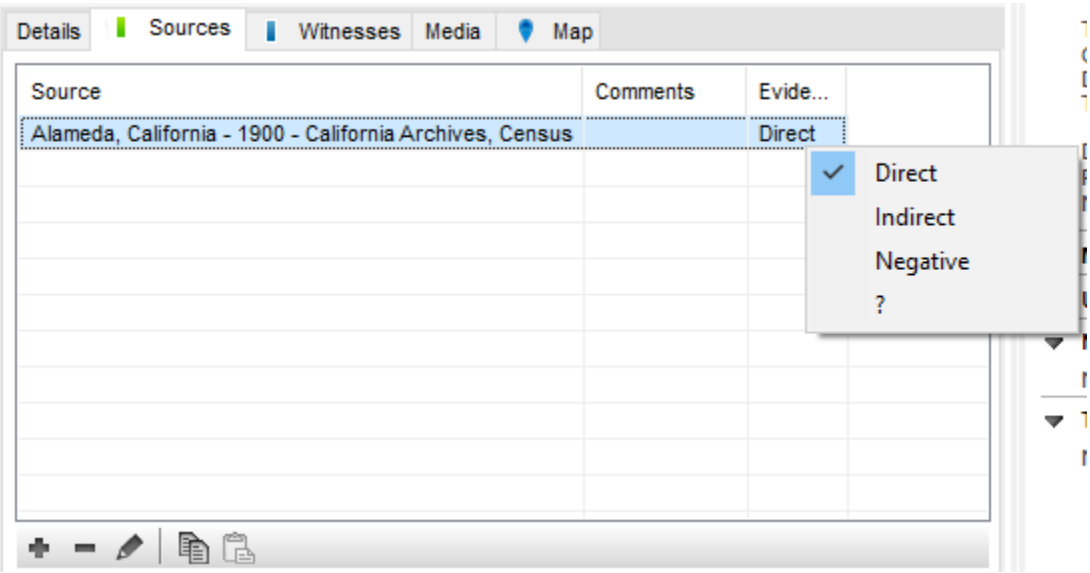
When you attach a source, add a comment to indicate the connection between the event, the facts or person and the source.

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

(Mac) Source tab



(Windows) Source tab



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

Indirect: the source is relevant but needs more information.

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

Note: When you add a source to an event, the proof is automatically fixed to direct. You can change this setting in Format tab of Heredis's preferences. (Mac) **Heredis** menu > **Preference > Format tab > Evidence**, (Windows) **Tools** menu **> Preferences > Heredis Preferences >**

Evidence, choose the option that matches best to your work.

Report to Source index (see page 459) and Indexes: Generalities (see page 412) for more details.

Managing citations in comprehensive mode

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

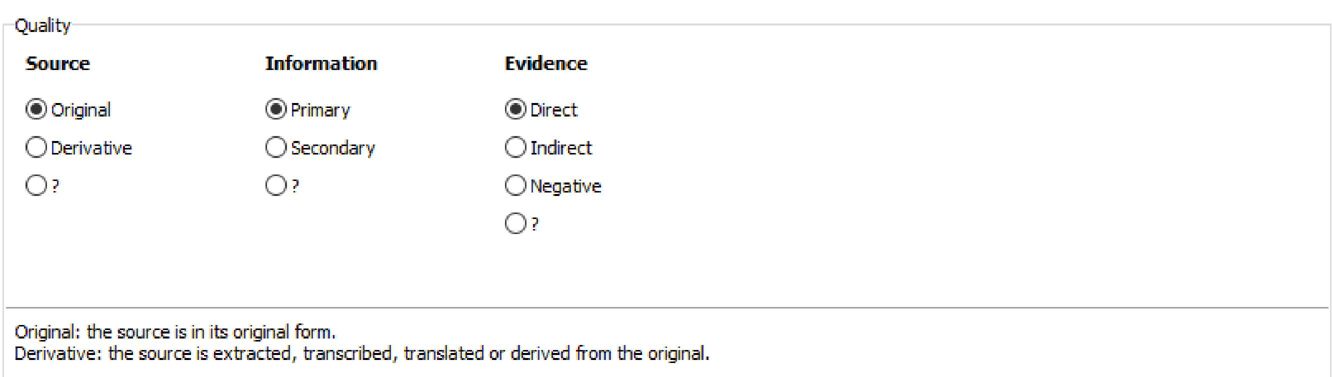
To switch in comprehensive mode,

- (Mac) click **Heredis** menu > **Preference > Format tab**,
- (Windows) **Tools** menu **> Preferences > Heredis Preferences**,
- Tick the **Comprehensive mode** box and check the “**Comprehensive mode**” alternative in the Default source citation options.

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

Original: the source is in its original form.
Derivative: the source is extracted, transcribed, translated or derived from the original.
Primary: the source comes from a person who did have direct knowledge of the event or person.
Secondary: the source comes from a person who did not have a direct knowledge of the event or person (local history, tradition, family history…).

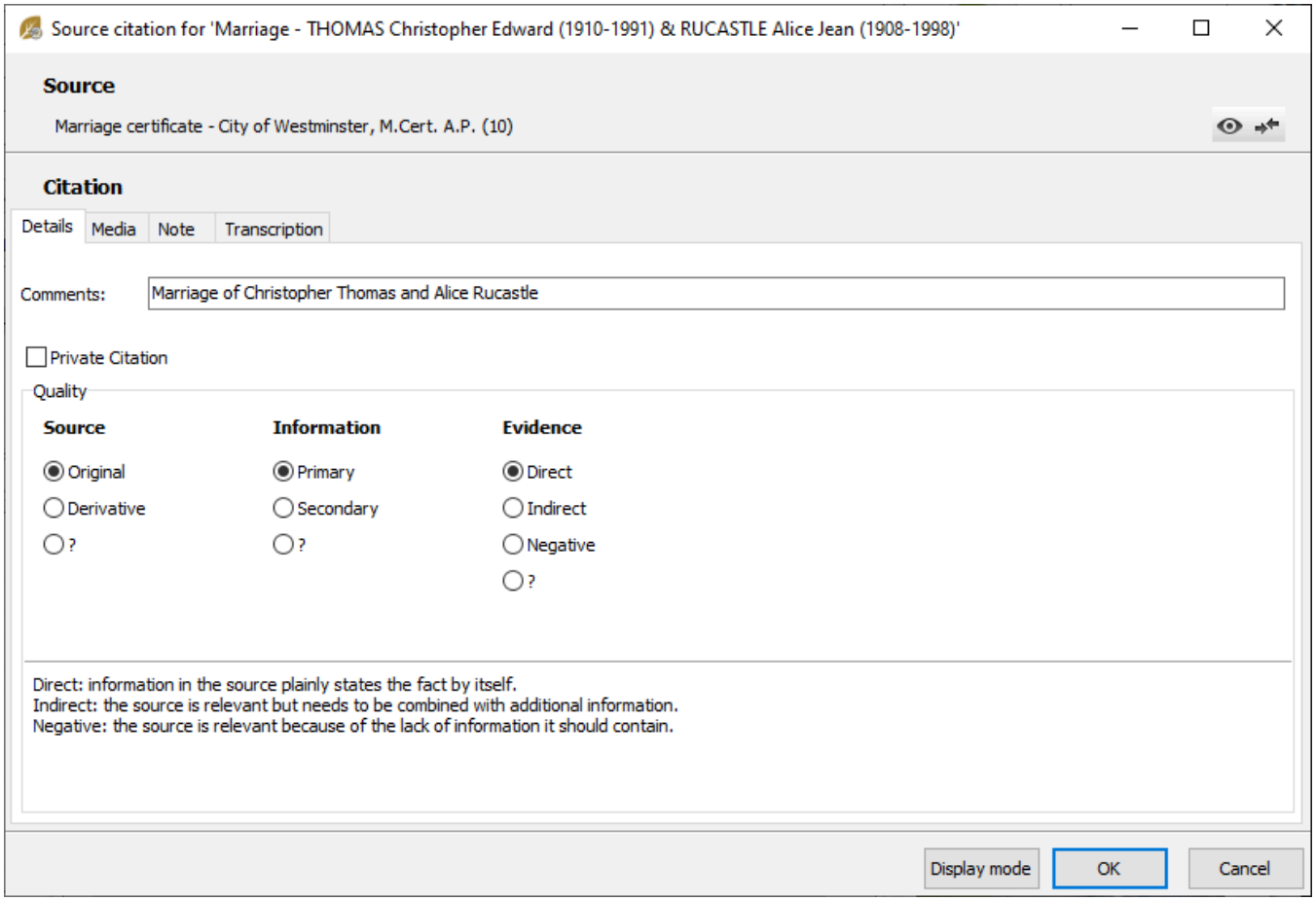
Source’s Preferences



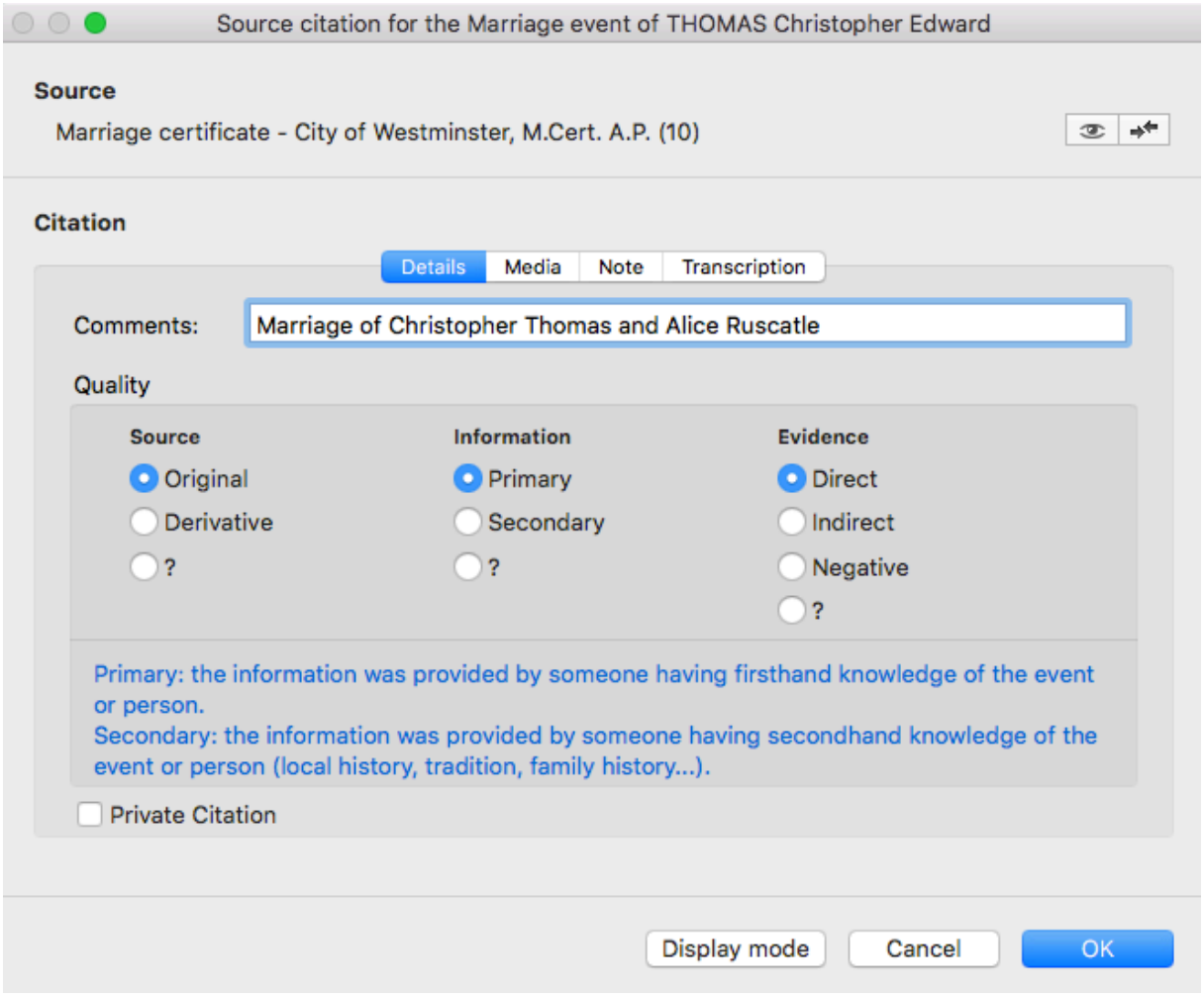
In comprehensive mode, when you want to associate a source to an event, Heredis display a citation windows allowing you to:

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

(Windows) Source Citation

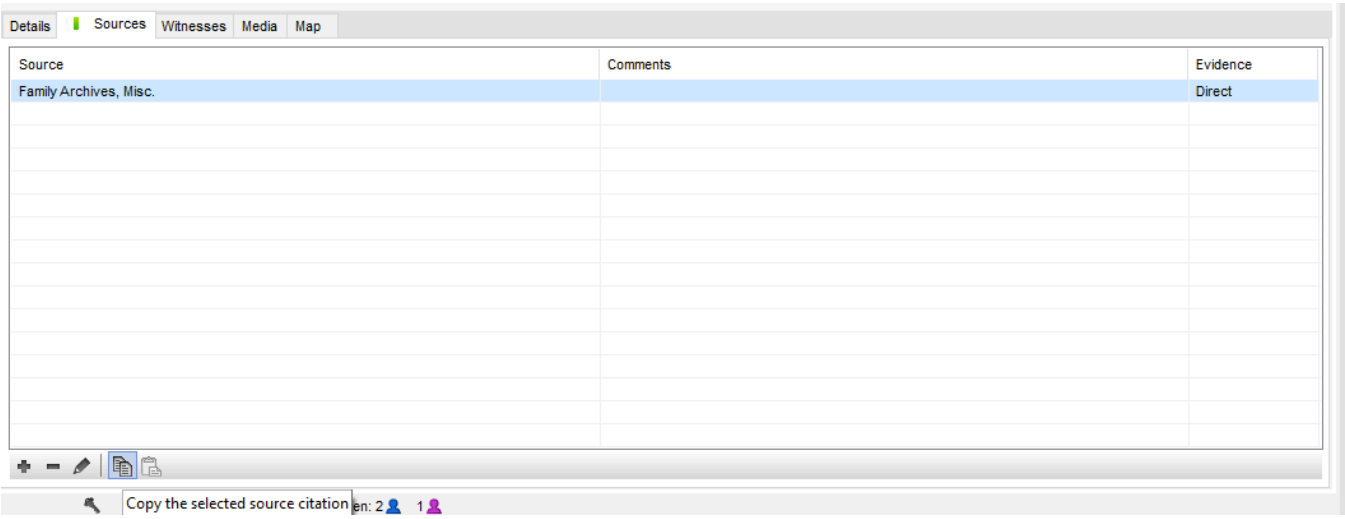


(Mac) Source Citation



Duplicate a citation of a source

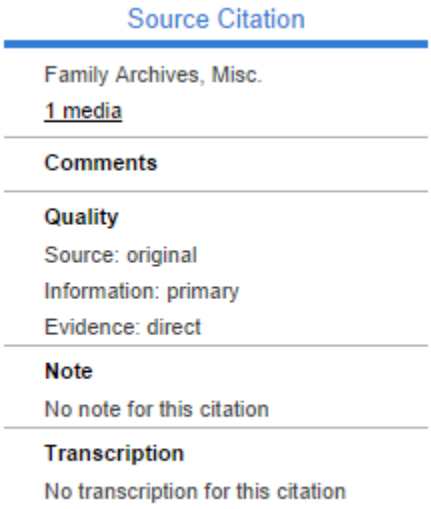
If you want to duplicate the citation and all the elements which compose it in another event, use the copy & paste buttons.



Summary of the source

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

Source Citation



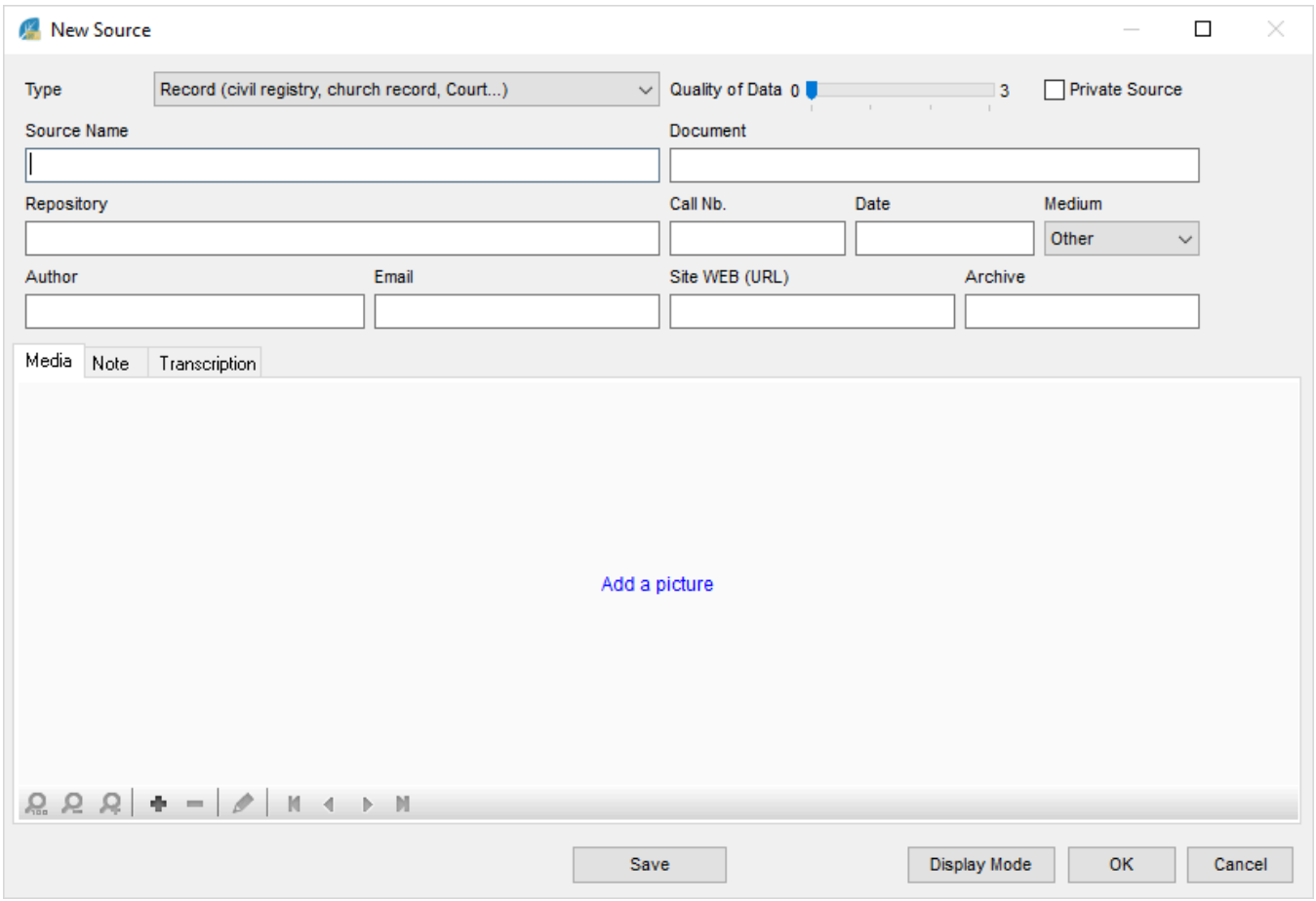
For further details, see The different mode for Sources & Citations (see page 272)

The different mode for Sources & Citations

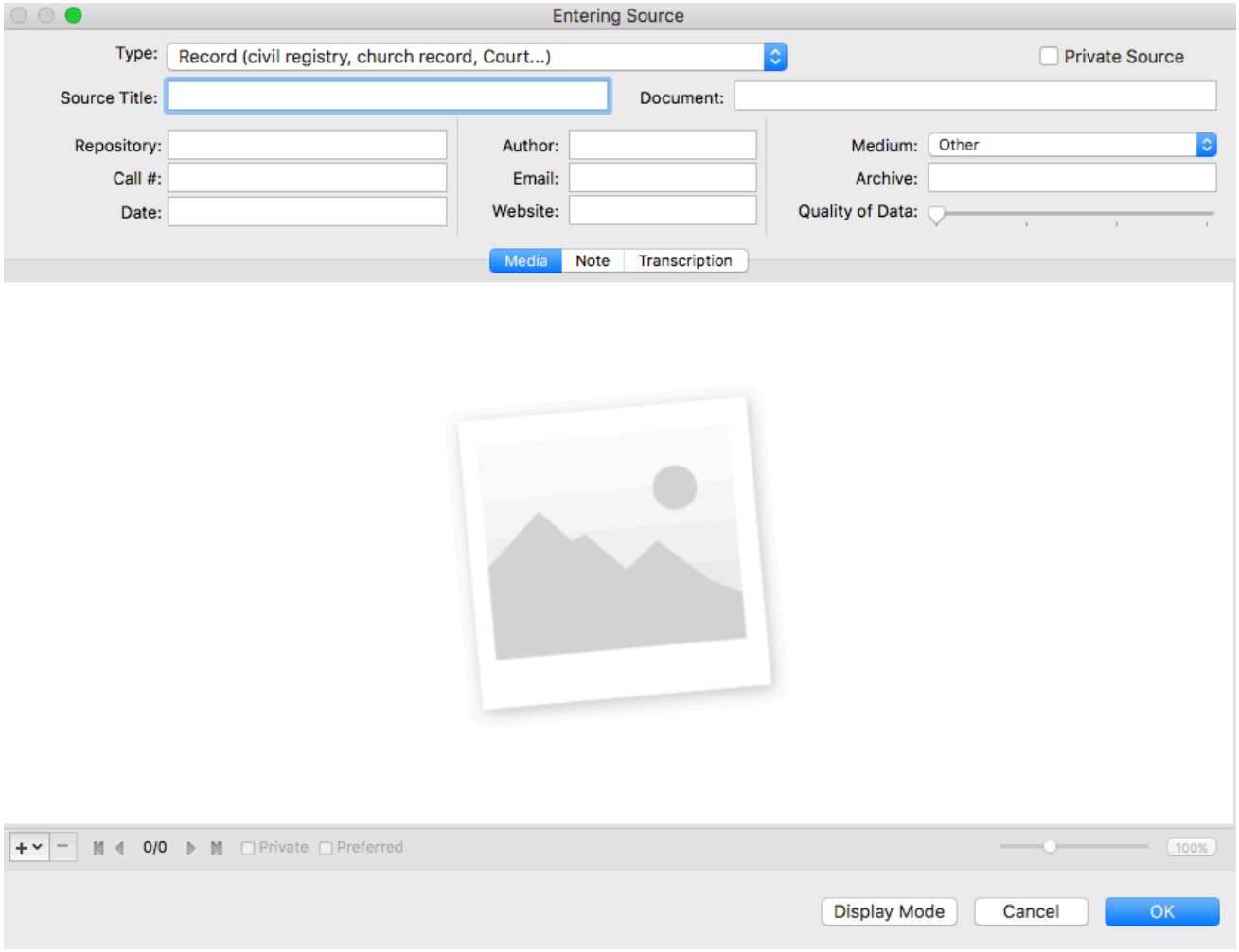
The information gathered about your ancestors will be more or less reliable depending on their origin. Assign one or more sources to each event in order to justify the information recorded.

Basic Mode

This source management mode is set by default in Heredis. It corresponds to 1 source = 1 deed. The source can then be used for the information resulting from this deed.
Add a source to an event by clicking ✚ button on Sources tab. See also Sources (see page 261).
(Windows) Source's Basic Mode



(Mac) Source's Basic Mode



Each source (an act, a website, a historical work…) may be detailed and illustrated at the time of its creation or later.

- For each source, specify in the proposed boxes, the title, reference, author, quality of data…. A free text box allows you to enter a note or record the transcript of an act.
- You can mark a source as private in order not to export it when exchanging files, nor to publish it.
- Each source may be illustrated with media.

Comprehensive Mode

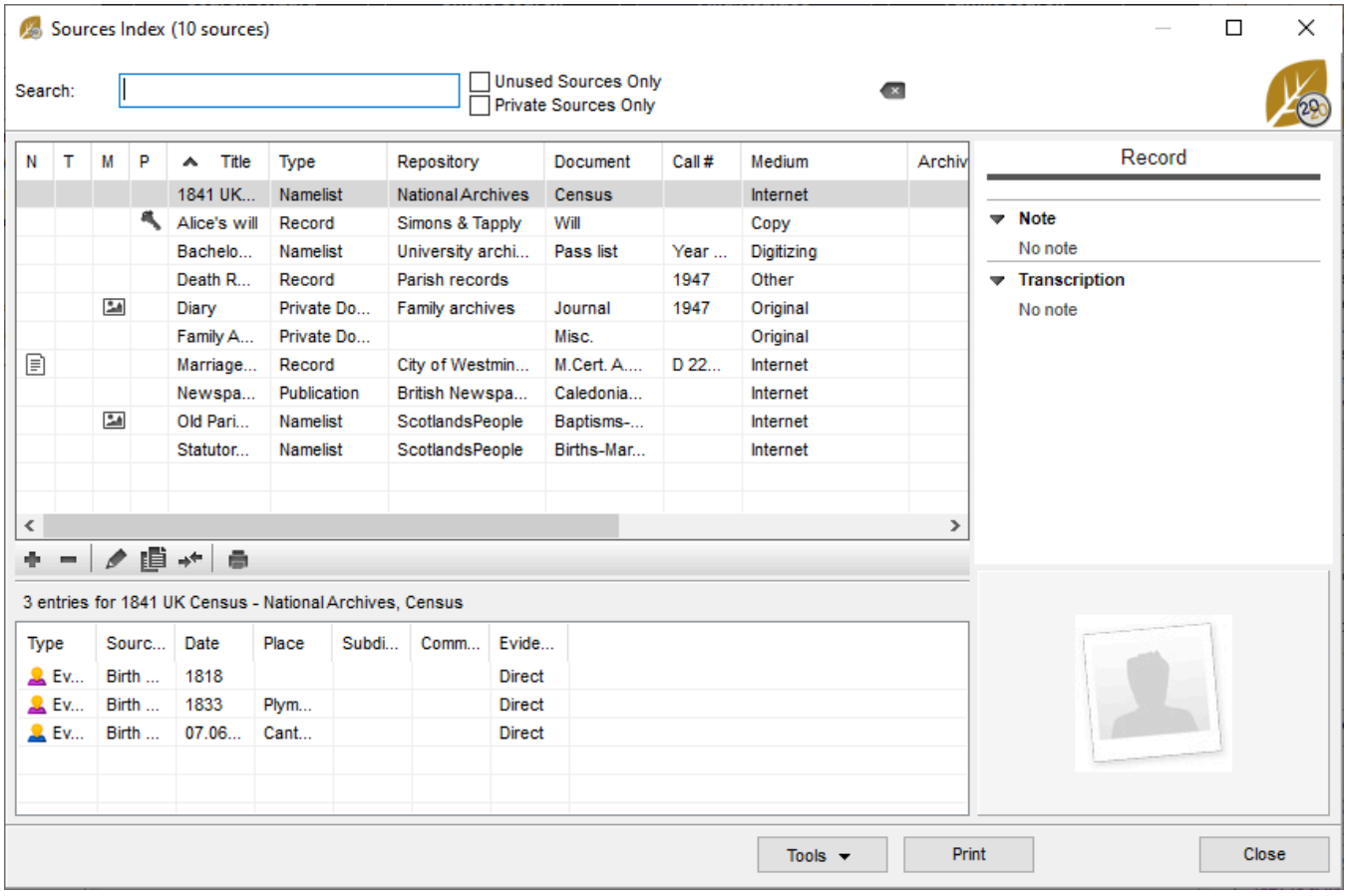
To switch in comprehensive mode,

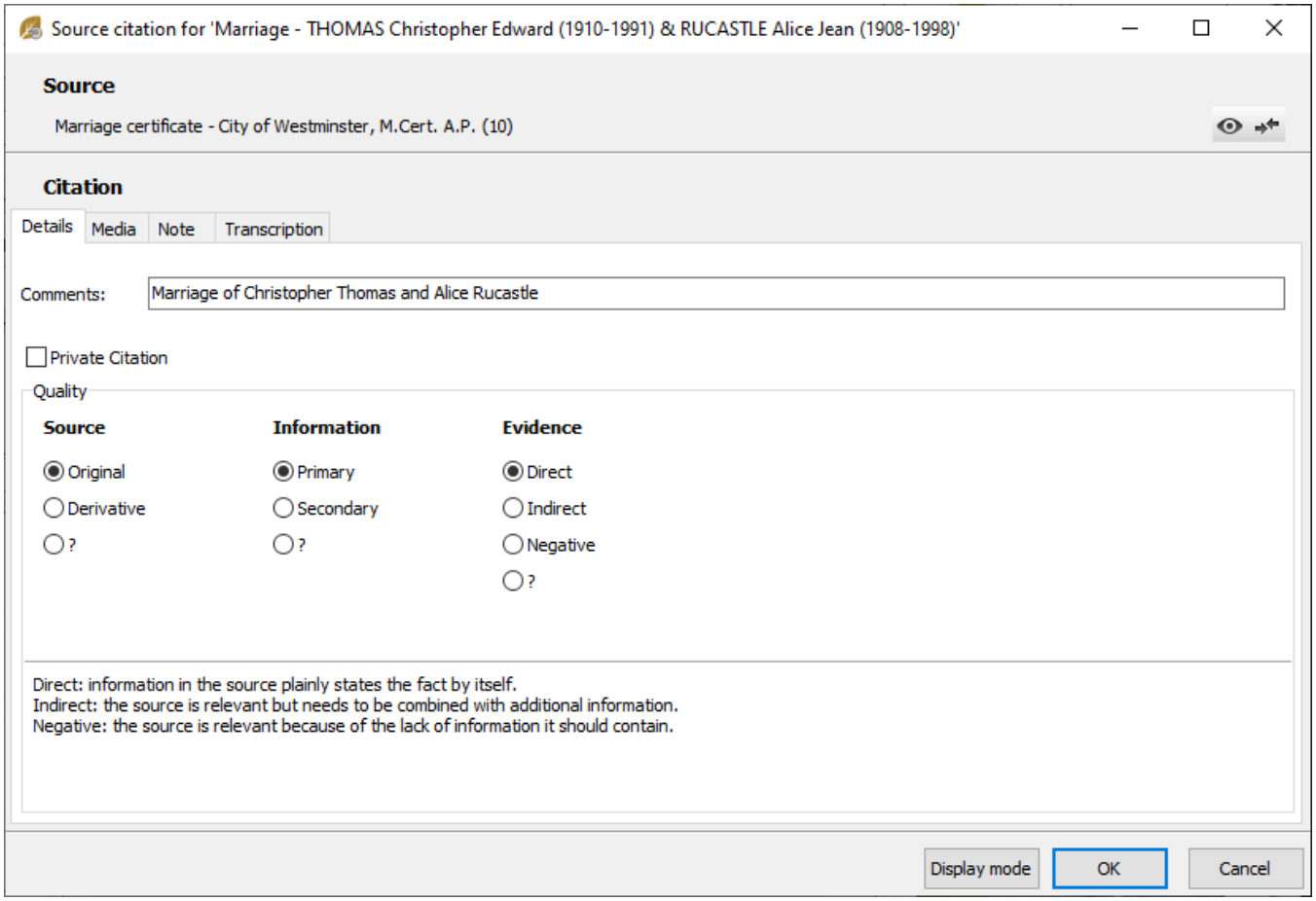
- (Mac) click **Heredis** menu > **Preference > Format tab**,
- (Windows) **Tools** menu **> Preferences > Heredis Preferences**,
- tick the **Comprehensive mode** box and check the "**Comprehensive mode**" alternative in the Default source citation options.

The comprehensive mode allows to have a generic source associated with a citation for several uses, 1 source = several deed. For example a source created for a registry and a citation per deed inside of this registry.

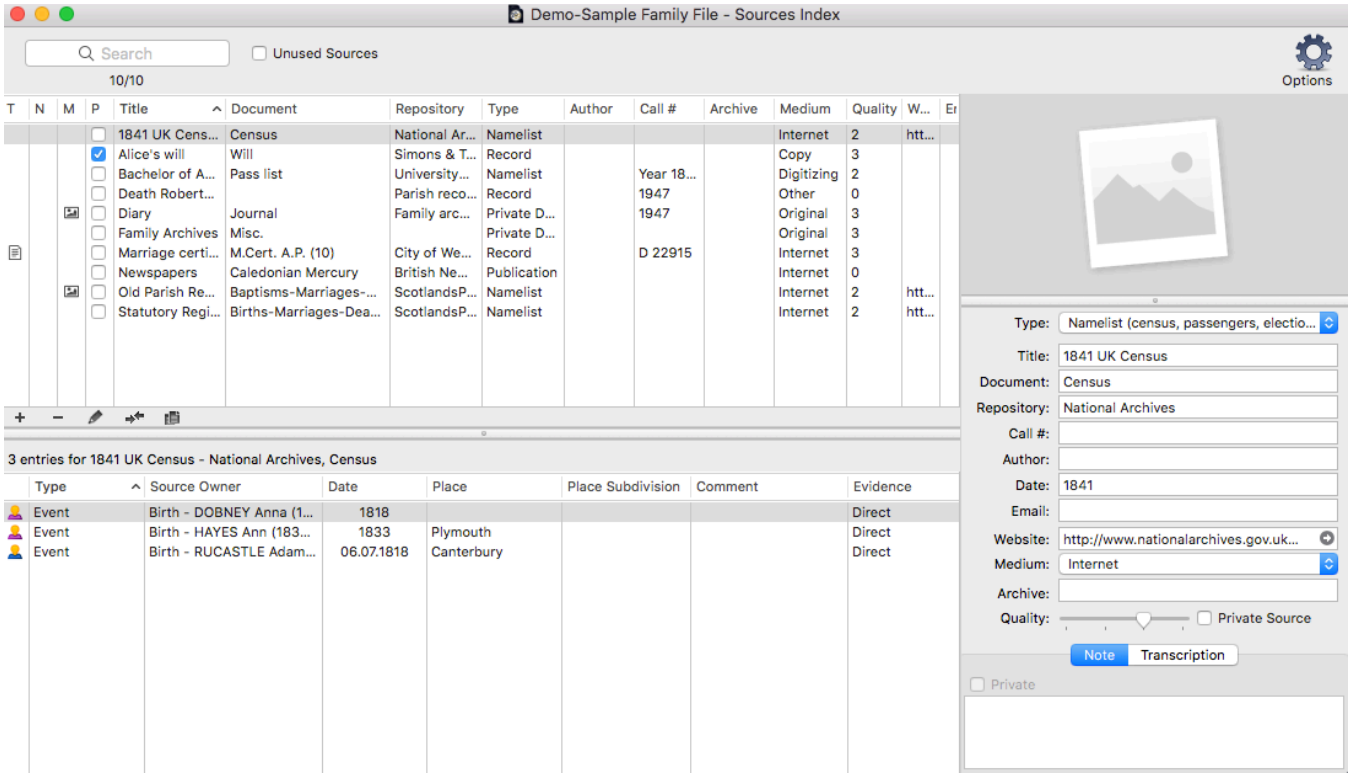
In comprehensive mode, when you click ✚ on Sources tab of an event, you can associate a source already in your Source Index or create a New source if not already created.

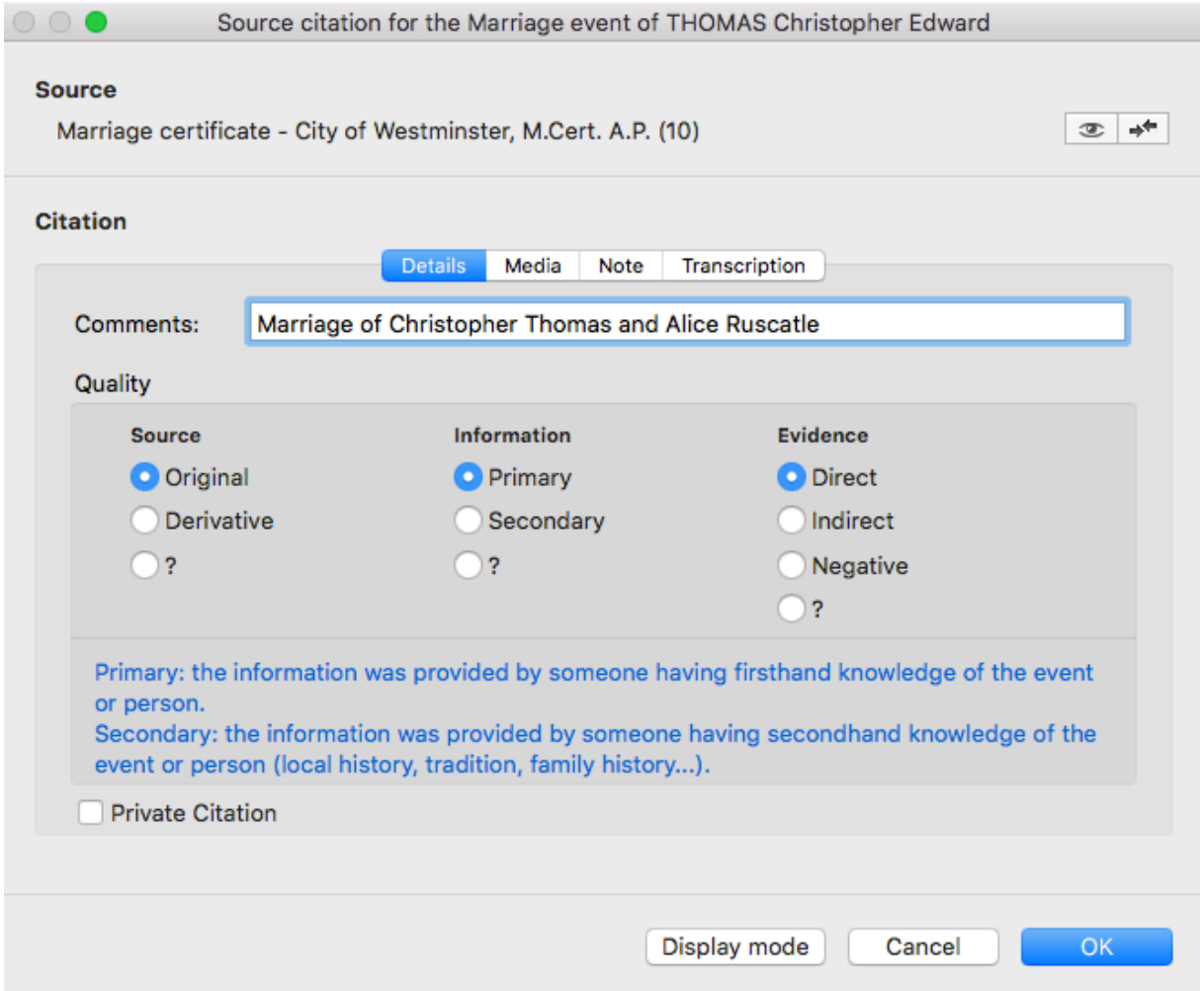
(Windows) Source's Comprehensive Mode





(Mac) Source's Comprehensive Mode

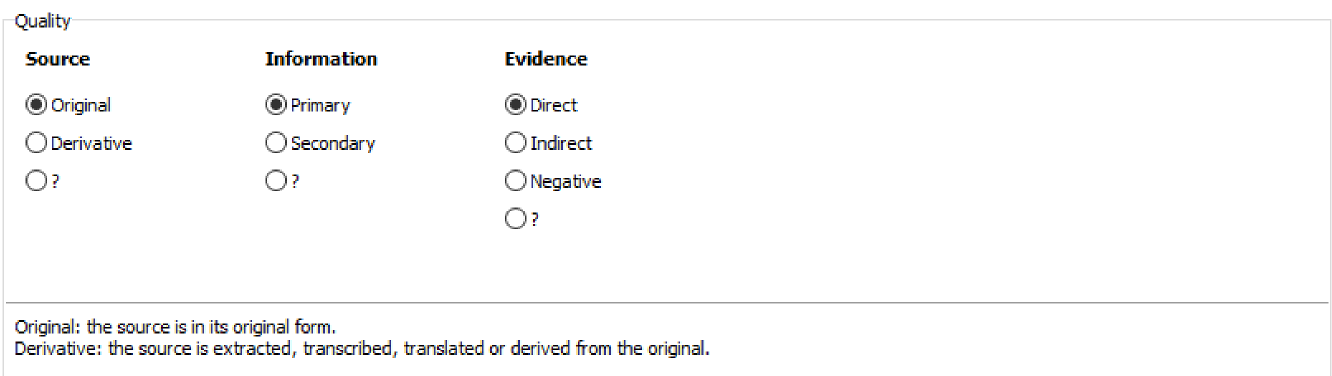

Demo-Sample Family File - Sources Index
Search
Unused Sources
10/10
Options
T N M P Title Document Repository Type Author Call # Archive Medium Quality W... Er
1841 UK Cens... Census National Ar... Namelist Internet 2 htt...
Alice's will Will Simons & T... Record Copy 3
Bachelor of A... Pass list University... Namelist Year 18... Digitizing 2
Death Robert... Parish reco... Record 1947 Other 0
Diary Journal Family arc... Private D... 1947 Original 3
Family Archives Misc. Private D... Original 3
Marriage certi... M.Cert. A.P. (10) City of We... Record D 22915 Internet 3
Newspapers Caledonian Mercury British Ne... Publication Internet 0
Old Parish Re... Baptisms-Marriages-... ScotlandsP... Namelist Internet 2 htt...
Statutory Regi... Births-Marriages-Dea... ScotlandsP... Namelist Internet 2 htt...
3 entries for 1841 UK Census - National Archives, Census
Type Source Owner Date Place Place Subdivision Comment Evidence
Event Birth - DOBNEY Anna (1... 1818 Direct
Event Birth - HAYES Ann (183... 1833 Plymouth Direct
Event Birth - RUCASTLE Adam... 06.07.1818 Canterbury Direct
Type: Namelist (census, passengers, electio...
Title: 1841 UK Census
Document: Census
Repository: National Archives
Call #:
Author:
Date: 1841
Email:
Website: http://www.nationalarchives.gov.uk...
Medium: Internet
Archive:
Quality:
Private Source
Note Transcription
Private


Source citation for the Marriage event of THOMAS Christopher Edward
Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)
Citation
Details Media Note Transcription
Comments: Marriage of Christopher Thomas and Alice Ruscatle
Quality
Source
Original
Derivative
?
Information
Primary
Secondary
?
Evidence
Direct
Indirect
Negative
?
Primary: the information was provided by someone having firsthand knowledge of the event or person.
Secondary: the information was provided by someone having secondhand knowledge of the event or person (local history, tradition, family history...).
Private Citation
Display mode
Cancel
OK

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

Original: the source is in its original form.
Derivative: the source is extracted, transcribed, translated or derived from the original.
Primary: the source comes from a person who did have direct knowledge of the event or person.
Secondary: the source comes from a person who did not have a direct knowledge of the event or person (local history, tradition, family history…).

Source's Preferences

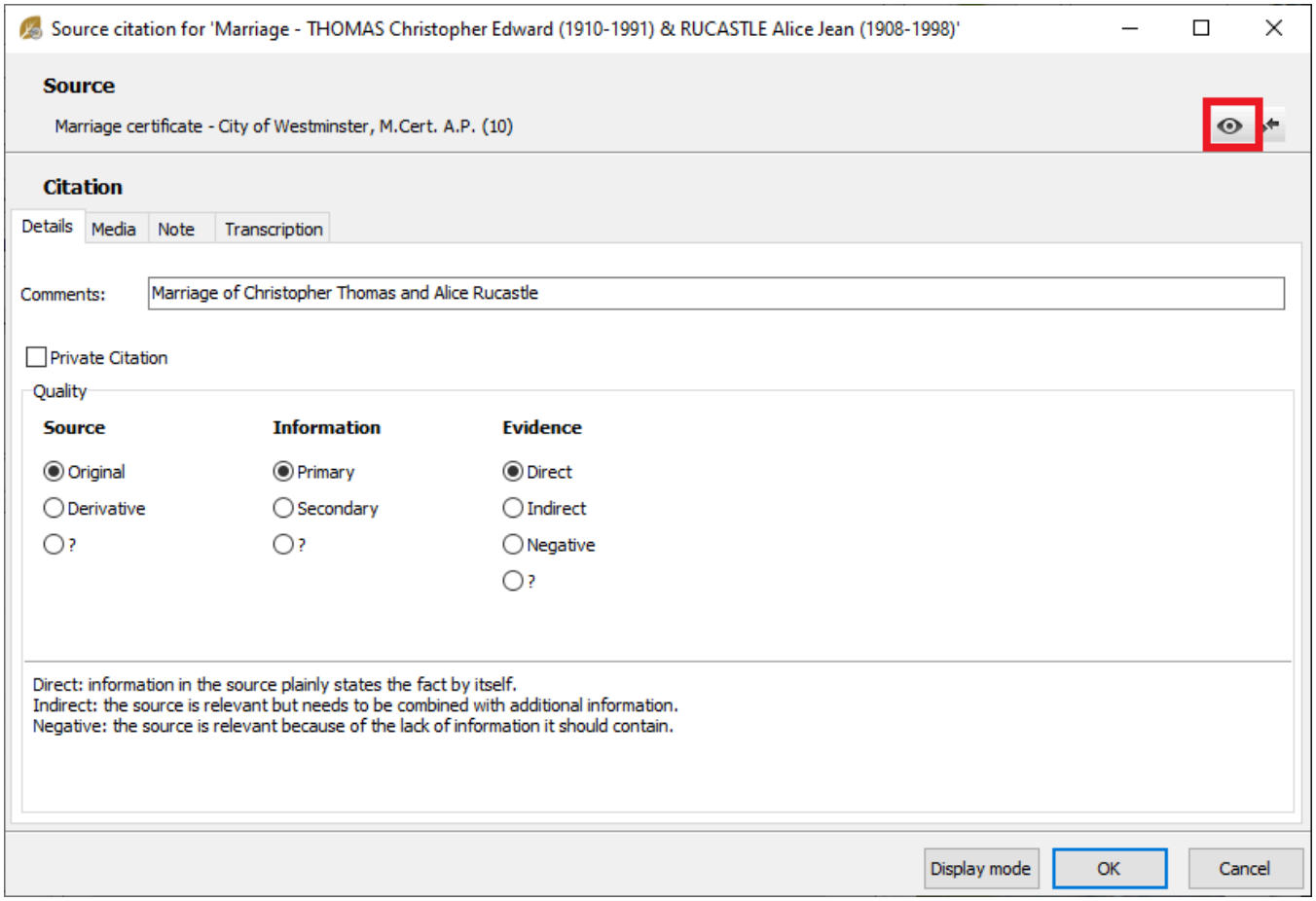


In comprehensive mode, when you want to associate a source to an event, Heredis display a citation windows allowing you to:

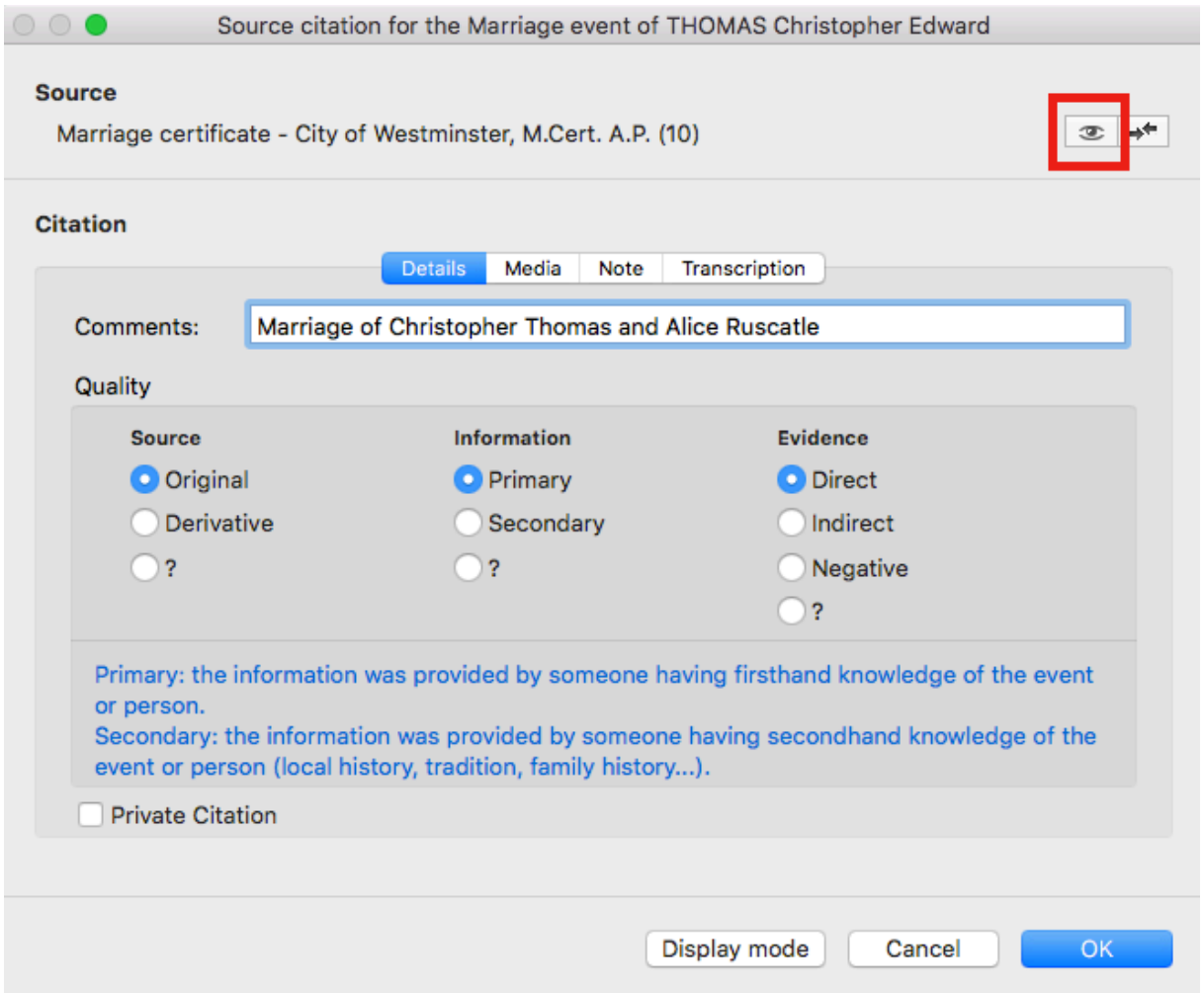
- link the citation to a generic source, a specific record for example
- qualify and eventually declare as private citation
- add the certificate that you detain as media of the citation
- transcribe this certificate and add a note

You can modify the Source by clicking on the eye button. Be aware that if you do modify it, it will be changed for all the utilisation of this source.

(Windows) Source's Comprehensive Mode



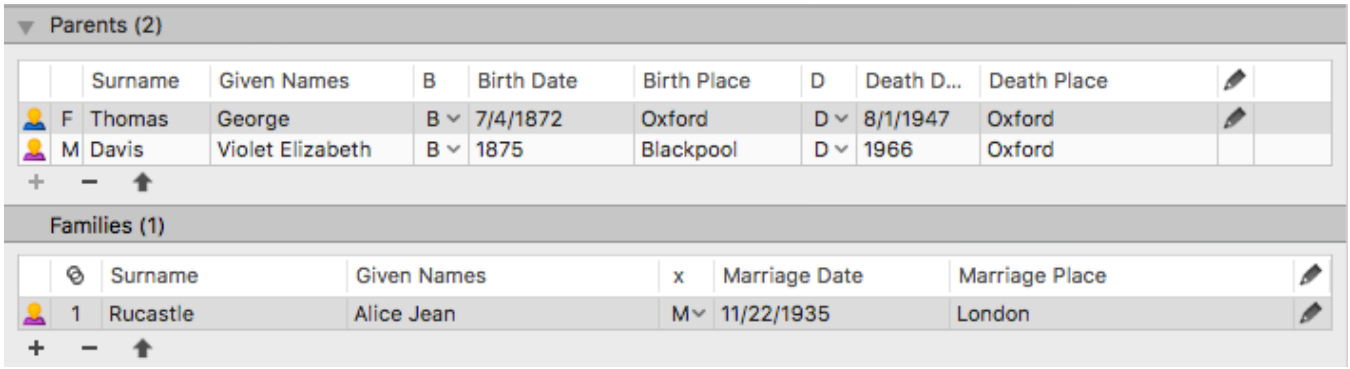
(Mac) Source's Comprehensive Mode


Source citation for the Marriage event of THOMAS Christopher Edward
Source
Marriage certificate - City of Westminster, M.Cert. A.P. (10)
Citation
Details
Media
Note
Transcription
Comments:
Marriage of Christopher Thomas and Alice Ruscatle
Quality
Source
Original
Derivative
?
Information
Primary
Secondary
?
Evidence
Direct
Indirect
Negative
?
Primary: the information was provided by someone having firsthand knowledge of the event or person.
Secondary: the information was provided by someone having secondhand knowledge of the event or person (local history, tradition, family history...).
Private Citation
Display mode
Cancel
OK

Input a Family Group Data

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

Family Group Data



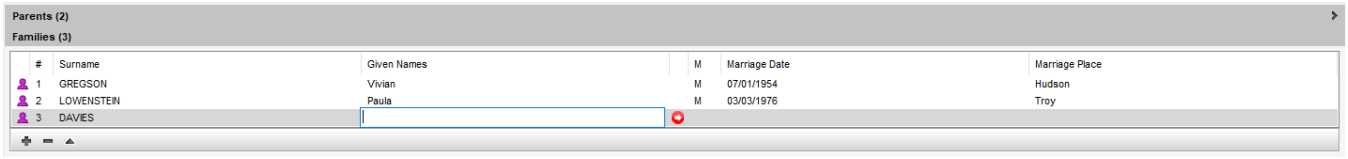
Each generation has an adapted data entry field: parents, spouses and children and their spouses may be entered one after another.

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



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 cogwheel and change the entering mode.

See also Add children (see page 172), Add parents (see page 141), Add spouses (see page 164).

Census

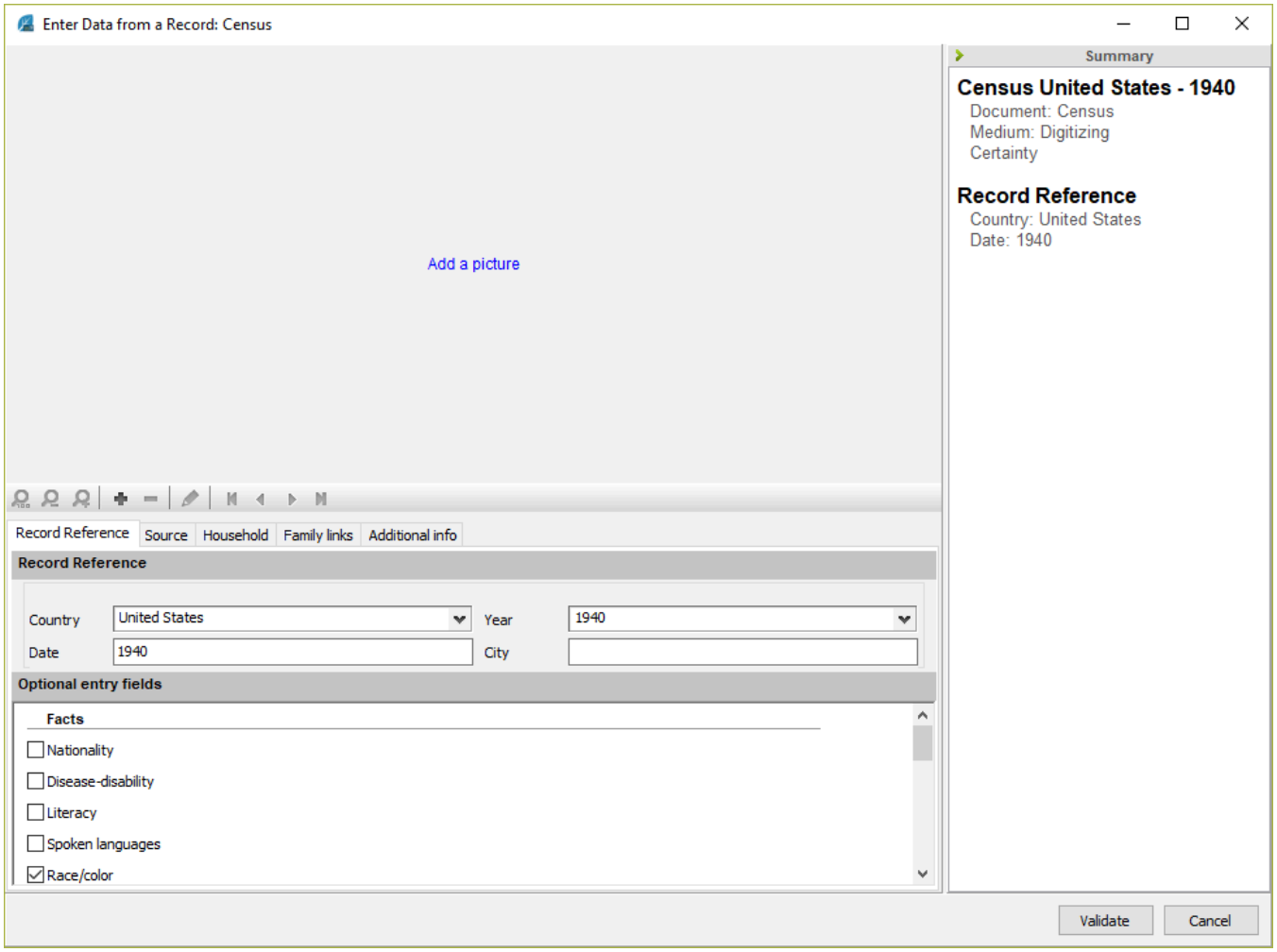
Entering Data from a Census

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

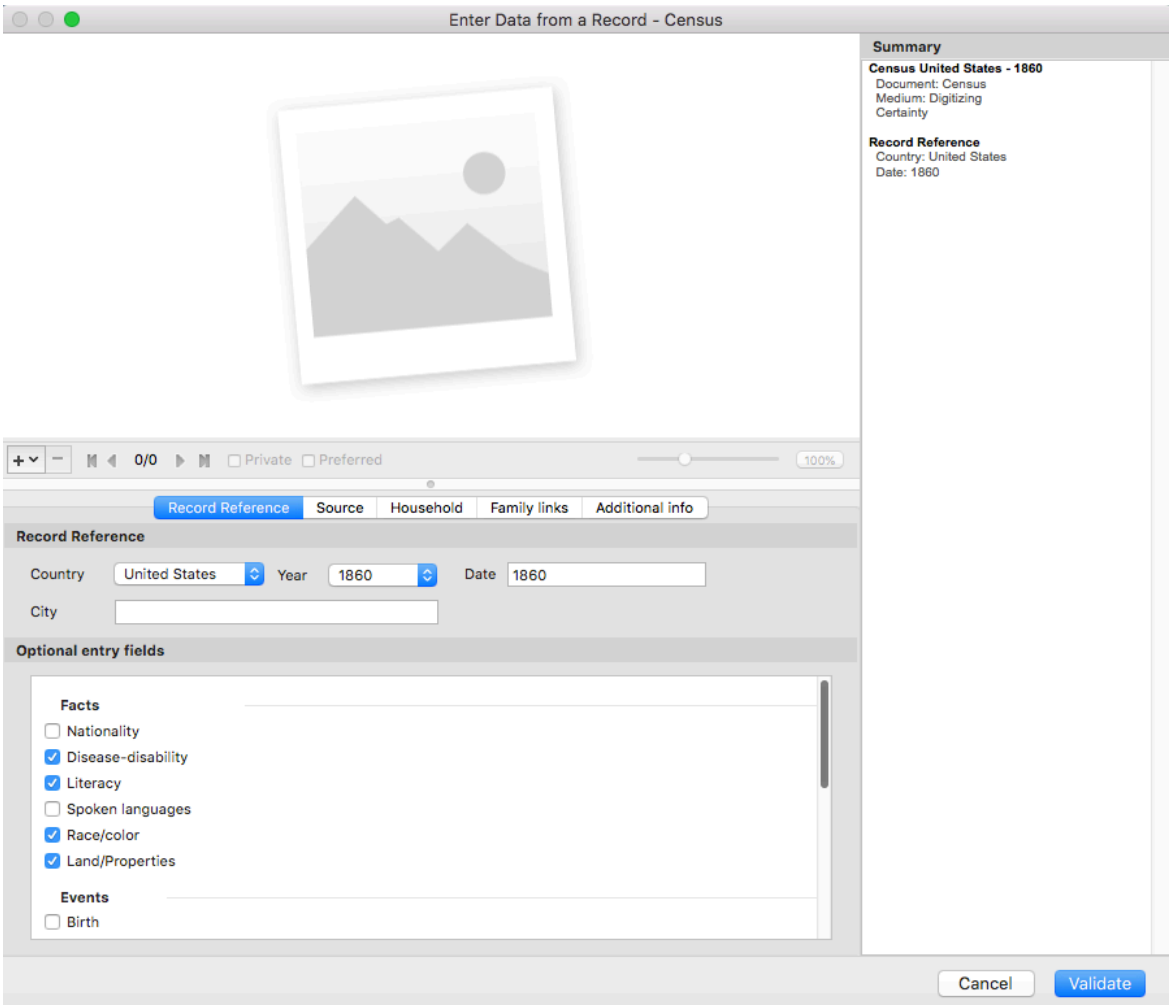
To easily enter data from census records, click on the shortcut Census of your toolbar or from the menu **Person** > **Census**.

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

(Windows) Entering data from a census



(Mac) Entering data from a census



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

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

The Record Reference tab

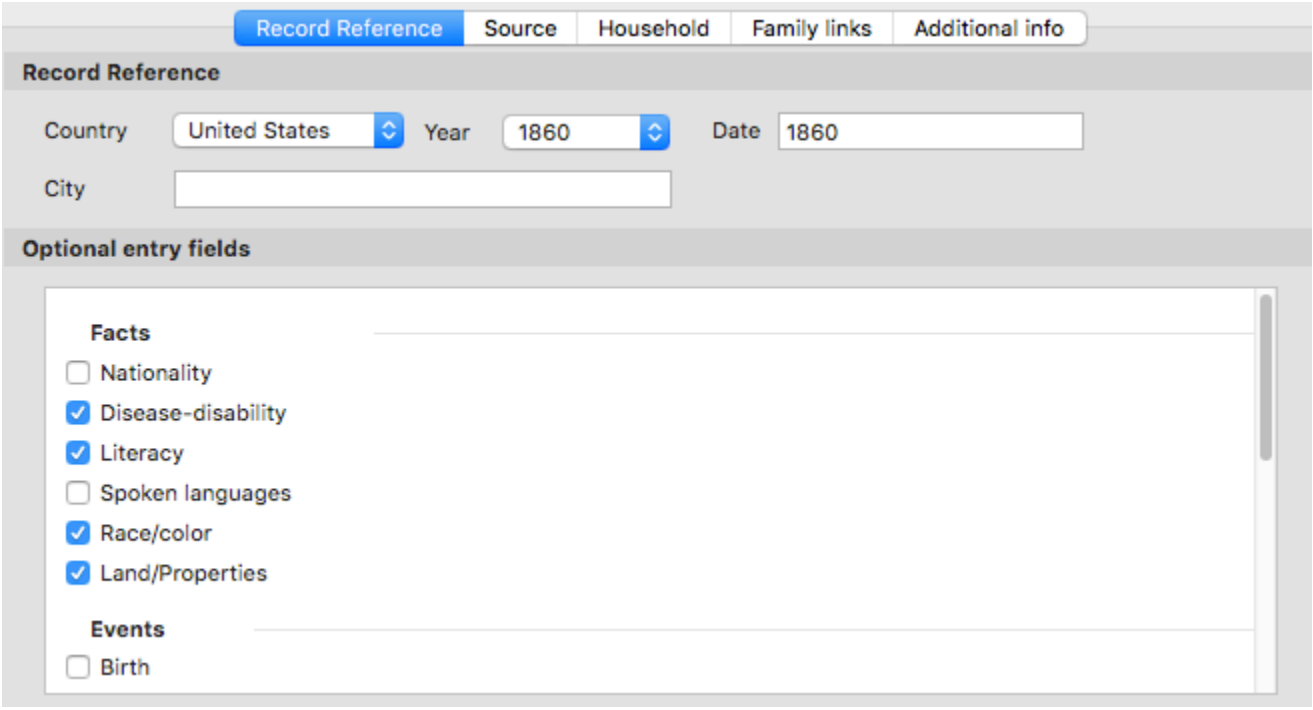
First, start with the **Record Reference** tab. Select the desired **Country**. If the country is not listed, select **Other** in the scroll-down menu. In the same way, you can modify the year in the **Date** field.

Enter the **City**.

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

(Windows) Record Reference Tab

(Mac) Record Reference Tab

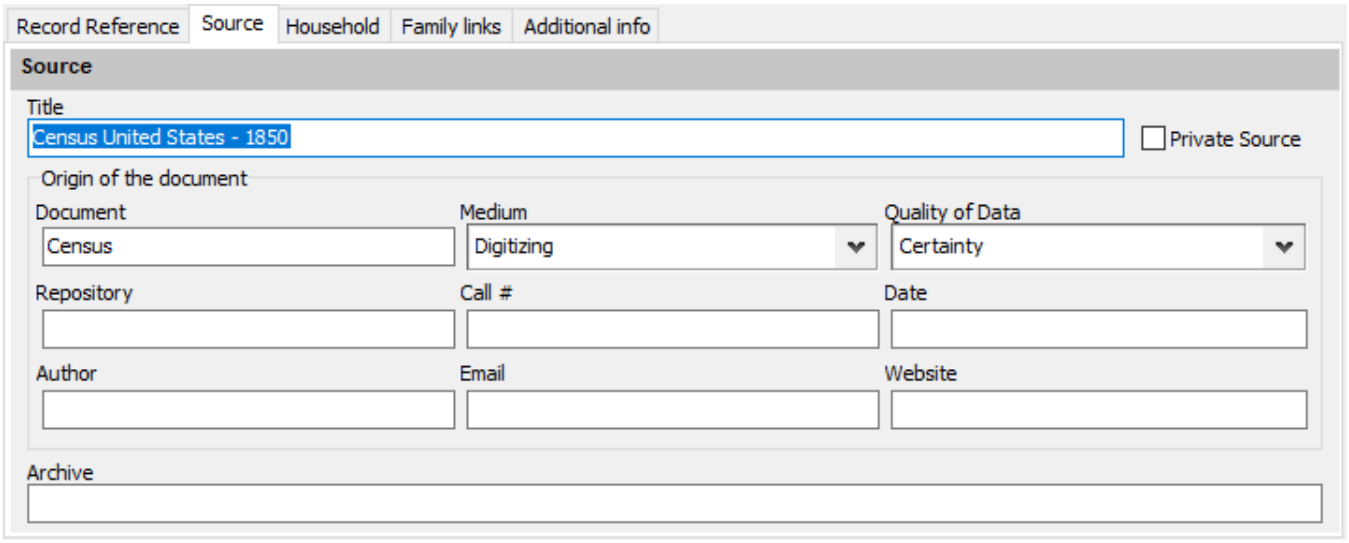


You may then enter the data related to the **Source**. As you will see, fields are partially filled out. You can modify them as you please.

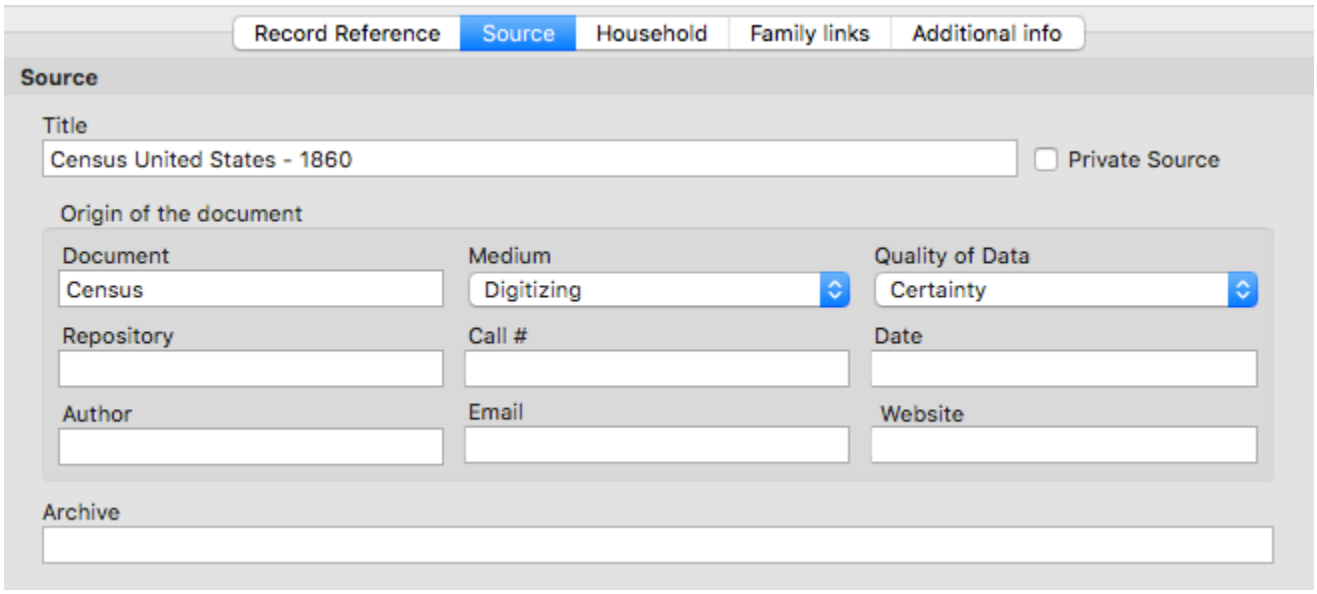
Source Tab

You are given the option to enter source details for your census. Some data are already filled based on what you previously entered in Record References. You may change it if you wish.

(Windows) Source Tab



(Mac) Source Tab



Then, go to **Household** tab.

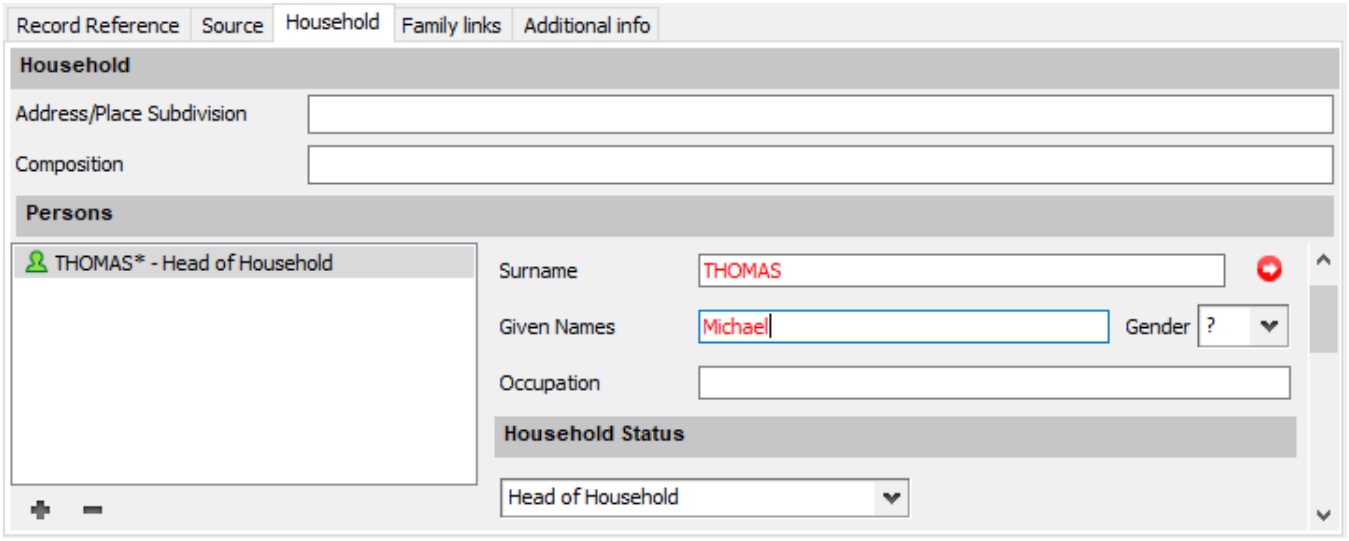
Household Tab

Under the **Household** tab, enter the **Address** then the household **Composition** – in other words, the number of persons living together under the same roof.
In the **Persons** area, click the + button to add a person; by default, the first person you enter will be considered the Head of Household.
Specify his/her **Surname** and **Given Names**. Just like every time a person is entered in Heredis, the magnifying glass will turn into a red arrow when the person is possibly already in the file. If you know he/she is in your file but his/her name is written in a different way, click on the magnifying glass to select him/her. If you don't and keep entering you'll create a duplicate.

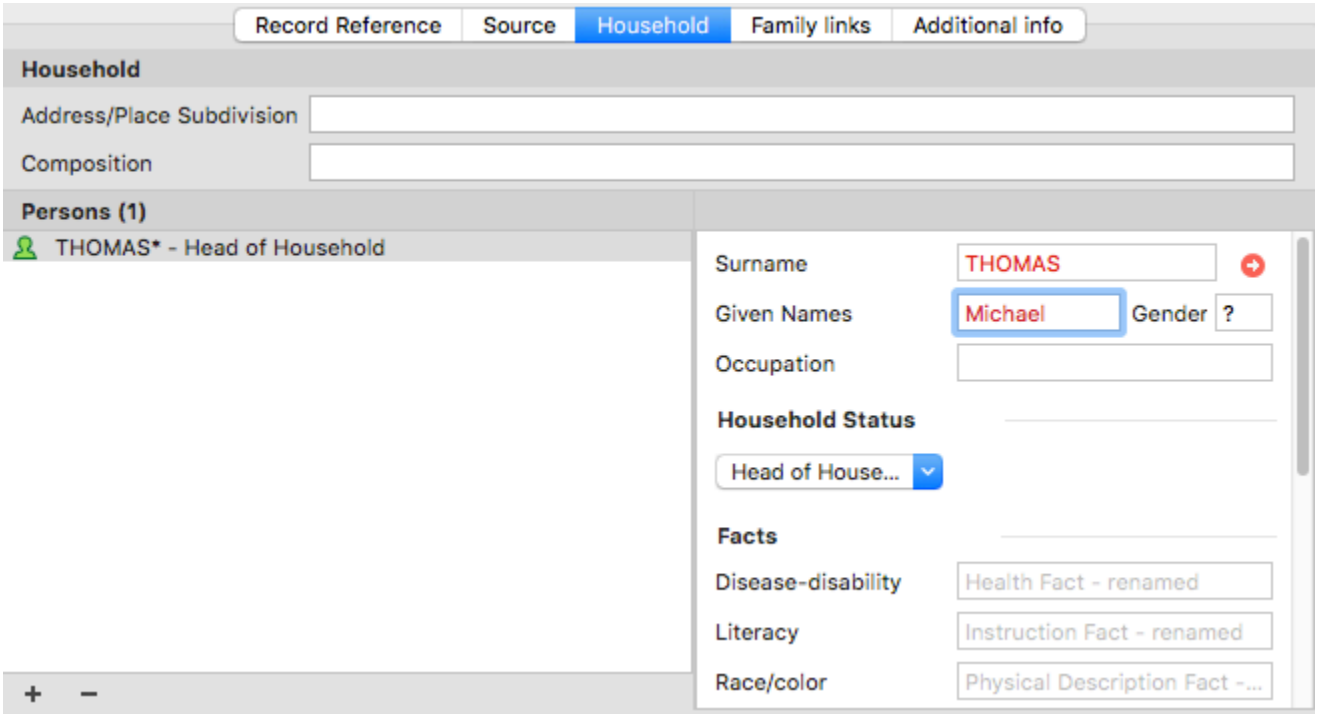
Specify **Occupation**.

Select this person's **Household Status** by clicking on the pull-down list.
Continue entering data according to the fields available for your census.

(Windows) Household Tab



(Mac) Household Tab



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

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

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

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

Make sure to check **Family Links** or to create them if needed.

Family Links tab

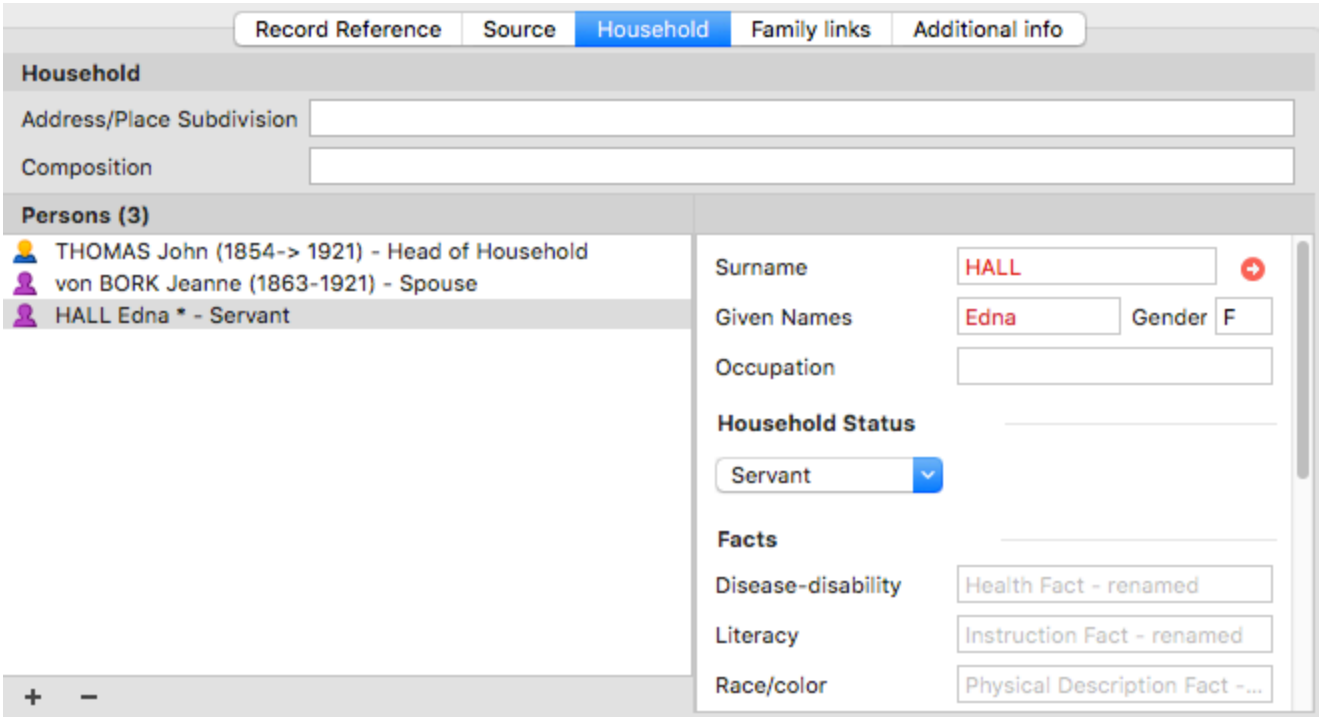
Under the **Family Links** tab, double check the links between each person and the head of household. When entering data from a census, Heredis will assist you in creating persons and the links between them.

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

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

(Windows) Family Links Tab

(Mac) Family Links Tab



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

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

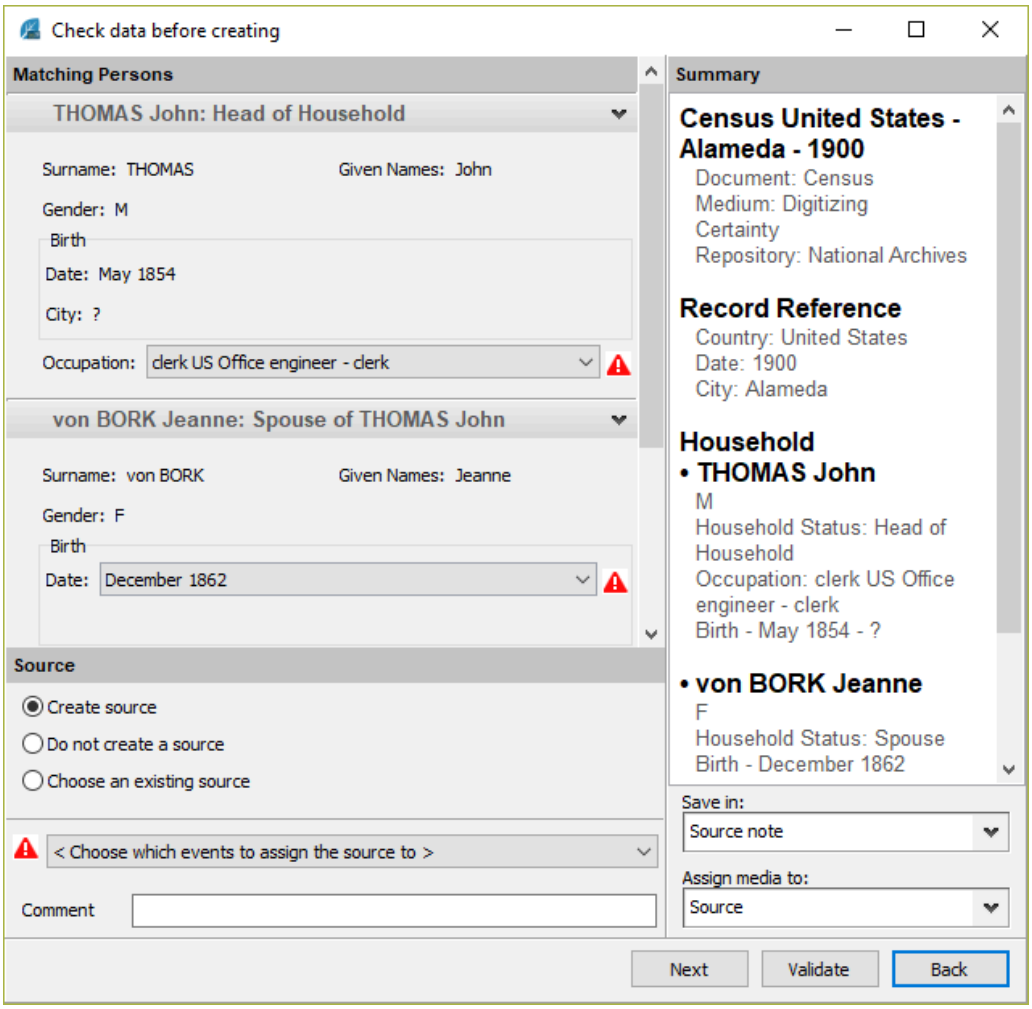
Additional Info tab

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

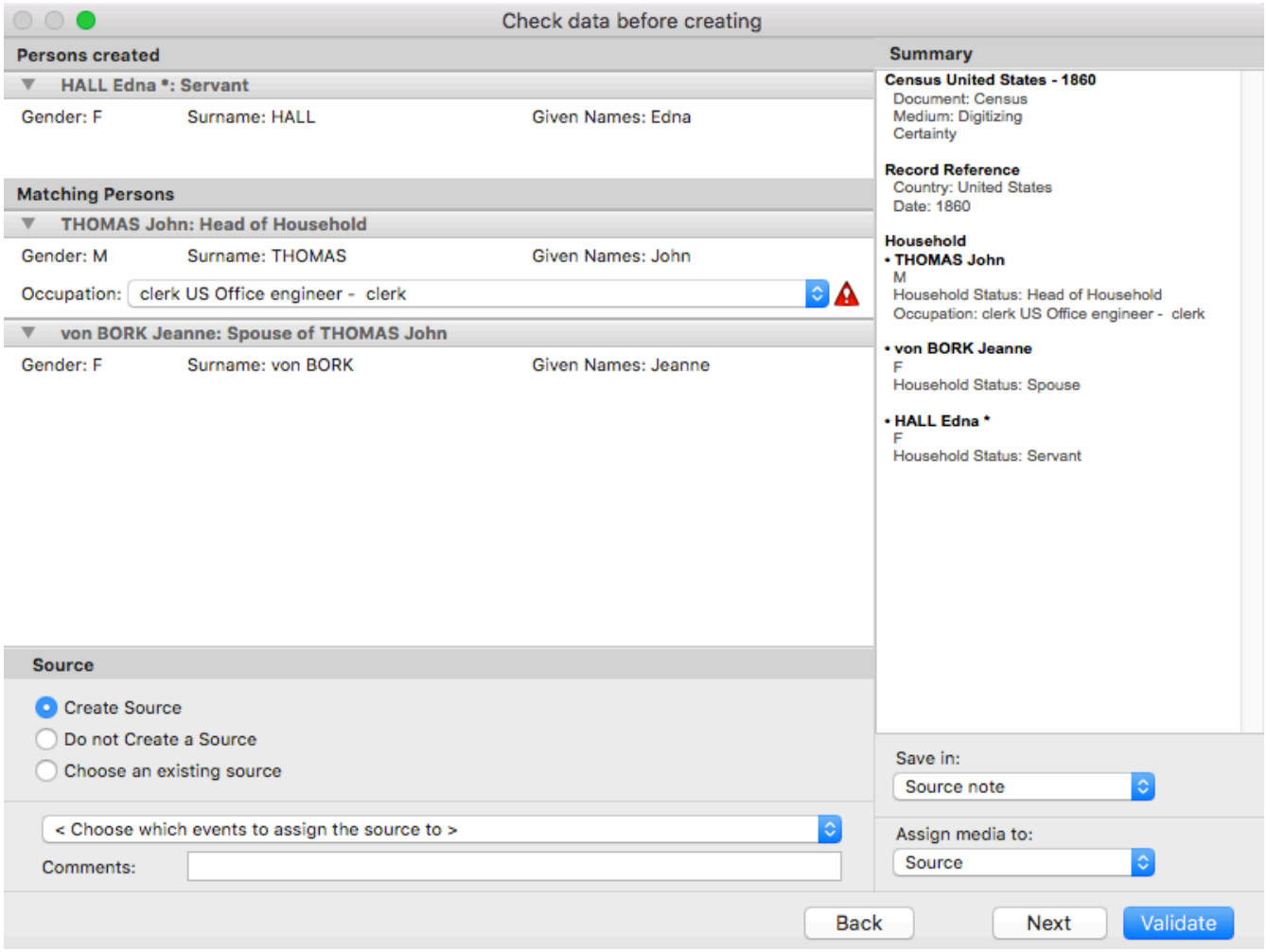
Validation Window

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

(Windows) Validation Window



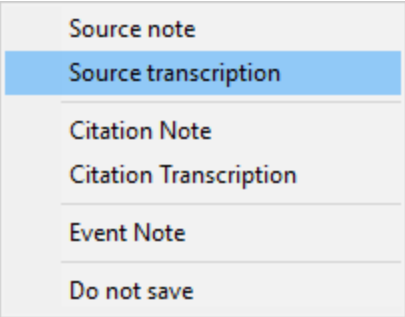
(Mac) Validation Window



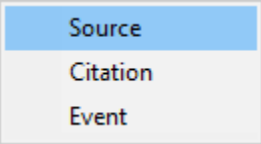
You are free to **create a new source**, to **choose an existing source**, or even **not to create a source**.
Remember to assign the source either to the census or to the events and facts related to the census.

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

- Save in the source note,
- Save in the source transcription,
- Save in the note or citation transcription if you work in Comprehensive Mode (see the The different mode for Sources & Citations (see page 272) article),
- Decide not to 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.

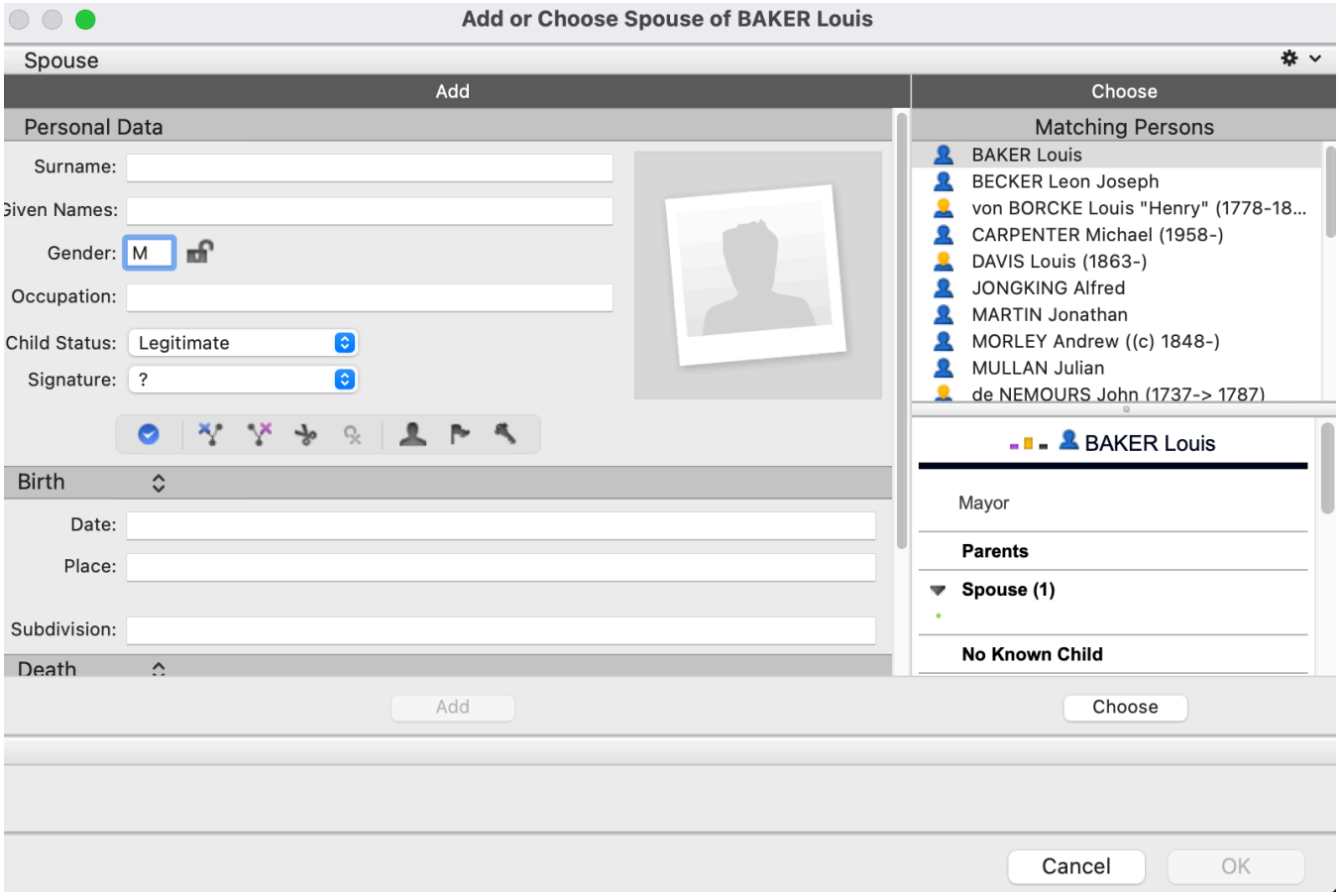
Check out our online video on Census on our Youtube channel for more explanations.

How to input a same-sex couple?

By default, when you add a spouse to a person, Heredis suggests the opposite gender of that of the person already entered.

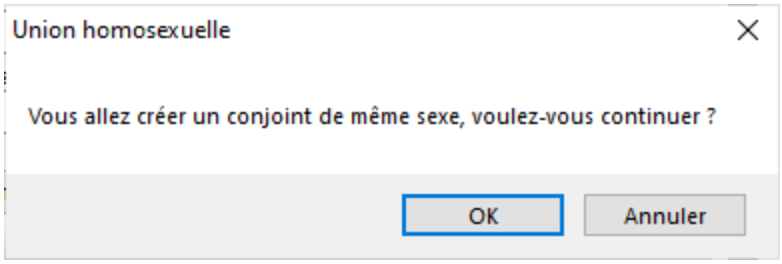
Click **Add Spouse**.

If you create a new person, you can change the gender of the person you are entering as a spouse.



If the person is chosen from the list of existing persons, change the gender (on Mac, click on the lock to be able to change it) in the **Create a new spouse** screen or choose a spouse from the **existing persons**. The list of existing persons is updated according to the chosen gender.

On Windows, a window alerts you that you are trying to put a spouse of the same gender. This alert is indicative to ensure that you are not making a mistake. If you are certain that it is a homosexual union, validate the message.


Union homosexuelle
Vous allez créer un conjoint de même sexe, voulez-vous continuer ?
OK
Annuler

How to input adoptive-biological parents?

Do you have a young adopted child but know the biological family? Has one of your relatives been taken in by a family that is not the biological family? Do you have a same-sex couple in your family tree and want to include the biological parent(s) of their child as well?

Since Heredis 2026, it has been possible to enter multiple sets of parents.
See the article Add several sets of parents, which explains this feature.

How to delete?

Delete a link or a person

Sometimes you need to fumble about, make mistakes, and be able to fix them. The toolbar has a **Delete** button and offers a list of persons to be “deleted”.

This feature actually allows you to unlink a person from the primary person without deleting it. The primary person is the only one who can be (completely) deleted this way.

If the “father” is not the right person, you can unlink him from the primary person by selecting **Unlink father**. You may still link him as a father to another primary person at a later time. The same thing is true for any other person in your genealogy.
In the same manner, you may delete a family link such as a spouse or a child.

Delete an item from an index

- Open the index you are interested in and select the item to be deleted.
- Click the button (Delete). Confirm you want it removed from the index by clicking **OK**.

Info • Surnames, given names, and places cannot be deleted if they are in use.

Delete unused items from an index

You may choose to remove, in one simple process, all unused items in your genealogy file. As a precaution, start with displaying a list of all unused items by checking the **Unused […] box** next to the Search field.

- (**Mac**) Click the **Options** button in the toolbar of the index then select **Remove all unused** […]
- (**Windows**) Click the **Tools** button of the index then select **Remove all unused** […]
- Confirm their removal by clicking **OK**.

The – button to delete

Generally speaking, when you see this button , it means you will be able to delete data.

Delete a Heredis file

Your genealogy file is stored on your computer hard drive. Heredis needs it to be on the hard drive to be able to work properly, you should not launch the file from a removable drive (USB drive or external hard drive).

You can delete a genealogy by placing the file in the recycle bin of your computer.

Heredis is a desktop software, which means that your files are saved on your computer. Only you can access it, we do not have your files. This is why it is always necessary to make backups on USB drive or cloud or external hard drive.

To find your files, see the article Find a file on your computer (see page 306).

How do I delete a genealogy?

Your genealogy file is stored on your computer hard drive.

Heredis is a desktop software, which means that your files are saved on your computer. Only you can access it, we do not have your files. That's why you should always make backups to USB key or external hard drive.

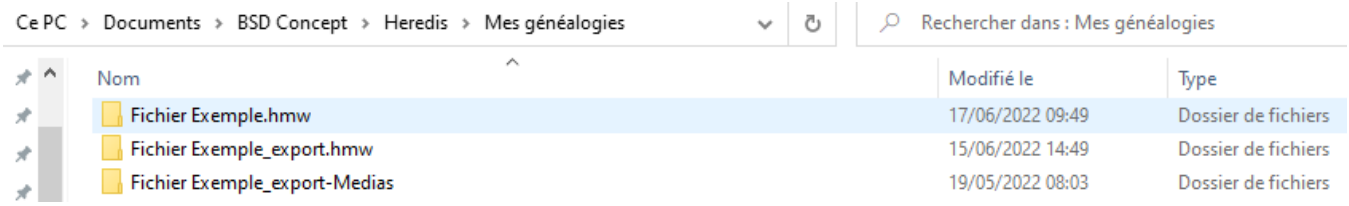
To find your files, see Find a file on your computer.

Heredis needs it to be on the hard drive of the computer to be able to work properly, you should not launch the file from a removable disk (USB key or external hard drive) and even less from a cloud.

You can delete a genealogy by placing the file in your computer's Recycle Bin.

On Windows

- Select the folder with the name of your genealogy and with the extension .hmw.



- Right-click on your mouse.
- Choose **Delete**.
- Windows puts your file in the Recycle Bin. It will be totally deleted when you will empty it.

On Mac

- Select the file on behalf of your genealogy.
- Hold down the left mouse click to drag the file to the Recycle Bin.
- Drop the file to the Recycle Bin.
- It will be totally deleted when you will empty it.

Note : Once this is done, if you empty the Recycle Bin, the file will be deleted and cannot be restored. If you have not made a backup, we do not have your file. It is therefore useless to contact us to recover it.

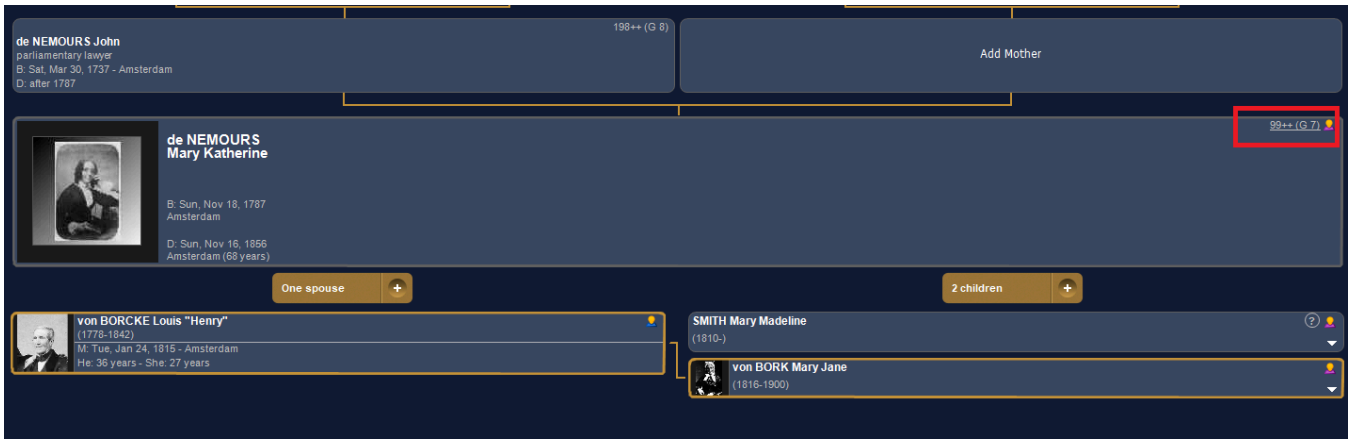
Implex (duplicate branches)

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

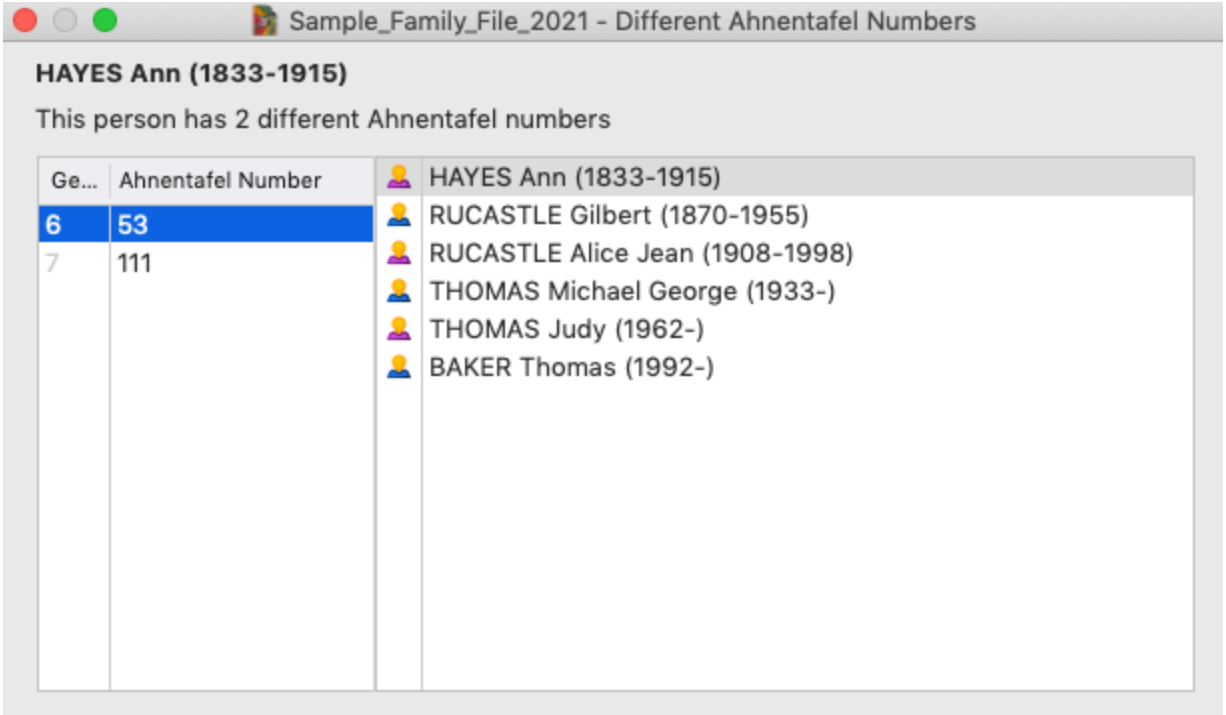
The ratio between the total number of ancestors and the number of ancestors that really exist (smaller) is called the Implex rate. One person may therefore bear several Ahnentafel numbers.
Imagine that Jack marries Marianne. However, Jack's father was the brother of the grandfather of Marianne. Jack and Marianne therefore have common ancestors, which will appear in two different branches of the family tree.

Heredis manages the different numbers automatically and symbolizes it with ++ symbol after the Ahnentafel number.

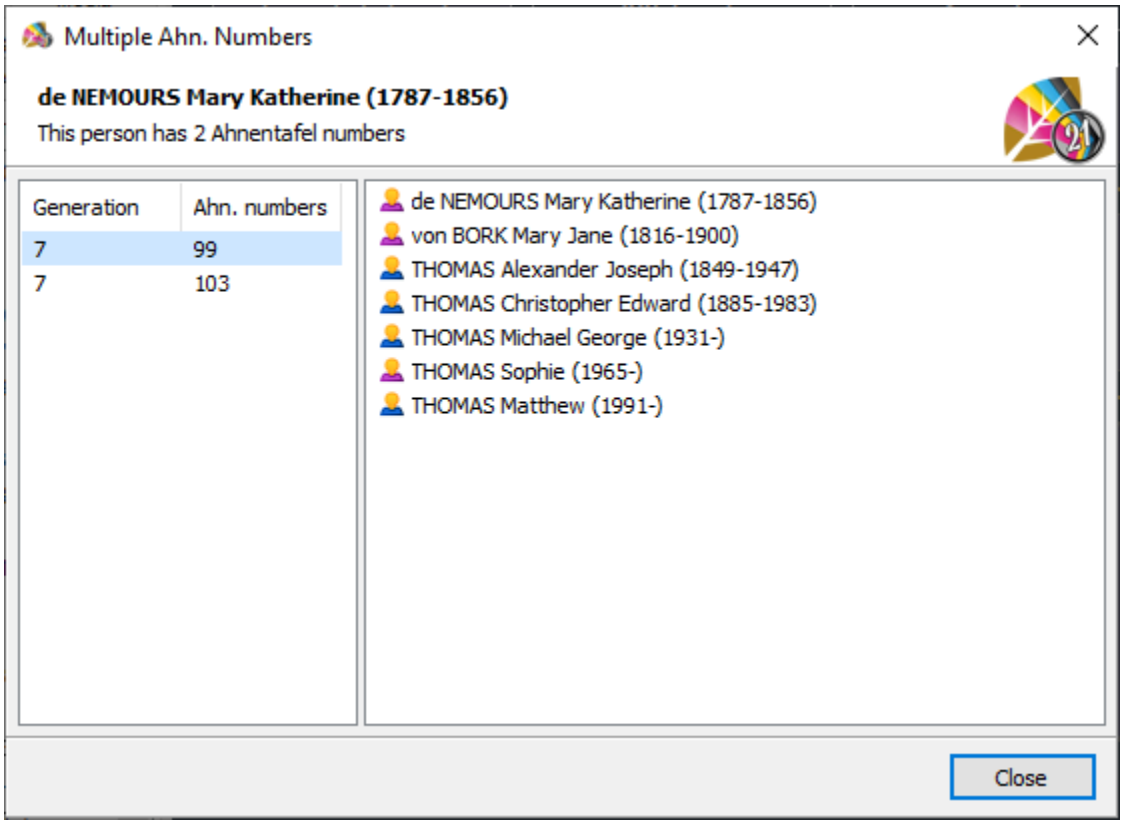
In the Immediate Family view, if you click on the Ahnentafel number, you'll see all numbers corresponding to the same person. Heredis will show you all Ahnentafel numbers for the person and the way to the root person for each number. Therfore you'll see how the implex was created.



(Mac) Multiple Ahnentafel Numbering

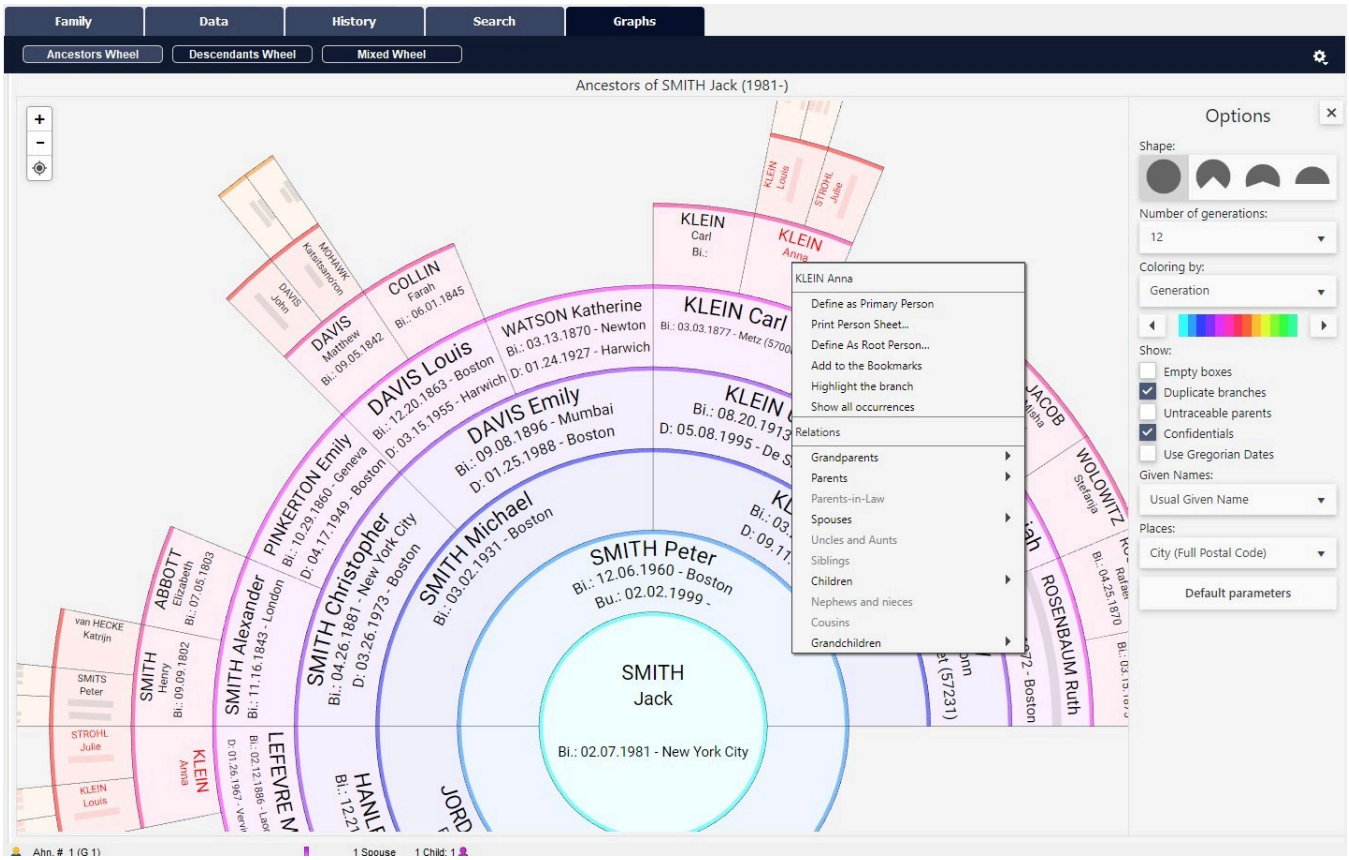


(Windows) Multiple Ahnentafel Numbering

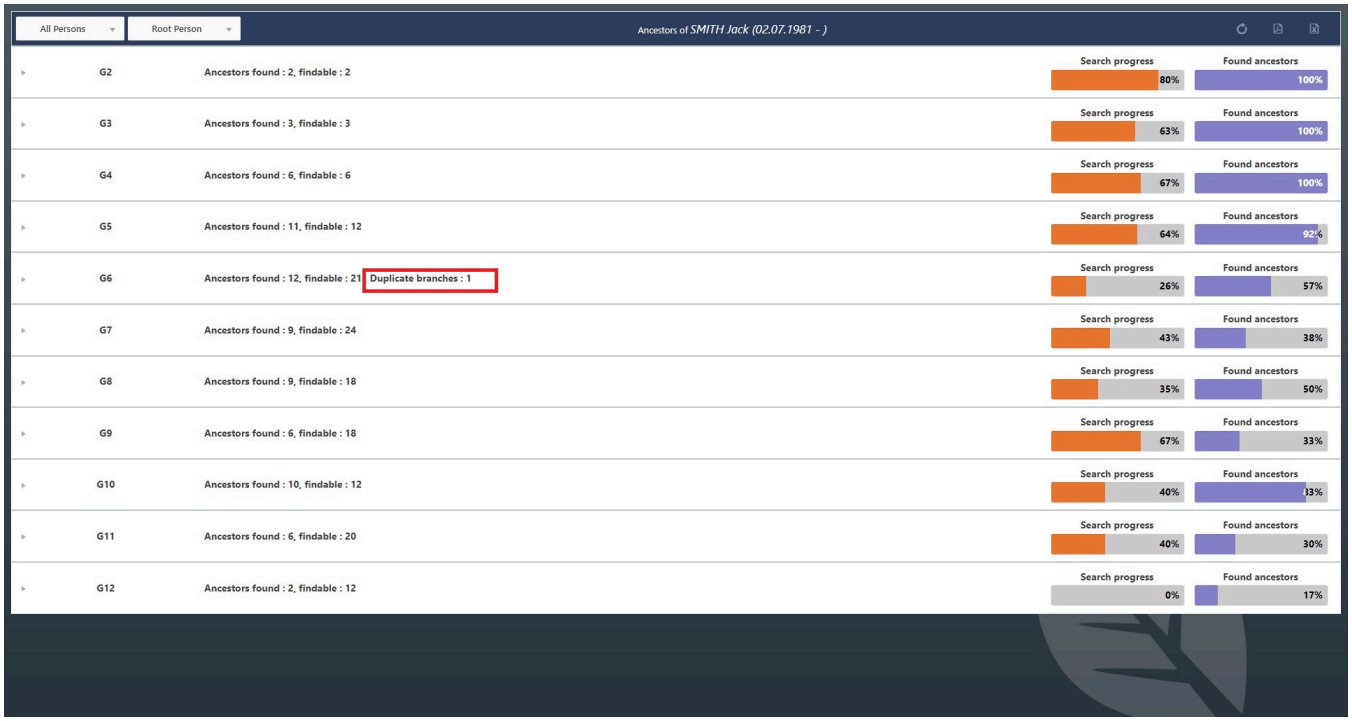


In Descendants view (Family tab) and in Search Tracking, the name of implex persons will appear in red.

The ancestors, descendants and mixed wheels show duplicate branches in relation to the primary person. Check the **Duplicate branches** box to see the text in the boxes of the persons in implexes appear in red. You can view the occurrences of implexes by right-clicking on the box of one of the duplicate branch.



Search tracking tool can also be used to identify implexes. The number of implexes is indicated in the generation heading. The first occurrence of an implex is indicated in red, while subsequent occurrences are not mentioned.

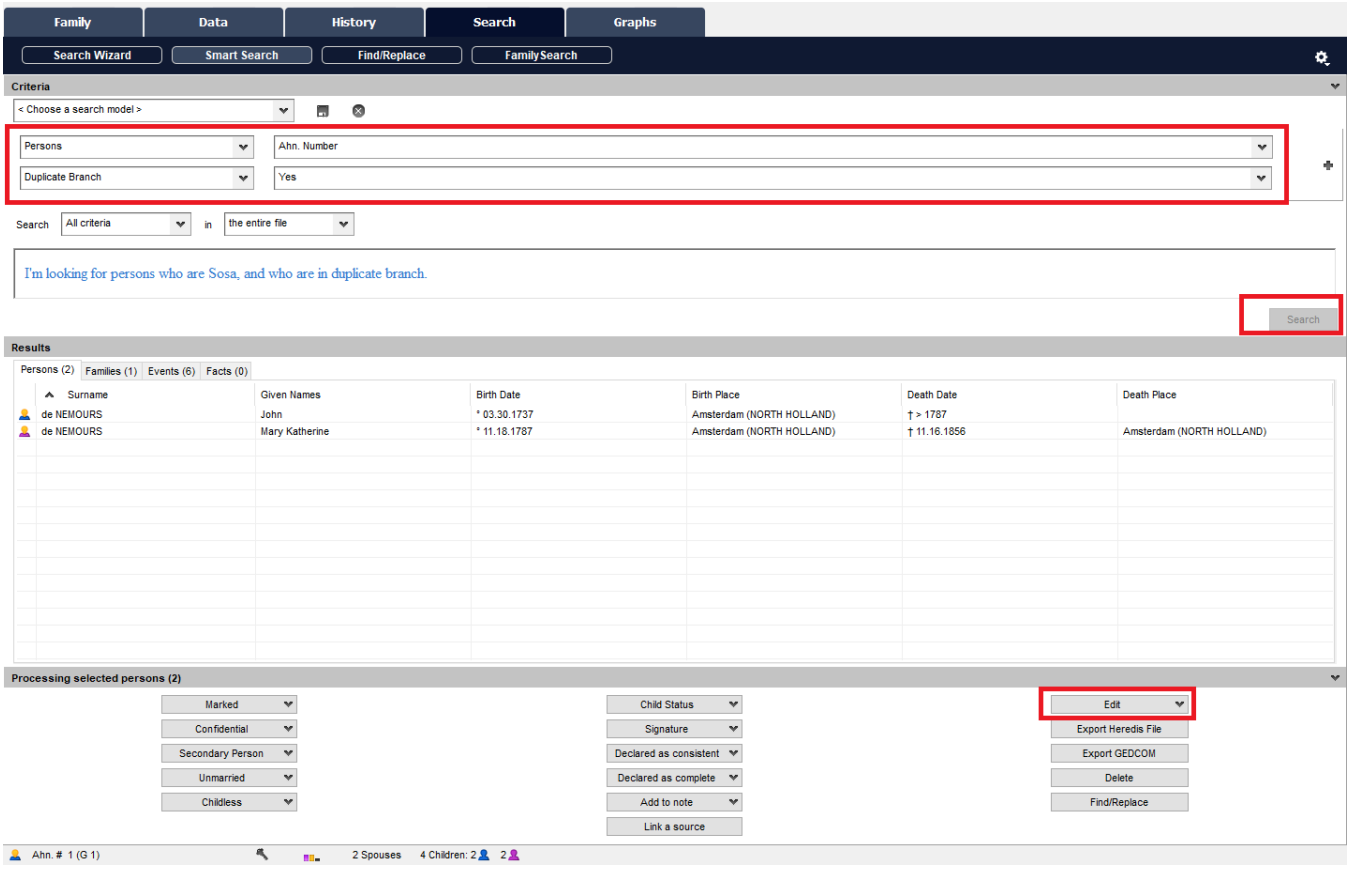


Edit a report of implexes

You can use the smart search to search for implexes persons and edit a report of it. Implexes are findable only on a direct line from the root person.

- Launch **Smart Search** from **Search** tab
- Choose **Persons** > **Ahn. number** > **Duplicate branch** > **Yes**
- Click on **Search**.
- Check the results.
- To edit a report of the results, click on the **Edit** button (from the Processing selected persons area) and choose the type of report you want.

Input data


Family
Data
History
Search
Graphs
Search Wizard
Smart Search
Find/Replace
Family Search
Criteria
< Choose a search model >
Persons
Ahn. Number
Duplicate Branch
Yes
Search
All criteria
in
the entire file
I'm looking for persons who are Sosa, and who are in duplicate branch.
Search
Results
Persons (2)
Families (1)
Events (6)
Facts (0)
Surname
Given Names
Birth Date
Birth Place
Death Date
Death Place
de NEMOURS
John
* 03.30.1737
Amsterdam (NORTH HOLLAND)
† > 1787
de NEMOURS
Mary Katherine
* 11.18.1787
Amsterdam (NORTH HOLLAND)
† 11.16.1856
Amsterdam (NORTH HOLLAND)
Processing selected persons (2)
Marked
Confidential
Secondary Person
Unmarried
Childless
Child Status
Signature
Declared as consistent
Declared as complete
Add to note
Link a source
Edit
Export Heredis File
Export GEDCOM
Delete
Find/Replace
Ahn. # 1 (G 1)
2 Spouses
4 Children: 2 2

Searching

Find a file on your computer

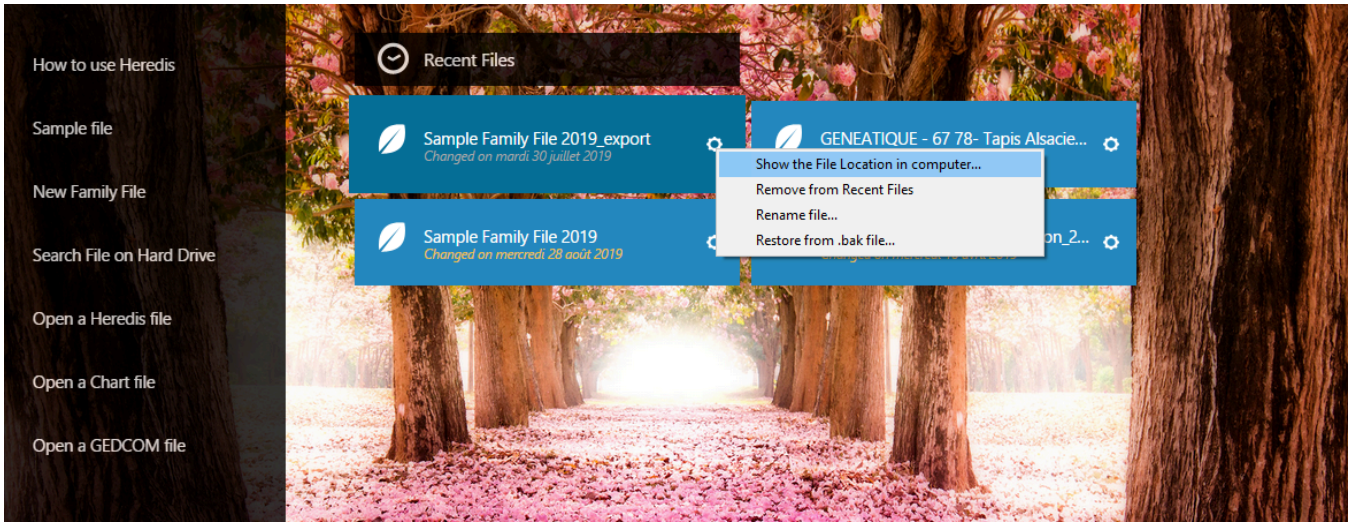
Heredis is a desktop software, which means that your files are saved on your computer.

Note: It is essential that your files are stored and launch from your computer's hard drive disk and not from a USB key or an external drive or a cloud. If the device is disconnected for any reason even for a second, Heredis will shut down and your file can be damage.

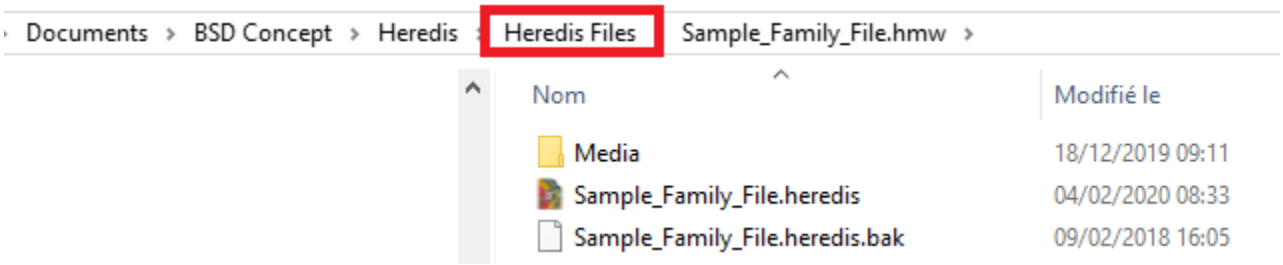
You are the only one who can retrieve them, as we do not have access to your files. Which is why you should always back them up either on a USB drive, a cloud, an external hard drive (just use it to store a backup not open it).

Find your files in Windows

To find your Heredis files in Windows, look in Documents / BSD Concept / Heredis / Heredis files, as this is where they are usually stored. If not, on the Heredis home page, click on the cogwheel near the name of your recently used file. Then select **Show the File Location in computer…**



Heredis will open Windows Explorer to show you the content of your .hmw folder. Click on the folder before the .hmw folder on the address bar.



You'll be able to copy the .hmw folder with a right click on it and click on Copy. Then Paste it

on a USB key or external hard drive.

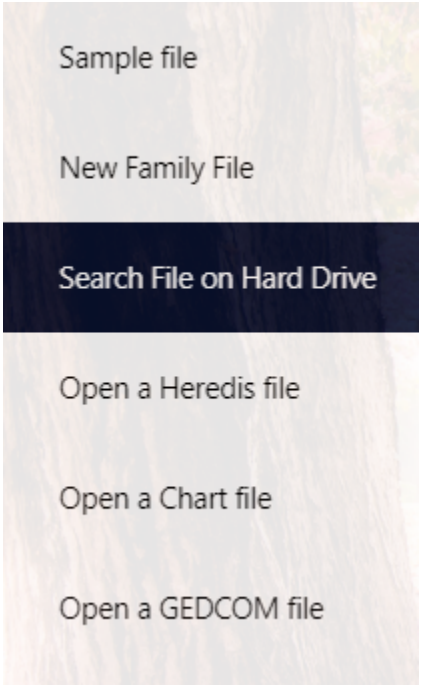
Find files missing from your list of Recent Files

If your file is no longer showing in your recently used files, it does not necessarily mean that it has been deleted. It is simply not displayed in the list of recent ones.

Heredis will not remove genealogy files. If your files are no longer on the computer, it means they were manually deleted, e.g. during a disk cleanup or by your antivirus software.

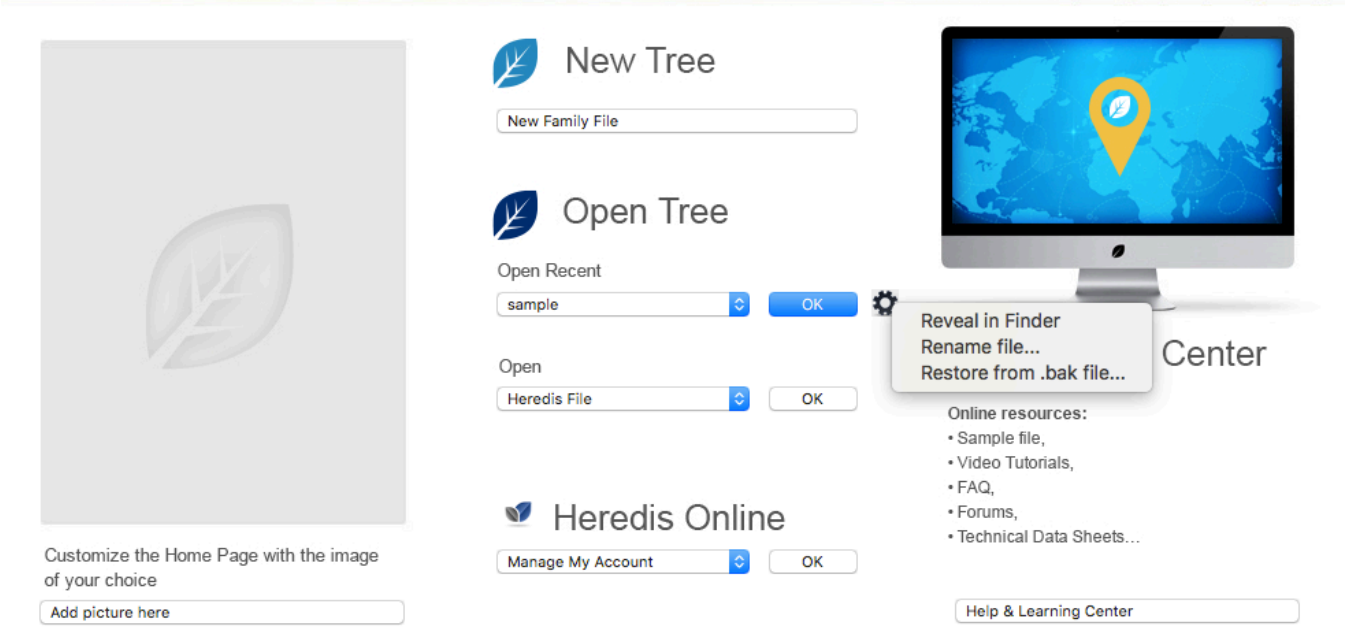
You can start a search from the Heredis home page to scan your entire computer for all potential genealogy files. It can be a lengthy process.

From the home page, click **Search File on Hard Drive** on the left side banner.



How to find your files on Mac

From the Heredis home page, click on the cogwheel next to the name of your recently used file. Then select **Reveal in Finder**.



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How to find files missing from your list of Recent Files

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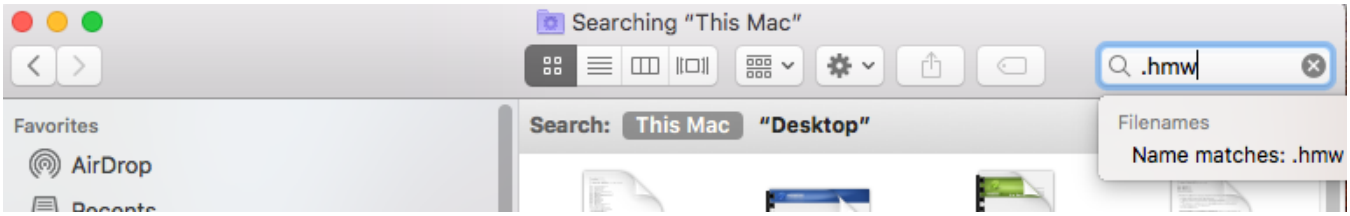
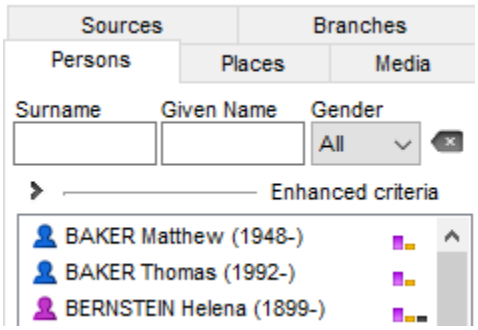
Heredis will not remove genealogy files. If your files are no longer on the computer, it means they were manually deleted, e.g. during a disk cleanup or by your antivirus software or the list has been cleaned in the Mac system.

- Open Finder
- Enter .hmw into the search box
- Launch the search



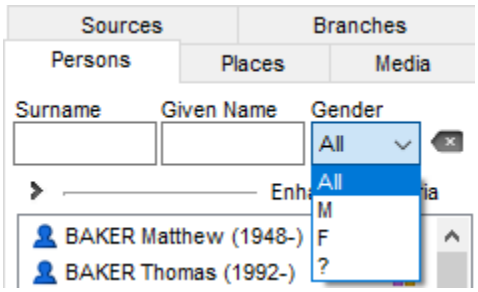
(Windows) Searching by theme (enhanced criteria) from Persons panel

Heredis offers a simple and rapid search for persons based on their **Surname**, **Given Names** and **Gender**. If this research does not easily isolate the person you are looking for, you have available other search criteria corresponding to all the information you have entered. These advanced research criteria are grouped in the **Persons** tab and are classified by research theme (**Personal Data**, **Relations**, **Events**, etc.).



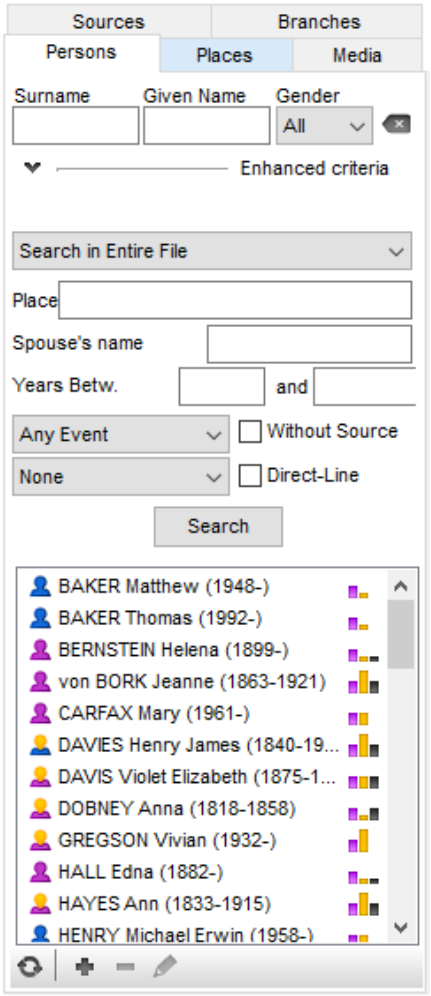
1. Open the **Persons** tab in the **Search** panels.
2. Enter if needed the **Surname**, **Given Names** and **Gender.**

Refine the search by Surname, Given names, Gender

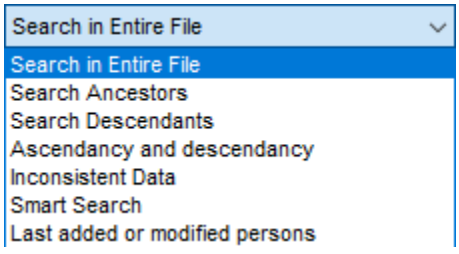


When the list of results is too long and fails to isolate the search person, click the **Show/Hide Enhanced Criteria** arrow to unfold the advanced search criteria.

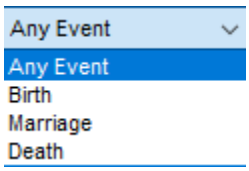
Search in Persons' panel



- Select from the drop-down menu which data is to apply to the search: **Search Entire File**, **Search Ancestors**, **Search Descendants**, **Ascendancy and Descendancy**, **Inconsistent data**, **Smart Search Results, Last added or modified persons.**

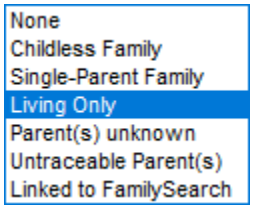


- Indicate a place, name of spouse and define a range of years.
- Apply a filter by **Any event**, **Birth**, **Marriage**, or **Death**.



- Tick the **Without source** box if you wish to search for person with event without

source.
- Make limitations on **Direct-Line** ancestors (Anhentafel line)
- Choose to display only **Childless Family**, **Single-Parent Family**, **Parents Unknown** or **Linked to FamilySearch**. Since Heredis 2021 , it is also possible to search for untraceable parents.



To display the persons corresponding to these Enhanced criteria, click the **Search** button to update the list.

The list of corresponding individuals is updated as you enter details. When you click the name of a person in the list, his/her summary appears in the **Summary Tool** panel. To view a person as primary person in a new **Immediate Family**, just double-click the name. To start a new search, click **Remove criteria** icon. All individuals in the file are displayed again.

Starting with Heredis 2025, it has been possible to add personalized flags to persons. This means you can also search by flags. See Search for data linked to flags (see page 319).

Searching for persons

Find the Root Person

The Root Person (see page 44) is the individual who lies at the base of your genealogical research and who bears the Ahnentafel (see page 44) No. 1.

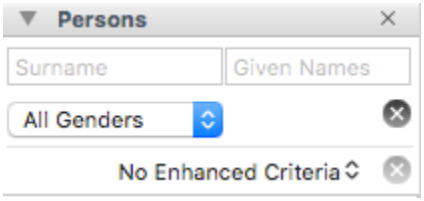
- Click **Root** on the toolbar.
- Choose **Find** menu > **View Root Person**.

See also The Root Person (see page 137) for more details.

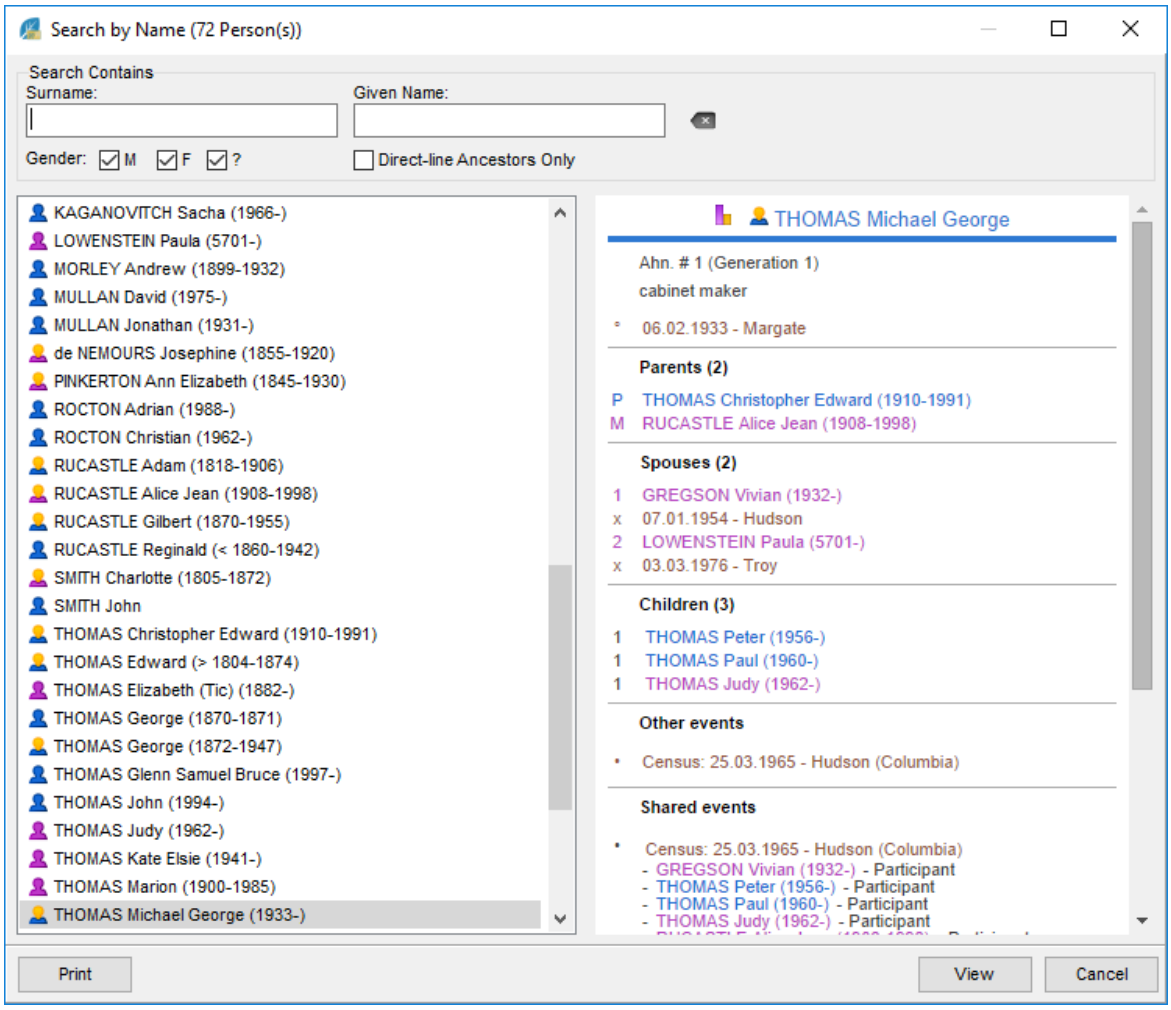
Search by Name

- Select **Find** menu > **Search by Name**
- or click the **Find** button on the toolbar and then click **Search by Name.**

(Mac) Search by Name window



(Windows) Search by Name window



1. Type the first letters of the Surname in the **Surname** input field. Heredis will display all persons with this surname and variations that you will have defined in the **Names Index.**
   (Windows) The search is carried out in the mode you have chosen. To change it, select **Tools** menu > **Heredis Preferences.** Select the **Search** option on the first letters of the name (**Search Starts with**) or Search the name (**Search Contains**) in the **General** tab.
2. In the **Given Name** box, type the first letters of the given name to narrow your search.
3. Tick the boxes **M**, **F** or **?** to limit the search to men, women or persons of indeterminate gender.
4. Tick the **Direct-Line Ancestors** box to limit the search to direct ancestors.

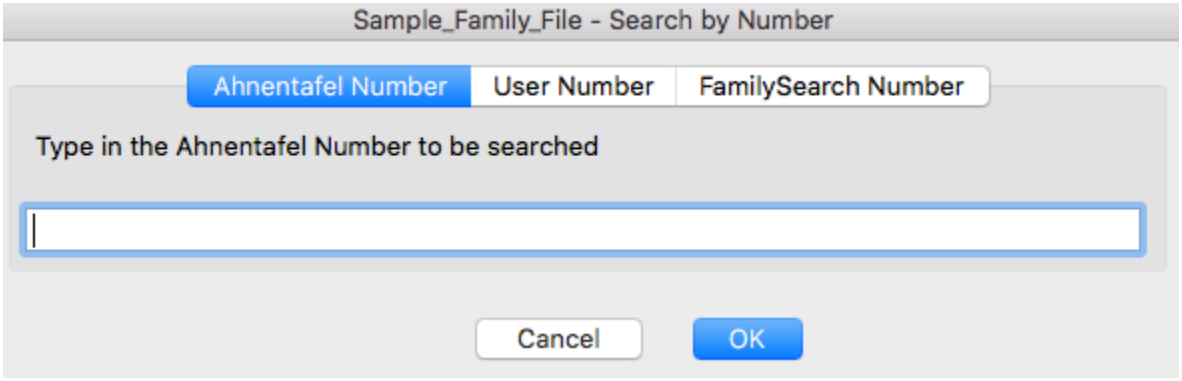
Info • In front of each individual, a colored square indicates the gender of the individual: blue for men, pink for women and green for individuals whose gender is not determined. If a square appears with yellow in the center, it is that of a direct ancestor bearing a Sosa number.

To be sure to correctly identify the person you want, select him/her and check all the information that appears in the Summary area. Click View or double-click the name to display the selected individual as the primary person in a new Immediate Family.

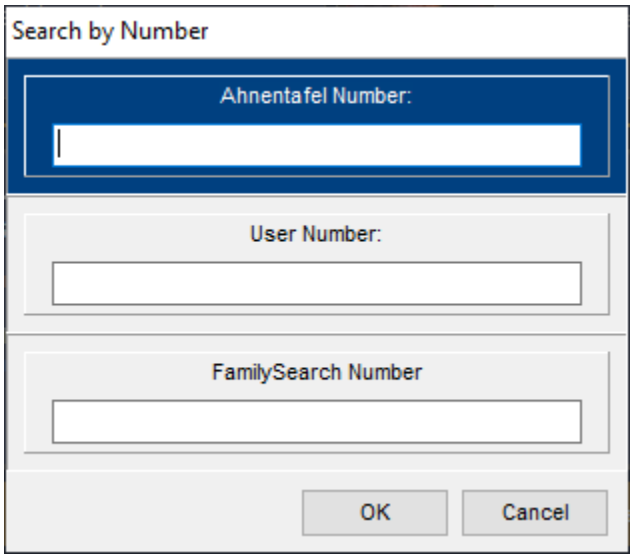
Search for a direct ancestor

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

(Mac) Search by Ahnentafel number



(Windows) Search by Ahnentafel number



- Click **Find** > **Search by Number** on the toolbar or choose **Find** menu > **Search by Number**.

- Click the **Ahnentafel Number** tab and type the number to be searched.
  You can type any one of the numbers carried by the person you are searching for if there is more than one (implex (see page 44)).
- Click **OK** to display the person corresponding to the selected number as the primary person.

If no person corresponds to the number typed, try another number. Click **Cancel** to abandon the search.

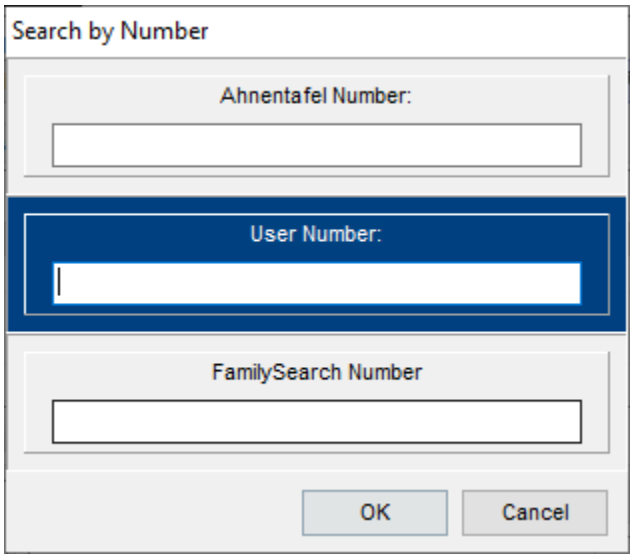
Search for a person by his/her personal number or FamilySearch number

You may perhaps have indicated a personal number to some persons in your genealogy. You can find these people with this number.

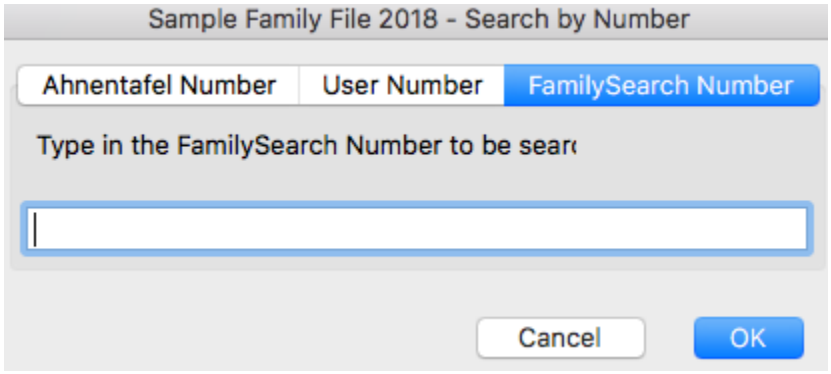
Info • Use the **Comprehensive** or **Customized** input mode to view the **User Number** input field.

1. Click the **Find > Search by Number** button on the toolbar or choose **Find** menu > **Search by Number**
2. Click the **User Number** or **FamilySearch Number** tab and type in the number to search.
3. Click **OK** to display the person corresponding to the number as the primary person.

(Windows) Search by number



(Mac) Search by number



Search for a bookmarked person

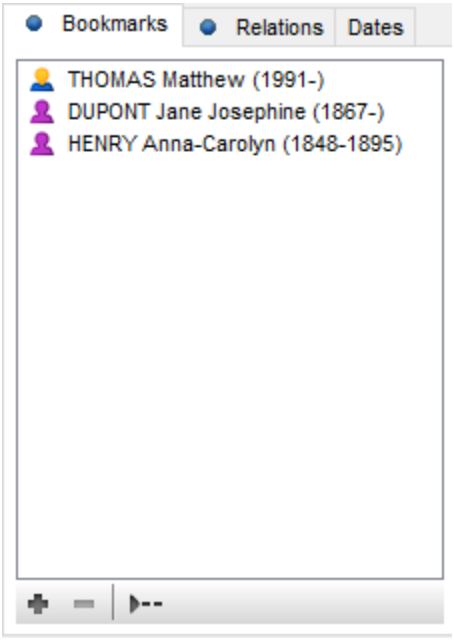
Open the **Bookmarks** panel that will display a temporary list of persons you require to access

frequently.

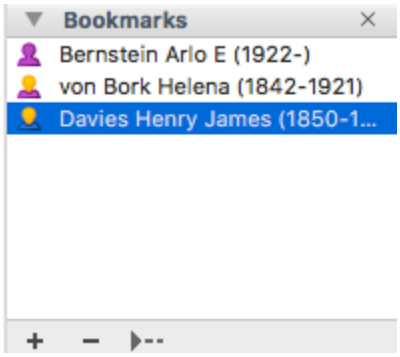
Double-click a person in the list to view as the primary person.

Info • To add a person to the **Bookmarks** list, use drag and drop, or click the ✚ (Add primary person to bookmarks) button on the panel toolbar.

(Windows) Bookmarks



(Mac) Bookmarks

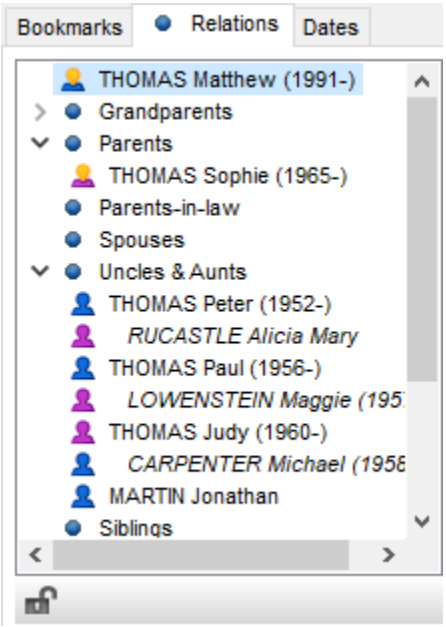


Search for family connections

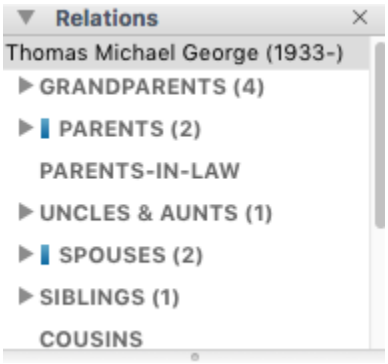
Open the **Relations** panel. It displays all the persons who are directly linked to the primary person: they are related, they are cited in one of the events, they played a role in his/her life or you have established a personal link between them.

Unfold the fields according to the type of relation linking the individual and the primary person: **Parents-in-Law**, **Cousins**, **Grandchildren**, etc.

(Windows) Relations Panel



(Mac) Relations Panel



Info • When a category contains persons connected with an event (godfather, declarant, witness…), it is marked with a blue symbol in Sundry Links tab of personal Data screen. See also Sundry Links.

Level 1 Information

Open the top level to see the names of parents or persons related to the primary person. Consult the list of direct relatives, persons connected to an event for the primary person (godfather, best man, etc.) or those for whom you have created a personal link.

Info • The step relations (aunts and uncles by marriage, step-brothers and sisters, etc.) are

shown in italics under the name of their spouse. Half-brothers and sisters are shown in grey.

Level 2 Information

If additional information is available, click the disclosure triangle next to their name to unfold this level.
Double-click the person sought to display him/her as the primary person on a new **Immediate Family** screen. Double-click the event to open it directly in the **Personal Data** tab.

Look for links between two individuals

Heredis allows you to search for links between two persons. For further details, see Find Relationship article.

Search for duplicates in the file

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

For further details, see Find duplicates (see page 324).

Search for data linked to flags

Starting with Heredis 2025, custom flags can now be added.

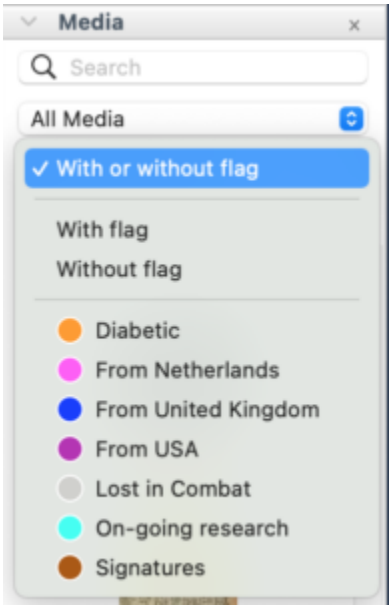
Please also see the following articles: Personalized Flags (see page 188) and Flags Index (see page 441).

Panels and Indexes

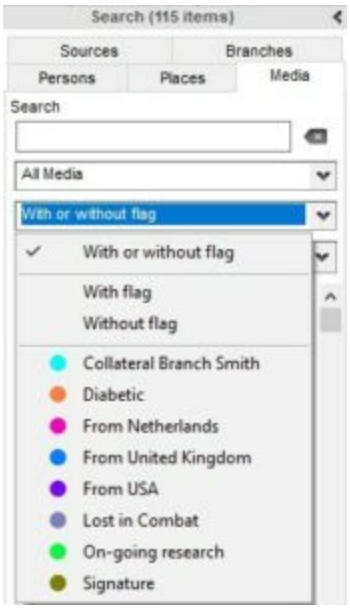
From the **Persons** and **Media side panels** as well as from the **Media Index** or from the list of persons under **Isolated Branches** (access the latter using the **Find** pull-down menu), you can filter your search results so as to display:

- All results, **With or without flag**,
- Results that include a flag, using the **With flag** filter,
- Results that do not include a flag, using the **Without flag** filter,
- Results that include the flag you selected.

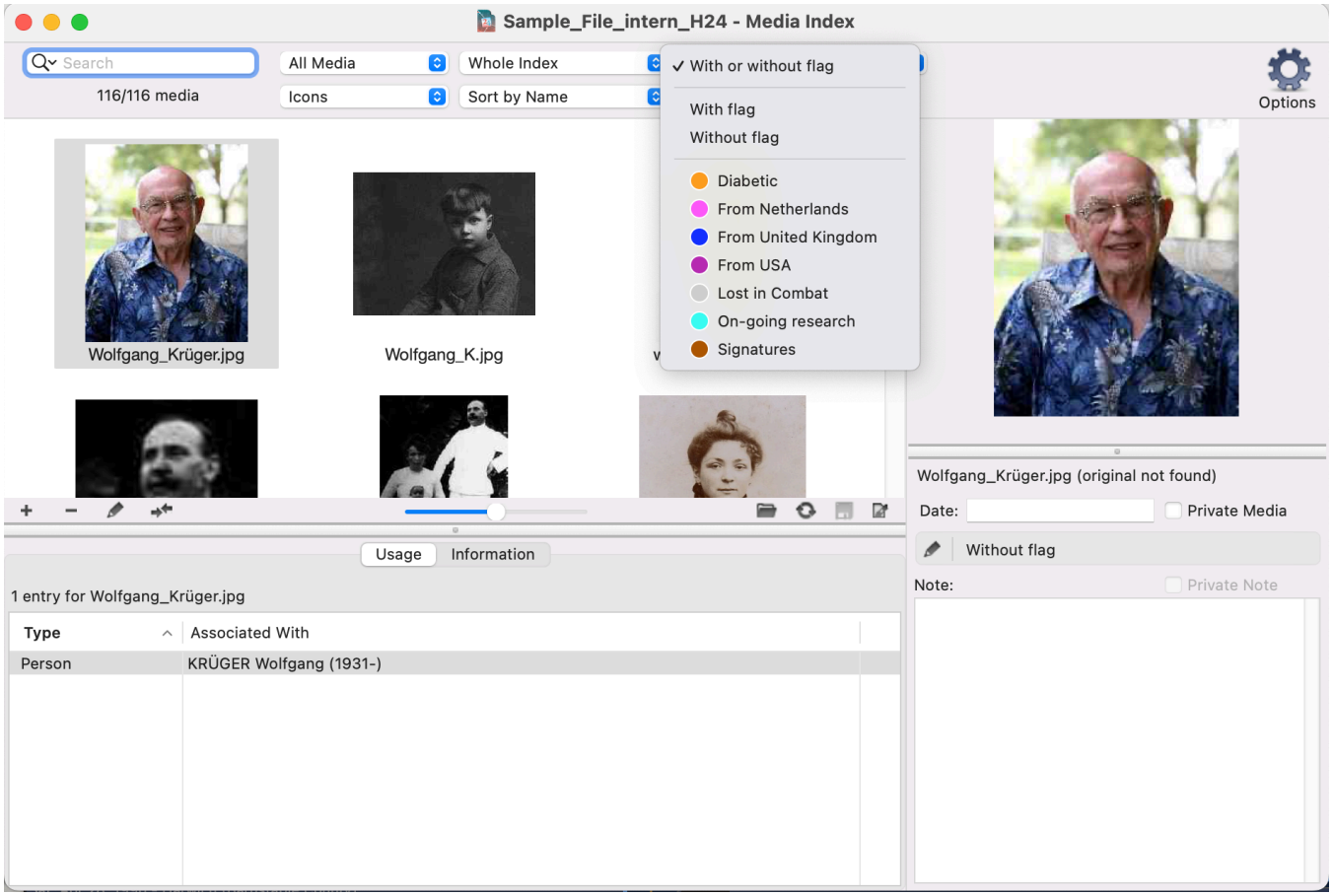
Mac Media Panel



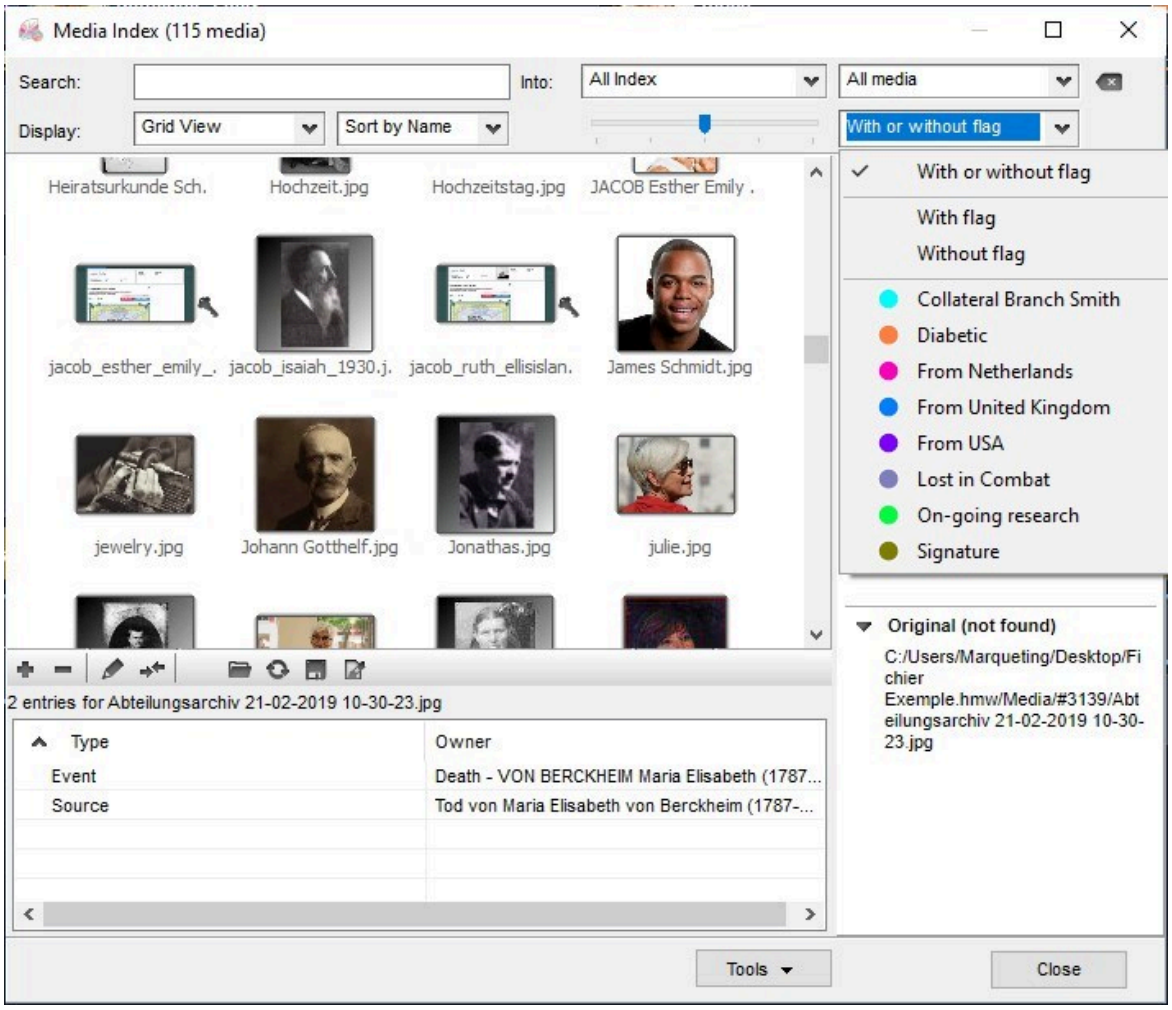
Windows Media Panel



Mac Media Index



Windows Media Index



Smart Search

Smart Search allows you to search for persons to whom specific flags have been assigned.

- Click on the **Search** tab **> Smart Search** button
- Set up your search according to your criteria. See the Smart Search (see page 371) article for more details.

Possibilities are countless. Search criteria vary depending on what you are trying to achieve.

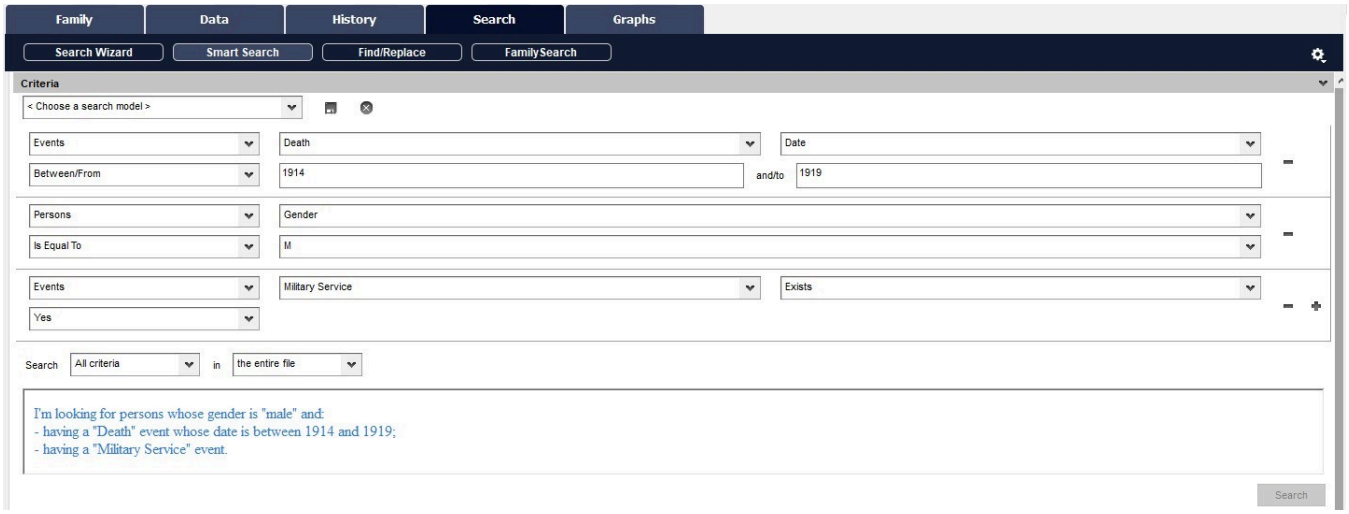
As an illustration of what can be performed, here is a practical example.

I am looking for all the persons who died during WW1 and were Lost in combat.

- I set up the Smart Search as follows: Events > Person Events/Death > Date > Between/From > 1914 and 1919
- Since all these persons were not necessarily fighting on the front, I click on the + sign at the end of the line to add: Persons > Gender > Is equal to > M (because generally it was men who died during the Great War)
- The persons I am looking for have done their military service so I click on the + sign at the end of the line to add: Events > Military Service > Exist > Yes

- I then click on the **Search** button.

I thus get a list of all the men with a military service event who passed between 1914 and 1919. Therefore, a high probability that they died for their country.



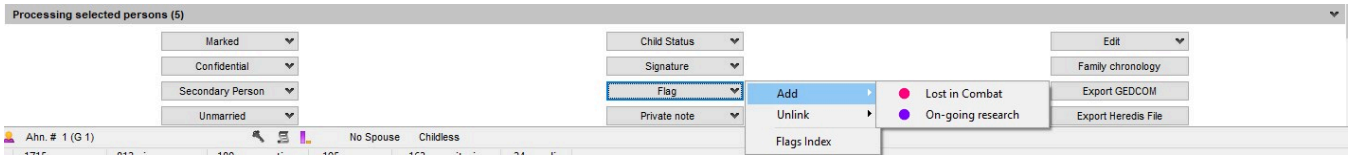
I check the results and consult each person's summary.

If any of them didn't die because of war, I can unselect the person. To do so, I need to use the comprehensive view. To do so, I click on the cogwheel and select Comprehensive.

I can then uncheck the box of the person(s) who didn't die in combat. In this example, Arthur Loreau died before the beginning of the First World War.

(Note: I could have been more precise by specifying a search date between August 1914 and 1919.)

Finally, in the **Processing selected persons** area (below the **Results**), I click on the **Flag** button**> Add>** and I select the “Lost in Combat” flag.



I can just as easily detach flags assigned to a whole set of persons by choosing Unlink > and selecting the flag to be removed from the results.

You can perform a search in order to flag persons as well as events or facts.
To do so, in the **Results** area, simply click on the tab you are interested in (Persons, Events, or Facts); the **Flag** button can be found below in the processing area.

Do consult the Smart Search (see page 371) article for more info.

Find Duplicates

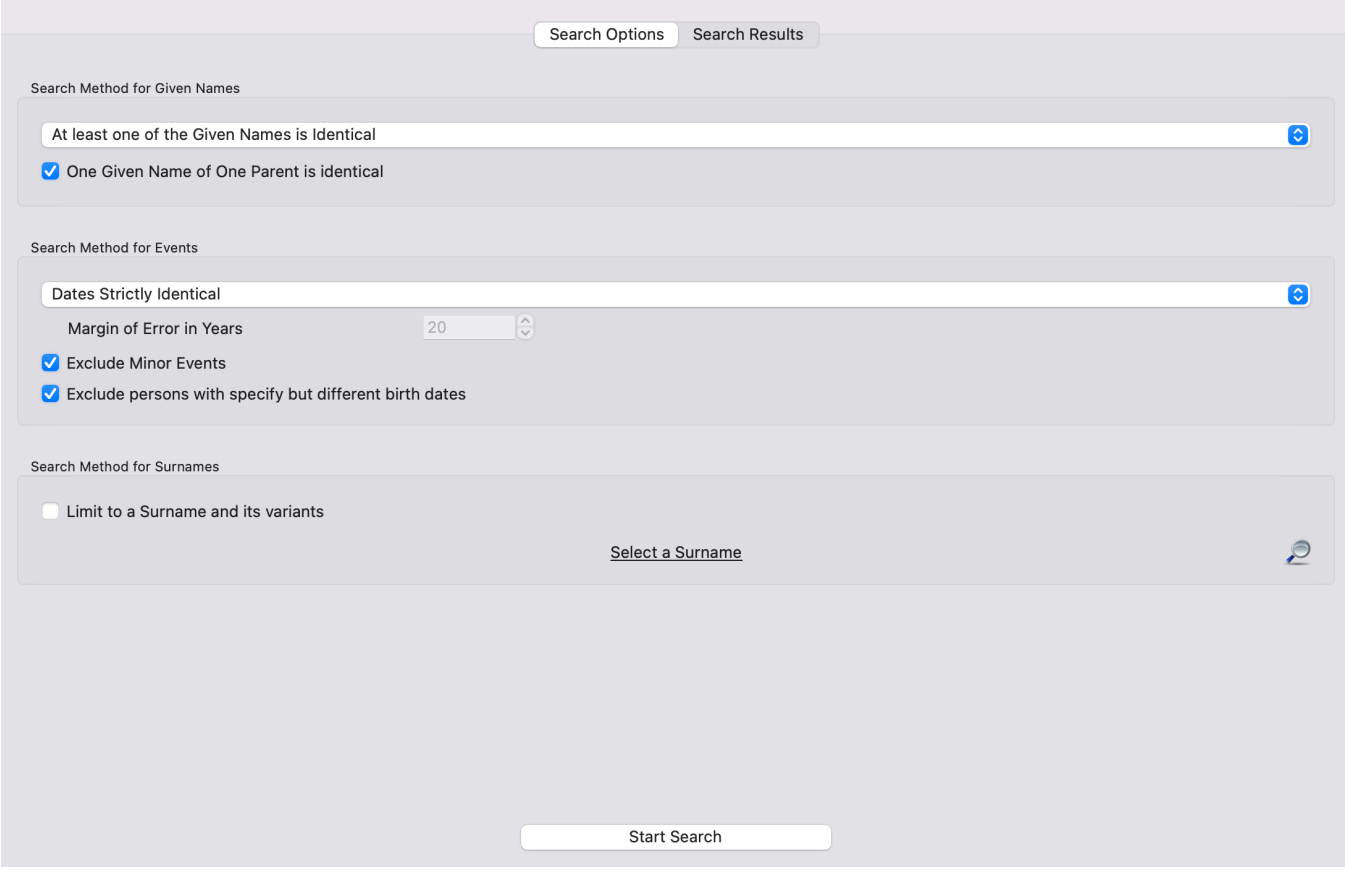
Starting with Heredis 2023, the duplicates search feature has been reviewed and improved. Prior to that, Heredis for Mac and Heredis for Windows used two distinct algorithms, each coming with its advantages and disadvantages.

In Heredis 2023, the two versions of Heredis have been merged, only to keep the best of both worlds.

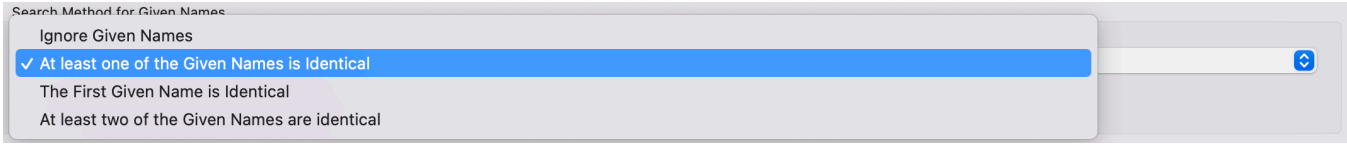
Find Duplicates

Launch Heredis.
Open your genealogy file.
In the pulldown menu, click on **Find > Find duplicates…**, or click the icon **Find** then **> Find duplicates…** or even directly the **Find Duplicates** icon if you have added it to your toolbar.

Set the Search Options



Choosing the Search Method for Given Names.

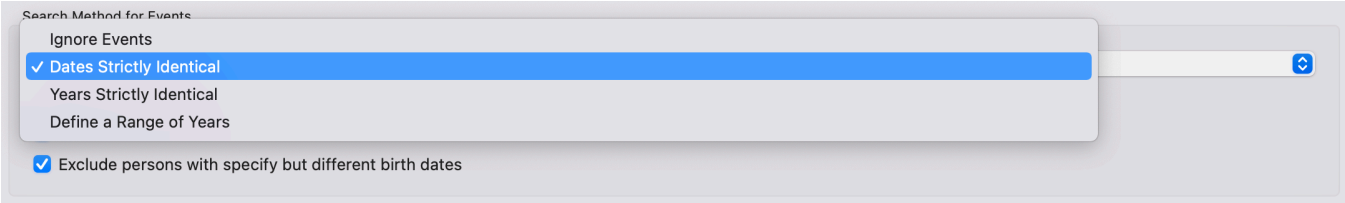


In the scroll-down menu, select the setting you wish to apply.

- **Ignore**: given names will not be compared.
- **At least one of the Given Names is Identical**: all given names will be checked and if one is identical, Heredis will display a duplicate.
- **The first Given Name is Identical**: only the first given name will be checked.
- **At least two of the Given Names is Identical**: all given names will be checked and if two are identical, Heredis will display a duplicate.

Check the box entitled "**One Given Name of One Parent is Identical**" if you wish to include this criterion.
Note: if one of the duplicates shows no parent then the duplicate won't be found.

Choosing the Search Method for Events.



In the scroll-down menu, select the setting you wish to apply.

- **Ignore Events**: events won't be taken into consideration.
- **Dates Strictly Identical**: only persons with events on the exact same date will be identified.
- **Years Strictly Identical**: only persons with events in the exact same year will be identified.
- **Define a Range of Years**: select a range of years, for instance to identify duplicates if one has a calculated date while the other shows an exact date, or if one has a birth date while the other shows a baptism date.

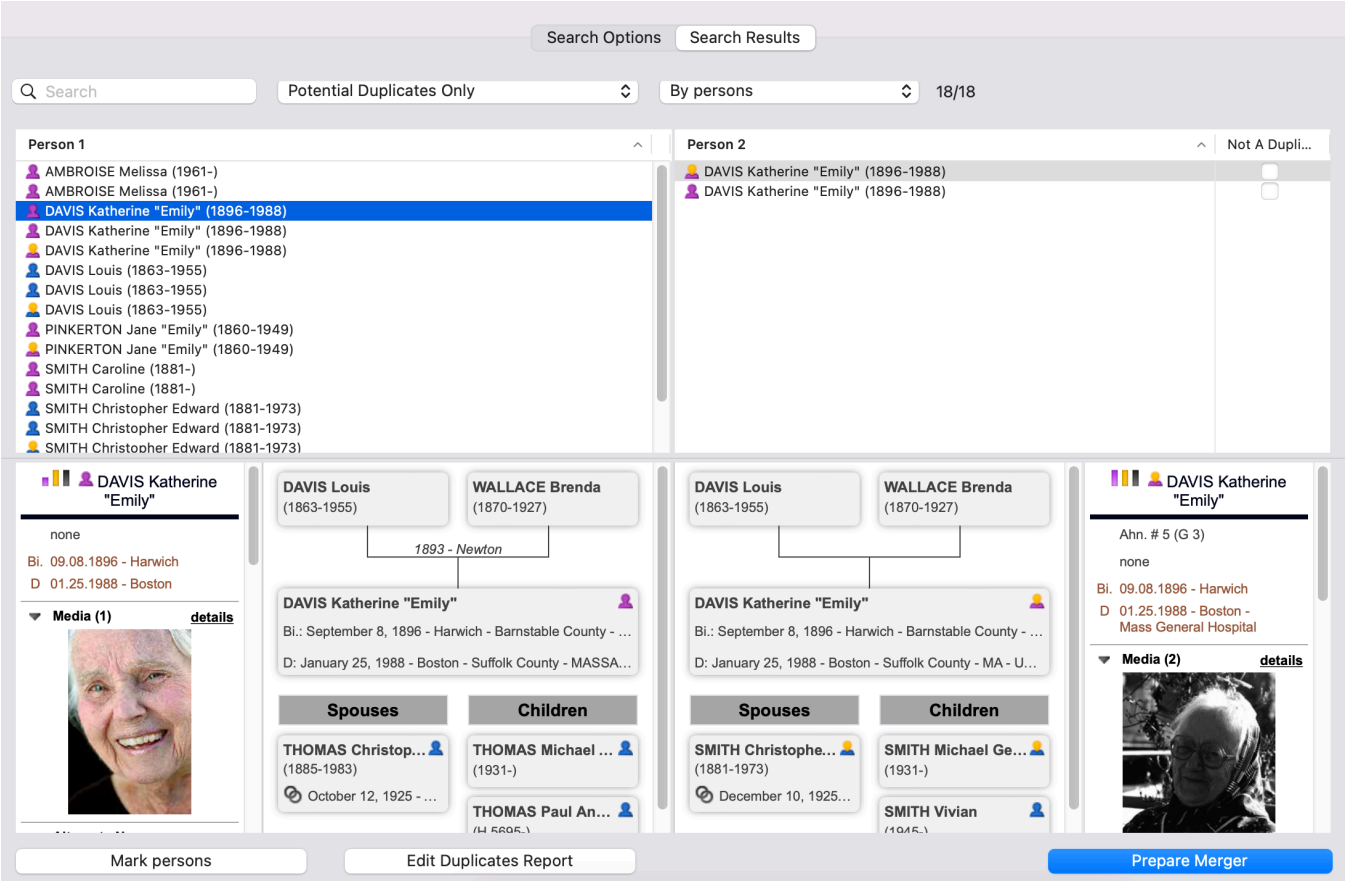
Research is done on major and minor events, check the box **Exclude minor events** so that all minor events (other than Birth/Baptism, Union, Death/Burial) are not taken into account.

You may also limit the search to a surname of your choice.
Check the box entitled "**Limit to a Surname and its variants**"
Note: variants will be taken into consideration only if you have indicated variants in the Surnames Index.
Click on **Select a Surname** and choose among the Surnames listed in your genealogy.
Validate your choice by clicking **Choose**.

It may be worth launching several searches, modifying only one criterion at a time to broaden the possibilities.
Once you are done setting your options, click on **Start Search**.

Search Results

Heredis switches to the **Search Results** tab.



The search bar allows you to narrow down the results to a given name or to a surname.

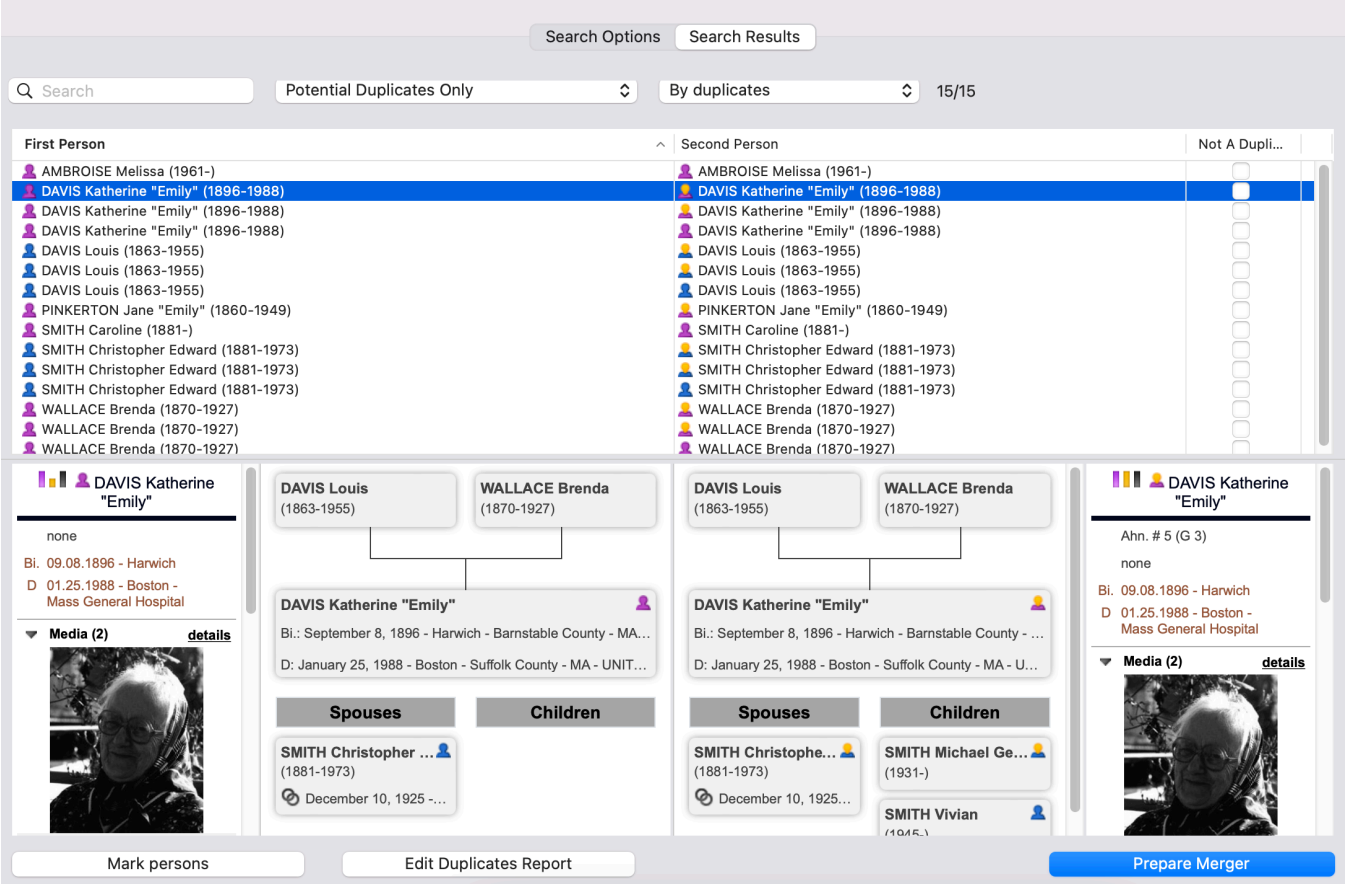
The first dropdown list allows you to display

- **Potential Duplicates Only**: it exclude the declared Not a duplicate.
- **Not a Duplicate Persons Only:** this shows only those that you have declared as not a duplicate, allowing you to reverse your decision and uncheck the Not a duplicate box in the event of an error.
- **All Results:** shows all potential duplicates persons and those you have declared as Not a duplicate.

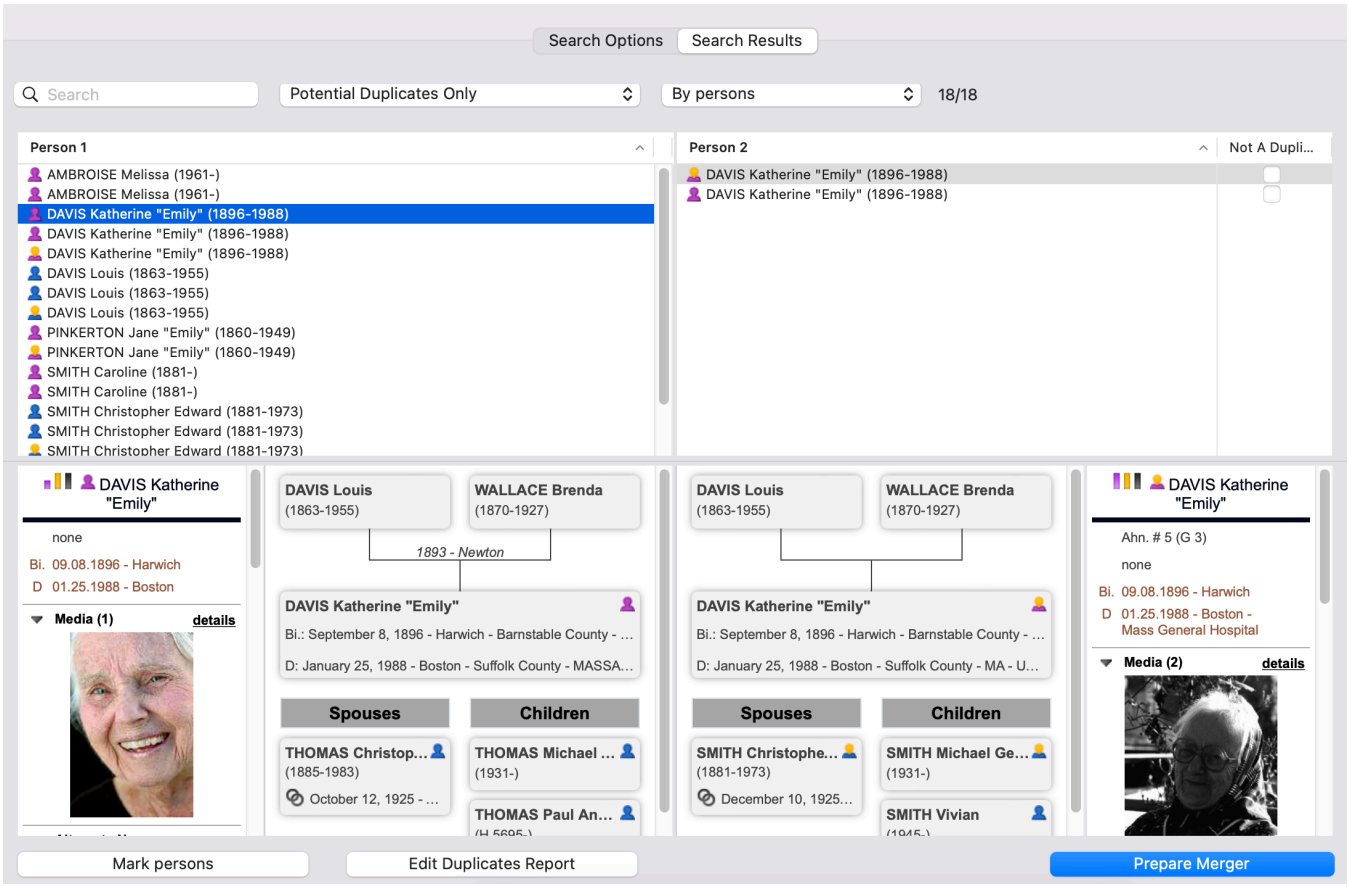
The second dropdown list allows you to change the way your results are presented.

Duplicates can be displayed:

- By pairs of duplicates, if you select **By duplicates**.



- **By persons**. If you click on one of the persons in the list on the left, you'll see the person(s) potentially matching as duplicate(s). This feature comes in handy when you have several potential duplicates for one single person.



Whichever presentation you choose, you can select a duplicate from the list in each column and use the summaries and mini comparison charts to make sure they are indeed duplicates.

If they are not actual duplicates, check the **Not A Duplicate** box at the end of the line on the right-hand side. This person will no longer be suggested as a duplicate. This duplicate will appear if you choose **Not a duplicate Persons Only** or **All Results** but you will see that they are already processed. If you made a mistake, you can uncheck the box to put them back in the potential duplicates.

If you have located an actual duplicate, click on **Prepare Merger**…

Do consult the article entitled Merging Two Persons (see page 330) for more details on how to merge duplicates.

Edit the list of duplicates

Click the **Edit Duplicate Report** button to get a document from the duplicate list in the file.
Click **OK** to get a .rtf document that opens with your default word processor.
Click **Export** to have a plain text document that opens with any notepad on your computer.

Mark Duplicates

If you don’t have time to manage the duplicates immediately or if you want to process the duplicate list, you can mark them.

Click **Mark Duplicates** to have the Marked Persons tag checked in the Personal Data entry for each person. Persons who will be marked are those whose list is displayed. If you have chosen the filter **Not a duplicates Persons Only**, the persons you declared not duplicates will be marked. Similarly, if you have chosen the **Potential Duplicates Only** filter, then only persons with potential duplicates will be marked.

Merging Two Persons

While entering data in Heredis, you realize you have created a person who may already exist in your genealogy. Or you have imported your cousin's genealogical data into yours and now find yourself with a bunch of duplicates…

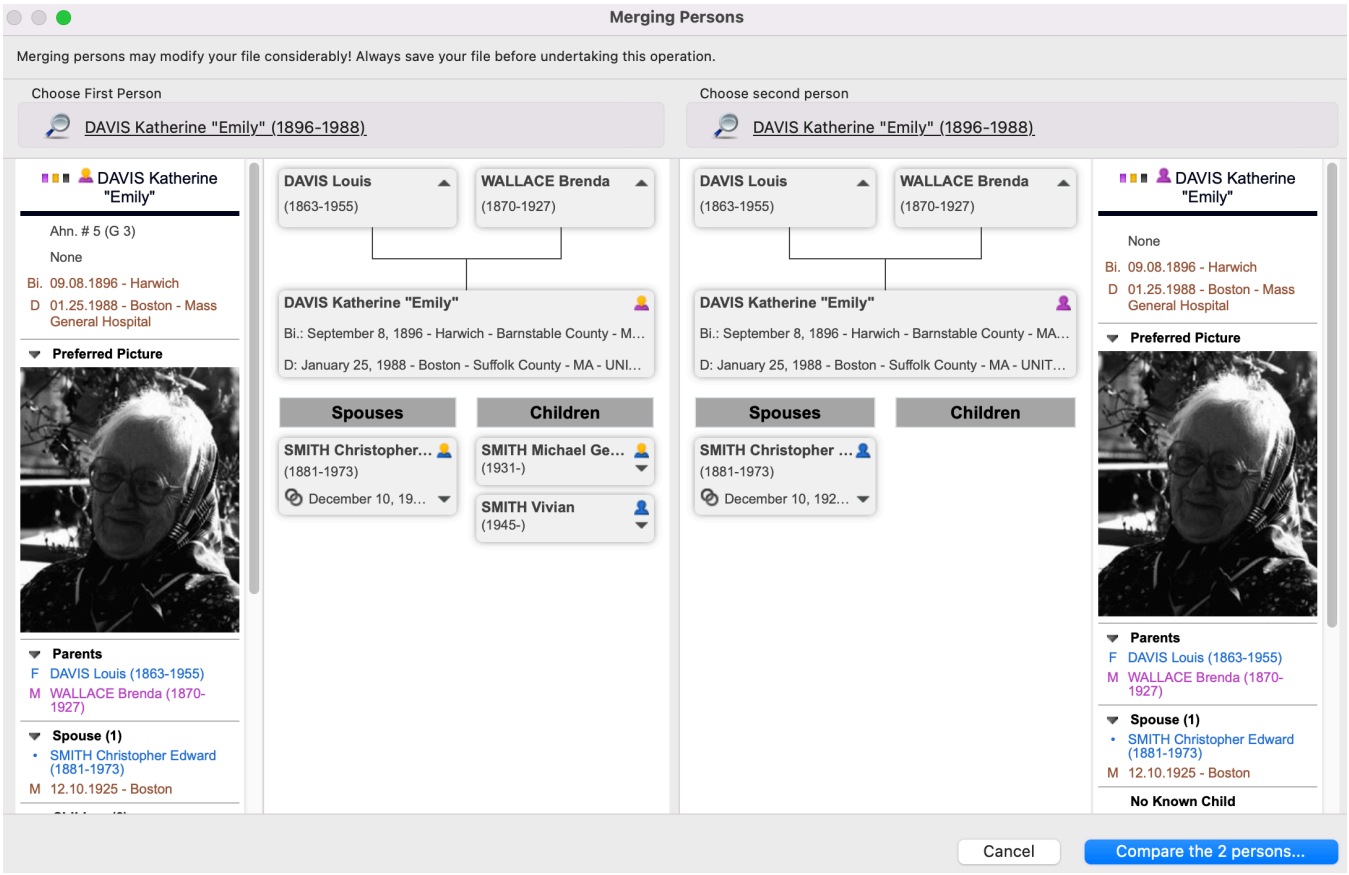
Starting with Heredis 2022, a brand-new merge module is now at your disposal! It will assist you from A to Z during this usually tricky process.

To locate a duplicate, you may:

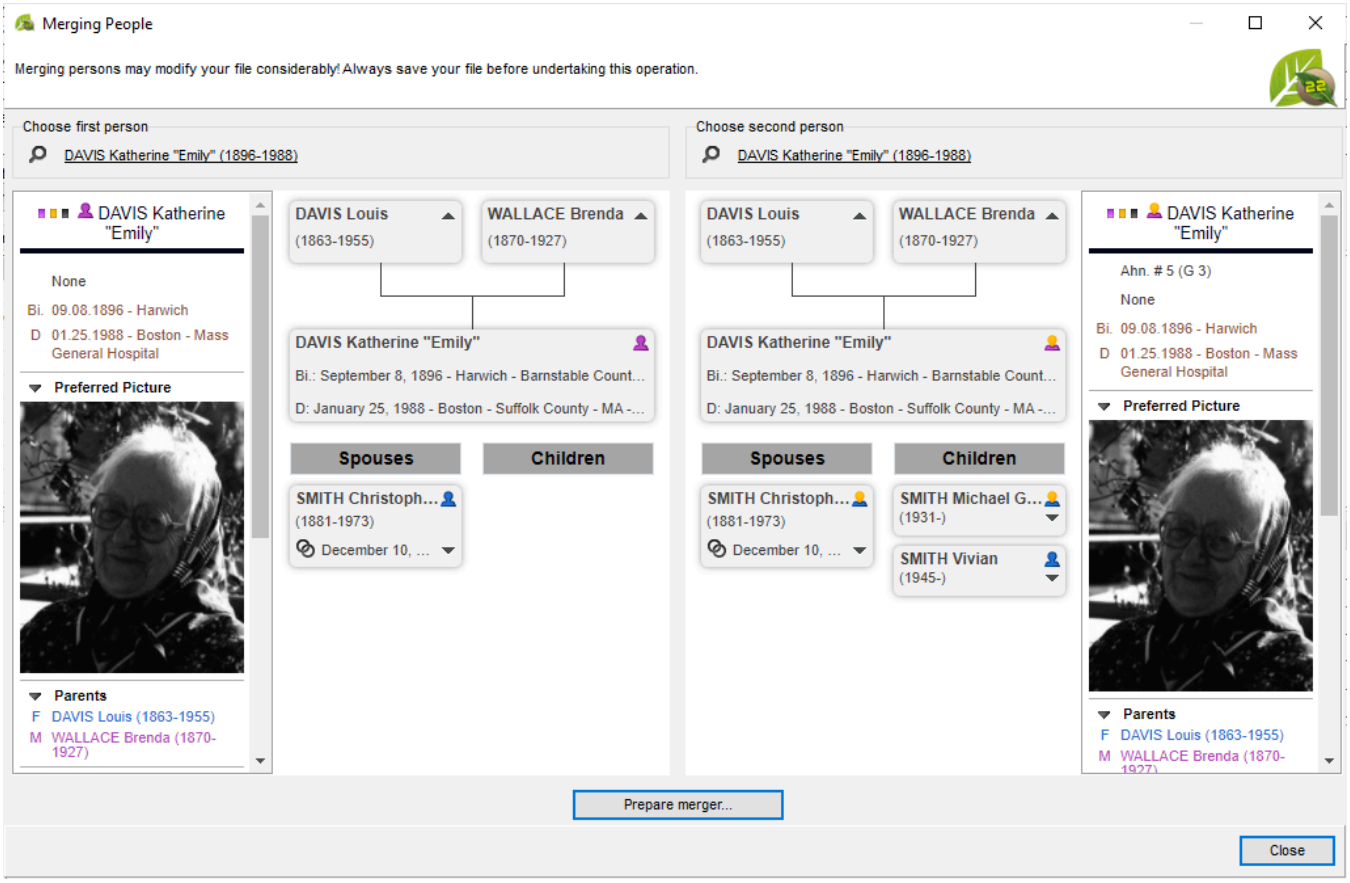
- Start a search for duplicates – read the article Find Duplicates (see page 324) in the file. Select two potential duplicates then click on **Prepare merger**.
- Try to find potential duplicates in the persons' panel. Once you have spotted a pair, choose one of them as the primary person and click on the drop-down menu **Person > Merge with another person**. Select the second person by clicking on the magnifying glass button (you will then access the list of existing persons to choose from).

Take a look at the summaries and comparison trees to make sure they are indeed duplicates. Should the person's parents be duplicates, start merging them first.
Once you have reviewed the summaries and comparison trees, click on **(Mac) Compare the 2 persons, (Windows) Prepare Merger** to prepare the merger.

(Mac) Merging Persons popup window from the Person menu

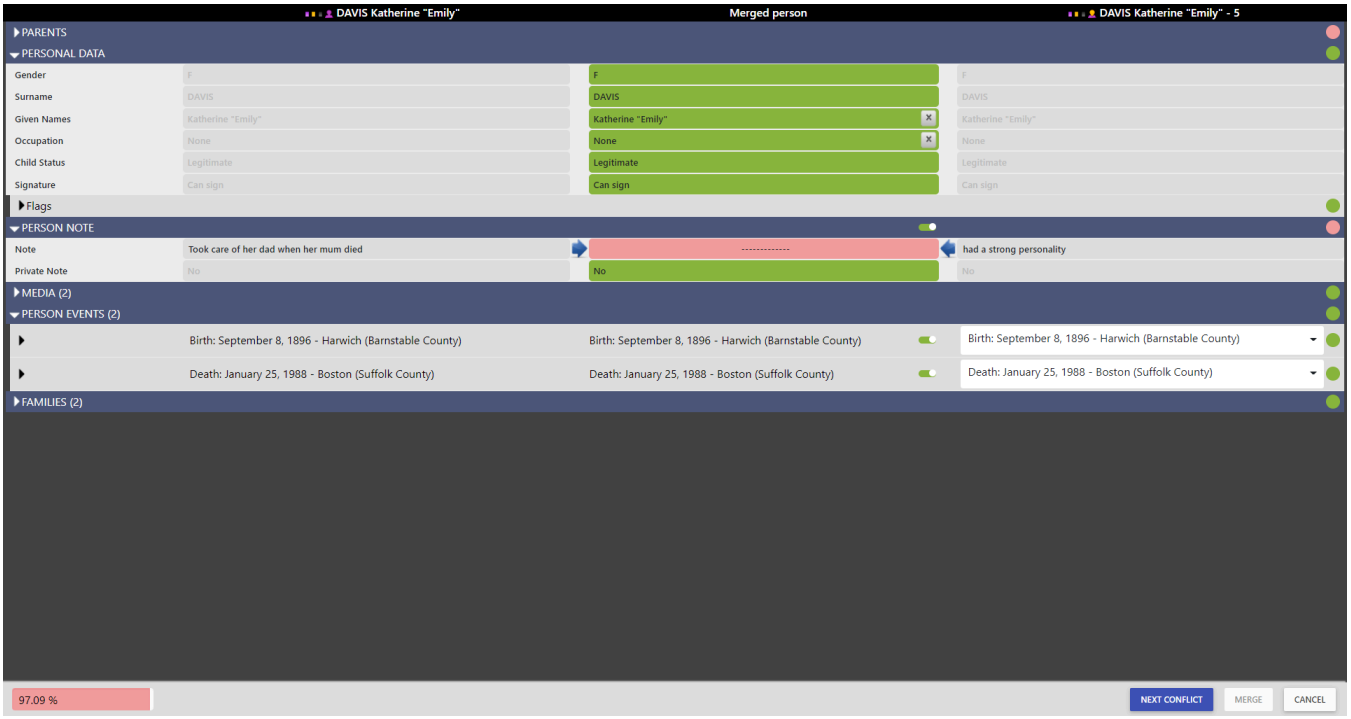


(Windows) Merging Persons popup window from the Person menu



See also Find Duplicates (see page 324) for all details on search for duplicate feature.

Heredis will open a window to prepare your merger. This window contains several columns, colored bullets, arrow buttons, and switches. Let's take a closer look at how to use them.

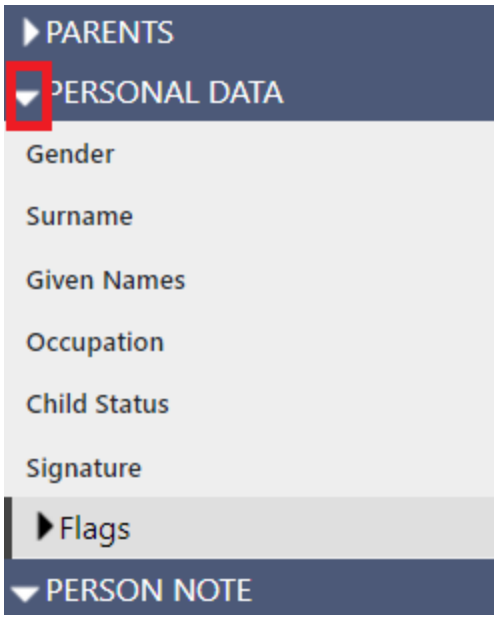


Note: a duplicate merger is irreversible; once you have validated and saved the changes to your file, you can no longer cancel it. Remember to back up your file before merging persons.

Columns and lines

The first column shows the names of the data categories and fields.
The "person" column on the left-hand side shows the first duplicate; the person's name, and his/her potential Ahnentafel number can be found in the column heading.
The "person" column in the middle shows the data of the person who will result from the merger; this column is entitled "Merged person".
The "person" column on the right-hand side shows the second duplicate; the person's name, and his/her potential Ahnentafel number can be found in the column heading.

To save some screen space, data is organized into categories (or "sections"). These categories are folded; by clicking on the arrow ▸ preceding the category title, you can unfold it and view all the information available. The arrow will then point downwards; by clicking on it, you will be able to fold the section again.



Note: If parents or spouses are duplicates, they must also be merged. Avoid doing this from the current merge; open their own merge so that you can select each item and avoid merging blindly.

Info: Since Heredis 2026, it is possible to add several sets of parents. You can therefore keep more than two parents, which was not the case previously.

Colors

Heredis has prepped up the work for. The data with a green background (in the middle column) has been pre-selected by Heredis. If there is no doubt that the data is identical for both duplicates, then Heredis will show the result in the middle column, colored in green. However, we advise you take the time to doublecheck this data, just in case.

If there is any conflict, Heredis displays the line in the middle column in pink. It's up to you to choose which data to keep and to resolve all conflicts before you validate the merger.

If the line is grayed out, it means that the data has been ignored. Heredis will not ignore data systematically, it is up to you to click on the switch to ignore a set of data. We will go back to this later.

Bullets

A system of colored bullets, located at the end of the line for each item, shows you which items have conflicts and which do not, i.e., data that might be questionable for the merger.

The pink bullet indicates that there is at least one conflict. The green bullet means that Heredis has not encountered any potential issue.

A gray bullet shows that the dataset has been ignored.

At the bottom of the screen, you can visualize the progress of the conflict resolution. When it reaches 100%, the merger can be validated.

Uncomplete progress bar

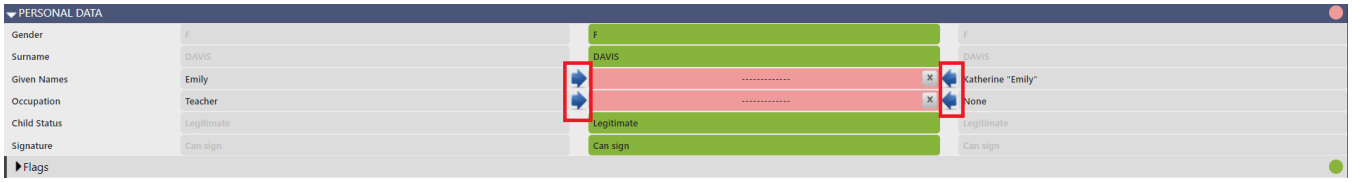
Complete progress bar

To resolve conflicts more rapidly, we have created a “**Next Conflict**” button (lower-right corner of the window) that allows you to move from one conflict to the next without checking the data already in green. Click on it to move from one conflict to the next if you don’t want to check the remaining data.

The list of information to be checked may be shorter or longer depending on the amount of data entered. Everything is detailed, nothing has been put aside. Therefore, you should take your time.

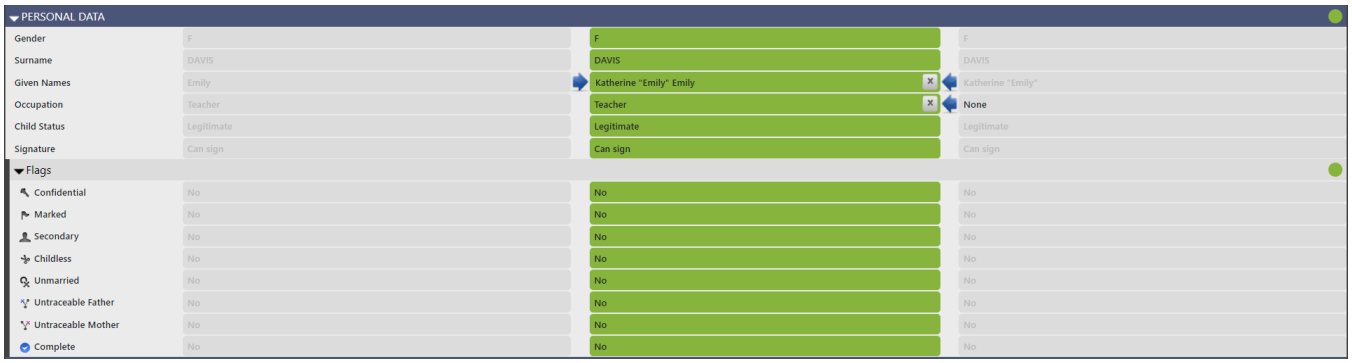
Arrows and crosses

To select the data you wish to save from one of the two duplicates, click on the or arrow located next to the Merged person column.

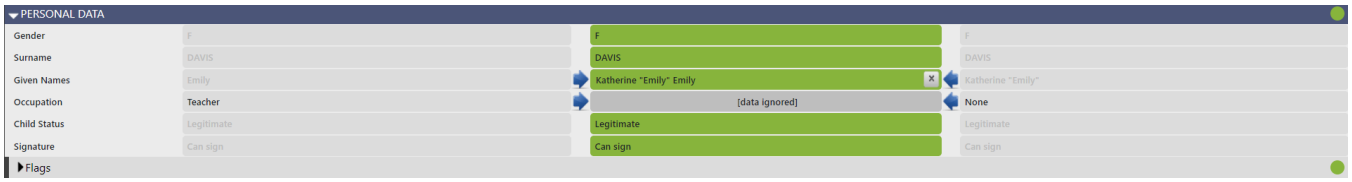


Some fields could be concatenated. Hence, if you want to retain data from both duplicates for Occupation, Given Names, Notes, etc., you can do so by clicking on the left arrow and then on the right one (or from right to left, it works too).

On the other hand, some fields do not allow you to cumulate data from both sides. For example, you need to be either a Natural or a Legitimate child, you can sign or you cannot. Such fields cannot be combined. Similarly, the same rule applies to Flags: Confidential, Marked, Secondary…



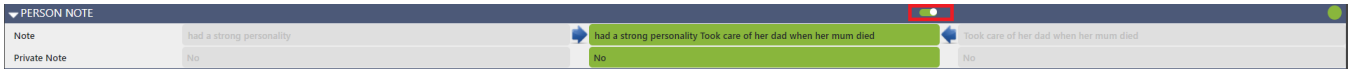
If you made a mistake when selecting the 2 pieces of information, click on the cross ✖ to remove the information. Both will be removed, then you will only need to click on one of the 2 arrows to select the data you wish to keep. You can also choose not to keep any data at all. In this case, the central rectangle will read [data ignored].



Switches

Switches allow you to ignore an entire set of data versus individual pieces of data, as described above (using the cross). For example, if the merger allows me to gather all the information I need on a person, my Person Notes will no longer be of any use to me. By clicking the switch in the Person Note section, I intend to ignore my research notes and therefore will no longer have this information available in the merged person.

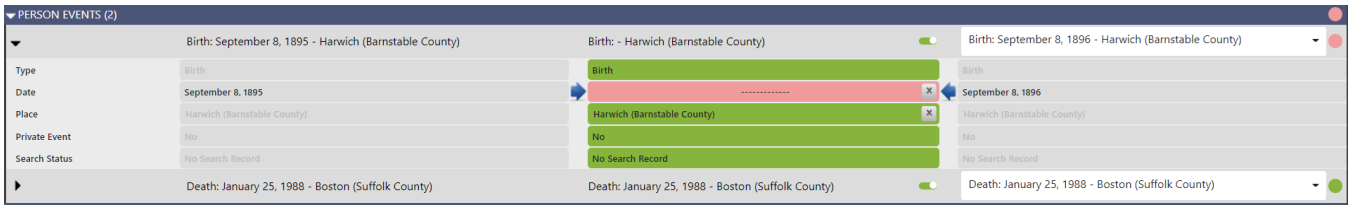
Switch icon is “on” so as to retain all data from this section



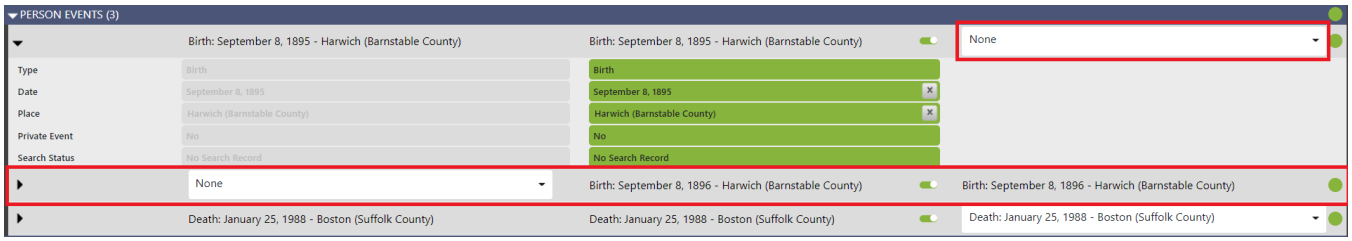
Switch icon is “off” so as to ignore all data from this section

Events

Heredis places events of the same type side by side for the 2 persons to be merged. For example, both persons have a Birth event. Heredis puts on each side the 2 Birth events, even if they differ. It's then up to you to solve the conflict. To do so, scroll down to the Person Events section, then to the Birth event line. Colored in pink, it will let you identify the issue right away. As an example, the capture below shows 2 different dates of birth.

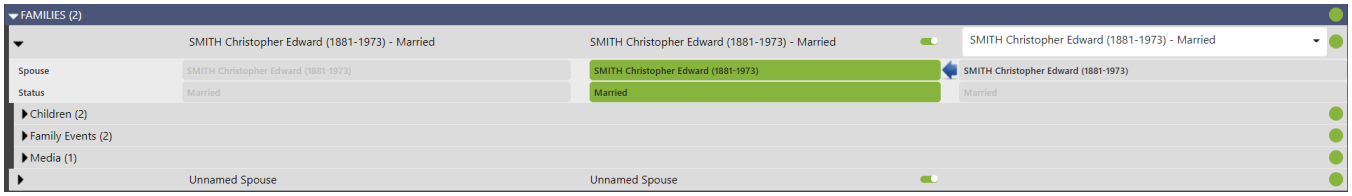


You may only choose 1 of the 2 dates as it is not possible to cumulate both of them. If you need to investigate some more before validating the date for good, you still have the option to save the 2 events. Click on the white rectangle, i.e. Birth: September 8, 1896 – Harwich (Barnstable County), and choose None. A second Birth event line appears so the 2 events are no longer on the same line. After validation of the merger, the merged person will own 2 birth events. You will later need to manually remove the incorrect birth event from the list of events in the Personal Data entry screen.

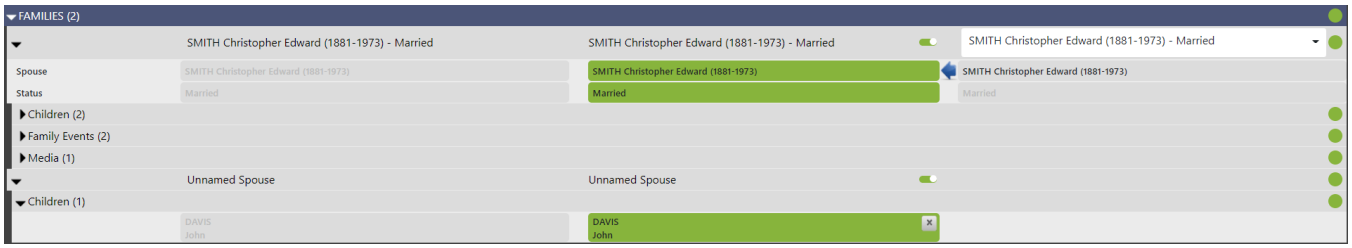


Despite the various suggestions made by Heredis, you remain in full control and can choose what you wish to keep or not.

As for Families (spouses), Parents, and Children, the same principle applies. You can choose to keep one or the other or simply both by selecting **None**. Remember to unfold each section to doublecheck the data.



If the person has a child but no spouse (e.g. a child with an unknown father), an "**Unnamed Spouse**" line will appear so the child can be displayed.



In short:

- **Colored bullets** indicate whether conflicts are present or not. Green means everything seems consistent, pink means you must doublecheck your data, grey means the data has been ignored.
- **Switches** allow you to ignore a set of data, a section, or an entire event (date, place, status…). The section's bullet point is grey if you chose to ignore this data.
- **Dropdown lists** under Person Events allow you to select the event you wish to compare between both persons.
- The **cross** allows you to ignore one single piece of information.
- The **Next Conflict** button lets you move forward at a faster pace when resolving conflicts, without dwelling on what was predefined by Heredis.

When everything is set up properly and the progress bar shows 100%, the **MERGE** button becomes clickable at the bottom right of the screen. You can then click on it to validate the merger.

Search for isolated branches

Isolated persons or branches are persons or branches (hence several persons) in your files that are not linked in any way to direct ancestors, i.e. to the root person.This search therefore displays:

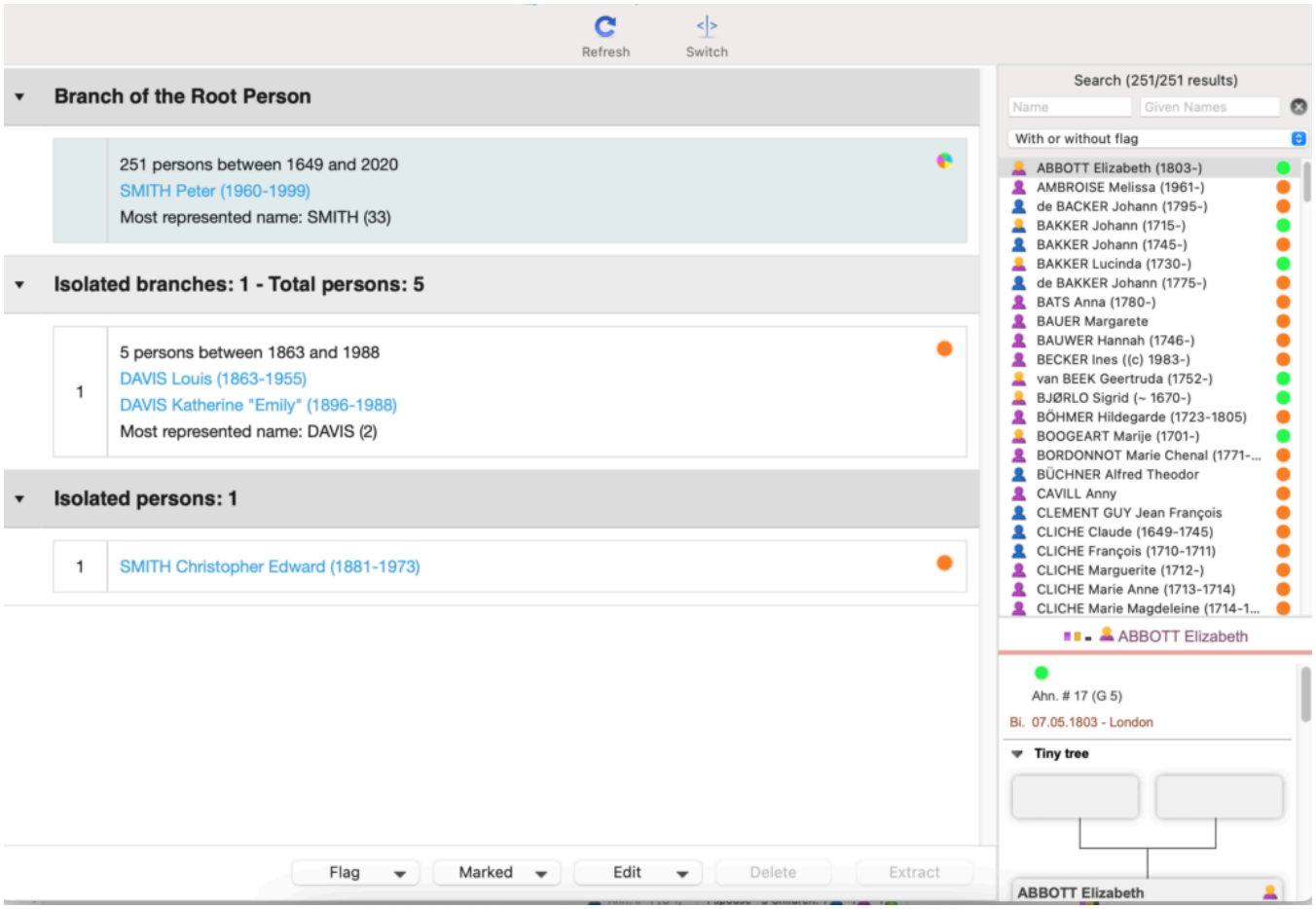
- Branches that are not linked to direct-line ancestors, i.e. isolated branches;
- Isolated persons, i.e. those who are not linked to anyone.

This may occur if you imported a file provided by one of your cousins, or if you have entered every person you found bearing the same surname hoping to link them together some day (but without ever finding the connection), etc.

Starting with Heredis 2025, you can perform searches on isolated branches or persons in your genealogy file. This will then allow you to carry on various tasks: deleting them, extracting them to store them in a separate file, labeling them, or even creating lists (reports).

Access the Isolated Branches search feature

- from the **Find** menu **> Isolated Branches…**
- from the **Find** button **> Find isolated branches** in the toolbar.



Heredis displays the main branch, i.e. the persons bearing an Ahnentafel number, who are in direct line with the root person.

You can then see all isolated branches and persons. See definition above (see page 338).

Toolbar buttons

You can continue entering data in Heredis while leaving the Isolated Branches window open.

Remember to click on **Refresh** for your changes to be taken into account.

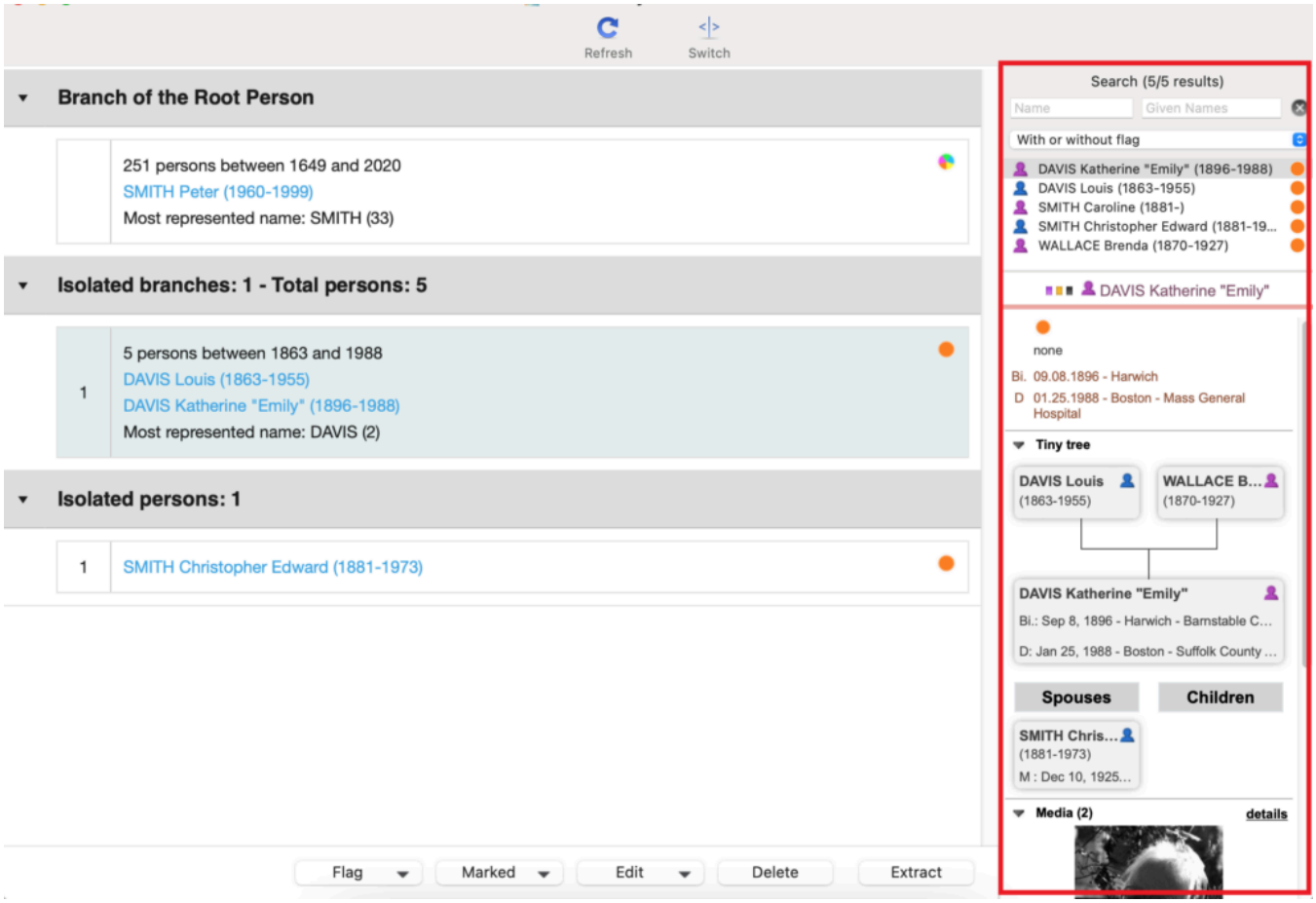
The **Switch** button allows you to shift the Search panel from one side to the other.

Consult the content of an isolated branch

Heredis shows you the number of persons included in the branch and the related time range (from the earliest to the most recent year).
You'll see the most distant person in the branch and the most recent one. If you click on their name (displayed in blue letters), Heredis displays the person in the last tab displayed in the main window.

Click on an isolated branch to consult its content.
The line you selected is highlighted in blue.

The list of persons in this isolated branch is displayed in the side panel (here on the right).



Use the provided search fields in order to perform searches by surname, given name.

If you have already created custom flags (see the article entitled Personalized Flags (see page 188)), you can use the With or without flag, With flag, etc. options. Click on a person to consult their summary.

Note: you can perform a multi-selection by holding down CTRL in Windows and CMD on Mac and click on the elements you wish to select. You may then perform edits to your entire selection.

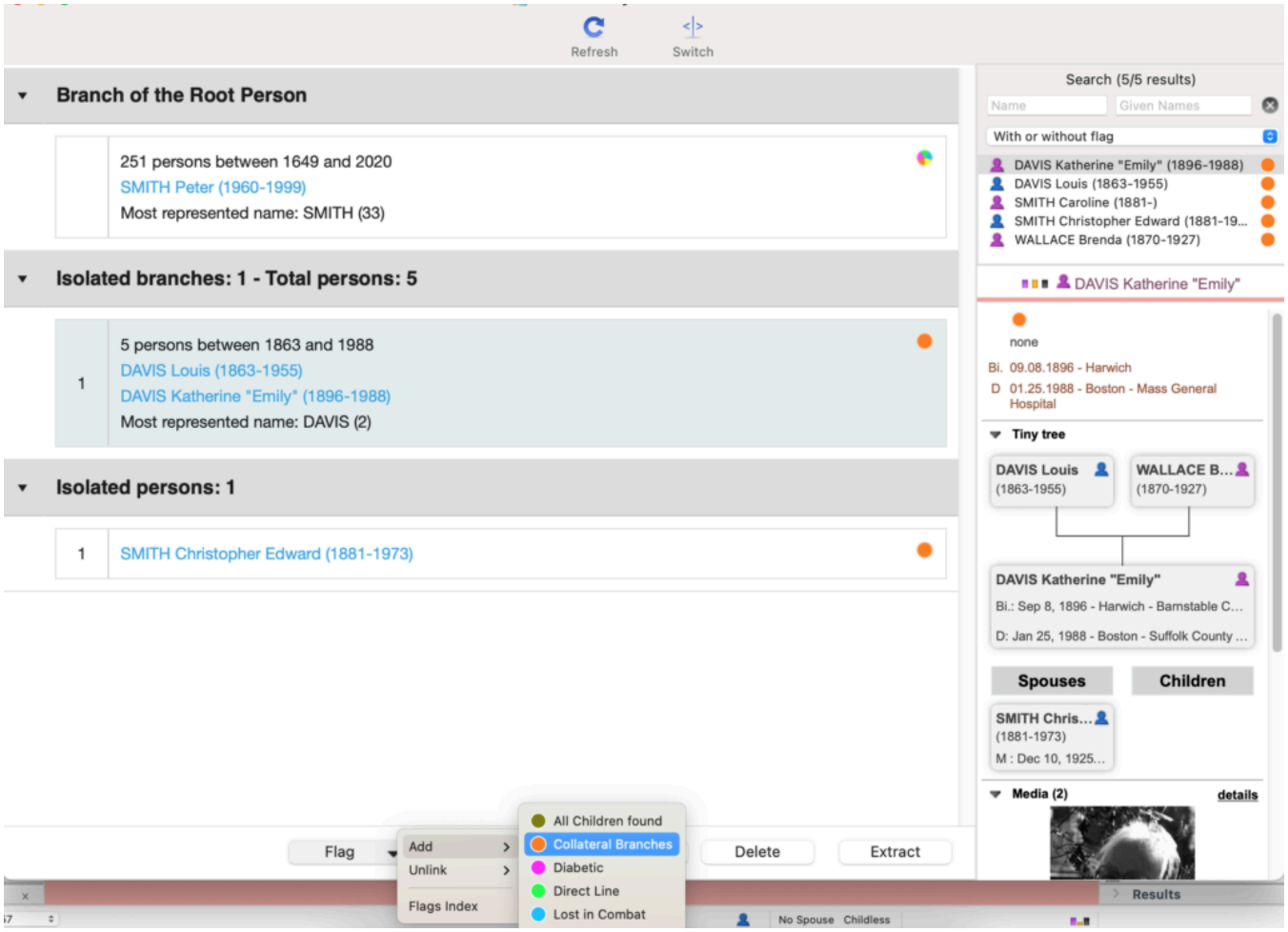
Manage isolated branches or persons

Flag

Click on the **Flag** button

- select **Add** so as to assign a flag to the persons in this branch or to the isolated persons and pick the flag of your choice.

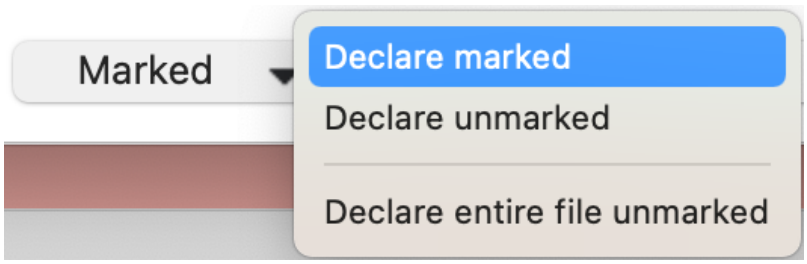
- select **Unlink** to remove a specific flag assigned to the persons in this branch or to isolated persons and pick the flag to be removed.
- create a custom flag by opening the **Flags Index** (see the article entitled Flags Index (see page 441))



Marked

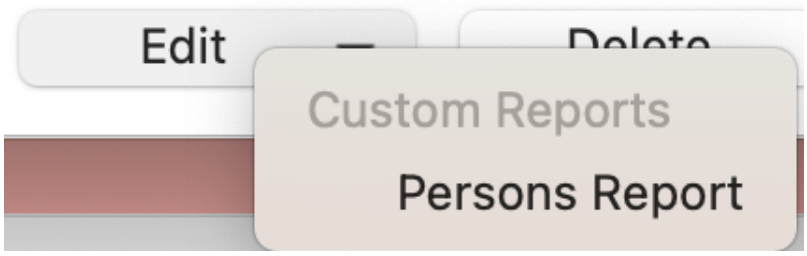
Reminder: the icon is the label provided by Heredis allowing you, for instance, to exclude specific data in documents, exports, etc.

Click on the **Marked** button so as to **Declare marked** or **Declare unmarked** persons from this branch or isolated persons.



Edit

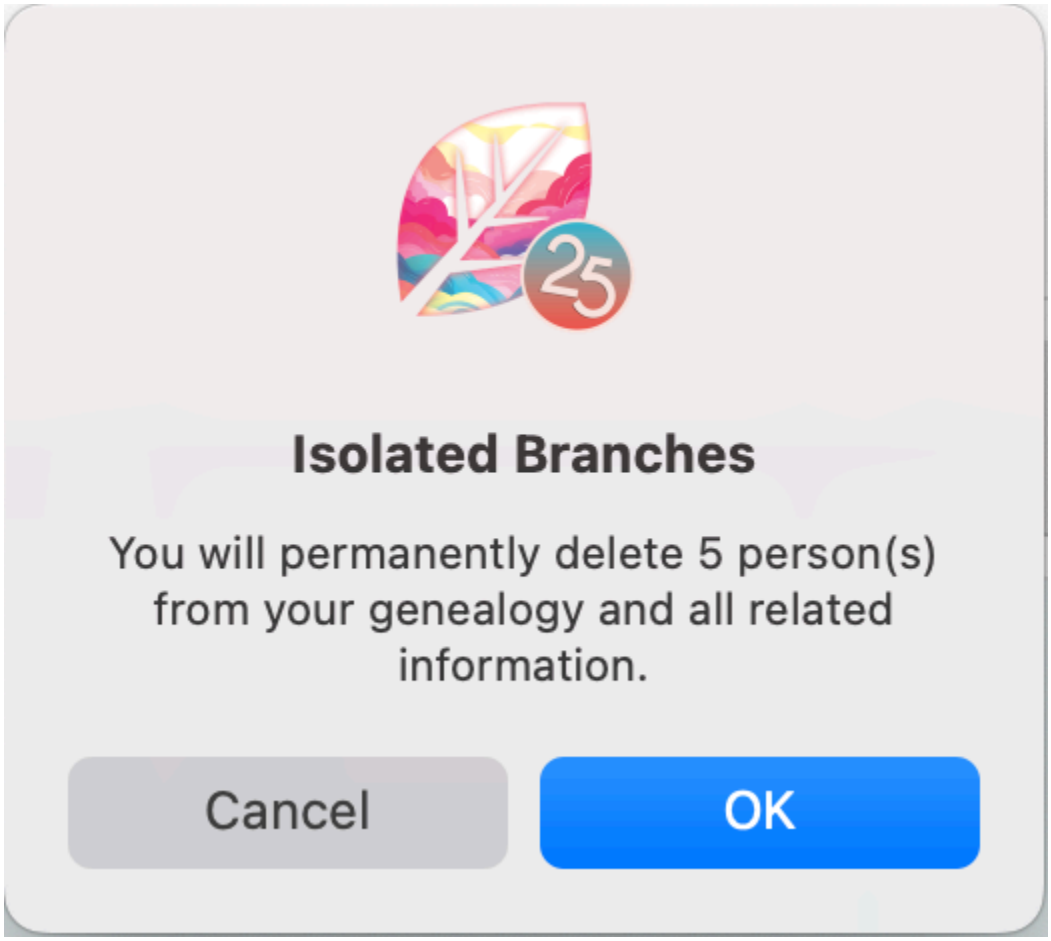
Click on the **Edit** button to generate a custom **Persons Report** listing exclusively the persons from the isolated branch or the isolated persons.



Delete

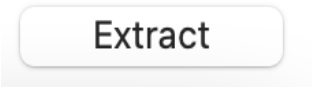
The **Delete** button allows you to delete persons from the isolated branch or selected persons.

Be careful, this action is not reversible, you will no longer find these persons after validating the alert message. Make sure your data is backed up before deleting persons… in case you end up realizing you've made a mistake. See the article How to save your file (see page 127).

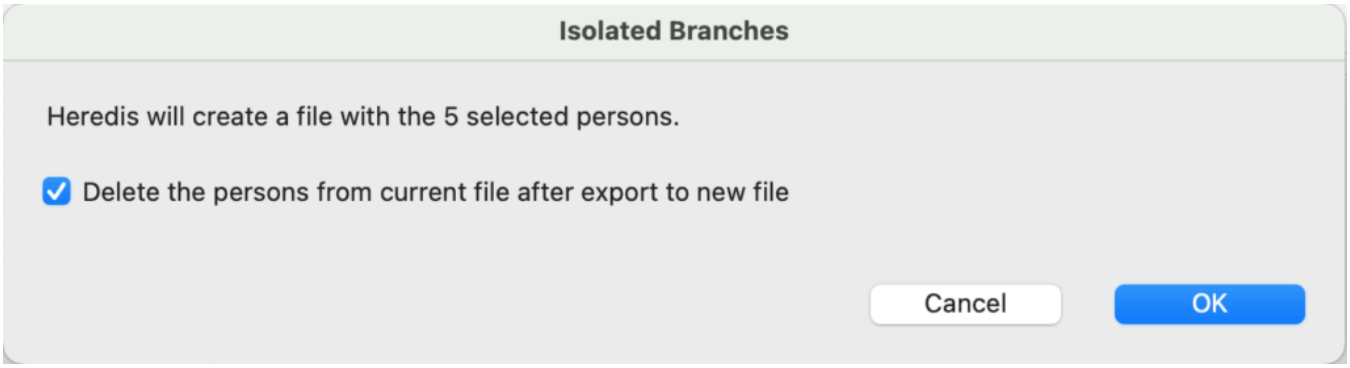


Extract

The **Extract** button allows you to copy persons from the isolated branch or isolated persons into a separate Heredis file.



If you check the box entitled **Delete the persons from current file after export to new file**, Heredis will create a new separate file with these persons and will then remove them from the Heredis file you are working on.



This feature lets you clean up your Heredis genealogy file without taking the risk to lose a part of your genealogical work. You may indeed, some day, discover how to link this isolated branch to your main branch. In which case, if you have extracted this data into another Heredis file, all you'll need to do is import this file. See the article entitled Import a Heredis file in an existing file (see page 762).

Research of Branches

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

If the **Branches** panel is not open, it will be displayed and updated by clicking

- the **Display Family Branch** icon on the **Search** tab **> Search Wizard** of the primary person displayed.
- or click on on the left of the name of the person whose branch is displayed.

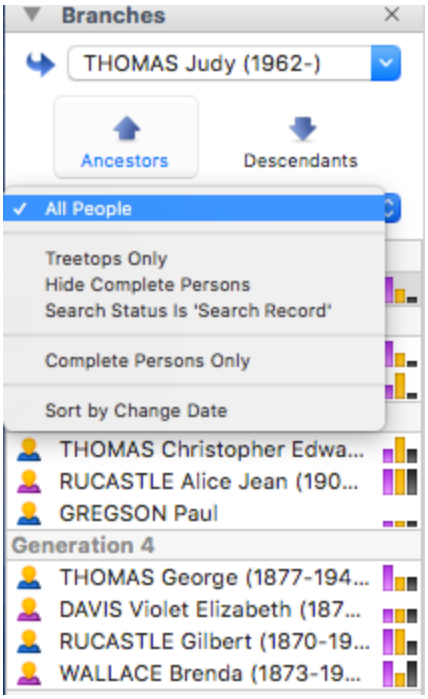
This function allow you to work through each family branch and carry out all the necessary research.

Click the **Ancestors** or **Descendants** button to display the required lineage in the **Branches** panel.

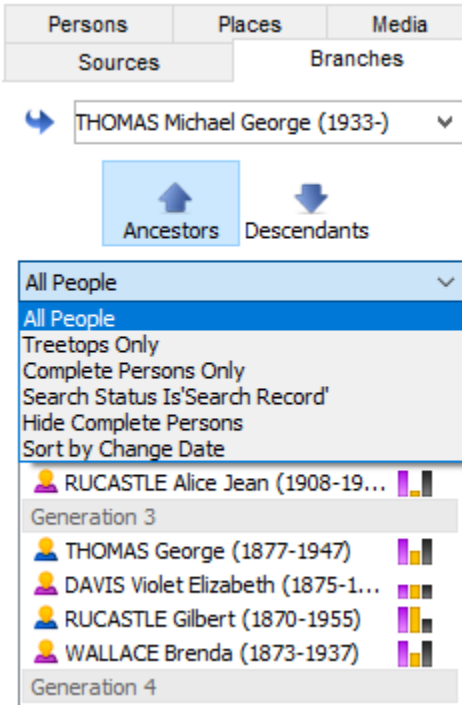
Each person displayed in the branch has an icon showing the completeness of data for the three main life events: Birth or Baptism in violet / Marriage in yellow / Death or Burial in black . Double-click any person to display the details. A simple click displays the summary in the summary panel.

You have a display filter available in a pop-up menu. You may choose between **All people, Treetops, Hide Complete Persons, Search Status is 'Search Record', Complete Persons Only** and **Sort by Change Date.** As an example, you will display **Complete Persons Only** to display a positive status of your work on this branch. If you **Hide Complete Persons**, you will have a clear idea of the work still to be done on the branch.

(Mac) Display criteria in the Branches tab.



(Windows) Display criteria in the Branches tab.



If you decide that there is much more work to be done on the descendants of a given ancestor, you may select **Memorize This Branch** from the pop-up menu.

The list of persons displayed in the pop-up menu corresponds to the family branches you will have memorized, both ancestors and descendants. Select the name to redisplay the memorized branch.

When you select a memorized branch from the pop-up menu, it will replace the previous branch displayed. You may also display the branch of the primary person by clicking the button to the left of the pop-up menu.

Do not overlook to suppress the memorized branch once you have finished your research of this lineage. Open the pop-up menu and select **Clear This Branch**.

Search for Sources

Find a source simply among all the sources assigned to events in your file.

With the Sources panel

Use the **Search** box in the **Sources** panel to type a word contained in any input field for the source selected: the document, the name of the author, the call number, etc.

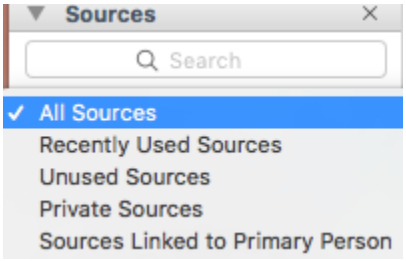
The number of items found matching your search is displayed at the bottom of the panel.

To cancel a search on any word, click the (Windows) (Mac) Delete icon to the right of the search box.

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

Windows Sources Panel Filter

Mac Source Panel Filter



To cancel the sort criteria, select **All Sources** from the pop-up menu.

With the Sources Index

Open the **Sources Index** from the **Tools** menu, or by clicking the button **Sources Index** on the toolbar.

In the **Search** box, type any word contained in any input field of the source desired.

The number of items found matching your search is displayed beneath the Search box.

(Mac) Click on the magnifying glass icon to select the search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.

To cancel a search on any word, click the (Windows) (Mac) **Delete** icon to the right of the search area.

You will limit the search to unused sources by checking the **Unused Sources** box.

The results can be classified by the presence of a note (N), media (M), private source (P) or Title, Document, Origin… by clicking on the column header.

See the list of events in which this source is used in the (Windows) **Entries** (Mac) **Usage** field at the bottom of the screen. Double-click the line of the event to navigate and view this person and this event.

See the Sources Index and The different mode for Sources & Citations (see page 272) articles for further details.

Search for Places

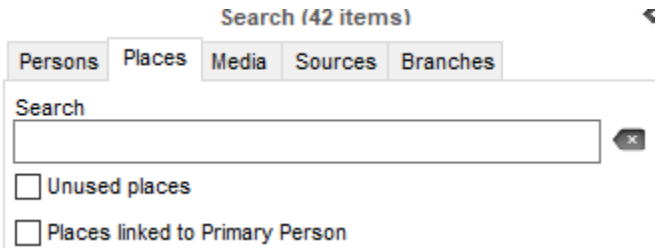
You know that the person has lived in this city or region? Consider using the event places to find someone in your genealogy.
To find a place among the places of your file, you have several options:

With the Places panel

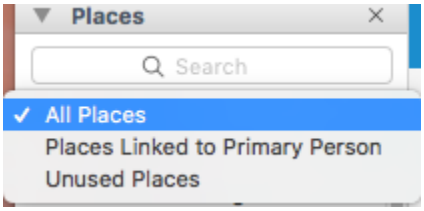
Use the search box on the **Places** panel to type a word in any entry field for the place you are looking for: the city, postal code, county, state, country.
The number of items found matching your search is displayed at the bottom of the panel.
To cancel a search on one element of the place, click the (Windows) (Mac) **Delete** icon to the right of the Search box.

Refine the search by selecting sort criteria from the pop-up menu: **Unused Places, Places Linked to Primary Person.** The list is updated according to the selected criteria.
To cancel the sort criteria, select **All Places** in the pop-up menu.

(Windows) Places Panel



(Mac) Places Panel



With the Places Index

Open the **Places Index** from the **Tools** menu, click **the Index** button on the toolbar or **(Mac)** click on the book symbol on the **Places Panel**.
In the **Search** box, type a word in any input field of the source being searched.
The number of items found matching your search is displayed **(Windows)** in the Title of the Index **(Mac)** beneath the search box.
(Mac) Click on the magnifying glass to select the search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.

To cancel a search on elements of the index, click the (Windows) (Mac) **Delete** icon to the right of the **Search** box.

You will limit the search to unused places by checking the **Unused Places** box.
(Mac) The results can be classified by the presence of a variant (V), note (N), media (M), or City, County… by clicking on the column header.
See the list of events/facts in which this place is used by clicking the **Usage** tab. Double-click the line of the event to navigate and view this person and this event.

See the Places Index article for further details.

Heredis also has tools to Geolocating Place subdivisions (see page 495), Zoom in on a place (see page 502), Zoom in on the World-Family Tree Mapping, (see page 508)consult these article to know all details.

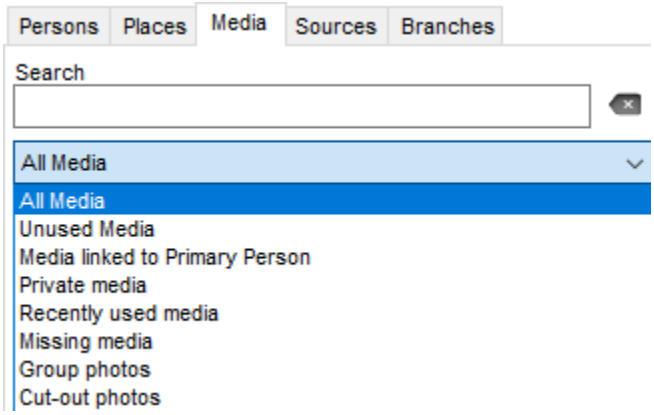
Search for Media

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

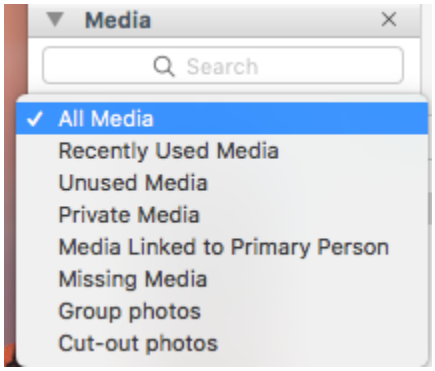
With the Media panel

1. Open the **Media** panel.
2. Type the name or partial name of the media sought in the search box. Cancel the search by clicking on the (Windows) (Mac) Delete icon to the right of the search area.
3. Refine the search by selecting sort criteria from the pop-up menu: **Recently Used Media, Unused Media, Private Media, Media Linked to Primary Person, Missing Media**. The list is updated according to the chosen criteria. To cancel the sort criteria, select **All Media** on the pop-up menu.
4. To better identify the media selected, change the display mode for the media, as a list or in thumbnail images, by clicking the corresponding buttons. You may also enlarge the thumbnails by using the zoom slider.

Windows Media Panel – Search Criteria



Mac Media Panel – Search Criteria



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

The media may be easily assigned to a data item of your file by drag and drop.

In the Media Index

Open the **Media Index** from the Tools menu, click the **Index** button on the toolbar or **(Mac)** click on the book symbol on the **Media Panel.**

- In the **Search** box, type all or part of the name of the desired media. The number of items found matching your search is displayed **(Winsdows)** in the titel of the Media Index oder **(Mac)** beneath the Search box.
  (Mac) Click on the magnifying glass to select the search mode **Search Contains** the word entered, or **Search Starts With** the entered letters.
  To delete or replace the search word, click the (Windows) (Mac) Delete icon to the right of box.
- Limit the search to a type of media by selecting from the pop-up menu: (Windows) **All Media, All Pictures, Other Media, Missing Media, Private Media** (Mac) **All Media, All Image Files, Audio Files, Video Files, Other Types, Missing Media, Private.**
- Limit the search based on the type of data to which the media is assigned by selecting from the second pop-up menu: **Whole Index, Persons, Families, Events, Facts usw…**

To better identify the media selected,

- Sort the thumbnails or (Mac) the list by the name of the media file or the date you entered.
- (Mac) Change the display mode of the media, as a list or thumbnails, by clicking the corresponding buttons in the first pop menu.

Info: You may also enlarge the thumbnails by using the zoom slider.

Mac Info • The results displayed in a list can be classified according to the presence of a note (N), a private media (P) or by the file name or date, by clicking the column header.

When media are selected from the list, see the data to which the media are assigned in the table at the bottom. **(Mac)** Double-click the data for display in a new screen.

For further details, see Media Index.

Starting with Heredis 2025, it has been possible to add personalized flags to persons. This means you can also search by flags. See Search for data linked to flags (see page 319).

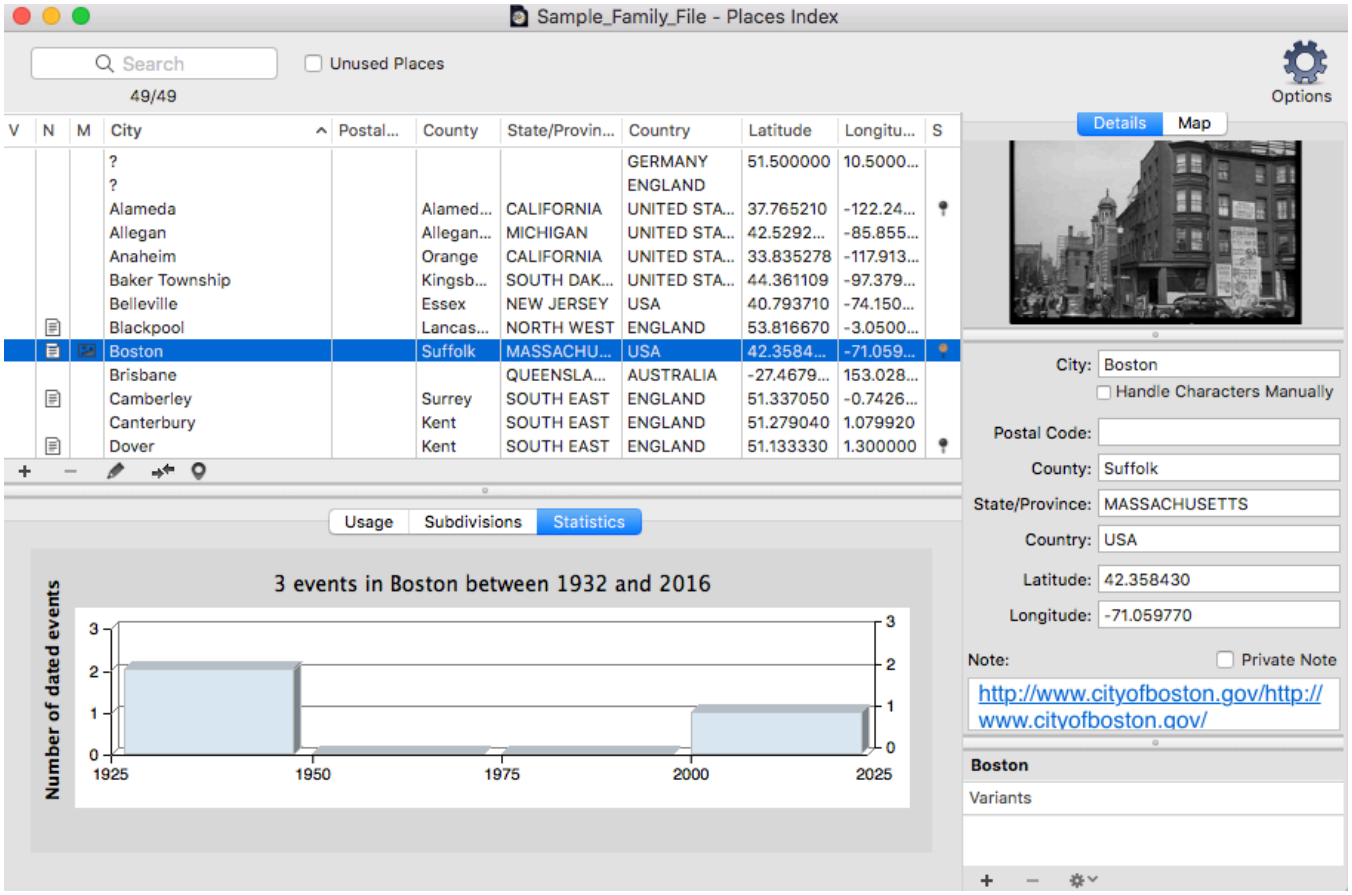
Search for other data types

The indexes list the information you have entered and display the uses for each type of data. By using the Indexes, you can find sources, places, media, but also occupations, surnames, given names and repositories . Each item of data can be illustrated or commented, which brings infinite richness to your genealogical research. What village was part of the «Pencader Hundred»? What was the family crest of «Bolgan»? What is the origin of the name «Andrew»? What was a «balancer»? You have taken care to note this information relating to the life of your ancestors and you will find them by searching in the index in question.

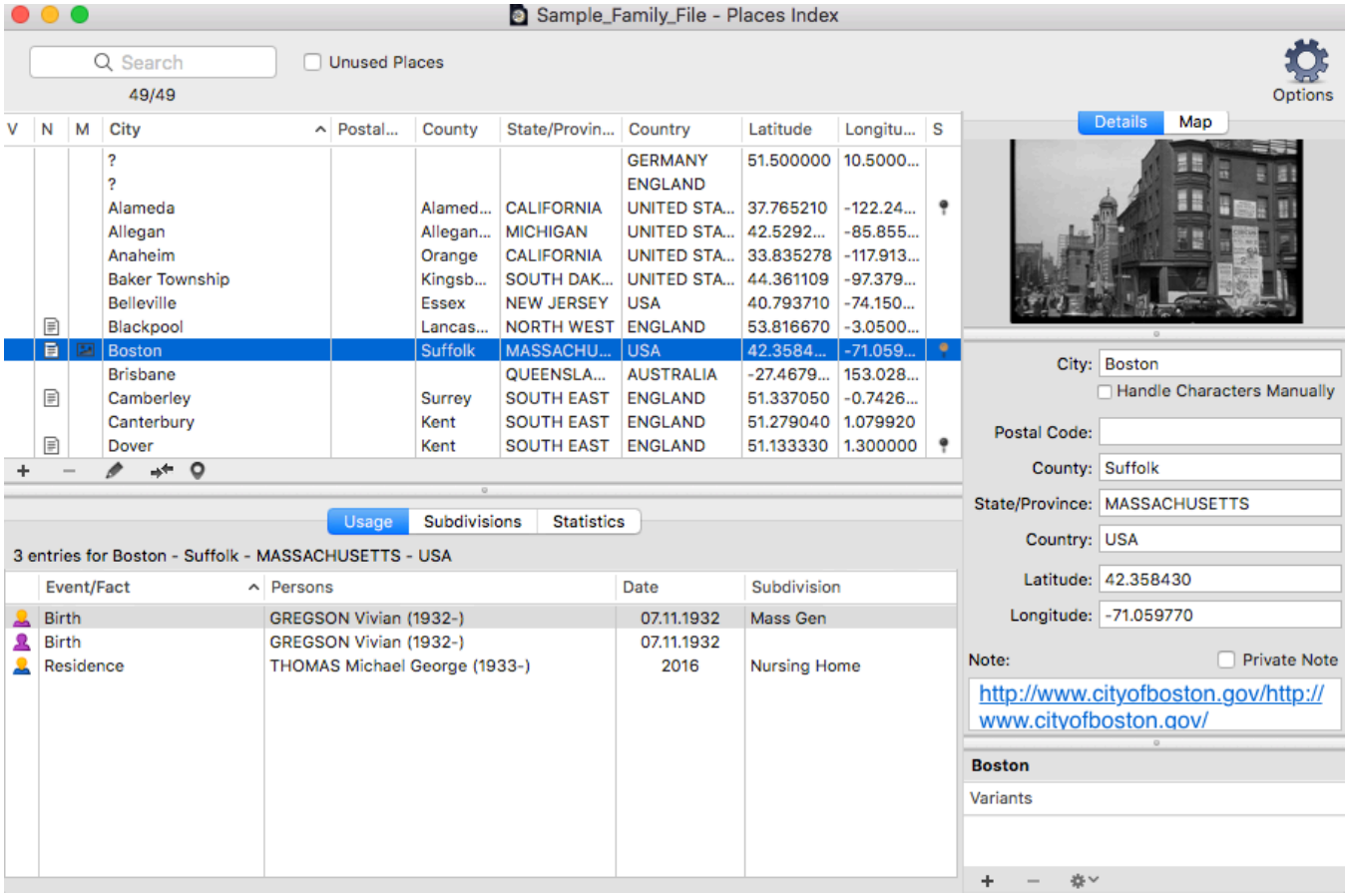
- Open each of these indexes, from the **Tools** menu, or clicking the **Indexes** button on the toolbar.
- Scroll the contents of the Index or use the search box to limit the number of items displayed.
  Type all or part of the search item. The number of items found matching your search is displayed beneath the search box.

Mac

- Click on the magnifying glass to select search mode: **Search Contains** the word entered, or **Search Starts With** the entered letters.
- **(Mac)** Click the **Statistics** tab to see periods of use of the element.



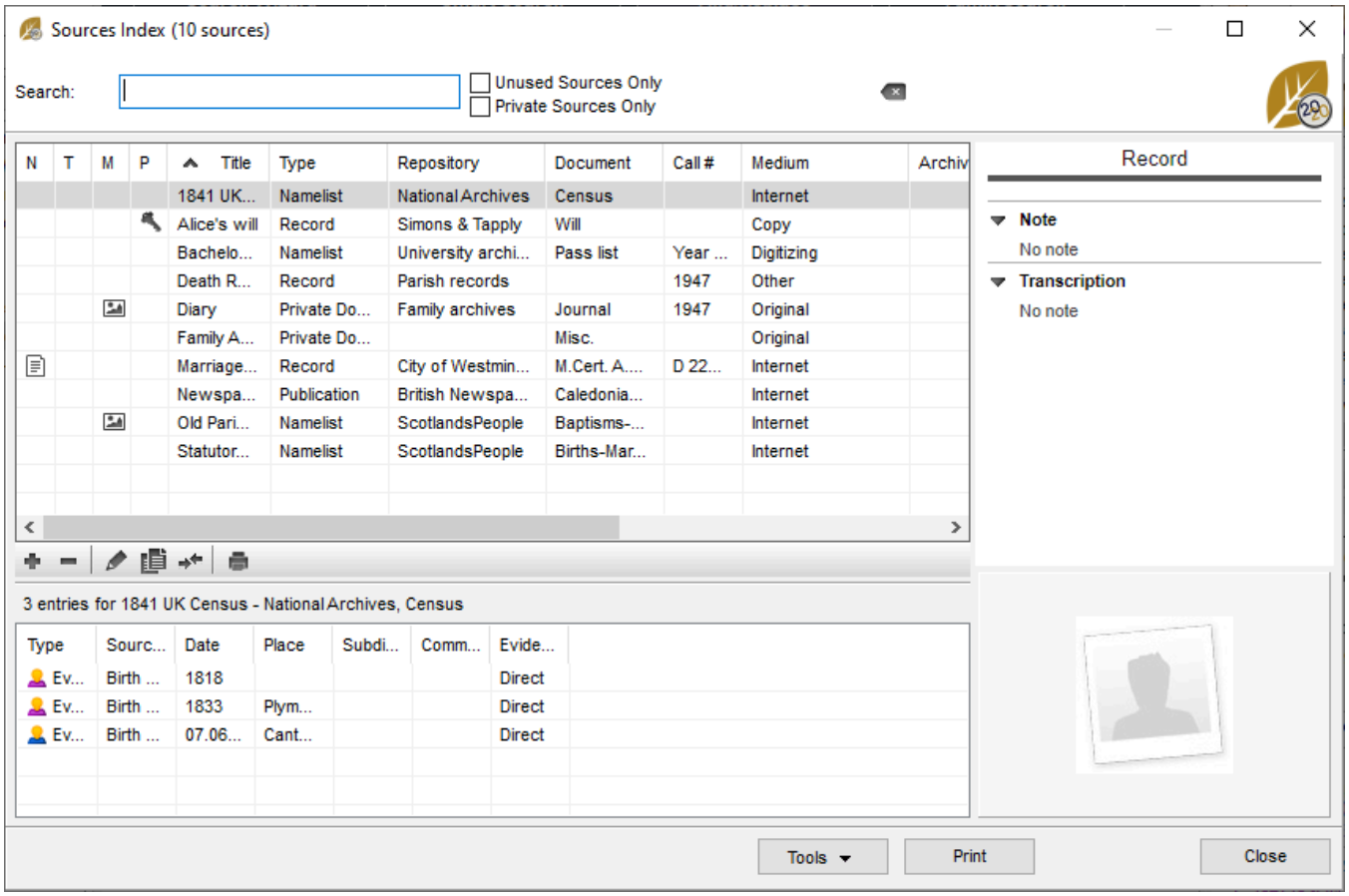
- Click the **Usage** tab and check the list of persons for whom you typed the given name, the surname or occupation.



- Double-click the line to display the individual as the primary person.

Windows

- Select the desired item from the list and consult all the details you entered.



- Click the **Entries** tab (or consult them in the lower part of the index depending on the type of index) and check the list of persons for whom you typed the given name, the surname or occupation. Double-click the line to display the individual as the primary person.

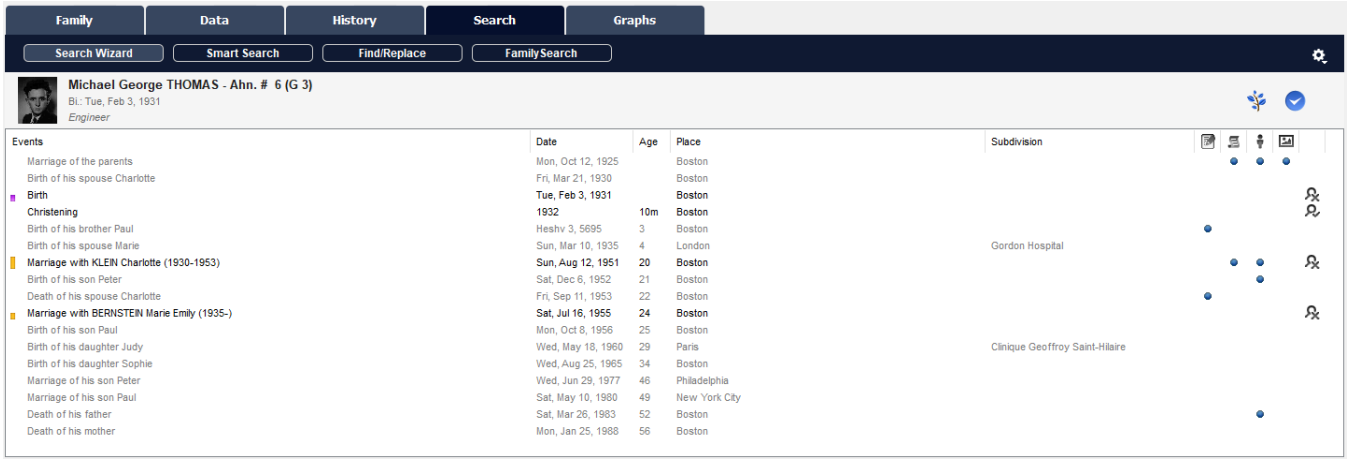
Search Wizard

Visual cues tell you whether or not a search is necessary for the primary person displayed, based on the criteria you set in **Heredis' Preferences,** see Heredis' Preferences (see page 107) for more details on data completeness. The completeness icon appears in the status bar, in the **Searches** tab, in the **Persons** and **Branches tabs** in the search panel.
It tells you whether, for the main life events (Birth or Baptism – Union – Death or Burial), the information entered is complete, incomplete or missing.

- Click on the **Search** tab > **Search Wizard**.

Primary Person data

- Heredis allows you to see events that have been experienced or of importance to your ancestor's history and gives you the age he was if he were alive. You see the data of the primary person and his/her loved ones (Parents, Spouses, Children, Fratrie), click on the cogwheel at the top right to change the display. Choose to view only the primary person's data by unchecking all the crossover events, or select which events you want to see.



The search wizard also displays:

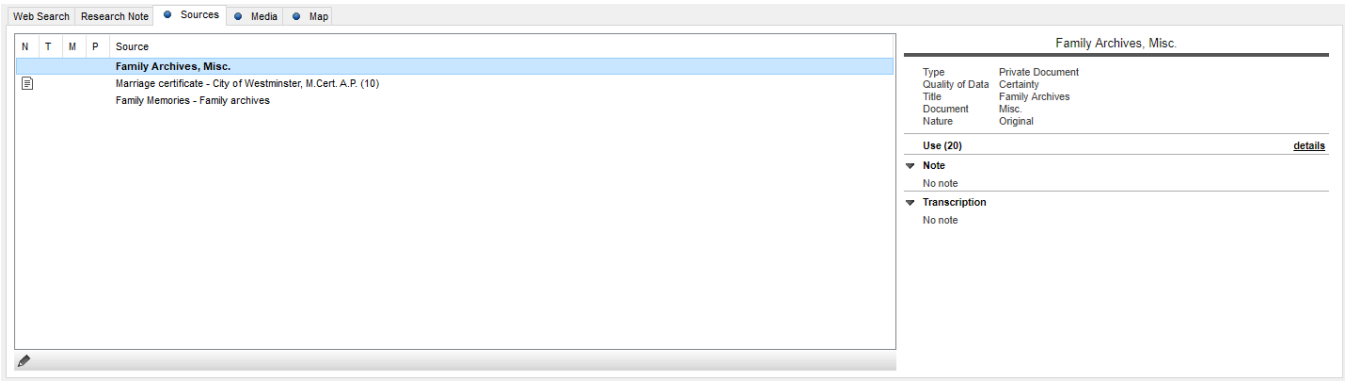
- the completeness icon of major events
- blue chips if you have a Note, a Source, a Witness, a Media attached to the event
- the primary person's event search status. Click on the icon to change the search status to **No Search Record,** **Search Record,** **Search in progress** or **Not Found.** You will then be able to see which event requires research.

Indicate manually that a person is complete by clicking on if you do not have more data to search for. Since Heredis 2021, this icon is also available in **Data** tab **> Personal Data.**

Click on to display the branch of the primary person in the **Branches** panel.

The lower area of the search wizard

To complete your analysis of the searches to be undertaken, check out the tabs located in the lower area of the screen.

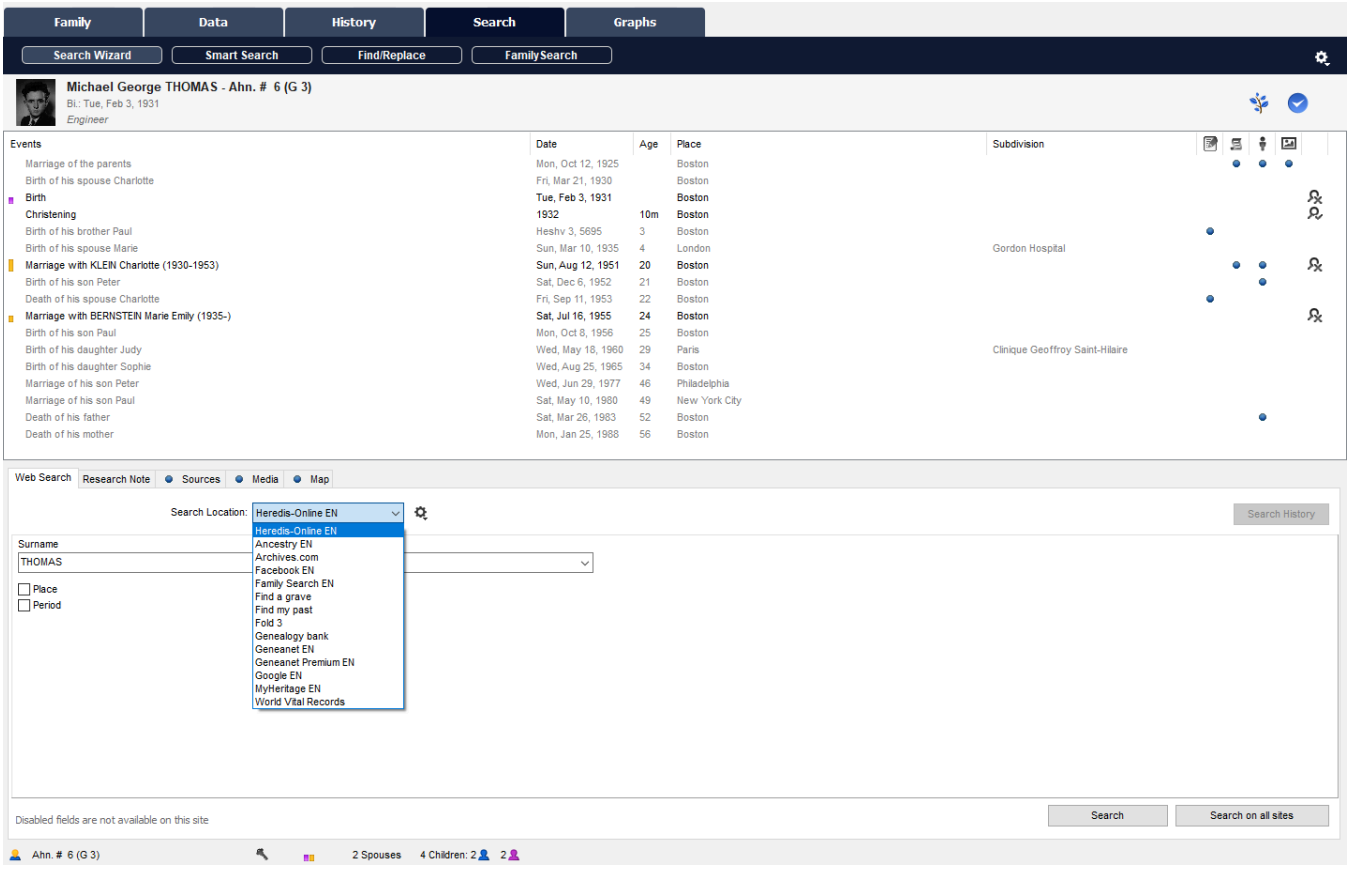


- **Sources** attached to all the events mentioned above may contain a crucial element for your approach.
- **Media** allows you to view documents that may have clues.
- The **Map** will allow you to see if the cities mentioned in the events displayed are close to each other or not.

Don’t hesitate to fill out the **Research Note** by indicating which track you want to focus on. You will be able to resume your steps later and continue your reasoning.

Start a search on the Internet

In the lower area of the **Search Wizard,** you can search one or more websites with a publishing database.

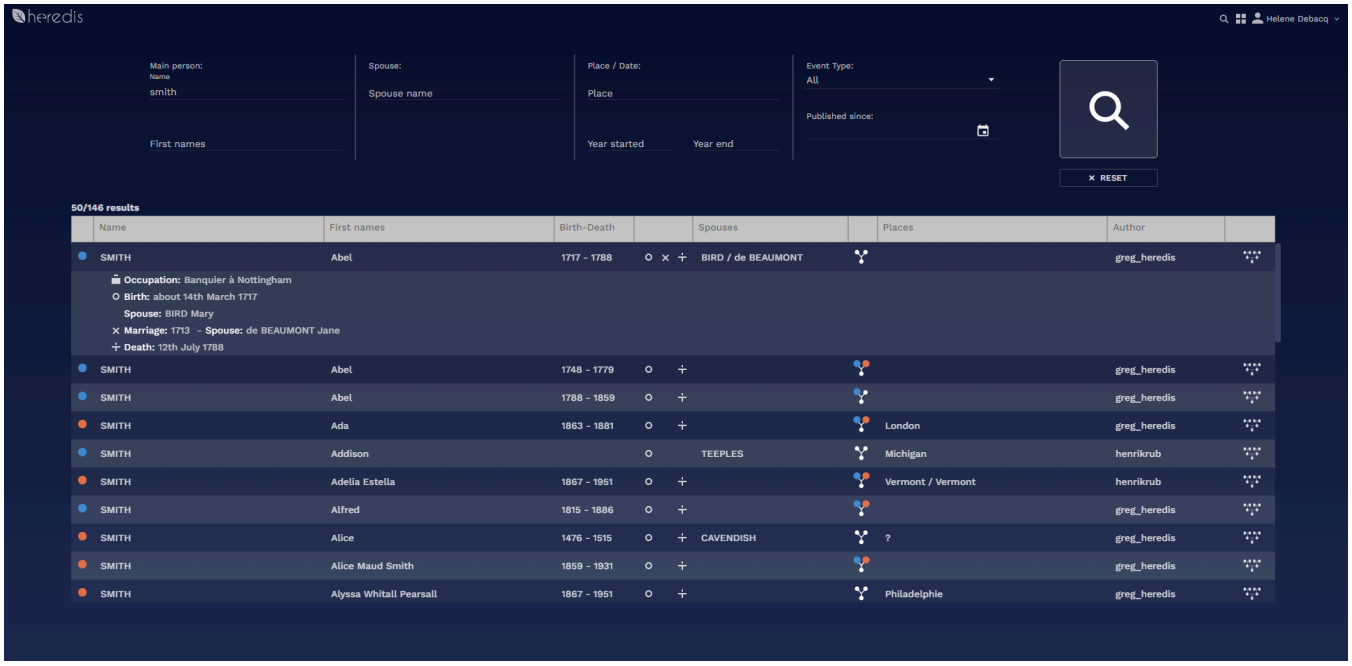


Click on the **Web Search** tab to select which data to take into account and which operator you want to search on.

1. Choose the search operator. Unroll the **Search Location** menu to select **Heredis Online** or another site suggested in the **cogwheel** ⚙.
2. Choose the criteria from those available from the selected operator. Some criteria may be grayed out if they are not usable in the operator's search fields.

- Keep the surname of the primary person or type in another surname.
- Choose a given name or all given names from the list on the drop-down menu. The given name selected by default is the usual given name.
- Check the **Place** box to include this data in the search if the chosen operator can manage it. Choose a location in the drop-down menu: a common one that corresponds to events related to the primary person, department or country.
- Check the **Spouse** box to include this data in the search.
  Choose a spouse from the drop-down menu if the primary person has more than one.
  To search with a new spouse, type his/her surname and given name into the entry fields.
- Check the **Period** box to indicate a range of dates. Validate or change the start and end years for online search.

3. Click **Search** to send your search criteria to the selected operator. Heredis opens your Internet browser and displays the requested site. It's up to you to complete the search based on any additional tools available at the default selected operator.



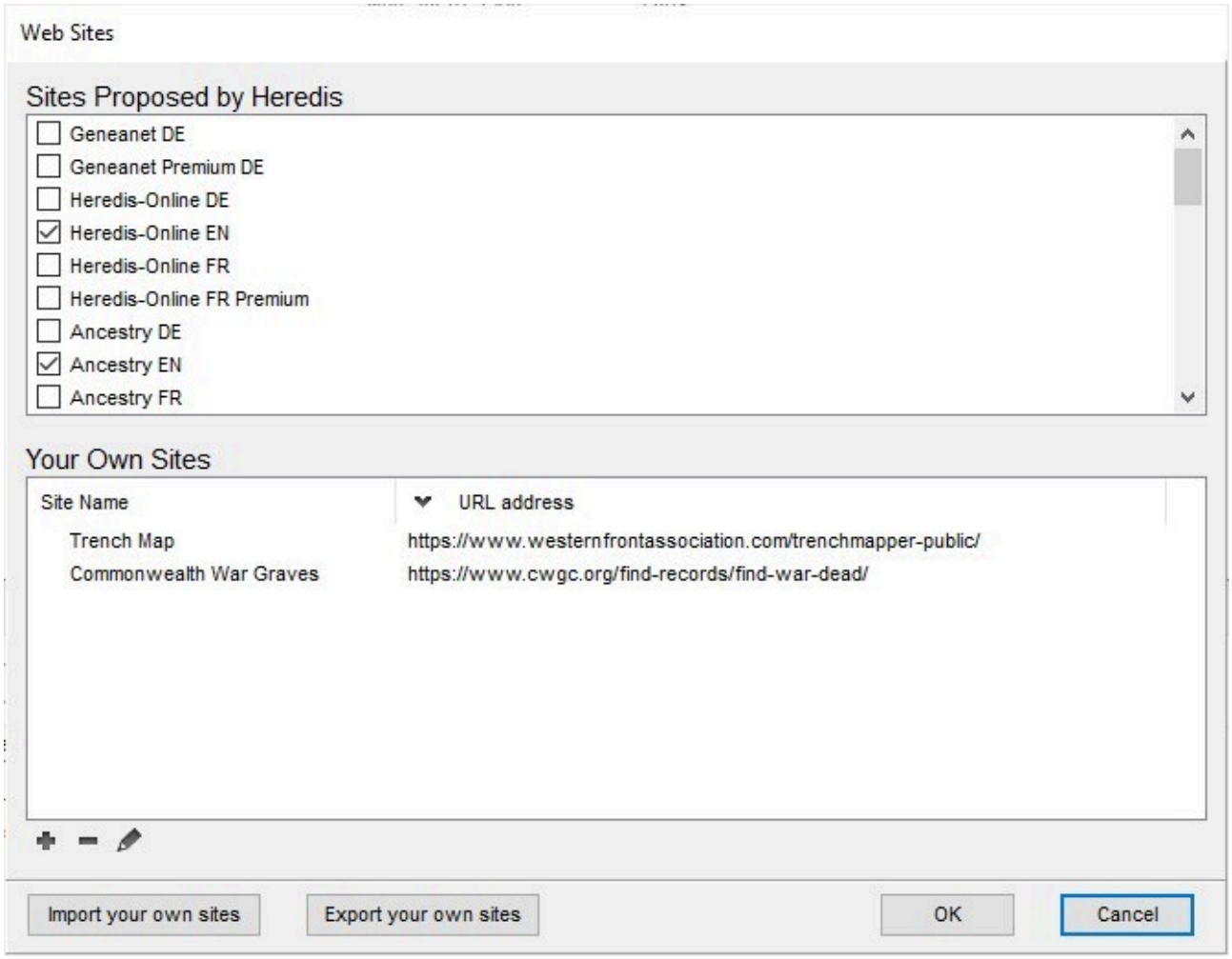
If you want to add a search operator or change the proposed list, click on the cogwheel icon. See also Search on Heredis Online (see page 883).

Check or uncheck the boxes to see, in the drop-down menu, the sites you are interested in. Some websites are available in several languages, they are offered by default in English. You may be familiar with other websites that may help you find information about your ancestors. You can add websites, which will always appear in the drop-down menu of the operator's choice.

To add a personal website:

- Click on the cogwheel icon.
- Click the **button** + at the bottom of the **Web Sites** window.
- In the first column, type the name of the website as you want to see displayed in the list of available operators.
- Open your Internet browser and log on to the search page of this site.
- Copy the URL address in your browser's address bar and paste it in the **URL** area of the Web Sites window.

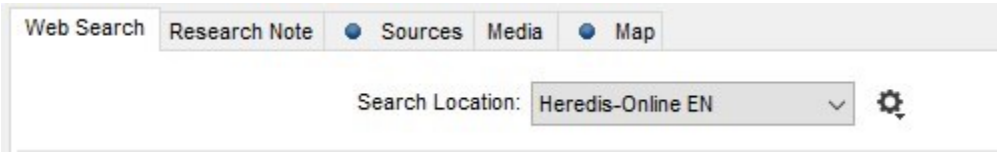
To remove a website added by you, select it from the bottom of the Web Sites window and click the button —.



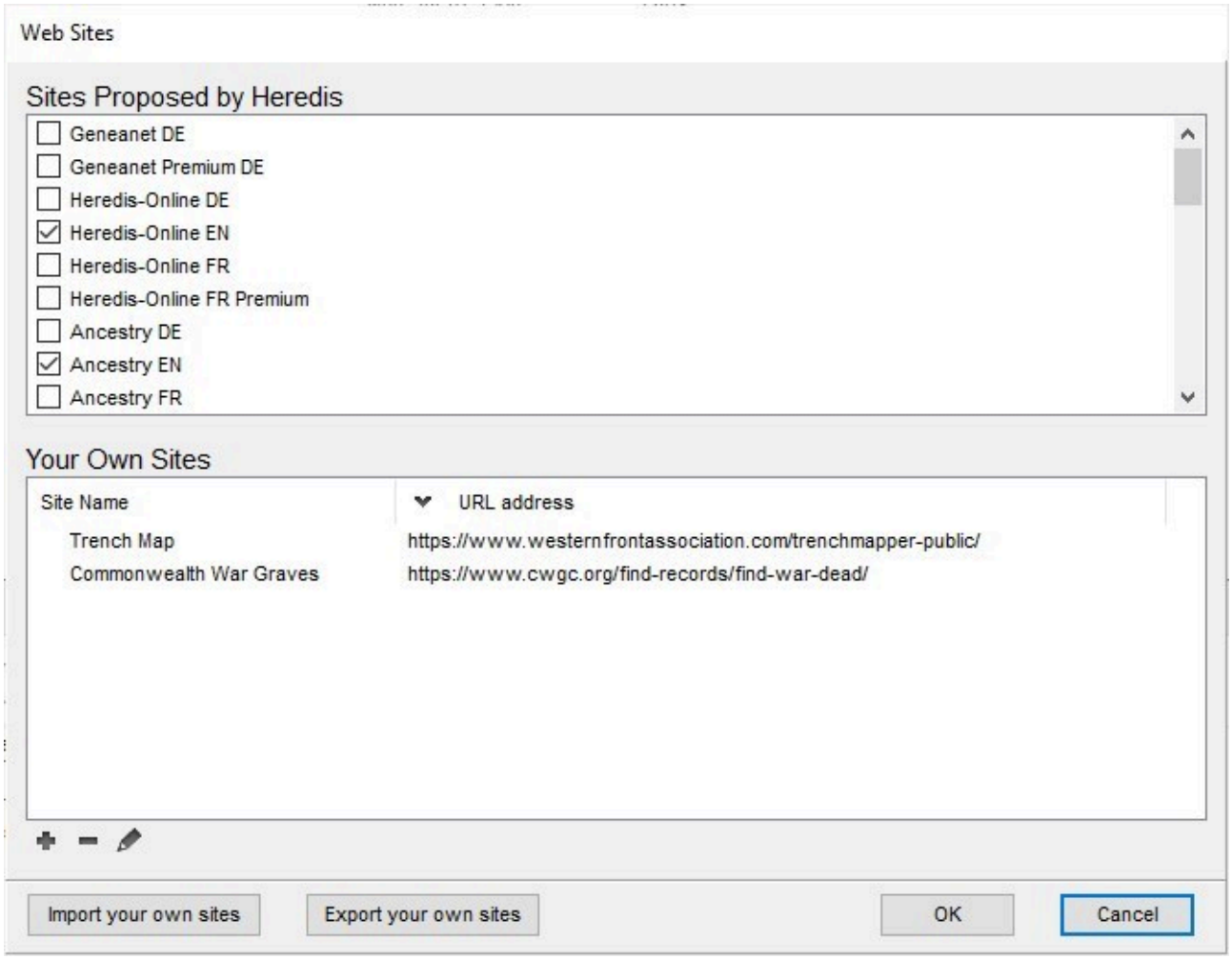
Since Heredis 2025, save your own favorite search web sites

The search web sites you add are linked to the computer. If you install Heredis on another computer, your favorite search web sites will not be shown.
You can therefore save your own favorite sites and transfer the exported file to another computer.

To do this, click on the cogwheel in the **Web Search** tab.

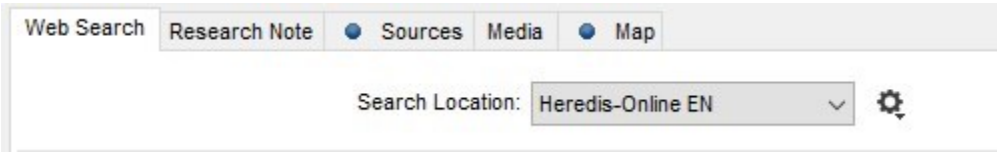


Then click on **Export your own sites**.
Save the .json file on a USB key or external disk.



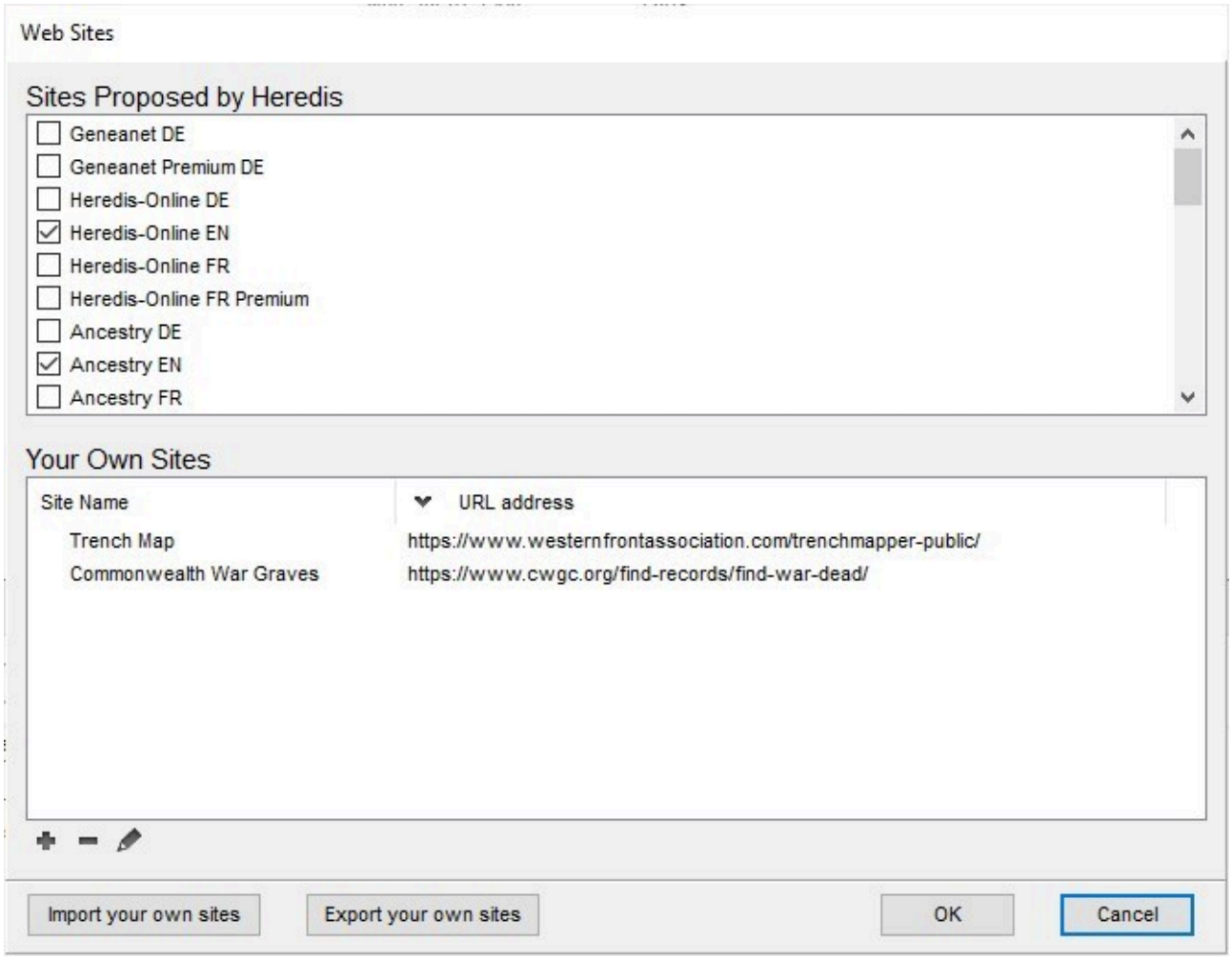
Since Heredis 2025, import your own favorite search web sites

On your other computer, plug in your USB key or external hard drive.
Launch Heredis and open your file.
Click on the **Search** tab **> Search Wizard**, then on the **Web Search** tab.



Click on the cogwheel .
Finally, click on **Import your own sites**.
Select the USB key or external hard drive, then choose the .json file.

Heredis now has your own favorite search web sites.

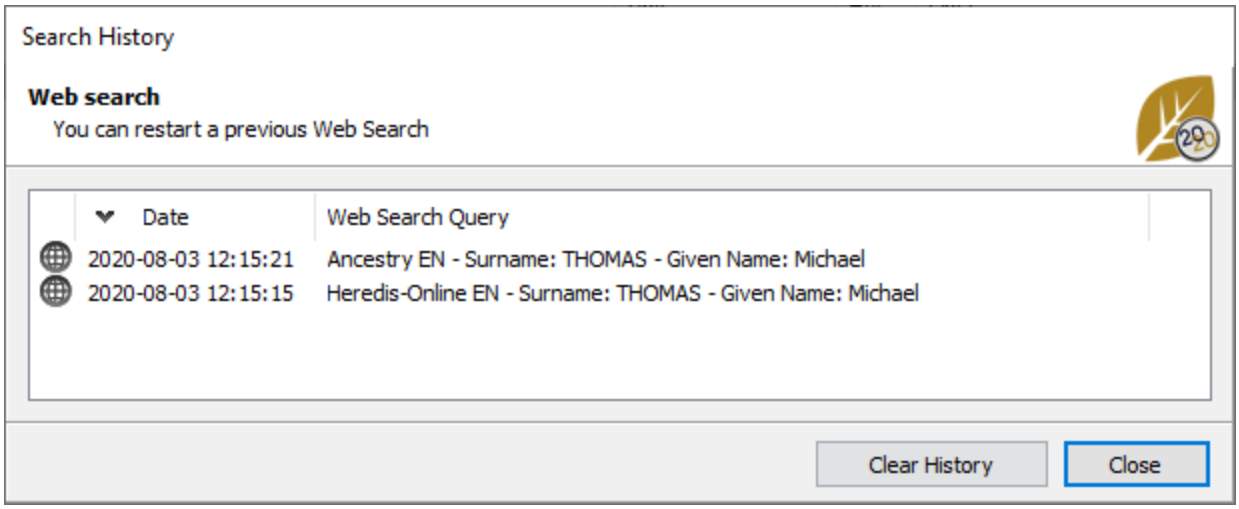


Relaunch a previous search

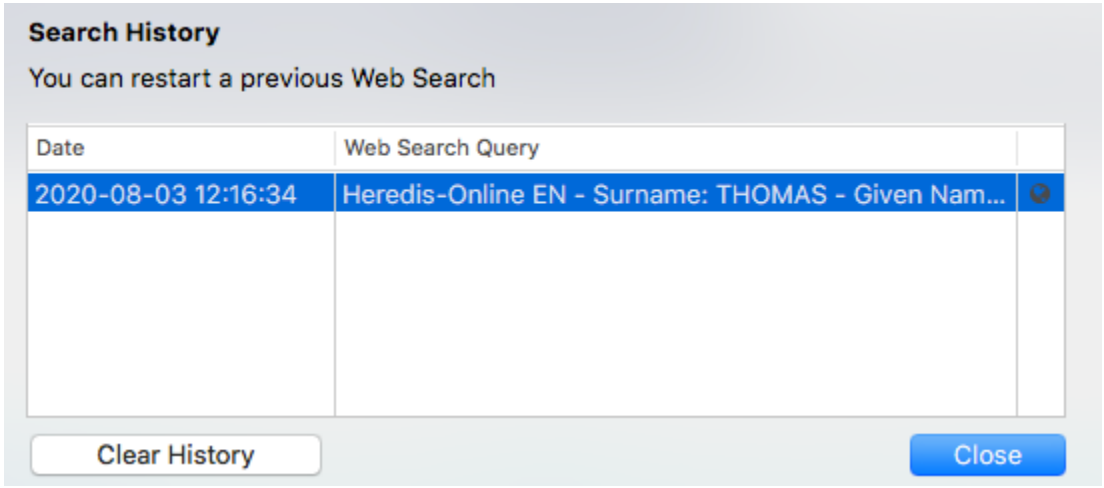
Haven't found the information you need? Didn't have time to study all the data on the genealogical website you were looking at? You can, at any time, restart a search you've already done.

1. Click the **History** button. All previous searches for the primary person can be found in this window.
Rank them by date, or by operator name by clicking on column headers.
2. Just click the button to restart the same search, with the same criteria.
Click the **Clear History** button to clear the list of previous searches for that person.

(Windows) Search history



(Mac) Search history



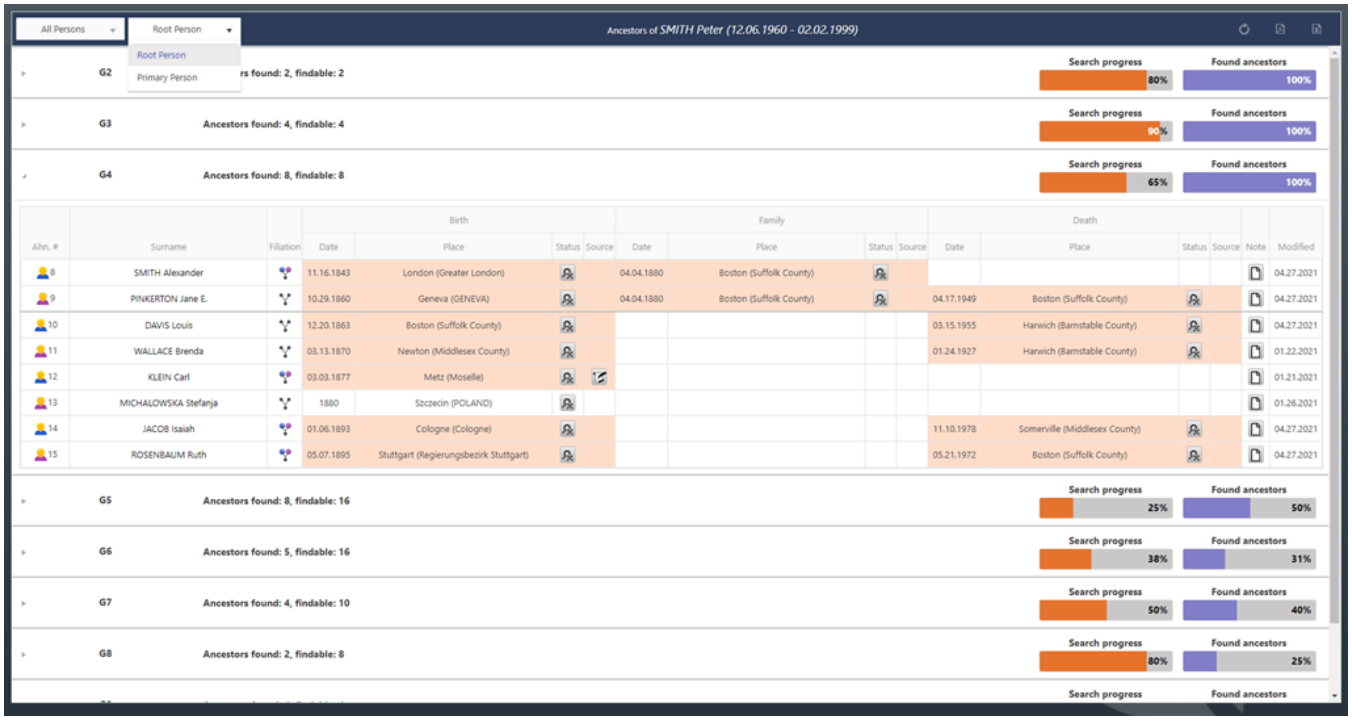
Search Tracking

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**,

- select **Find** menu **> Search Tracking**
- or from Heredis' toolbar click on the button.

Search Tracking Tab



Each generation has a synthetic view and a more detailed one. You can switch from one to the other by clicking on the arrow on the left .

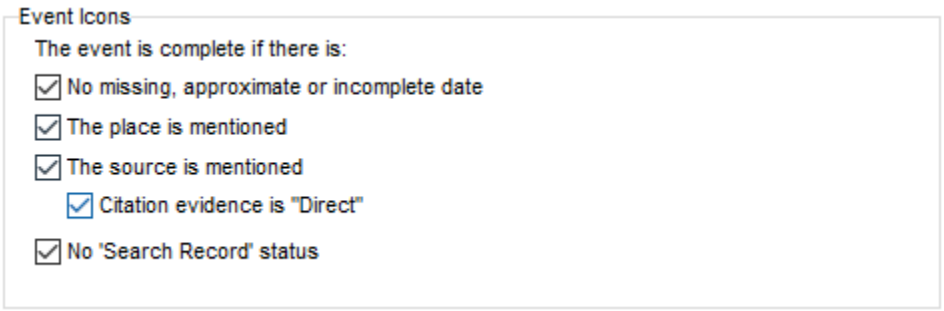
The search tracking function can stay open while you continue to work in Heredis.
Remember to refresh the information of this page by clicking the button, so the changes you just made are included.

Synthetic view

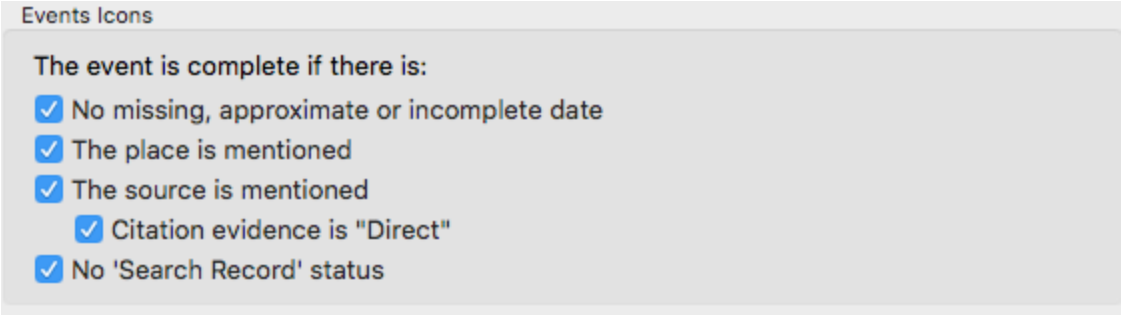
On each generation, the following information is displayed:

- the number of the generation, G2 for generation number 2 for example
- the number of ancestors you found
- the number of ancestors that can be found. You found only half of the findable ancestors in generation 4, ie 4 ancestors out of the theoretical 8; therefore, you will be able to find only the parents of these 4 ancestors: either 8 potentially findable ancestors instead of the 16 theoretical. If, during your research, you find additional ancestors at generation 4, Heredis will automatically update your calculation.
- from Heredis 2021 , untraceable parents are deduced from the findable ancestors and found ancestors.
- the duplicate branch (implex) of the generation, if there are any. Heredis shows here the number of persons appearing several times in the generation (shown with a ++ before the anhentafel number in the detailed view).
- the progression in the search for major events of persons. The orange progress bar, **Search progress,** allows you to see the progress of your research by making a report of the information you hold about the major events of found ancestors in all of the information you should collect on these found ancestors for them to be considered complete. Heredis takes into account your preferences. Set up what you think is important to consider a complete event in Heredis Preferences. (**Windows**) **Tool** menu > **Preferences** > **Heredis Preferences** > **Apprearance** ; (**Mac**) **Heredis** menu > **Preferences > Appearance**.

(Windows) Event Completion Preferences



(Mac) Event Completion Preferences



- the percentage of ancestors found. A purple progress bar **Found Ancestors** indicates the percentage of ancestors found in relation to findable ancestors.

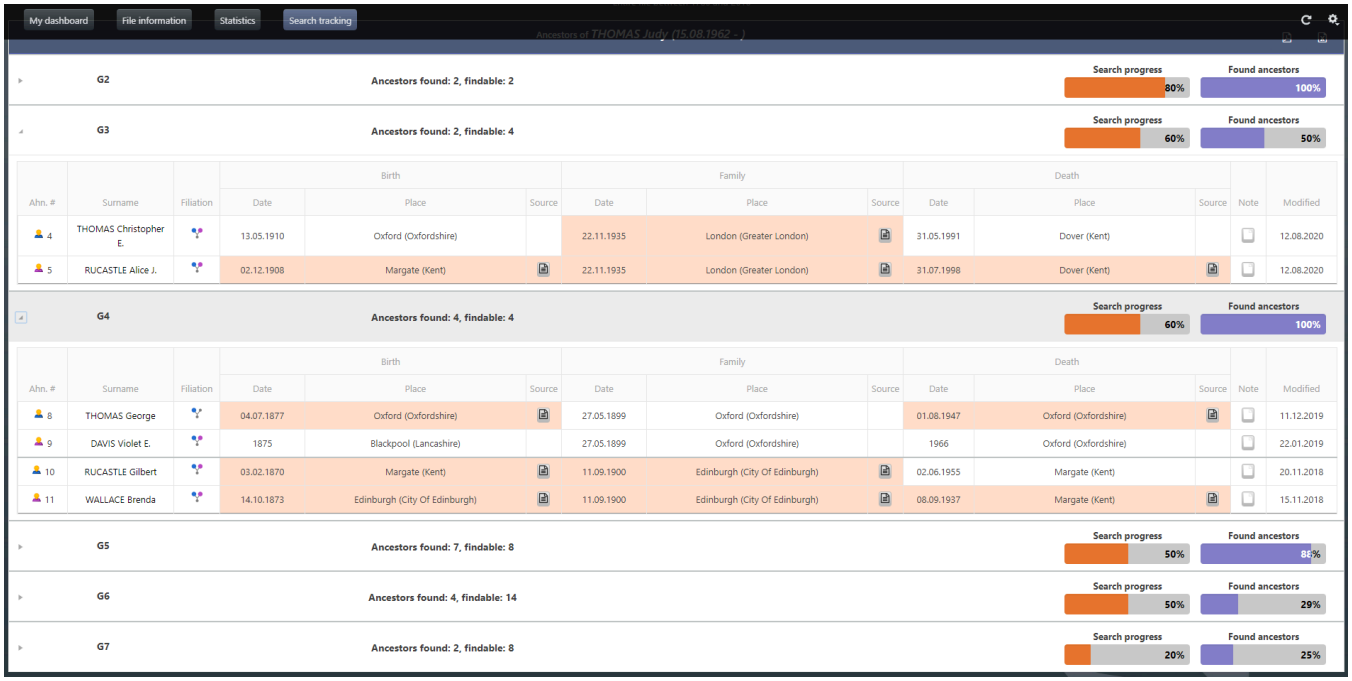
Detailled view

At a given generation, if you notice that the number of found ancestors is less than the number of findable ancestors, unfold the previous generation and locate the gray filiations icons. They tell you about individuals with no parents, who are therefore not found and which will not figure in the next generation.

When you click on a generation to display its **detailed view**, Heredis lists all ancestors ordered by Ahnentafel number. If you selected «Ancestors» as the scope in the dashboard options, this number may not be entered.

Other information displayed in detailed mode are:

- The surname and given name of the person. In the case of a duplicate branch, they are displayed in red.
- The filiation icon indicating the presence or not of the parents of the person. Blue indicate the presence of the father, violet of the mother.
  The absence of colour indicates the absence of the parents. Since Heredis 2021, when a parent is declared untraceable, the icon has a blue cross for untraceable father or pink for untraceable mother. See also the article Untraceable Parents.
- 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.



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 sofware. 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 Wizard > Button** or since Heredis 2021 from **Data > Personal Data** tab), it will appear visually as complete in the search tracking with this button displayed in front of the name of the person to report that you have forced his status to complete. This person will also be counted in the percentage of completion.

A Common-Law Union is considered by Heredis as a complete union event.

The last column indicates the last time you updated that person. This information is useful to know what was the latest ancestor you worked on. You can sort out the column by decreasing date to have the latest date first.

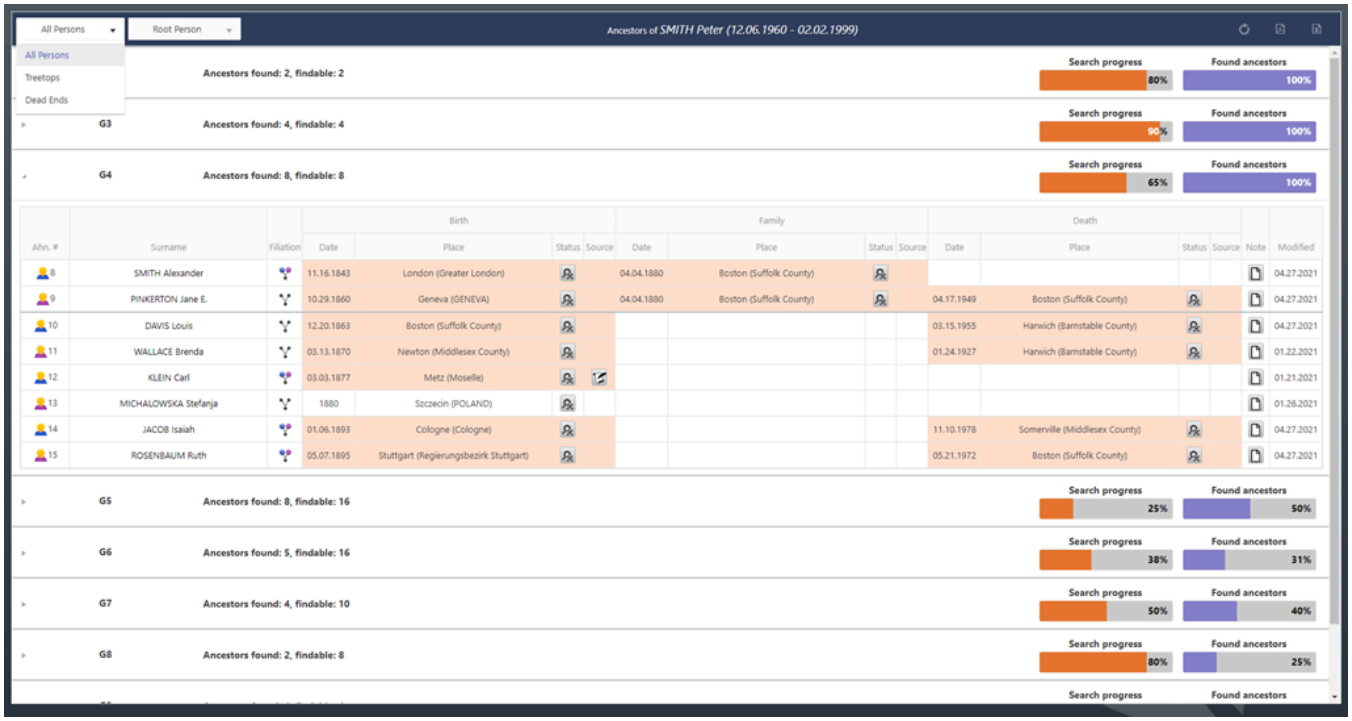
Heredis proposes by default in the preferences a maximum age at death fixed at 90 years for men and 100 years for women. If one of your male ancestors is still alive after 90 years, it will not be considered complete. Your **Search Tracking** will indicate that it is missing the date of death. Simply change this in «**Preferences – Consistency**» to increase maximum age at death for your entire file.

Filter

It is possible to filter

- By **Treetops**, to display only individuals on top of a branch and know where you need to search
- By **Dead End**s, to identify the branches where you will have to search in specific archives or completely stop searching.

Click on the desired filter in the upper left corner. Heredis unfolds the first generation affected by this filter and colors in blue the other generations where you will find Treetops or Dead Ends.



A second drop-down menu allows you to change the scope of search tracking. If you selected

- **Root Person**: Heredis lists the ancestry by generation of the root person of your file.
- **Primary Person**: to show the ancestry of the primary person you selected in Heredis. If you need to change the primary person, don't forget to refresh with the button .

Export Search Tracking

The table «**Search Tracking**» can be exported

- in Excel format: click on the button .
- in PDF format: click on the button .

Of course, the data in this Excel table or PDF will not automatically update.

This function has a simplified view in the **My Dashboard** page, where you can display a progress graph of search progress and ancestors found limited to the first 15 generations.

Click the button to export this chart to PDF or PNG.

Smart Search

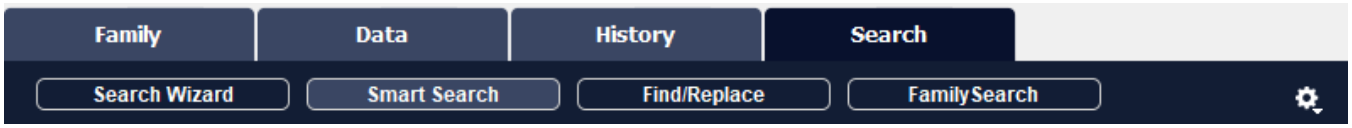
Smart Search

This function allows you to find specific data in your genealogy by combining different search criteria; you may then modify or process the data you have found.

It is impossible to quote all possible combinations so try, read the blue sentence carefully to see if the configured query matches what you are looking for.

To access **Smart Search**:

- choose **Smart Search** in the **Find** drop-down menu
- or select the **Search > Smart Search** tab



- or click on the **Find** icon and select **Smart Search** in the drop-down menu

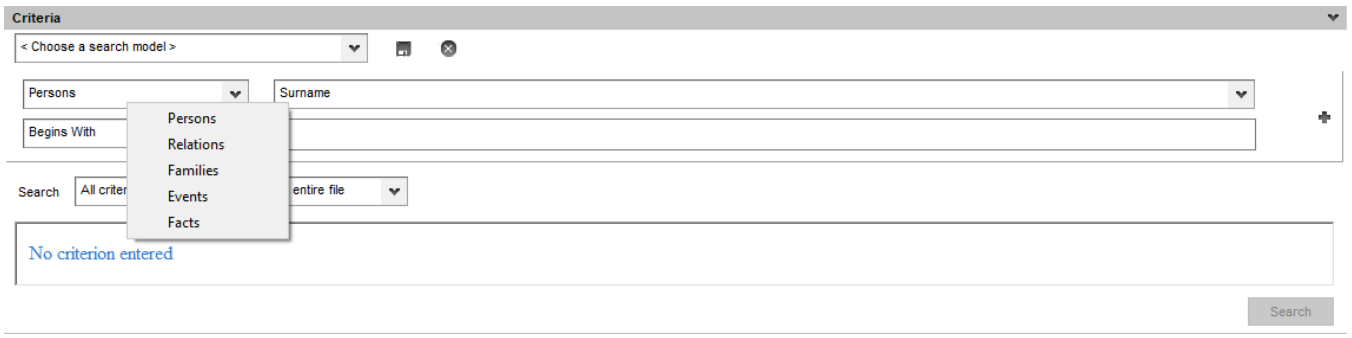
The **Smart Search** tool is composed of a “Criteria” field, a “Results” section, and a “Processing selected results” section. **(Mac)** This screen is also linked to a specific side panel entitled “Results”.

Search Criteria

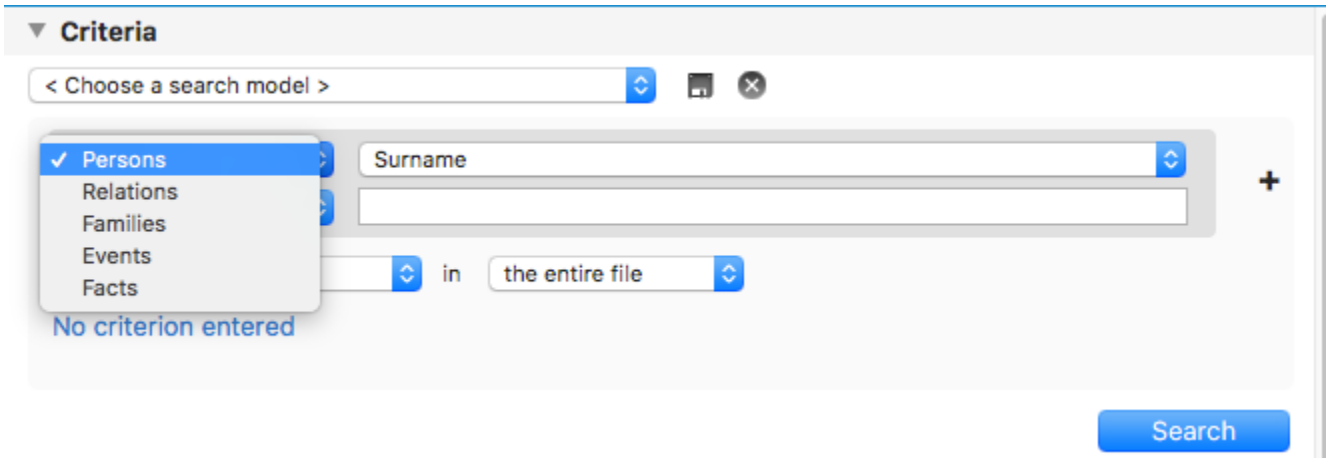
The Heredis default display shows <**Persons**> as the first search criterion, then the <**Surname**> field, and the <**Begins With**> operator. In the entry field to the right of <**Begins With**>, type in the first letters of the surname you are looking for and click on the **Search** button to find all relevant persons in your genealogy.

The initial search criterion will determine what the next field options are.

(Windows) Selecting criteria



(Mac) Selecting criteria



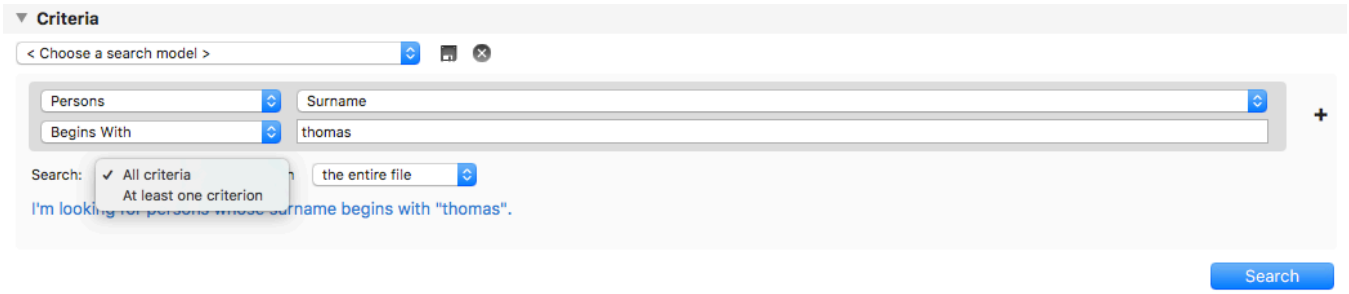
Click on each of the fields and specify the type of information you are looking for in your genealogy. You can combine criteria such as **Persons, Relations, Families, Events, Facts** to build more or less intricate searches depending on the number of criteria you have selected.

- The ⊗ button to the right of the <**Choose a search model**> pop-up menu allows you to remove all existing criteria and to clear the list of results.
- The ✚ and ━ buttons to the right of a criteria line allow you to add or remove a criterion. Note that the ━ button won't be displayed unless you have already added at least one criterion.

Additionally, you can organize the combination of your criteria by clicking on the pop-up menu located below the criteria selection area.

(Windows) How to combine search criteria

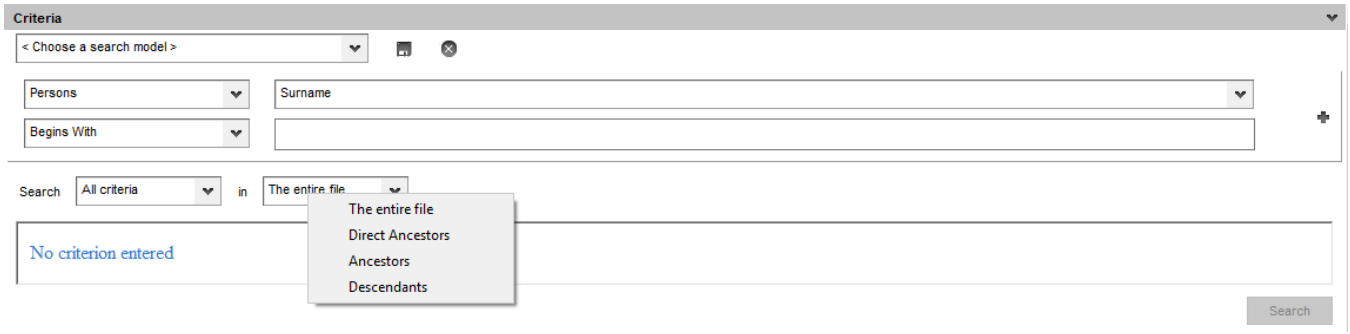
(Mac) How to combine search criteria



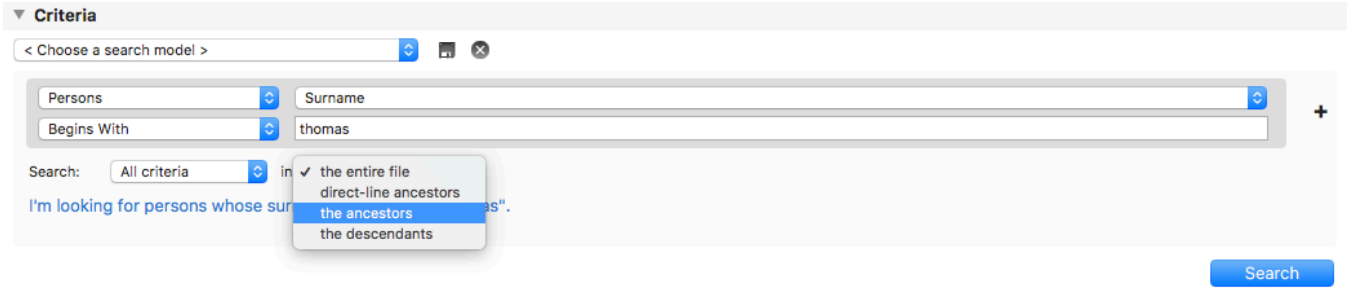
The default search mode is set on <**All criteria**>. This option allows Heredis to search all data that match at least one of the criteria you have selected. You can also narrow your searches down to specific parts of your genealogy or use the entire file.

Click on the pop-up menu that reads <**the entire file**> and select <**direct-line ancestors**>, <**the ancestors**>, or <**the descendants**>.

(Windows) How to limit the search



(Mac) How to limit the search



Existing models

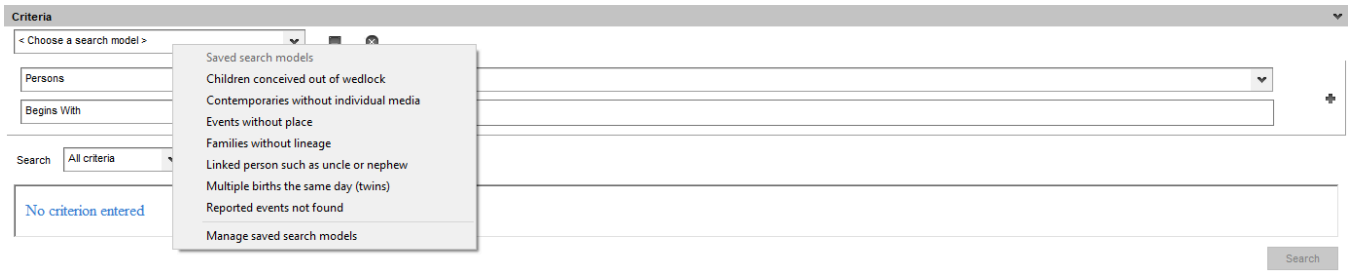
Heredis provides pre-saved search models to help you create your searches step by step.

Click on <**Choose a search model**> and select the model you are looking for.

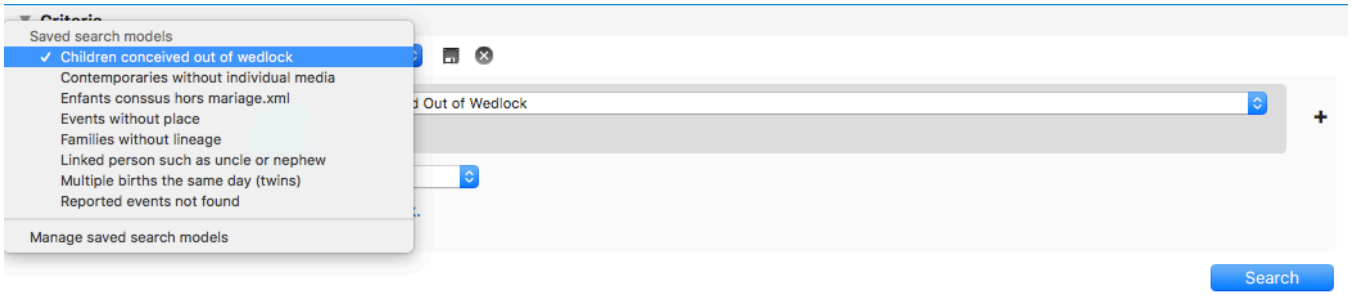
The fields associated with the model you choose are automatically prefilled. You can modify a search model by changing or adding criteria and save these modifications by clicking on the **Save As** button located to the right of the field entitled <**Choose a search model**>.

To manage your models or to reload the saved search models, click on <**Choose a search model**> and select **Manage saved search models**.

(Windows) List of saved search models



Mac List of saved search models



Additional options for research

A phrased version of your search is automatically displayed below the criteria fields area. This allows you 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 cogwheel in the upper right corner. If you tick **Search in variants**, the searches will be extended to the variants you entered in your genealogy. If you activate the **Comprehensive** mode, two additional buttons will be displayed to the left of the **Search** button: **Search in results** and **Add to results**.

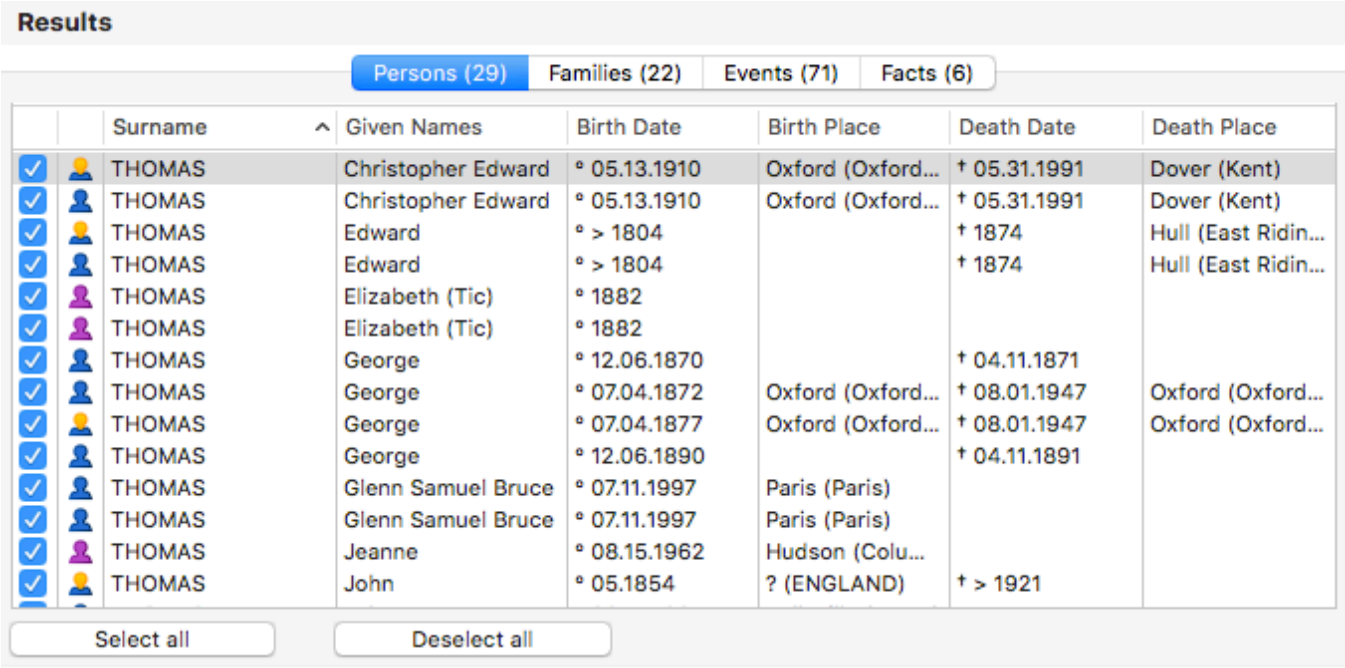
Extra buttons in Comprehensive mode in Smart Search

Search in results allows you to research data within the results of your previous search in order to refine your results.

Add to results allows you to add your search results to the results of your previous search. Thanks to this option, you can build a list of results, adding up data from a series of searches.

If you enable **Comprehensive** mode, two additional columns appear on the left in the search

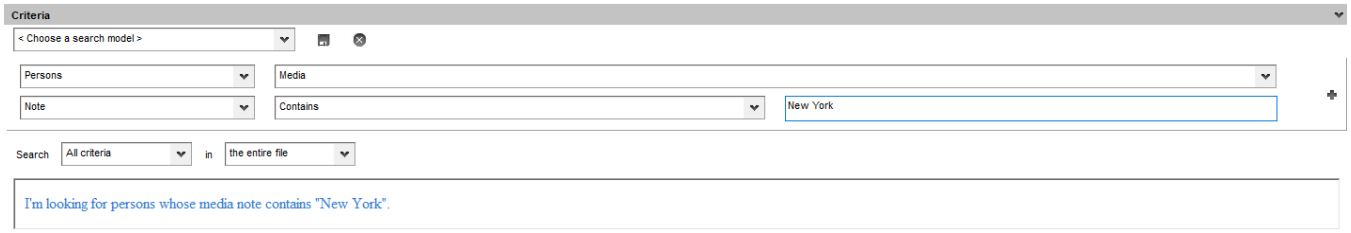
results: you can select the row and sort by gender.



Note: When you consider your research is complete, hide the Criteria area **(Mac)** by clicking on the **Criteria** banner **(Windows)** by clicking on the arrow on the right side. This will leave more space available to display the results from searches and processing. More space can also be freed by deactivating the phrasing of your search: click on the cogwheel in the upper right corner and untick **Show the edit**.

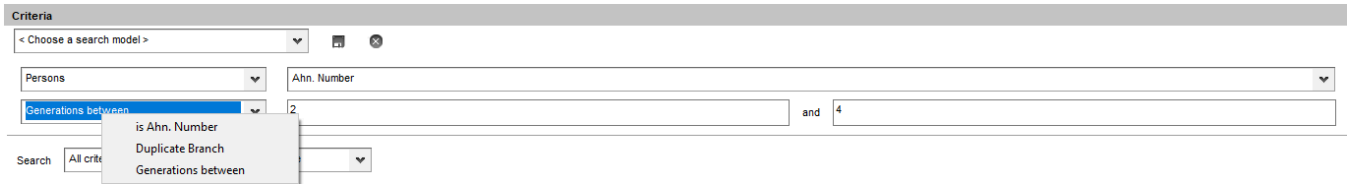
It is possible to search one or multiple words in all notes : media, sources (or in transcription), events in addition to the notes of persons or unions previously present.

Example of search for note in media



You can also easily search for

- persons of the Ahnentafel line (Persons > Ahn. Number > Is Ahn. number > Yes or No) or those who are not
- persons who are in duplicate branch also called implex (Persons > Ahn. Number > Duplicate Branch > Yes or No)
- persons of the Ahnentafel line between generation X and generation Y (Persons > Ahn. Number > Between Generations > X and Y)



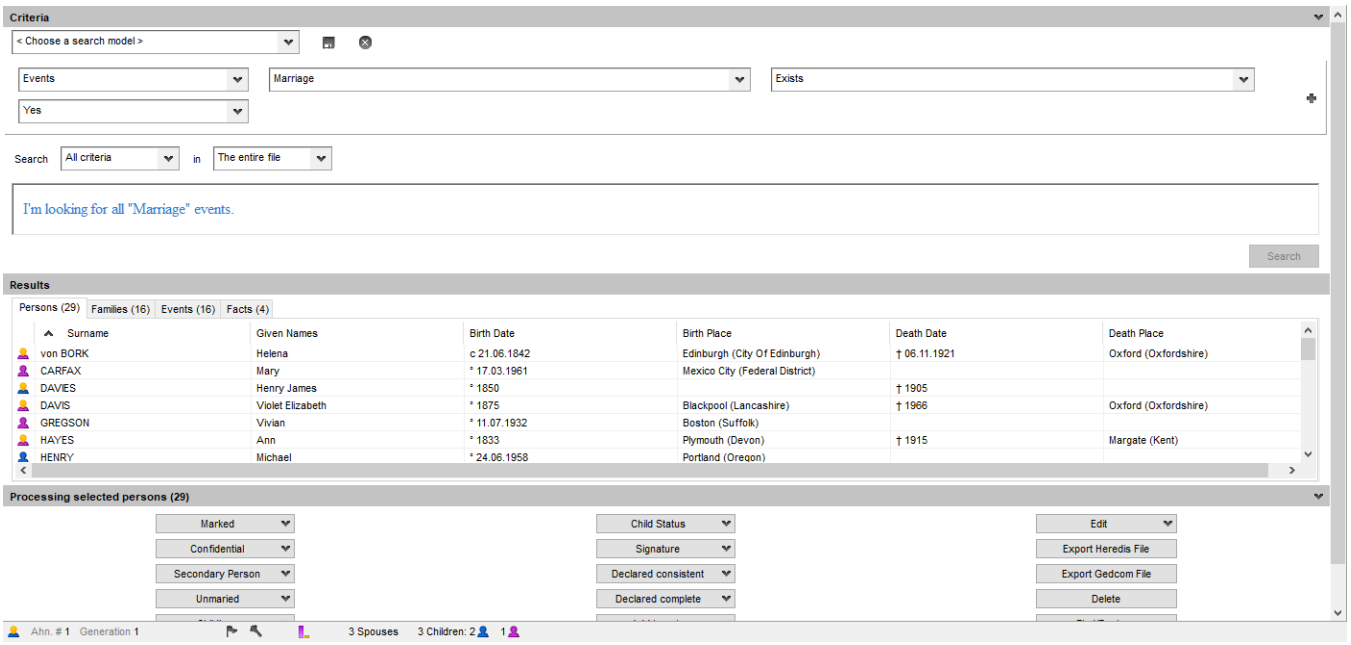
Search for all persons you indicated to have father and/or mother untraceable…

Search results

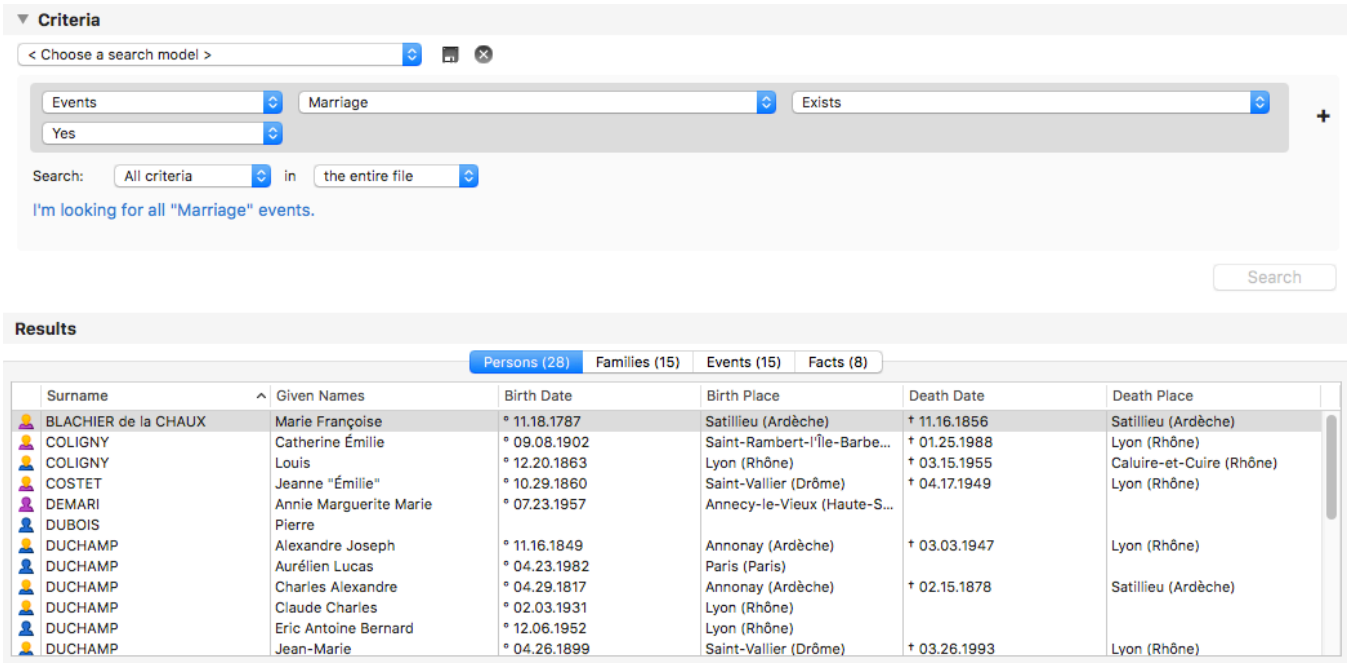
When you click the **Search**, **Search in results** or **Add to results** buttons, Heredis displays the data found under the **Persons, Families, Events** and **Facts** tabs.

Within each tab, a number (in brackets) indicates how many persons, families, events and facts were found.

(Windows) Display of Smart Search results



(Mac) Display of Smart Search results



Open the **Summary** panel. To verify the results displayed in the list are correct, click on any line in the list of results and the details will appear in the **Summary** panel. The data displayed in this panel varies according to the tab you selected under **Results**.

Should you notice a mistake to be corrected, double-click on the line in the list of results to directly access the person's **Personal Data** in your genealogy file.

Mac Specificity: Results panel

The results of your smart search are also available in the **Results** panel.

Results Panel – List of found persons

You can navigate in Heredis while keeping your search results on hand. Use the <**Persons**> pop-up menu to select and display results from the **Families, Events** or **Facts** tab. At any point, you can go back to the Smart Search screen by clicking the button to the right of the pop-up menu.

From this panel, select a person and use the drag and drop feature to easily complete your genealogy.

Processing results

Now that you have found persons, families, events or facts in your file, you may want to update this data, share it with a cousin, or even publish it in a document.

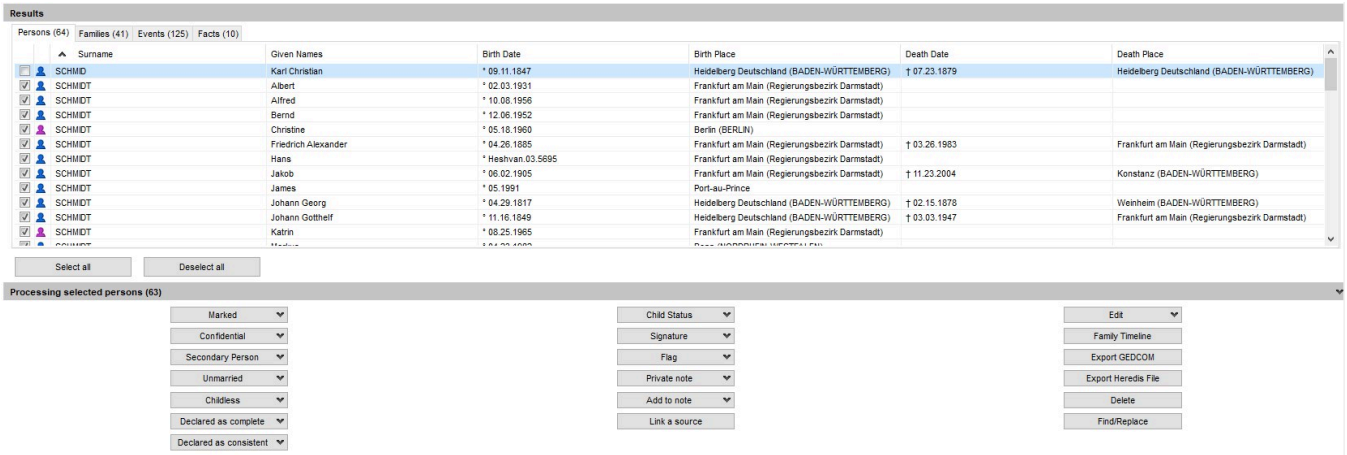
The Processing feature allows you to do this and much more, based on the data you have selected in the **Results** section under the current tab.

Note: in **Comprehensive** mode, by clicking the cogwheel 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

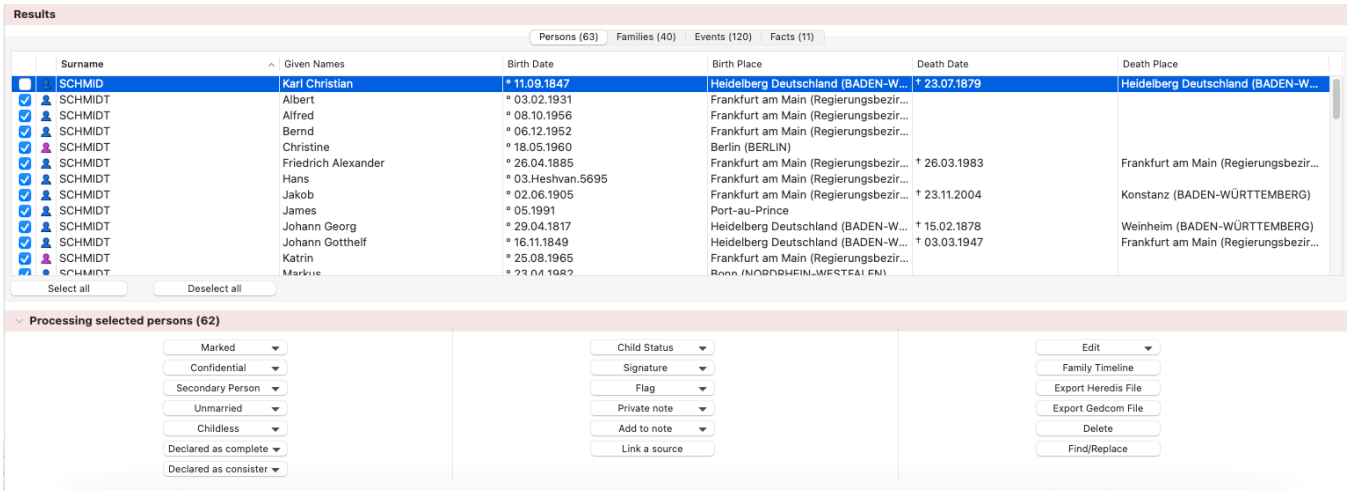
data lines you want to include in your processing. If you want to go back to including all results, click **Select All.**

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.

(Windows) Processing results



(Mac) Processing results



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
  => starting with Heredis 2025, add/unlink personalized flags, see the article Personalized flags (see page 188)
  => starting with Heredis 2025, make person or search notes private or not

=> add an identical text to all selected persons using **Add to note**
=> link a common source to all selected persons

- Create a Custom report, chronological or alphabetical report listing the persons you selected (**Edit by Date** or **by Name**). See also Custom Reports (see page 598), (Mac) Create and Edit a Report, (Windows) Pre-established reports (see page 612).
- Create a Family Timeline including search results only. Read the article Family Timeline – Smart Search.
- Export the selected persons as a Heredis or Gedcom file
- Delete the selected persons
- Launch Find/Replace screen. See also Find/Replace (see page 382) article.

Processing selected families

If the **Families** tab is highlighted in the results section, you may then decide to:

- Modify a series of information for the families you selected
  => change the field value **Family Status** in the scroll-down list.
  => starting with Heredis 2025, make person or search notes private or not
  => add an identical text to all selected families using **Add to note**
- Create a report listing the families you selected (**Edit report**)
- Launch Find/Replace screen. See also Find/Replace (see page 382) article.

Processing selected events

If the **Events** tab is highlighted in the results section, you may then decide to:

- Modify a series of information for the events you selected
  => change event type
  => change the field value under **Search Status**
  => declare them as private or not private
  => share or no longer share them
- Starting with Heredis 2025, add/unlink personalized flags, see the article Personalized flags (see page 188).
- Starting with Heredis 2025, make person or search notes private or not
- Add an identical text to all selected events using **Add to note**
- Link a common source to all selected events
- Starting with Heredis 2025, add a new place to the events
- Create a report listing the events you selected (**Edit report**). See also Custom Reports (see page 598), (Mac) Create and Edit a Report, (Windows) Pre-established reports (see page 612).
- You can delete all events of the smart search at once by clicking on **Delete** button. Warning, this action is irreversible.
- Launch Find/Replace screen. See also Find/Replace (see page 382) article.

Processing selected facts

If the **Facts** tab is highlighted in the Results section, you may then decide to:

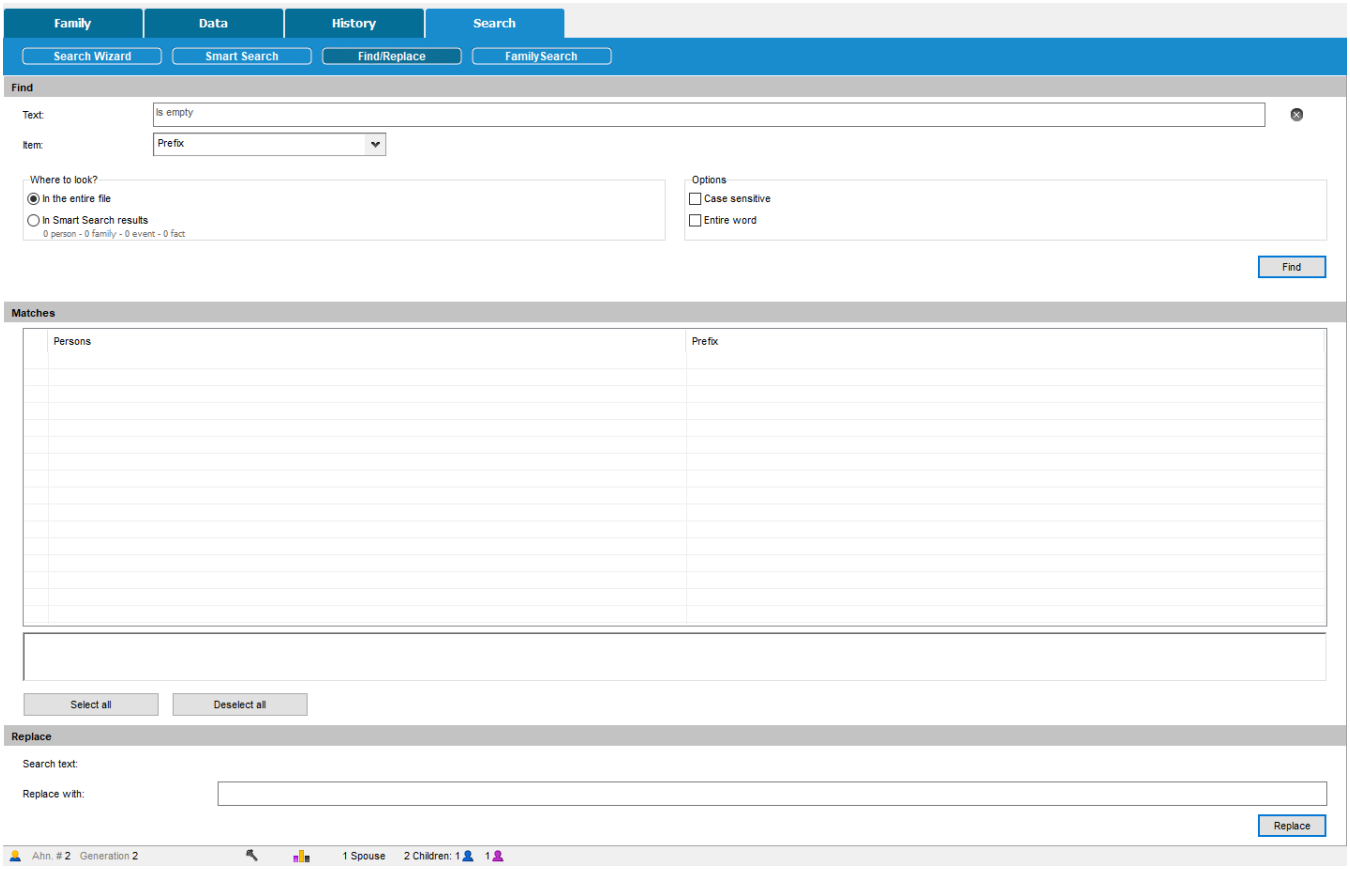
- Modify a series of information for the facts you selected
  => change facts type
  => change the field value under **Search Status**
  => declare them as private or not private
- Starting with Heredis 2025, add/unlink personalized flags, see the article Personalized flags (see page 188).
- Starting with Heredis 2025, make person or search notes private or not
- Add an identical text to all selected facts using **Add to note**
- Link a common source to all selected facts
- Starting with Heredis 2025, add a new place to the facts
- Create a report listing the facts you selected (**Edit report**)
- Delete the facts
- Launch Find/Replace screen. See also Find/Replace (see page 382) article.

Note: the Processing section banner indicates the type of data you are about to process (Persons, Families, Events, Facts) and the number of records you have selected.

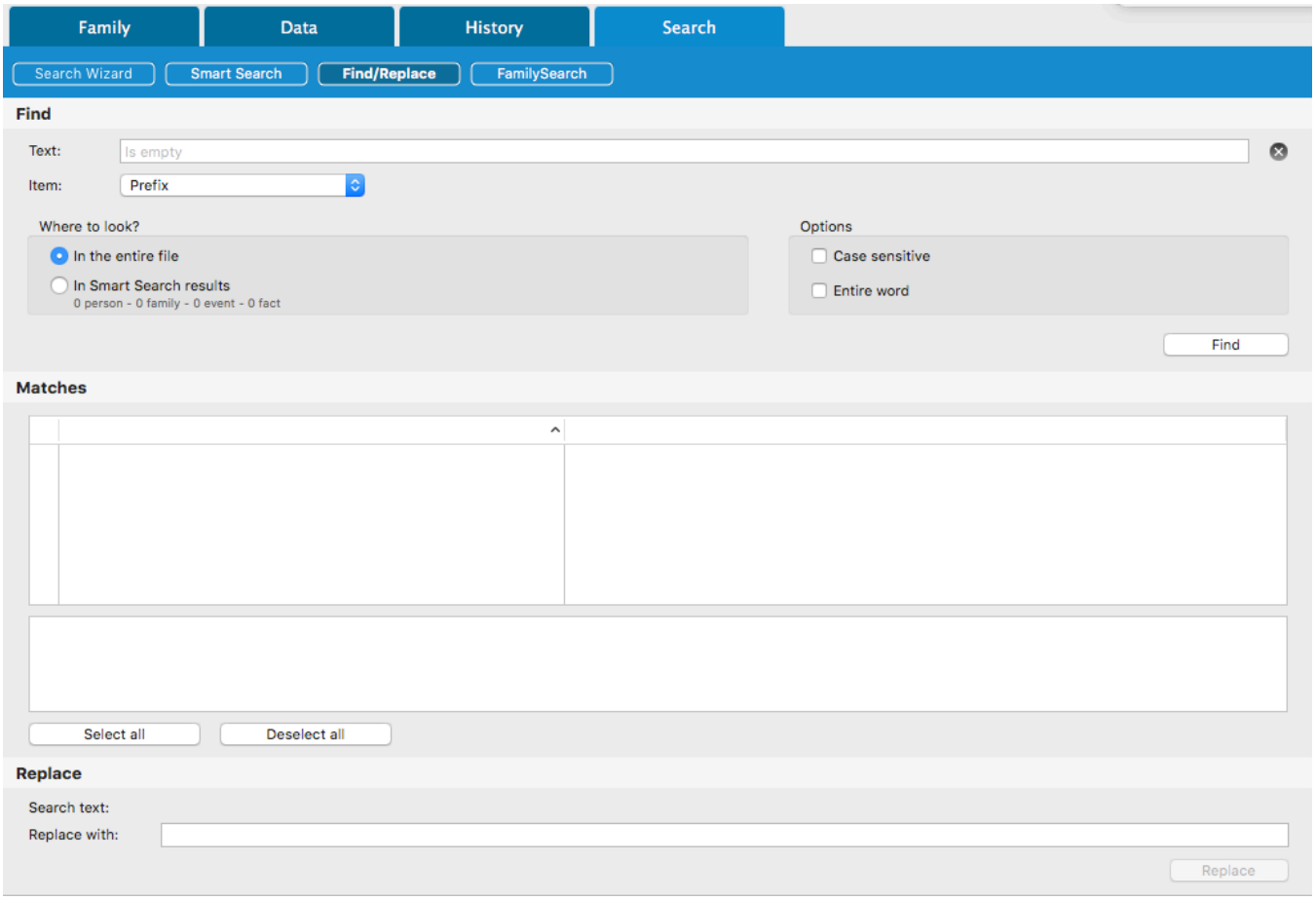
Find/Replace

The **Find/Replace** feature allows you to find a specific text entered under **Persons**, **Families**, **Events**, or **Facts** and to replace it with a new text, which you can type in directly.

(Windows) Find/Replace



(Mac) Find/Replace



You can search for text entered under:

- one of the following **Persons** fields: **Prefix**, **Suffix**, **Nickname**, **Title**, **User Number**, **Person** or **Research Note**.
- the union status **Other union** or a **Family Note** for a Spouse
- one of the following **Events** or **Facts fields**: **Place Subdivision**, **Description/Cause**, **Note** or **Name**.

You may access this feature:

- from the drop-down menu **Find** > **Find/Replace**
- or by selecting the **Search** tab and the **Find/Replace** sub-tab
- or by clicking on the **Find** icon then on the **Find/Replace** button.

Searching for Text

- Enter the text you are looking for in the Text field.

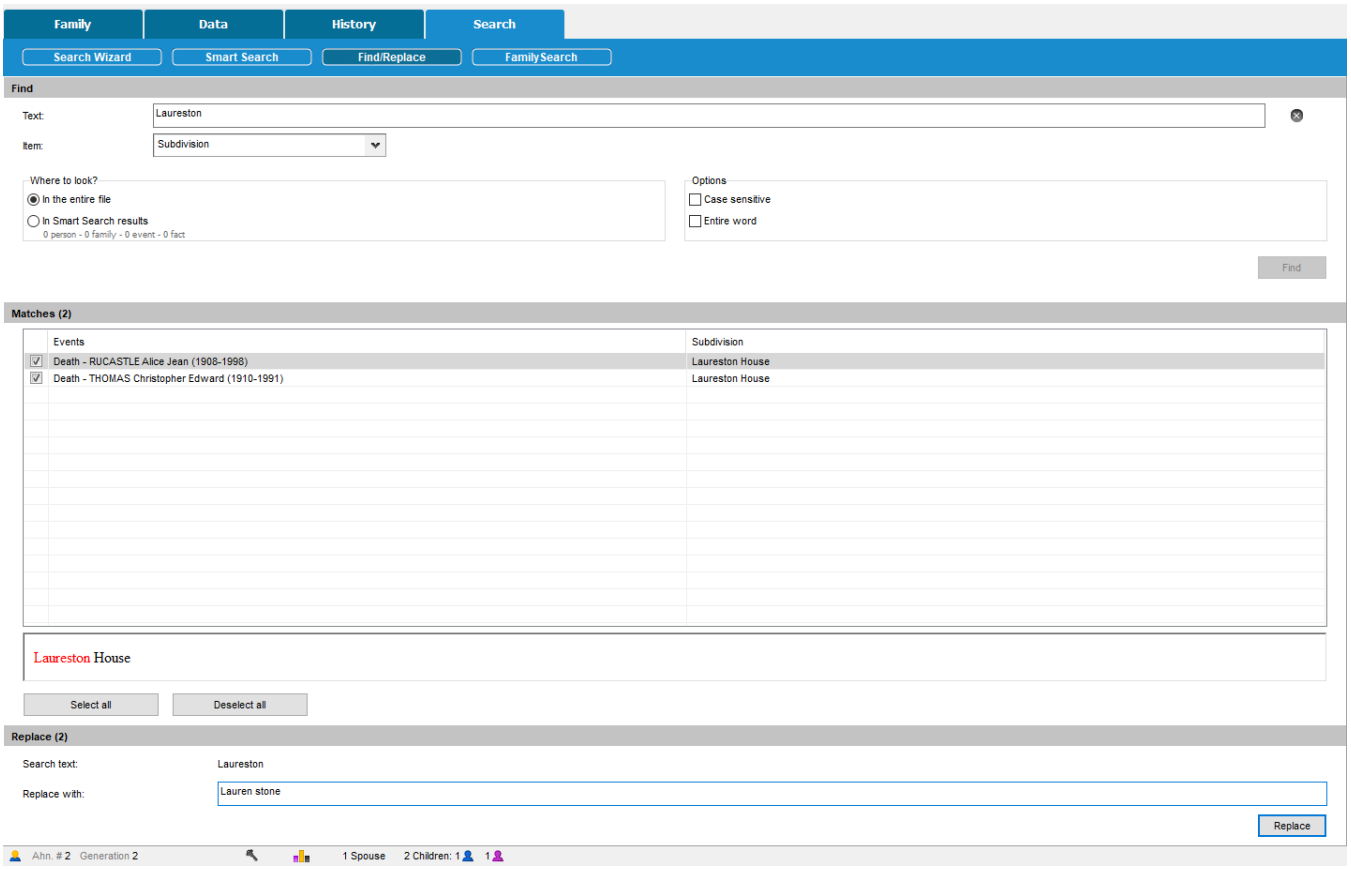
Note: if you leave this field blank, Heredis will look for all empty fields.

- Use the Item pop-up menu to select the type of data you wish to edit.
- Specify where to search for the text you have just entered: **In the entire file** or **In**

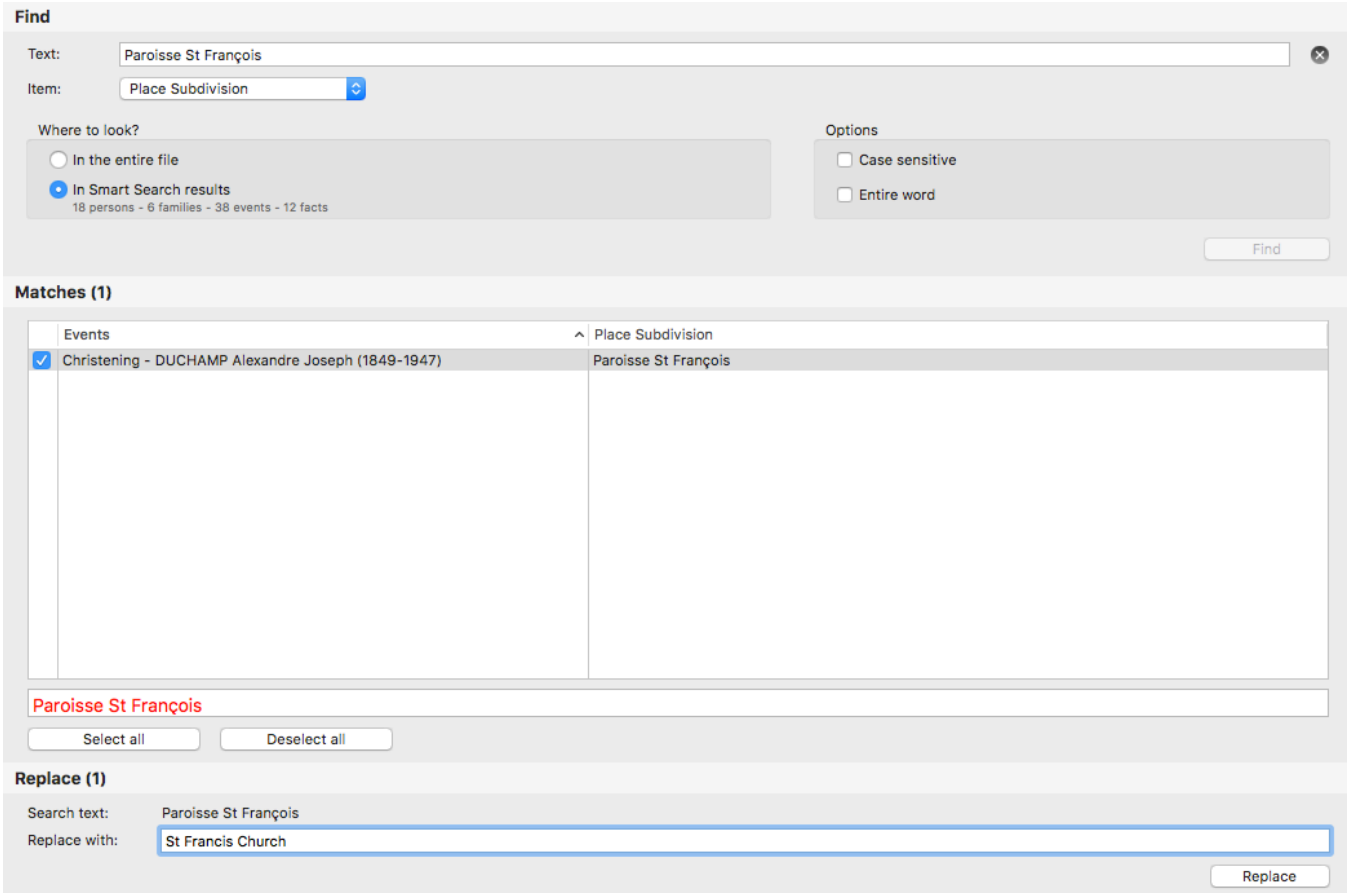
Smart Search results.
(For more details on this feature, refer to the Smart Search (see page 371) section).

- Check the **Case sensitive** box for Heredis to distinguish upper- and lower-case. It will be able, for instance, to look for ”honest” and replace it with “Honest”.
- Check the **Entire word** box to prevent modifications within a word. This way you can replace, e.g. in the Place Subdivision field, the abbreviation “st” with “Street” without affecting words such as “Newcastle”.
- Click the **Find** button to display all relevant matches found in your genealogy. The number of found occurrences is mentioned between parentheses in the Matches banner.

(Windows) Matches



(Mac) Matches



Right below the list of matches, the searched text is displayed in red within each occurrence that was found. By default, all matches are selected – but you can uncheck, one by one, matches you do not want to modify. Conversely, you may prefer to click **Deselect all** and then check (only) the matches you want to modify.

Replacing text in your genealogy

- Enter your new text in the field entitled **Replace with.**
- Click the **Replace** button to apply your changes to all the matches you have selected.

FamilySearch

Heredis integrates various functions that allow you to search, compare, link, and import persons from FamilySearch universal Family Tree.
Click on the **Search > FamilySearch** tab if you wish to access it.

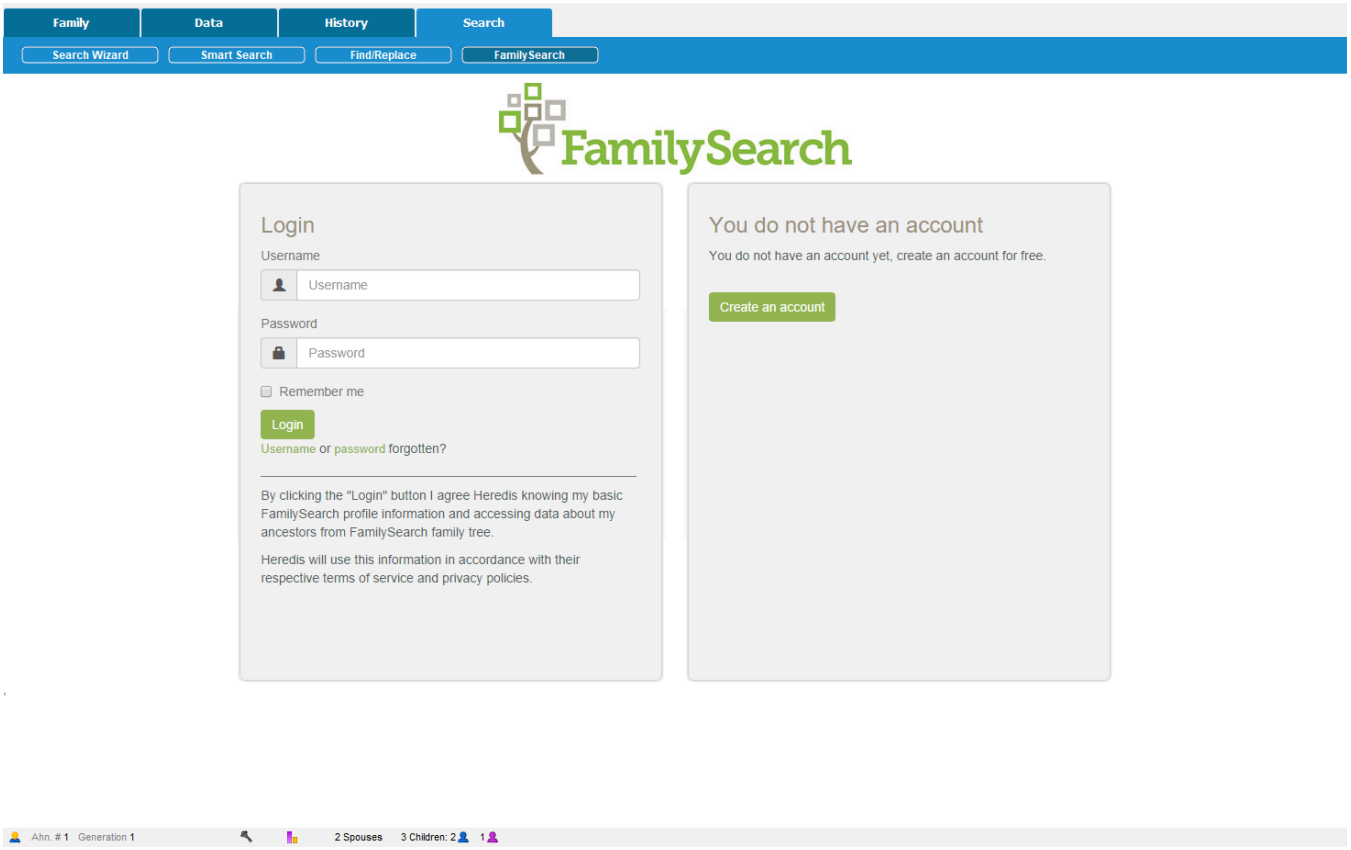
Important: Verify the compatibility of your Heredis version and FamilySearch.

Note: for an easy access to theses 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



Primary Person

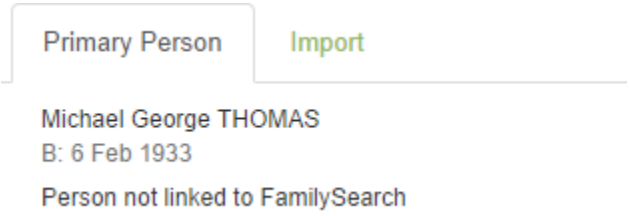
In this tab, you can compare, link or unlink a person from your Heredis genealogy file to a person found in FamilySearch.

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.

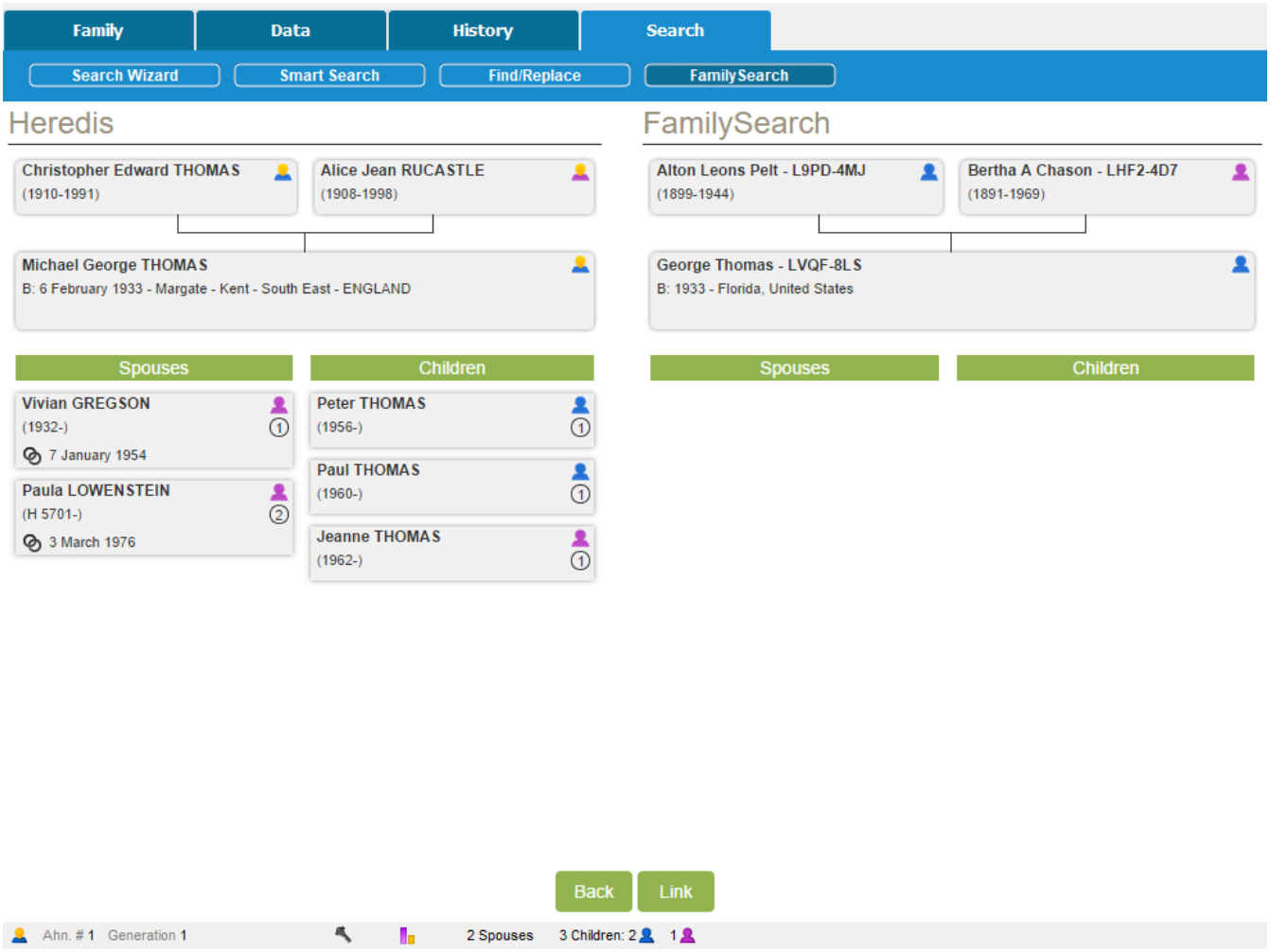
If you click on the **More criteria** button, additional search fields for the primary person's parents and spouse will appear, which should allow you to refine your search on FamilySearch. The **Reset** button will delete the content of all search fields displayed on the screen.

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.



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.

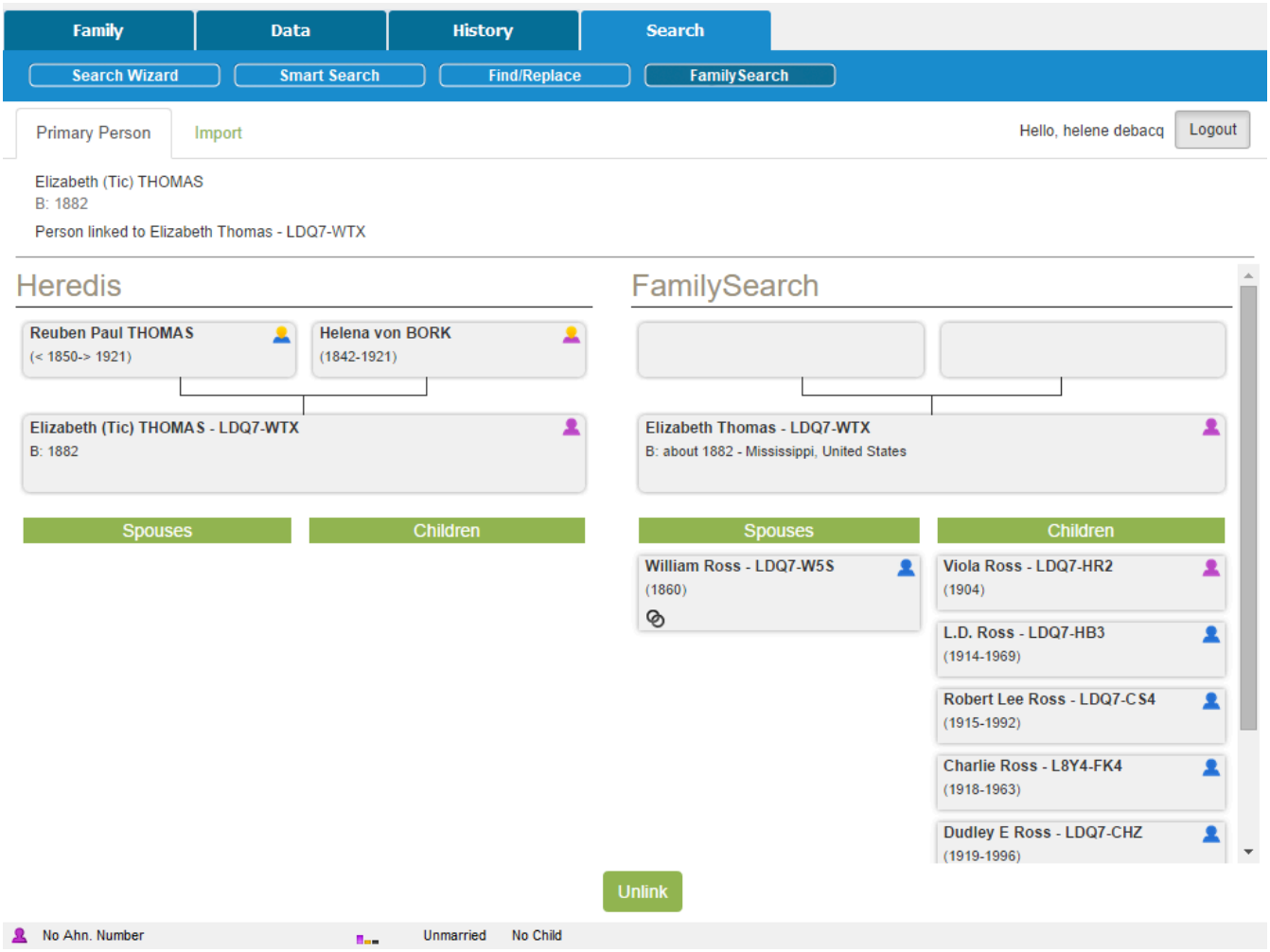
If you click on the **Link** button, Heredis will attach the FamilySearch person's ID number to the primary person in your Heredis genealogy file.
The two persons are now linked.

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.



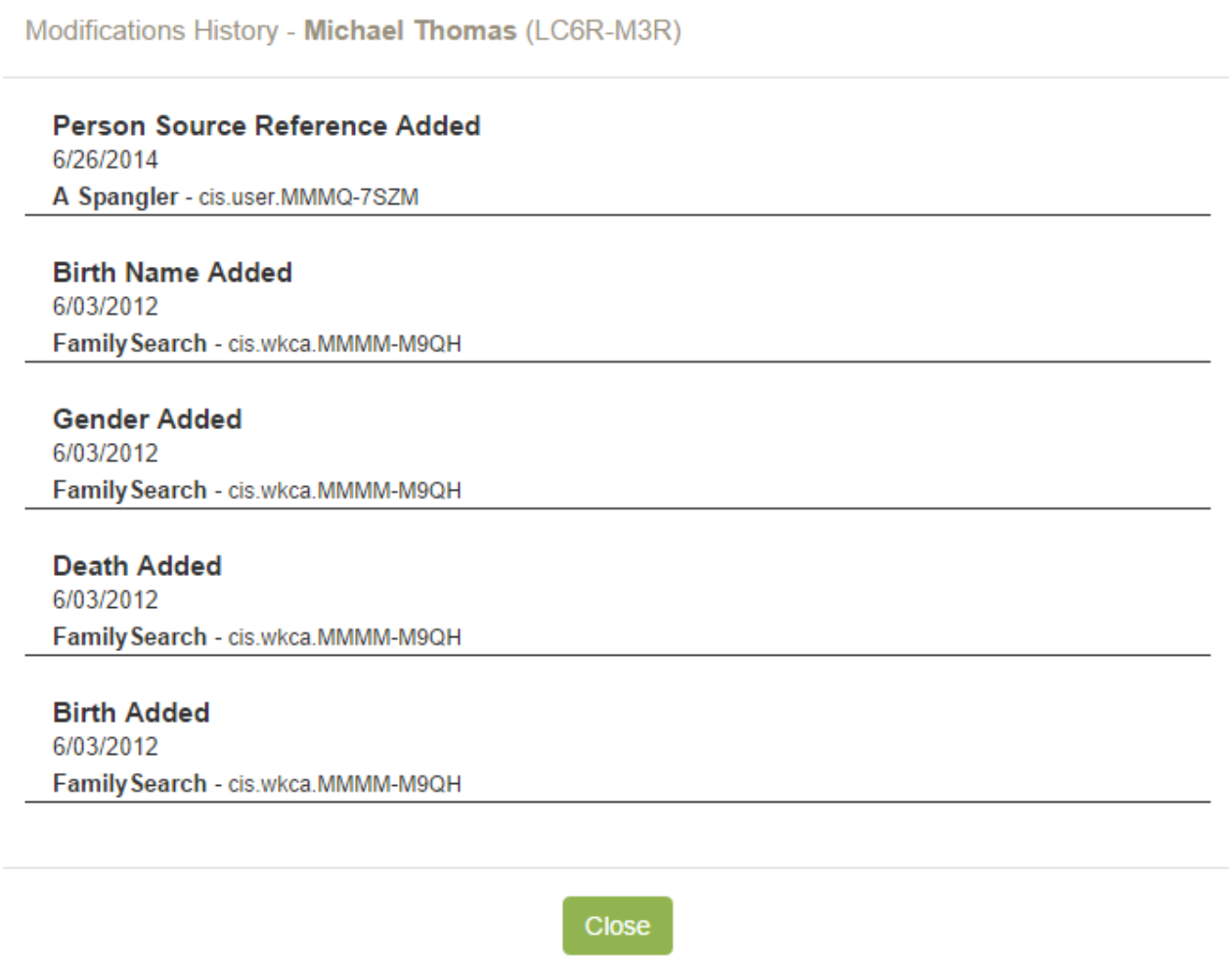
3) The primary person is linked to a FamilySearch person who has been deleted

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.



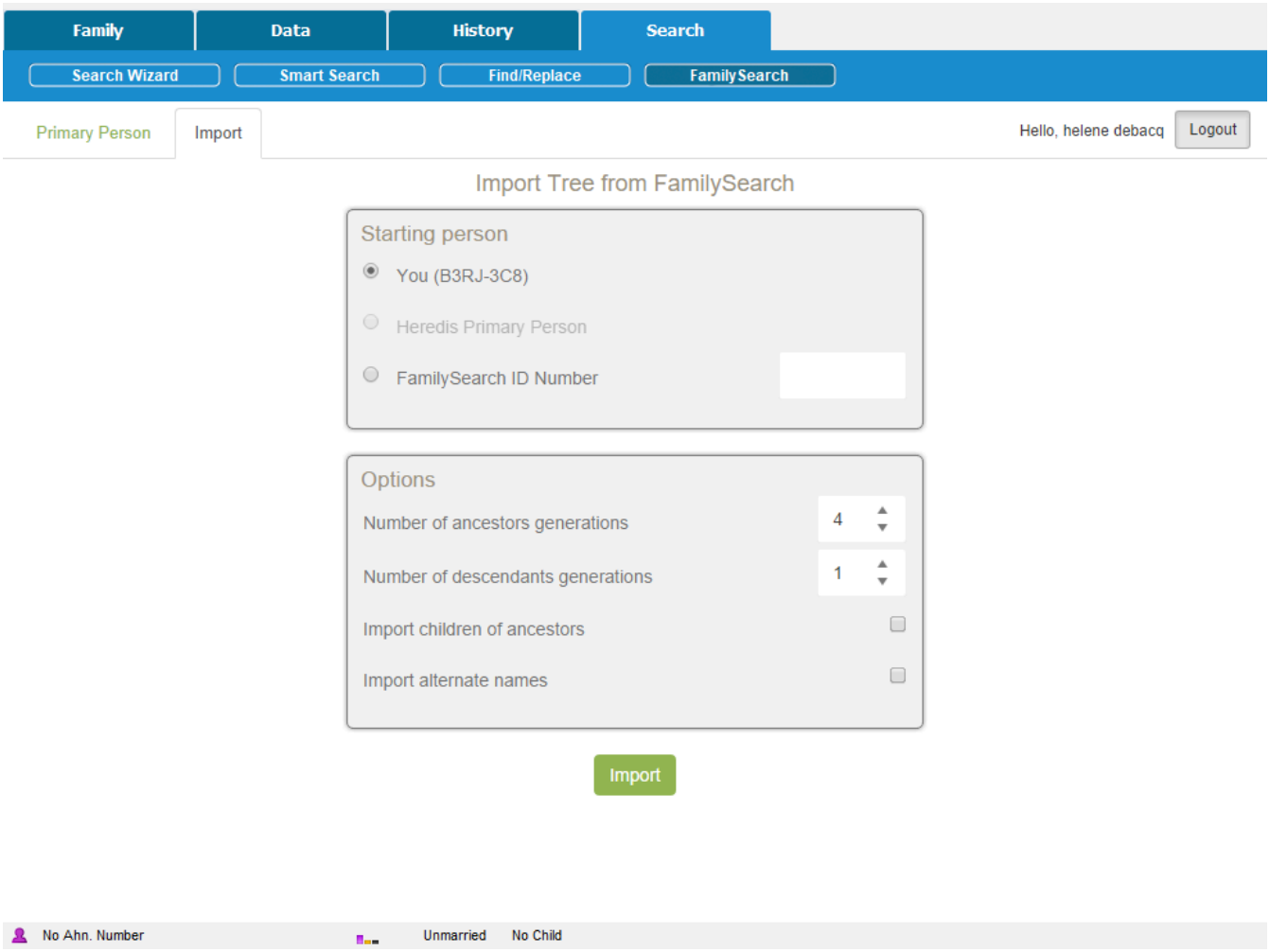
Note: Modifications made in FamilySeach after your import is processed will not be automatically updated in your file.

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.



1) Set the parameters for your import

Source Person

- Yourself: select this option to recover all or a portion of the genealogical data you have already entered in FamilySearch.
- Primary person in Heredis: if the individual displayed as the primary person in Heredis is already linked to a person in FamilySearch, you can select this option and thus complete his/her ancestors or descendants thanks to the data already gathered in FamilySearch's global tree.

Note: if the primary person is not linked to a person in FamilySearch, this option is greyed out.

- FamilySearch ID number: enter a person's FamilySearch ID number in order to retrieve a FamilySearch branch that will complete your genealogy.

Additional Options

Choose the number of generations for ancestors and descendants (limited to 5 maximum). Tick **Import Children of ancestors** to retrieve the primary person's siblings, uncles, aunts, etc.

You may also tick **Import Alternate Names** to retrieve additional names that might have been entered in FamilySearch.

Note: if you set the number of generations for ancestors and descendants to 1, the import will include the Source person and his/her spouse(s).

2) Imported data

When you click on the **Import** button, the following information is retrieved from FamilySearch's global tree:

- persons
- events
- notes
- sources

All the persons imported into your Heredis genealogy are linked to in FamilySearch's global tree and are recognizable thanks to their FamilySearch ID number.

Rules applied during data import from FamilySearch to Heredis:
When importing persons from FamilySearch, you may face a number of situations such as:

- the person to be imported is already in your genealogy with the exact same FamilySearch ID (FSID): this person will not be imported again to prevent the creation of duplicates; the import process will move on to the ancestors' or descendants' branch, according to your import settings.
- the person to be imported is already in your genealogy but does not have a FamilySearch ID (FSID) number or the FSID number is different: this person and his/her ancestors' or descendants' branch will not be imported to avoid creating inconsistent data.

Notes: If the person to be imported is already in your genealogy – without a FamilySearch ID number – and if he/she is not linked to the branch being imported, he/she will be added to your genealogy as a homonym.
The data imported from FamilySearch will never overwrite personal data in your Heredis file.

Persons in Heredis linked to Persons in FamilySearch

In Heredis, various functions are available to help you find persons in your Heredis genealogy file who are linked to FamilySearch persons.

1) Search by numbers

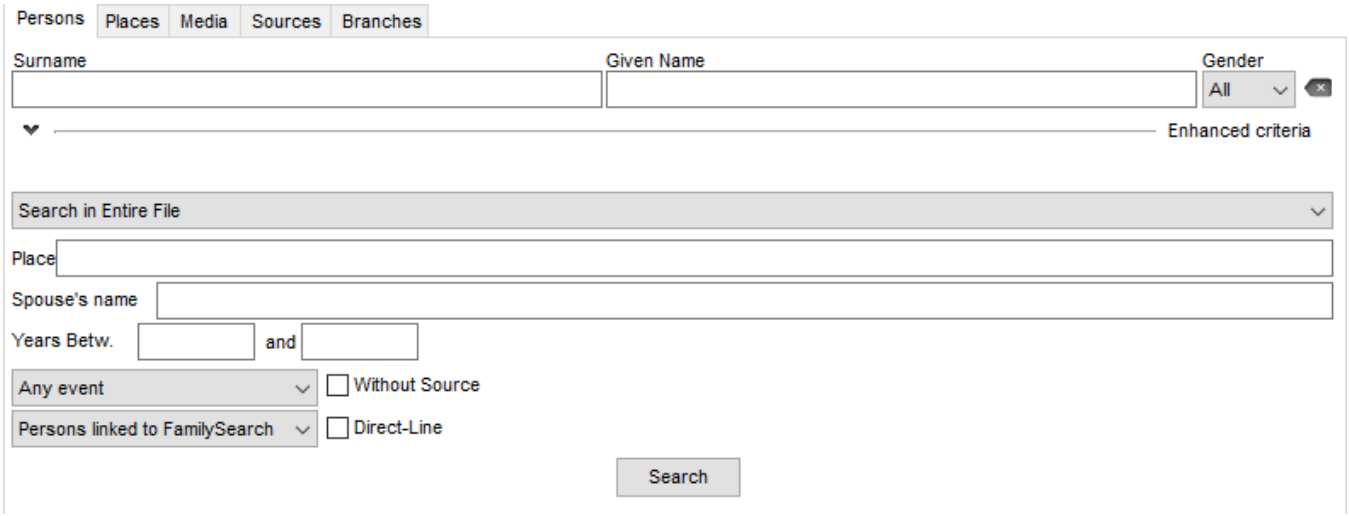
Search Menu > Search by number
Enter the FamilySearch ID number you are interested in and Heredis will automatically take you to the matching person, who will be displayed as the primary person.

2) Advanced search

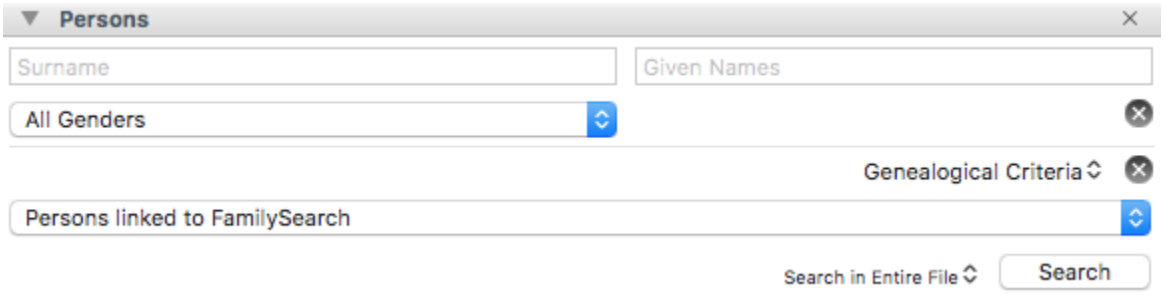
The advanced search will allow you to apply filters to your list of persons in order to only display the persons linked to FamilySearch.

From the Persons panel, on Windows in the <**Enhanced criteria**> replace <**None**> with <**Persons linked to FamilySearch**>. On Mac, select <**Genealogical Criteria**> and replace <**None**> with <**Persons linked to FamilySearch**>.

(Windows) Family Search Enhanced Criteria.



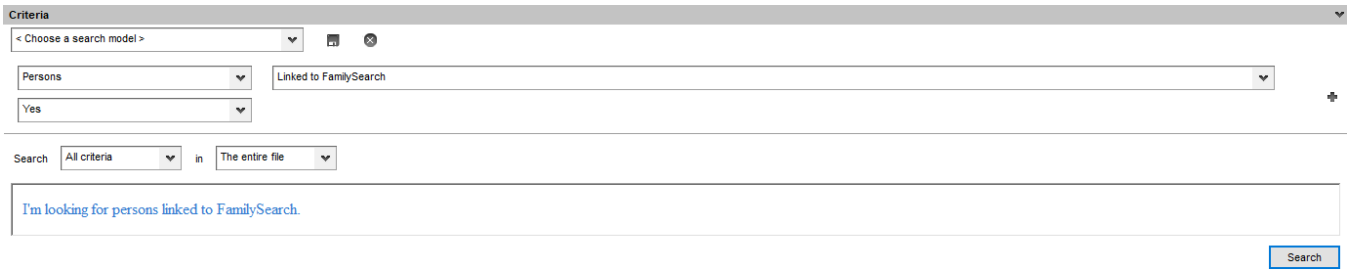
(Mac) Family Search Advanced Criteria.



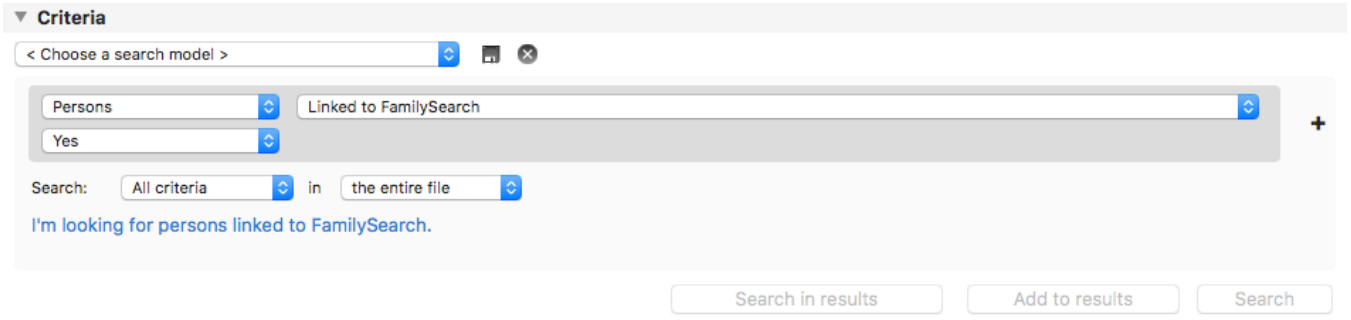
3) Smart Search

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** (see page 371) section for more details on this feature.

(Windows) Smart Search.



(Mac) Smart 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.

Searching in Online Archives

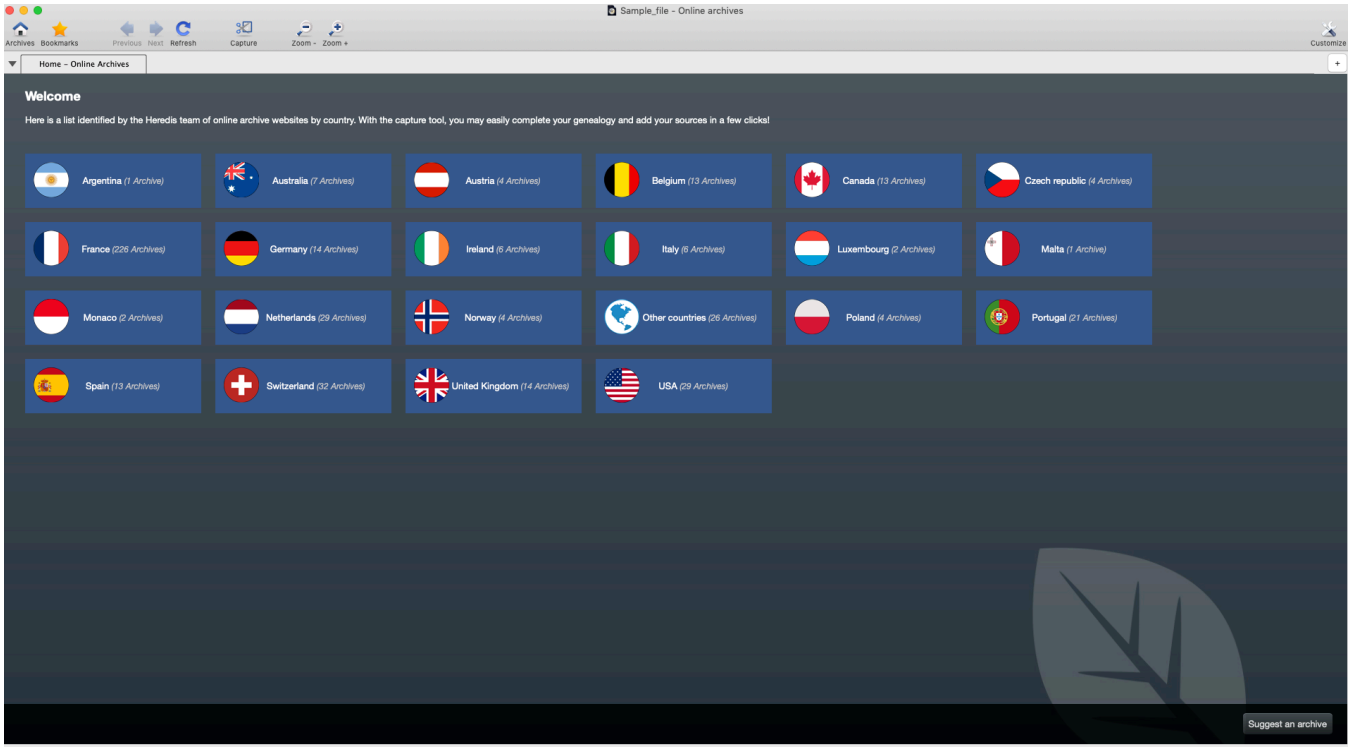
The **Search in Online Archives** tool allows you, from your software, to access the Online Archives portal. Heredis facilitates your research and also allows you to integrate acts you have found and cut into your family tree, by creating the event and the associated source for example.

Click on the button
or choose from the menu **Find > Search in Online Archives…**

Access and navigation in Online Archives sites

Heredis displays the Online Archives search portal in a real web browser.

Online Archives Portal



Online Archives

You have a button bar with the following options:

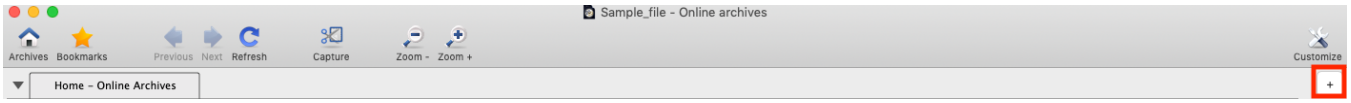
- **Archives Button**: displays the home page of the online archives.
- **Bookmarks Button**: lists the sites you have added as bookmarks and allows you to manage the list of bookmarks.

- **Previous, Next Navigation** buttons: they give you an indication of the history of your browsing and allow to re-display pages already consulted.
- **Update Button**: updates the page displayed on the screen.
- **Capture Button**: Captures the whole page displayed in the browser. If you have already made a capture, this button opens a menu either for you to make another capture, or see the list of already captured but not processed sites.

As in any internet browser, you can add a new tab by clicking (Windows) on the little tab, (Mac) on the + button on right side.

(Windows) New tab

(Mac) New tab



Close a tab by clicking the cross to the right of the title of the displayed tab.

The Archives portal concerns a a lot of countries. If you do not find a country, check on **Other Countries** section.

Since Heredis 2026, you will also find the websites of genealogy societies partners of Heredis. Genealogy societies can be found by clicking on countries such as USA, UK, etc. If there are no genealogy societies available but you know one is interested in becoming Heredis' partner, tell them to contact us.

By clicking on the button on the button bar, you return to the home page.

Use the navigation buttons to navigate as on a website.

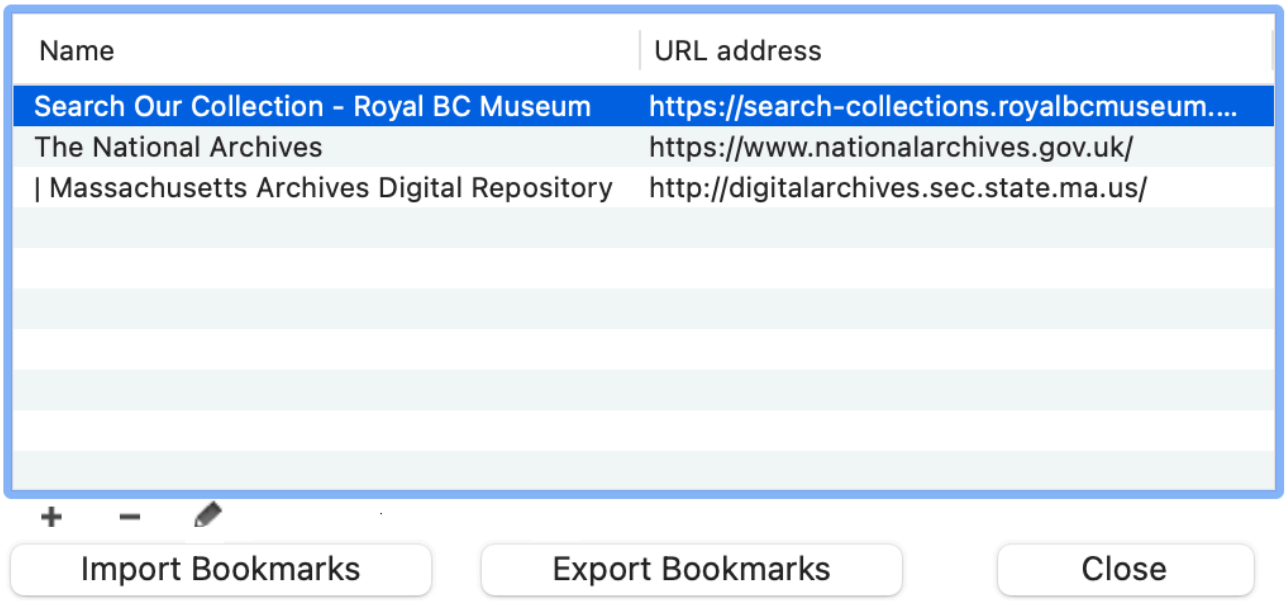
If a website appears to be missing from the list, share it via the Suggest an archive button at the bottom right of the footer band. Each proposal will be submitted to the Heredis team. If accepted, it will appear on the portal and will be permanently accessible to all users. We add website if screenshot can be made of records.

Manage bookmarks

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.**

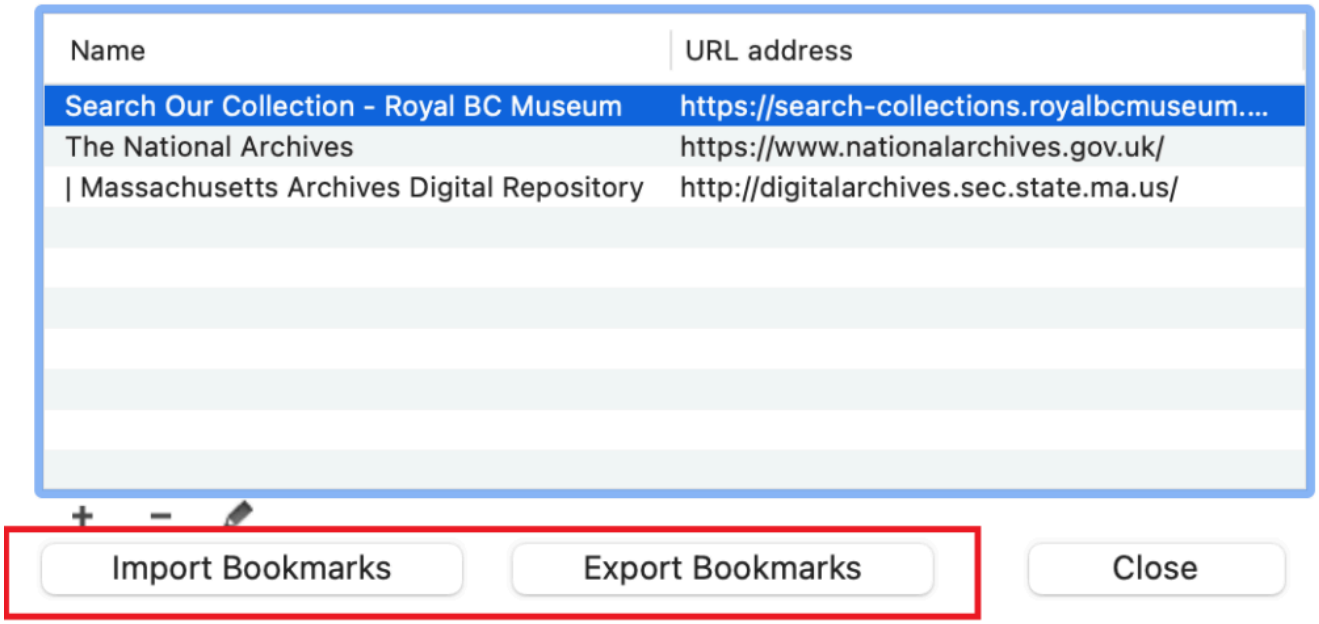


You can add other sites and delete them with the ✚ and ━ buttons. By clicking on a line, you may change the name or address of the sites.
From Heredis 2025, click on the pencil ✎ to edit a favorite and correct a typo or change the site address.

Export/Import favorites

From Heredis 2025, if you change computers, you can easily retrieve your favorites so you don’t have to redo everything.

Click on ⭐ **> Edit bookmarks.**



Click on **Export bookmarks**. Choose the save location. Send the file by e-mail or copy it to a USB stick for transfer to the new computer.

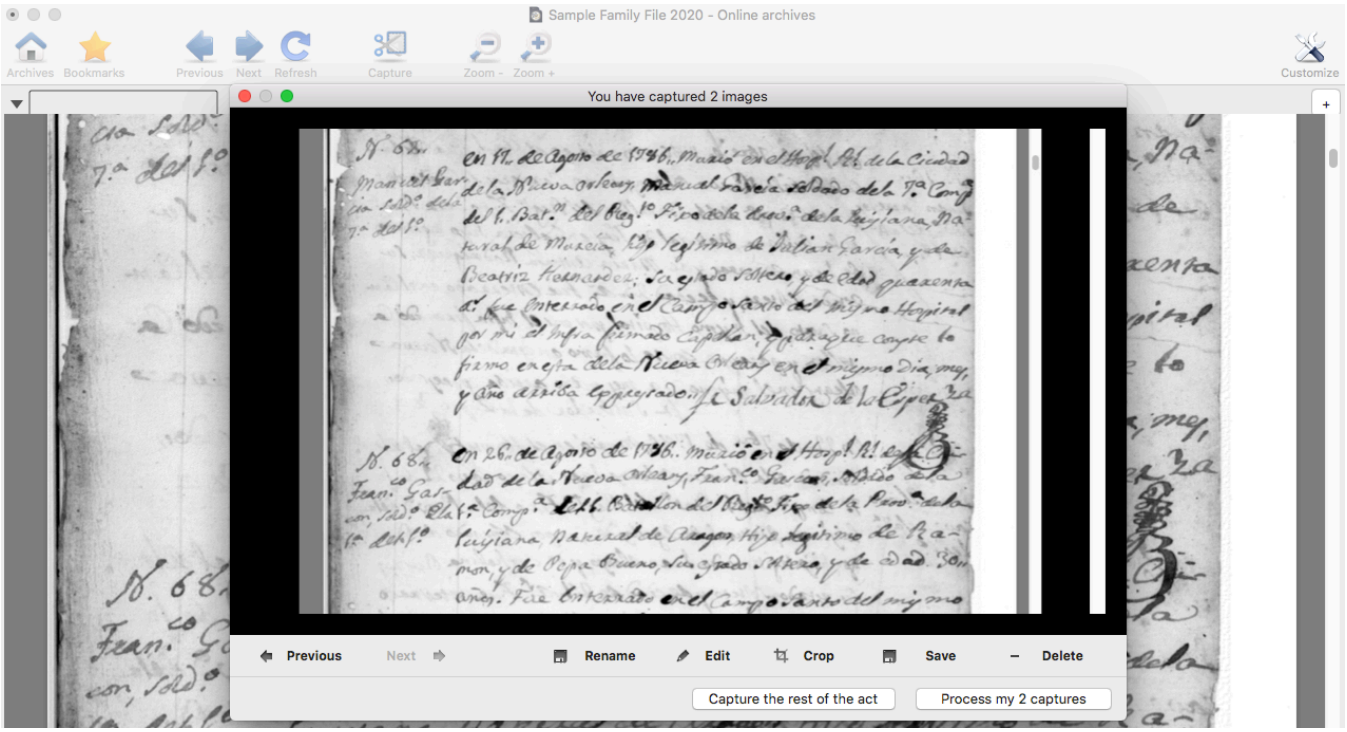
Install Heredis on the new computer and open a file. Then click on **Online Archives > Edit bookmarks > Import bookmark**s. Select the .json file you previously exported.

This is how you'll find your bookmarks on the new computer.

Capture images

Once the certificate found, Heredis allow you to make a screenshot of this certificate. Click on **Capture** button.

Online Archives Capture



When you capture a deed or any other document, you capture all of the displayed page in the browser.

Once your certificate captured, rename the picture by clicking on **Rename** button. Otherwise, it will be difficult to find your picture in Media index.

You can edit the capture by clicking the **Edit** button. Your image is displayed in the **Photo tool** and you can edit the image to make the document more readable (see the article on Photo Tool (see page 540) to see the details of this feature). Once the editing parameters are right for you, close this window and treat your captures.

Crop the image to remove unwanted parts with the button: when you click this button, your mouse cursor changes shape. Place your cursor at the spot where the picture should be adjusted. Hold down the left mouse button and slide the selecting window to encompass the desired area. When you release the mouse, the **Crop** button appears on the image; then click this button. Your image is now framed.

When you have captured several images, the Previous and Next buttons allow you to scroll through the list of your captures. You'll need to rename, edit, and crop every capture you make.

We advice you to keep a copy on your computer, click the **Save** button and choose the location on your computer.

The **Delete** button will delete the capture displayed in this window.

Info • All the captured images are declared as being private by default in order to respect the terms of use of the Archives. Remember that if you close the **Archives Online** tool without

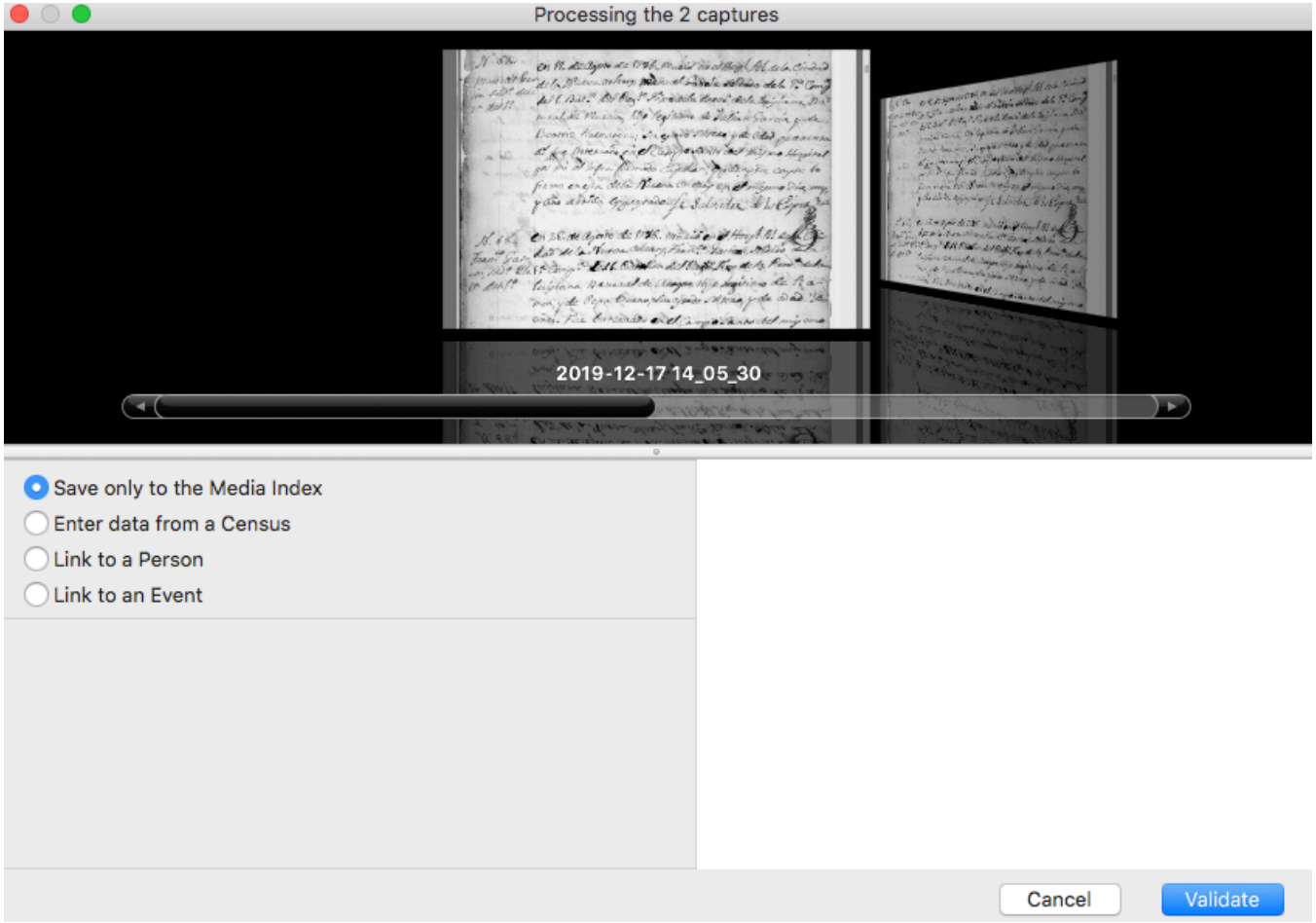
managing your captures, they will be retained in the list of captures only as long as the Heredis session is still open.

If you have managed to capture all of the act, click **Process my capture**, or on the **Capture the rest of the act** button in order to cover the act in its entirety.

Processing captures

Heredis allows you to process the capture of acts to associate them with an event of your genealogy and save the information concerning the act.

Online Archives Capture



Multiple choices are available to you for treating these captures:

Save only in the media index

If you do not have the time, tick the **Save only in the media index** box for treating it at a later date.

Link to an event/person

Since Heredis 2020, you may **Link to a person** the image you just captured.

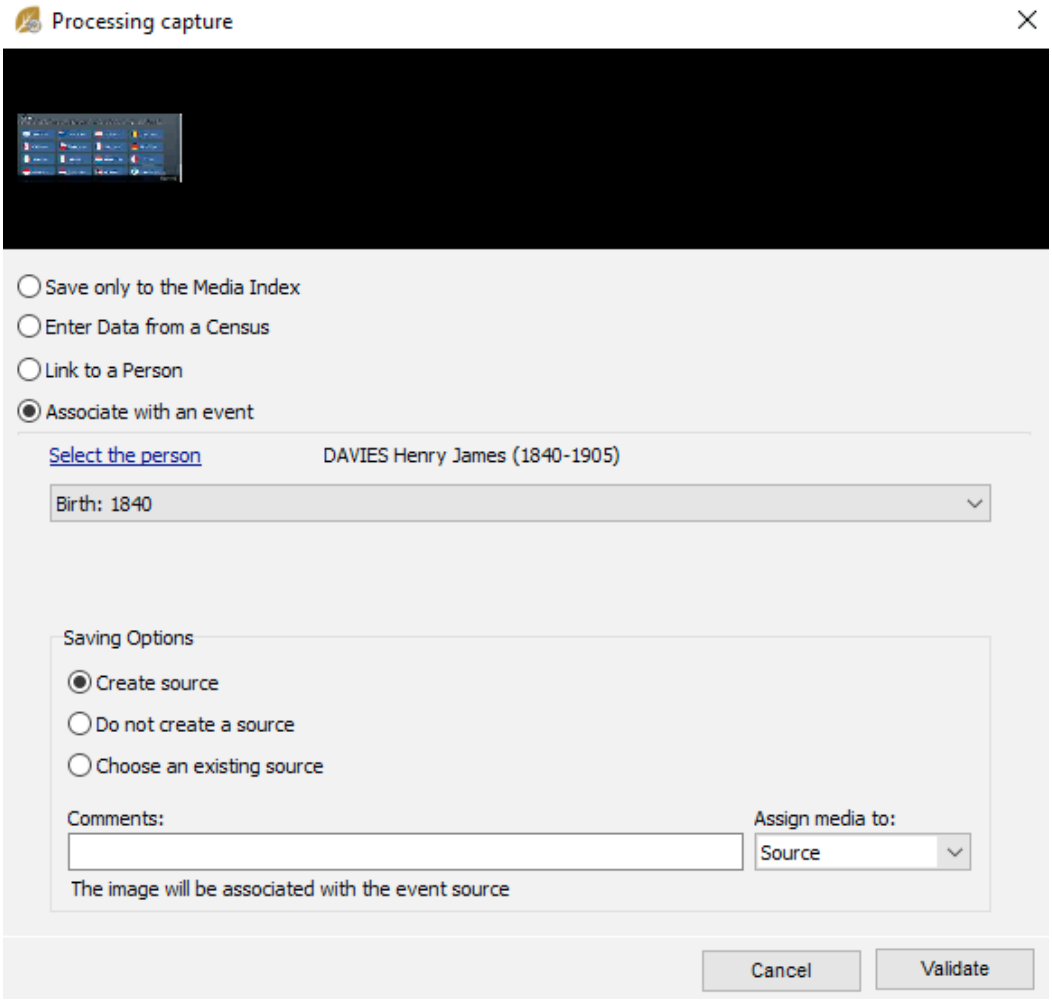
Select **(Mac) Link to an event / a person** or **(Windows) Associate with an event / Link a person.**

Click on **Select the person** to select or create the person whom the captures are to be associated. Then, in case of a link to an event, unfold the dropdown list to select an existing event or create one if it has not already been created.

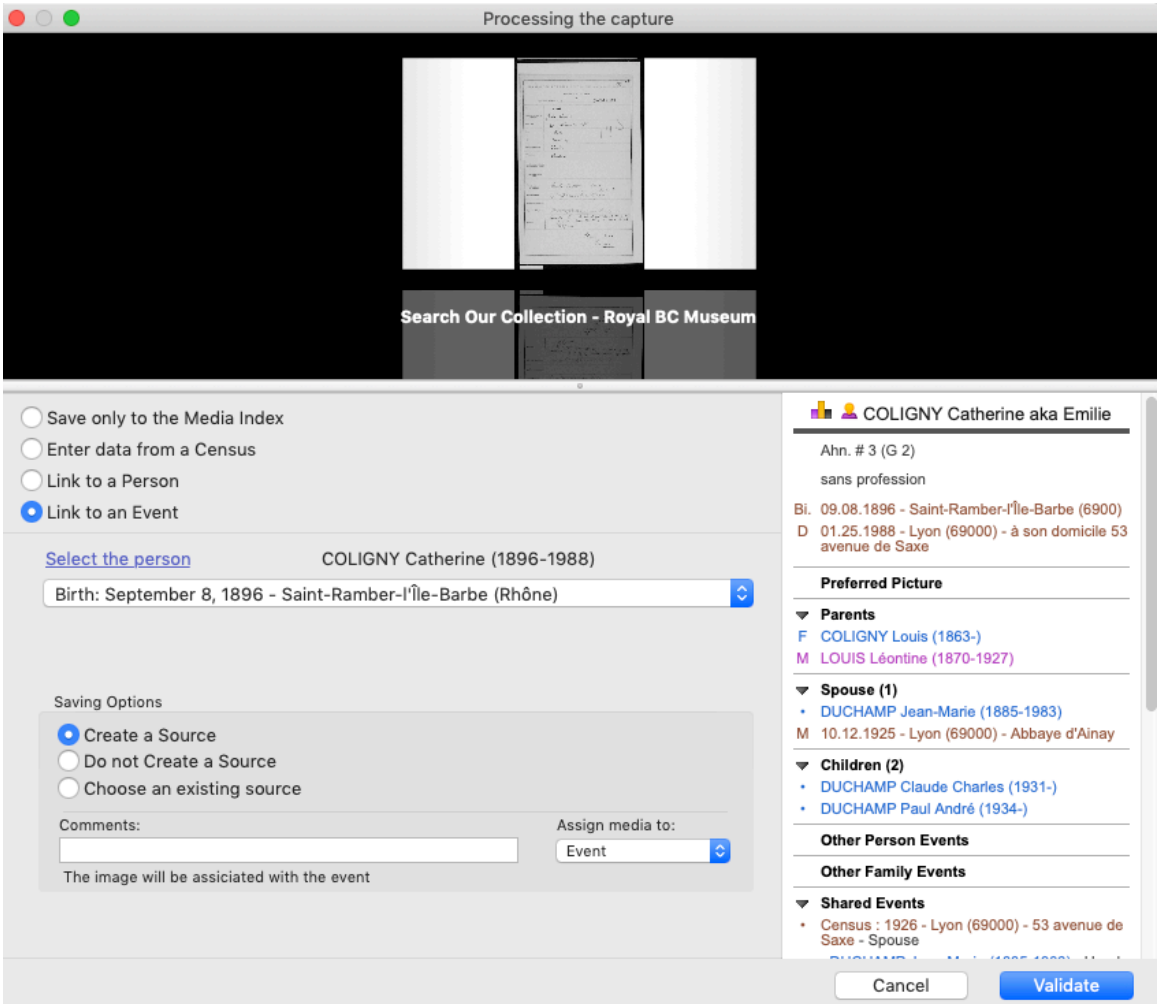
You can choose between different option to save the source and the media. To do so, choose between **Create a Source, Do not create a source** and **Choose an existing source**. Make sure to choose to save the media in the source or the event by unfolding the dropdown list to **Assign media to**.

Note: If you use Comprehensive mode of sources, you can add the citation in **Comments** area and assign the media to the citation. If you choose **Not to create a source**, the media will automatically go to the event.

(Windows) Processing capture



(Mac) Processing capture



When you click **Validate**, Heredis opens the source and prefills known information, the type of the source, the title of the source, the Archive depository, the nature of the source, its quality, the website and automatically associates the capture or captures with the source. Fill in any missing information if necessary and click **OK** to create the source.

See our MOOC on Online Archives for more explanation.

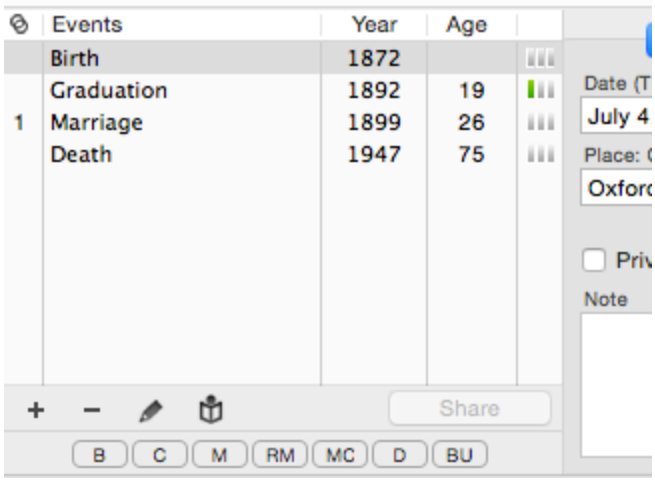
Enter data Census

Since Heredis 2019, you can also **Enter Data from a Census**. It will open the Census Grid feature. Please see Census (see page 282) article or see our MOOC for further details.

Launch Online Archives from an event

The **Online Archives search** tool may be launched directly from the file of the person.

Events



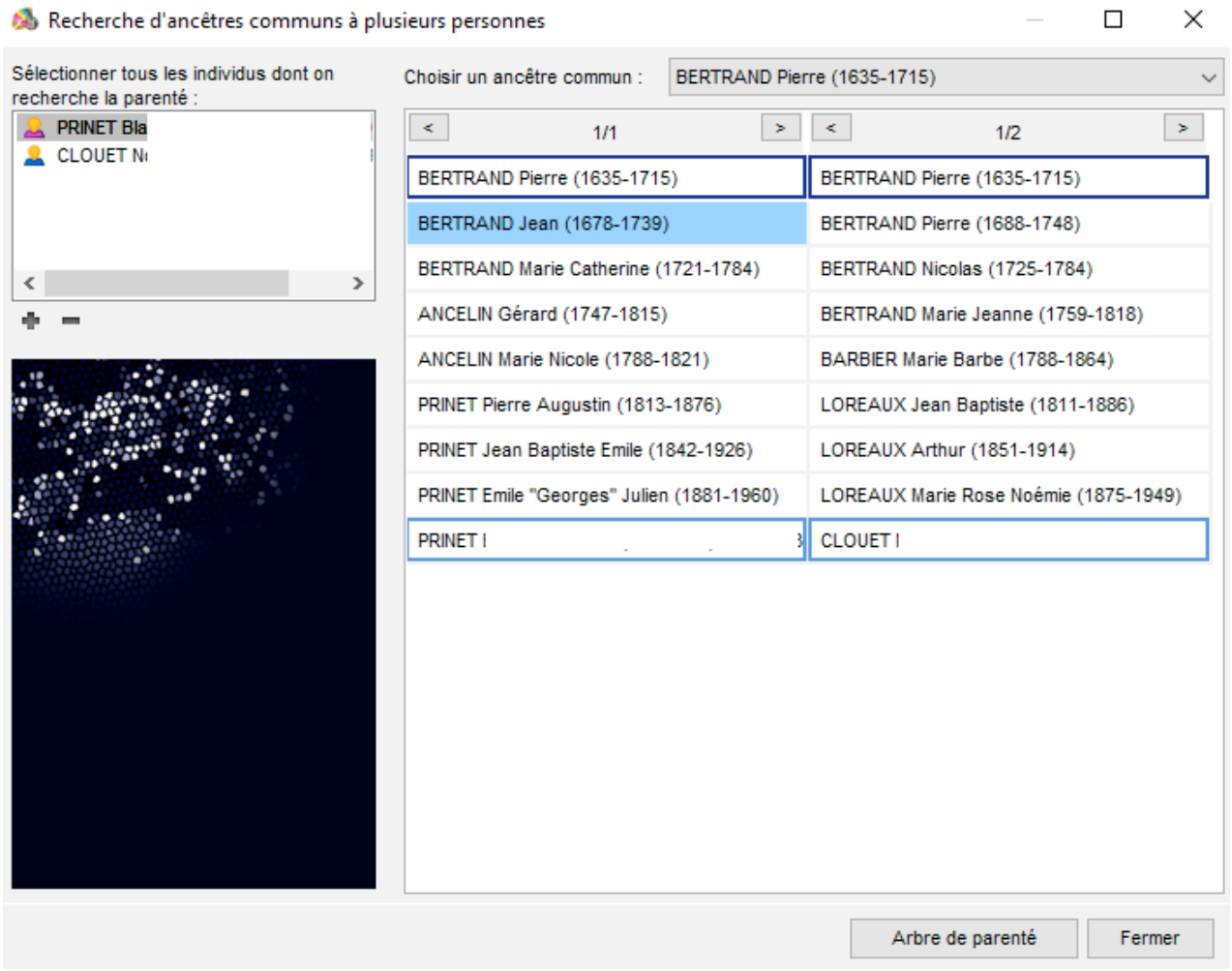
From the **Personal Data** entry tab, select the event you want to complete. Start the online archives search by clicking the **Online Archives** button below the list of events. Heredis displays directly the list of available archives of the country for the selected event provided you have previously entered this information. When you have found and captured the act of the event to be completed, Heredis prefills the treatment of captures with the relevant information on the person and the event selected in the **Personal Data** entry tab.

It remains for you to validate and possibly complete the missing information for the source.

(Windows Pro) Rechercher les ancêtres communs

Pour retrouver les ancêtres communs à deux ou plus de deux individus enregistrés dans un même fichier généalogique :

- Sélectionnez le menu **Recherches – Rechercher les ancêtres communs**.
- ou Cliquez sur le bouton puis sur le bouton .
- Le personnage central est sélectionné par défaut. Vous pouvez le supprimer en cliquant sur le bouton .
- Sélectionnez tous les individus pour lesquels vous souhaitez révéler une parenté en cliquant sur le bouton . Validez chacun de vos choix dans la liste des individus enregistrés dans le fichier en cliquant sur le bouton **Afficher**. Depuis Heredis 2021, vous pouvez cliquez sur le bouton **Personnage central** ou **Personnage racine** pour ajouter rapidement l'individu central ou racine de votre fichier.

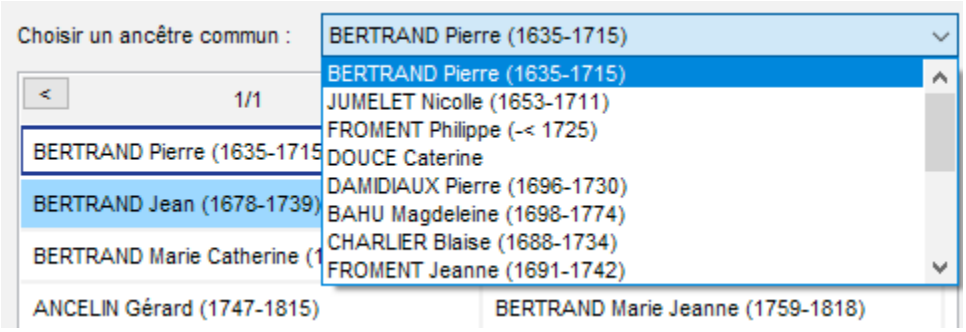


Cliquez sur un individu sélectionné pour afficher un résumé des informations le concernant

dans la partie gauche de la fenêtre de recherche.

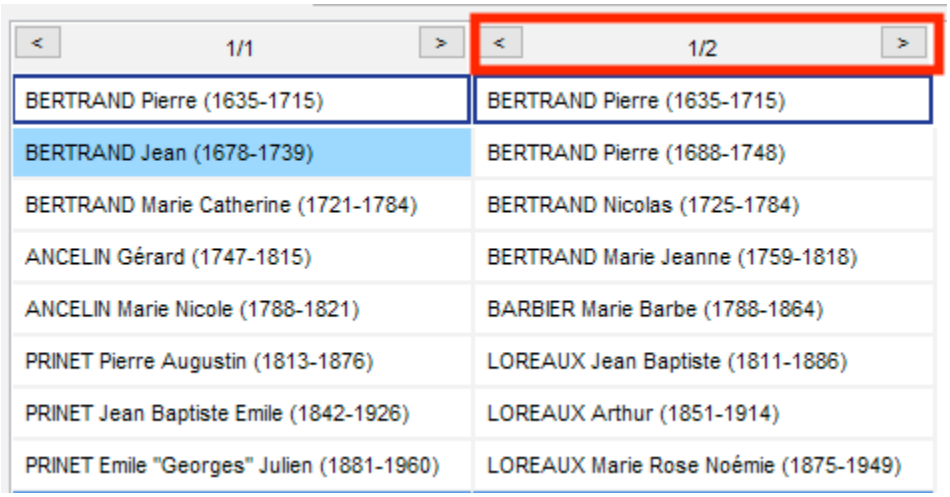
Pour ôter un des supposés cousins de la liste, sélectionnez son nom et cliquez sur le bouton ➖ dans l'écran de recherche.

Si tous les individus sélectionnés ont des ancêtres communs, ces derniers apparaissent dans la partie droite de la fenêtre de recherche de parenté. Cliquez sur la flèche du menu déroulant pour les voir tous et sélectionnez l'ancêtre pour lequel vous voulez afficher les liens.



En sélectionnant un des ancêtres communs, vous faites apparaître le ou les différents chemins reliant chacun des cousins à cet ancêtre commun. Dans les familles où l'on constate des cas d'implexe dus à des mariages consanguins, plusieurs chemins peuvent mener de l'un à l'autre. Le nombre de chemins, précisé en tête de colonne pour chaque cousin, indique les différentes filiations entre ces deux individus.

Pour les visualiser, cliquez sur les flèches. Le dernier chemin visualisé sera celui qui apparaîtra dans la construction de l'arbre de parenté.



Cliquez sur le bouton **Arbre de parenté** pour lancer la construction d'un arbre de descendance où figurent tous les cousins choisis en partant de l'ancêtre commun sélectionné.

Vous pourrez alors paramétrer cet arbre graphique comme les autres arbres de taille illimitée. Consultez l'article (Windows) Construire des arbres de tailles illimitée pour plus de détails.

Find Relationships

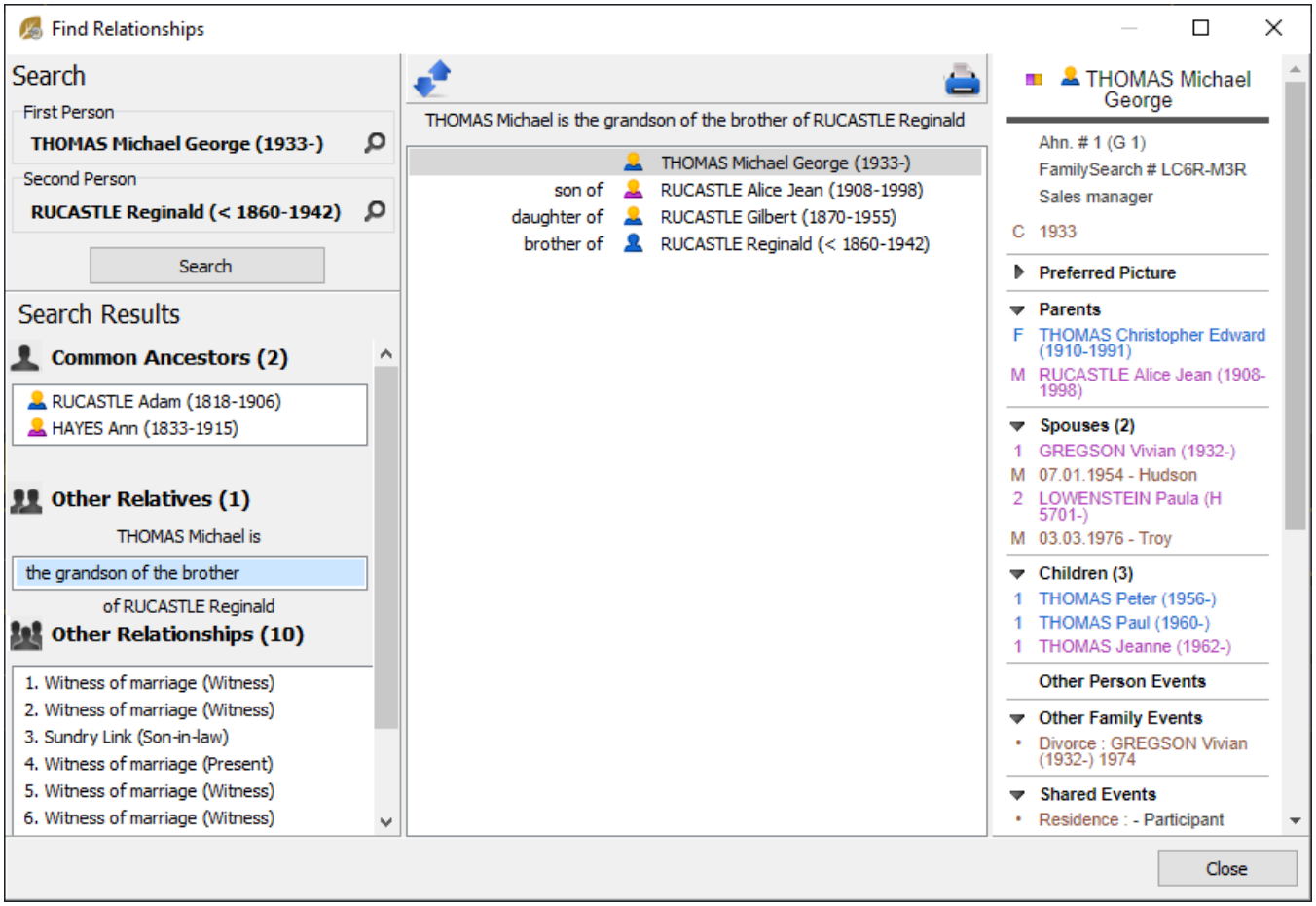
The Find Relationships feature **scans** all the connections in your genealogical file to find out how two people can be linked, even if they're not directly related or allied.

- Click on the **Find > Find Relationships menu.**
- or Click the button and then the button.

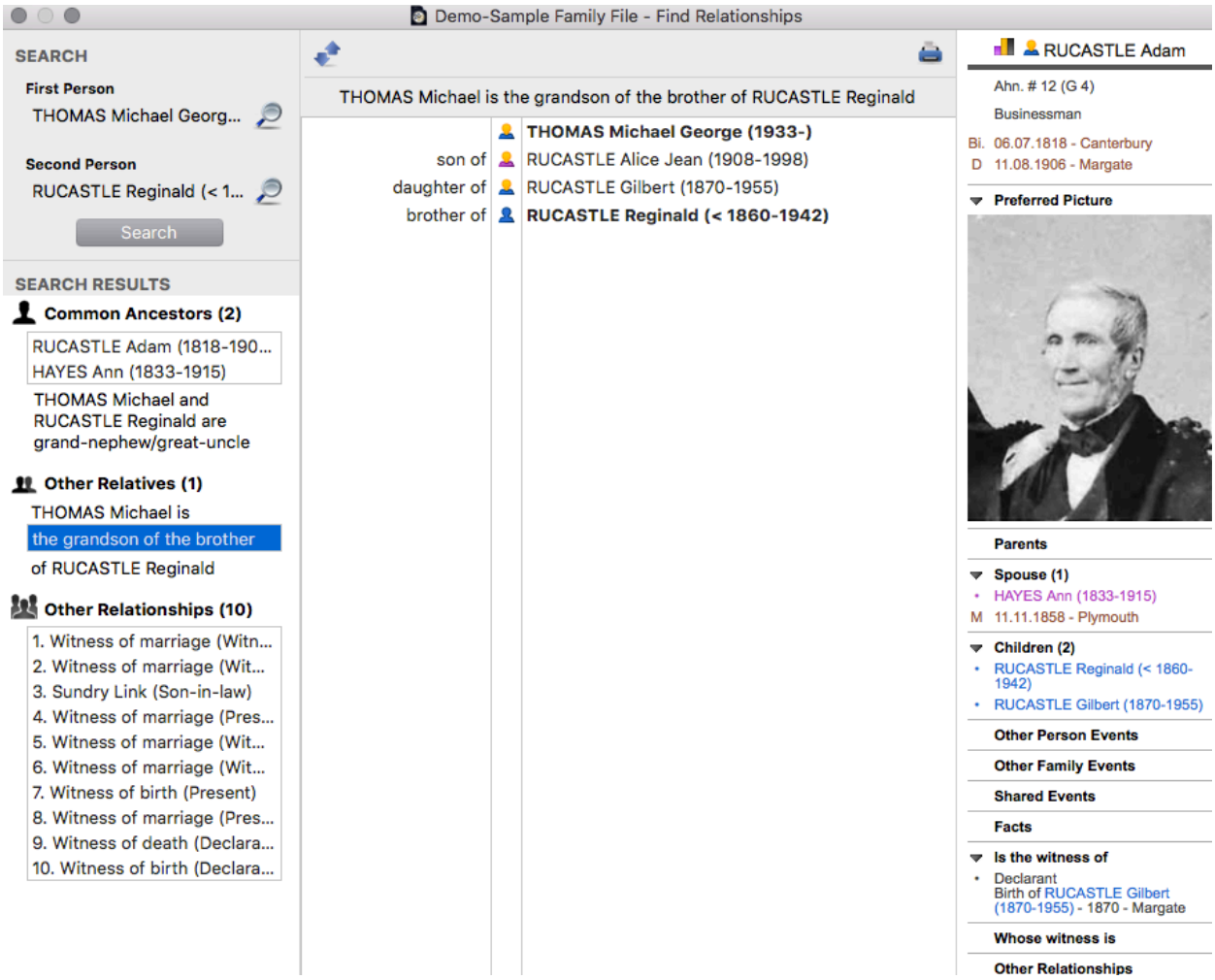
The primary person is proposed by default as the first individual to analyze. You can change it by clicking on the magnifying glass.

Under the title Second Person, then click on the magnifying glass to choose the second person from the matching list or, from Heredis 2021, click on **Root Person** or **Primary Person** button for a faster choice. Finally click **Search** to start searching for relationships.

(Windows) Find Relationships

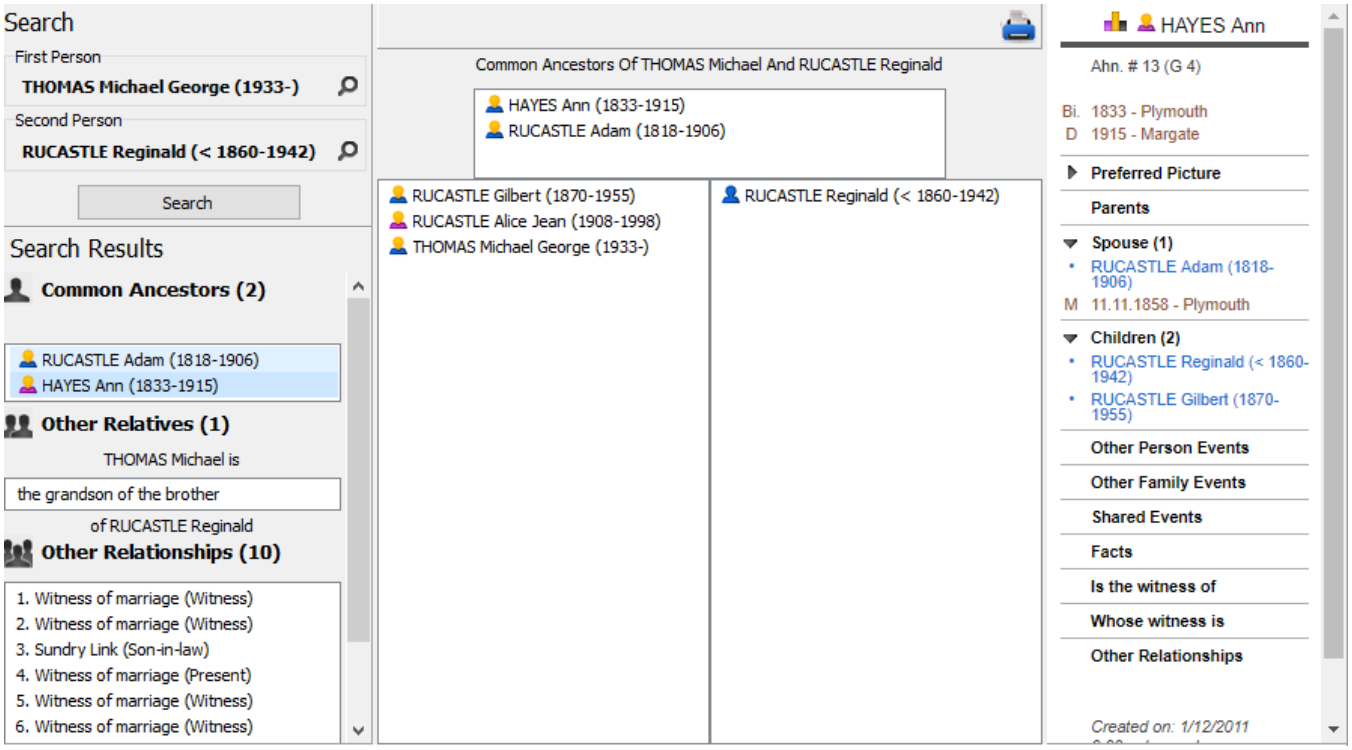


(Mac) Find Relationships



Common ancestors

In the **Search Results** area, Heredis looks for possible common ancestors. By selecting one of the common ancestors found, a table shows you the parallel paths leading each of the two persons to this ancestor.

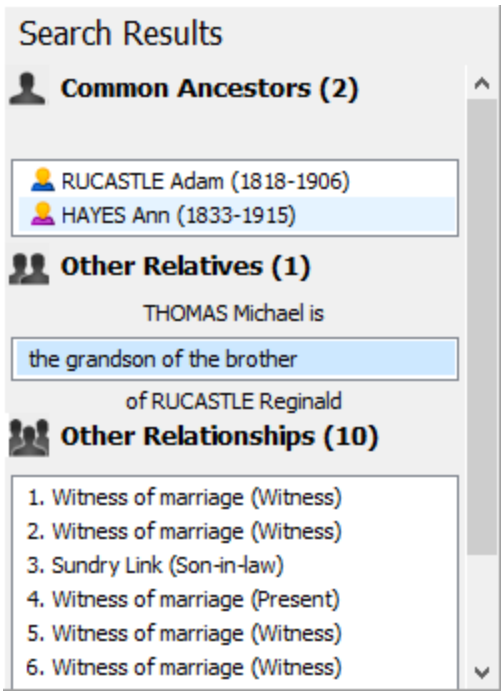


In case of implex due to inbred marriages, several paths can lead a person to the common ancestor. The number of paths is specified at the top of its column. Click on the lines of the different links to see the different parentages that lead to the common ancestor.

Other Relatives

Heredis then searches whether they are related by parentage or marriage: maternal great-great-uncle, brother-in-law of the son-in-law, spouse of the second cousin.

Select the link or unroll the menu to see all the links and select another one. The table shows the parentages and alliances that connect the two persons. Each link is named. To make it easier to understand the link, you can click the button (Change the meaning of the reading).



All links representation tables are printable by pressing .

Other Relationships

Heredis is finally looking for all the non-kinship ties: do they have in their relationship a person who witnessed marriage, declaring death?

Regardless of the type of link, it is represented in the form of a table in which each line names the relationship: son of, mother of, witness of death, etc. This makes it easy to find the thread that connects the two persons.

As for relatives, eventually click the button (Change the meaning of the reading) to better understand the link.

Click on any person mentioned in the links table to view their summary in the right part of the Find Relationships window.

Click the print button to start your word processing software and print out the detail of the selected link as well as the summary of all the links found.

The tools

Indexes: generalities

As you input data, Heredis groups the data by type and creates the corresponding indexes: surnames – given names – occupations – places – sources – media – repositories.

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

Below are the general information for all indexes. Consult the articles Sources Index (see page 459), Media Index (see page 422), Places Index (see page 472), Repositories Index (see page 465) for specifics related to these indexes.

Accessing Indexes

Indexes are permanently available.

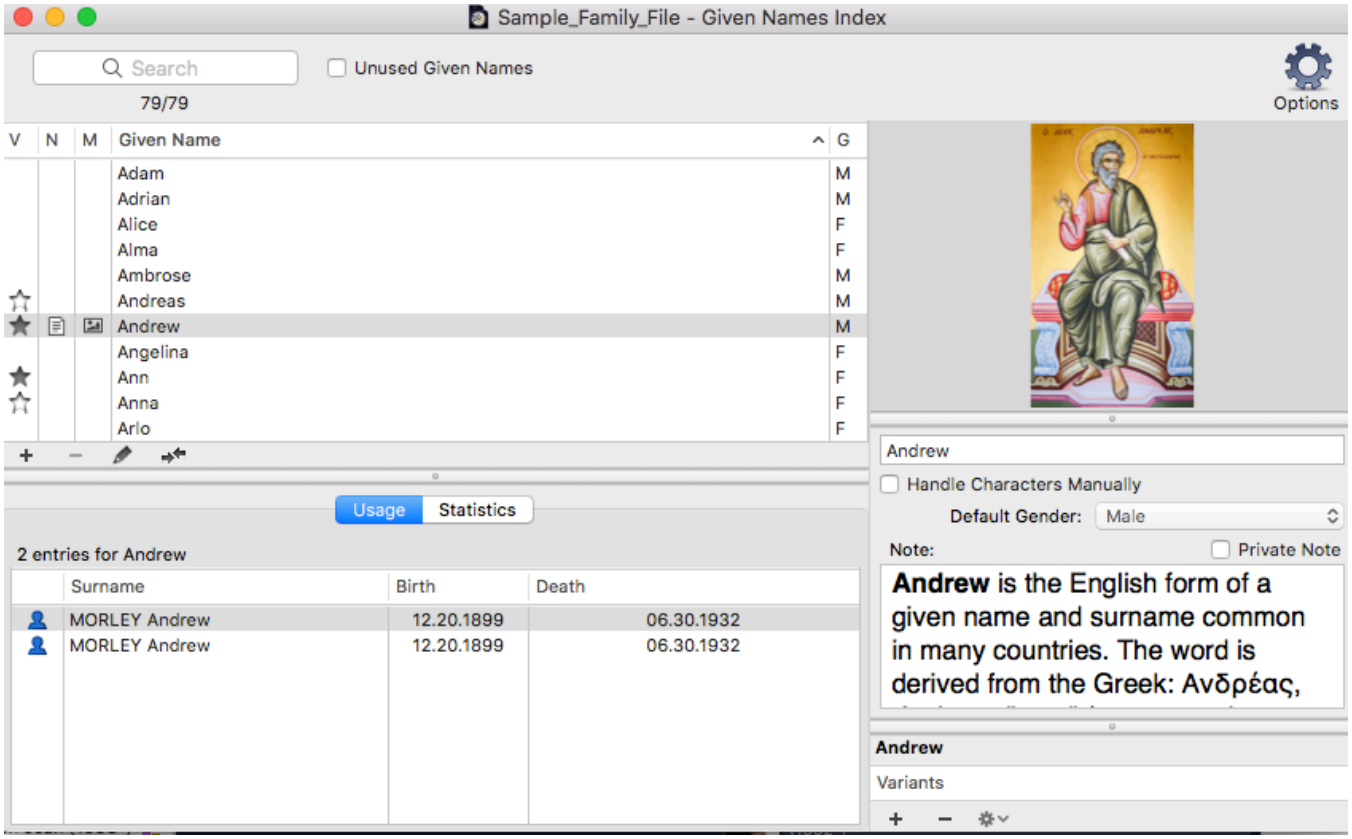
- From the toolbar, click on the **Indexes** button then select the one you want to open.
- From the **Tools** menu then choose the index you want to open.
- Click on the corresponding panel of the **Search panel.** You can access **Places, Sources,** or **Media Index.**

Exploring the Indexes

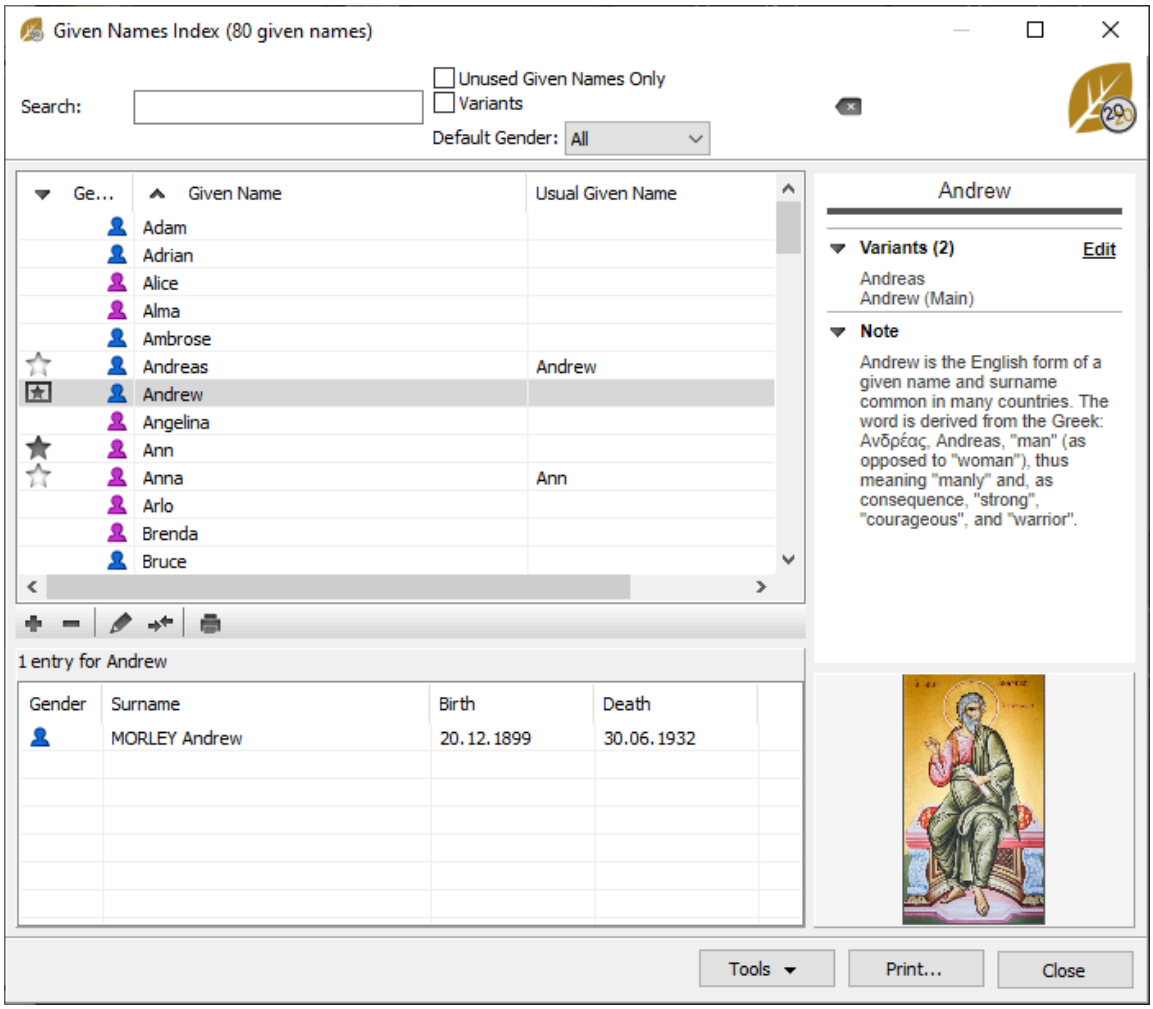
You may use the indexes for finding any data, modify or complete them, and simply navigate throughout your genealogy. Each Index gives you an overview of your data, indicates where they are used and permits you to edit them throughout your genealogy file.

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

(Mac) Given names Index



(Windows) Given names Index



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

Edit by double-clicking or selecting and clicking on the pencil , comment in notes, illustrate your data in the Index for transmitting throughout your genealogy.

Change the spelling of «SHELITO» to «SHILLITO» so that it applies to all holders of this surname. Change the default gender assigned to all new «Lindsey» given names which you may enter. Consult the list of all the «Master builders» and navigate throughout their families. Show photos of the places where your ancestors lived and refine their geolocation. Enter a transcript of an old deed, which you may then consult in each event where the source is assigned. Import folders of photos to the **Media Index** so that you have them to hand for associating by a simple drag and drop.

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

Search and sort

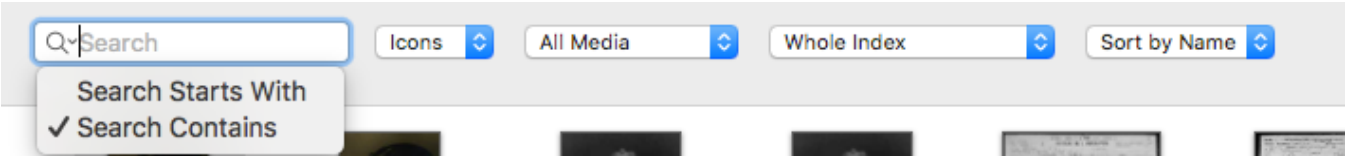
Search for an element in an index

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

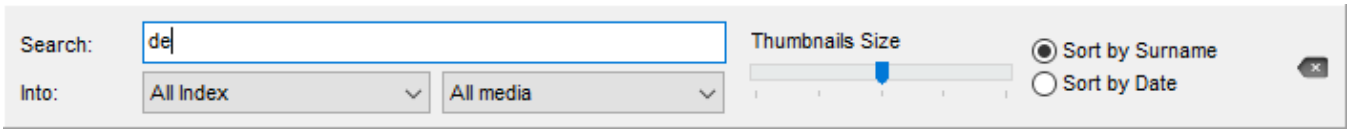
(Mac) Click the **Search** icon to select the Search mode: «Search Contains» the word, or «Search Starts With» the entered letters.

You also have display filters to refine your search. You can display items that are not used in your genealogy by ticking the **Unused…** box and then delete them from (Windows) **Tools** button; (Mac) **Option** Button.

(Mac) Sorting indexes



(Windows) Sorting indexes



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

Only results that match your search criteria are displayed.

The counter (**Mac**) below the search box, (**Windows**) in the title of the index window, indicates the number of results compared with the total number of elements in the Index.

Manage the displayed results

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

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

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

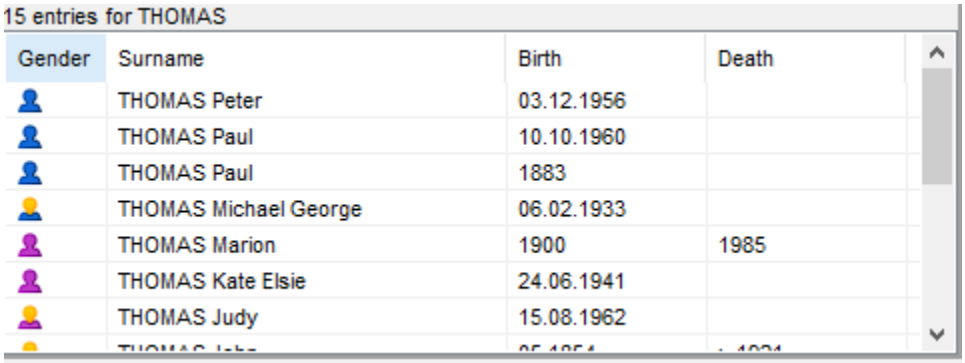
Display all the elements of an index

To see the complete list of all items in an index, make sure you have no active search criteria or filters.
To cancel a search, click the **Delete** icon to the right of the search field.
To cancel the filter, uncheck the options. In the **Media Index** choose **All Media** and **Whole Index in the pop-up menus**.

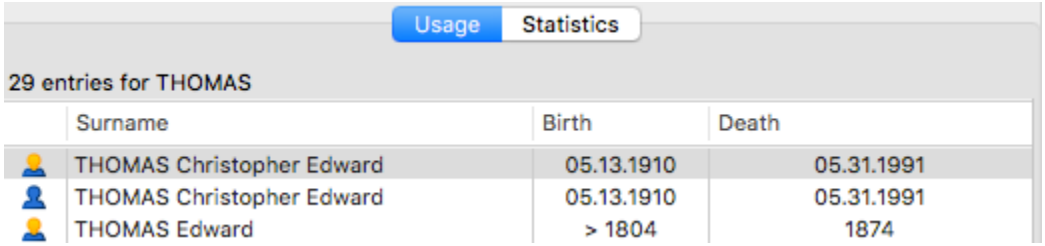
Consulting usage

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

- Open the index you are interested in.
- Select the line corresponding to the item you want to research.
- (**Windows**) In the bottom part, the number of occurrences (Usage) will be displayed either directly or under a tab, depending on the index you are using. In the right end column or at the bottom, depending on the index, you will see the variants, attached media and/or notes



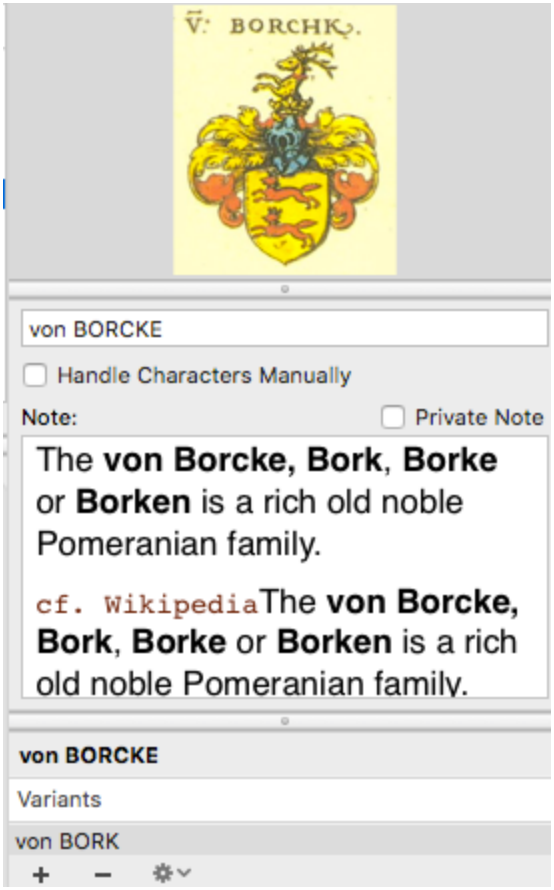
- (**Mac**) Click on the **Usage** tab in the lower part of the window.



- Double-click on the person's name to display the person's data.

- In some indexes, you can view variants, media path, or other information in the right column.

(Mac) Surnames index



(Windows) Surnames index

- All indexes allow you to see where the information is attached. For example: If you want to know who of your family was a doctor, you click on doctor in the occupation index and you will see who had this occupation.

Each item of the index is analyzed so you can improve your knowledge of your genealogy.

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

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

Modifying data throughout the file

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

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

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

Modify upper or lower case

Most data managed in the indexes are automatically formatted when entered. The automatic formatting is defined in

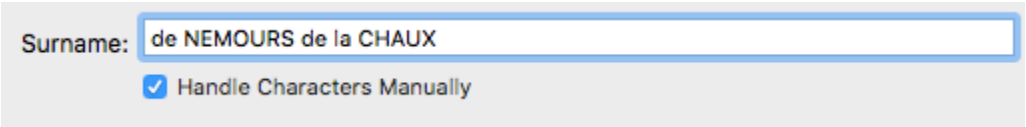
- (Windows) **Tools** menu > **Preferences > Appearance;**
- (Mac) **Heredis** menu **> Preferences**.

You can choose to display the surnames, given names and places in uppercase, or with only the first letter in capitals. However Heredis allows you to change the formatting for a single item and then apply the changes to all uses of this element.

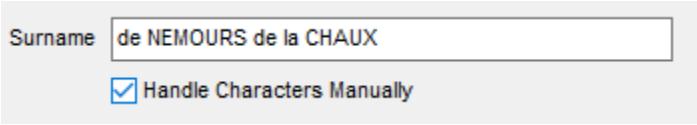
You want to make an exception for a surname, a given name or a place where the spelling is unusual.

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

(Mac) Handle Characters Manually



(Windows) Handle Characters Manually



Replace an element with another

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

1. Open the index and find the item in question to be replaced.

2. Click the **Replace…** on the toolbar of the list.
3. Select the replacement item in the list. Click **Choose** to confirm the replacement.

The element is replaced in the Index, and therefore wherever it has been used in your genealogy. The Index now contains one element less than before.
Info: An element with variants can't be replaced. You first have to unlink the variants.

Manage variants

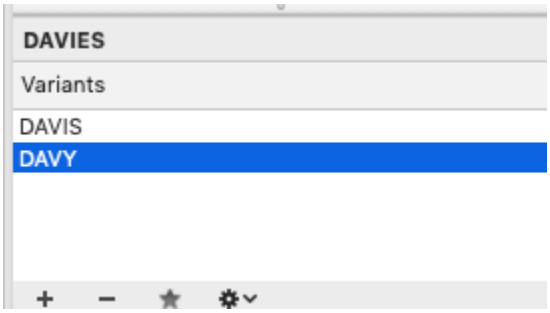
The notion of a variant allows you to assign several elements to an Index entry. You can define variants of Surnames, Given Names, Occupations and Places.
Place names have sometimes changed over the centuries. As part of your genealogical research, you may find a number of variants for the same place. «New Amsterdam» was renamed «New York» in 1665, «Philipstown (Leinster)» became «Daingean» in 1929. Similarly, you may encounter a name spelled differently depending on the date of the certificate found: the «Taylor» family is sometimes noted with the spelling «Taylour» or «Tayler».

Specify the variants

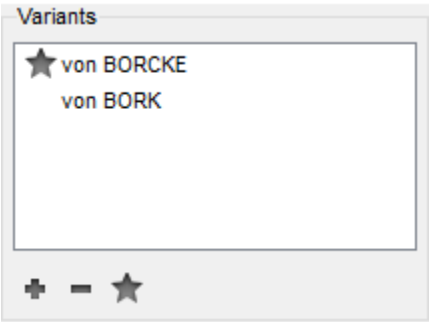
- Open the index in question.
- Select the surname, given name, occupation or place you choose as the standard version.

In the **variants** field at the bottom right of the screen, click the (Link a variant…).

- (**Mac**) click on the button in **Variants** area.



- (**Windows**) click on the link **Edit**, then on button in **Variants** area.



- **(Windows & Mac)** Select the item to be the variant and press the **Choose** button.

You can repeat this as necessary to add several variations to the main element.

Choose the main variant

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

To change the main variant, select the element to be the main element, then click on the ★ button.

Unlink variants

To unlink a variant, select **Variants** in the screen and click the ➖ (Unlink the selected variant) button.
To remove all variants of a group: click the cogwheel icon in the **Variants** field, and choose **Remove this group of variants**.
To remove all variants from your genealogy file, click the **Options** button on the toolbar and choose **Unlink All Variants…**

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

Delete unused data from an Index

You can delete at one go all the elements that are not used in your genealogy file.
As a precaution, review first the list of unused data by ticking the **Unused…** box in the search field.
1. Click the (Windows) **Tools** / (Mac) **Options** button on the toolbar of the Index and select **Remove All Unused…**
2. Confirm the deletion by clicking **OK**.

Media Index

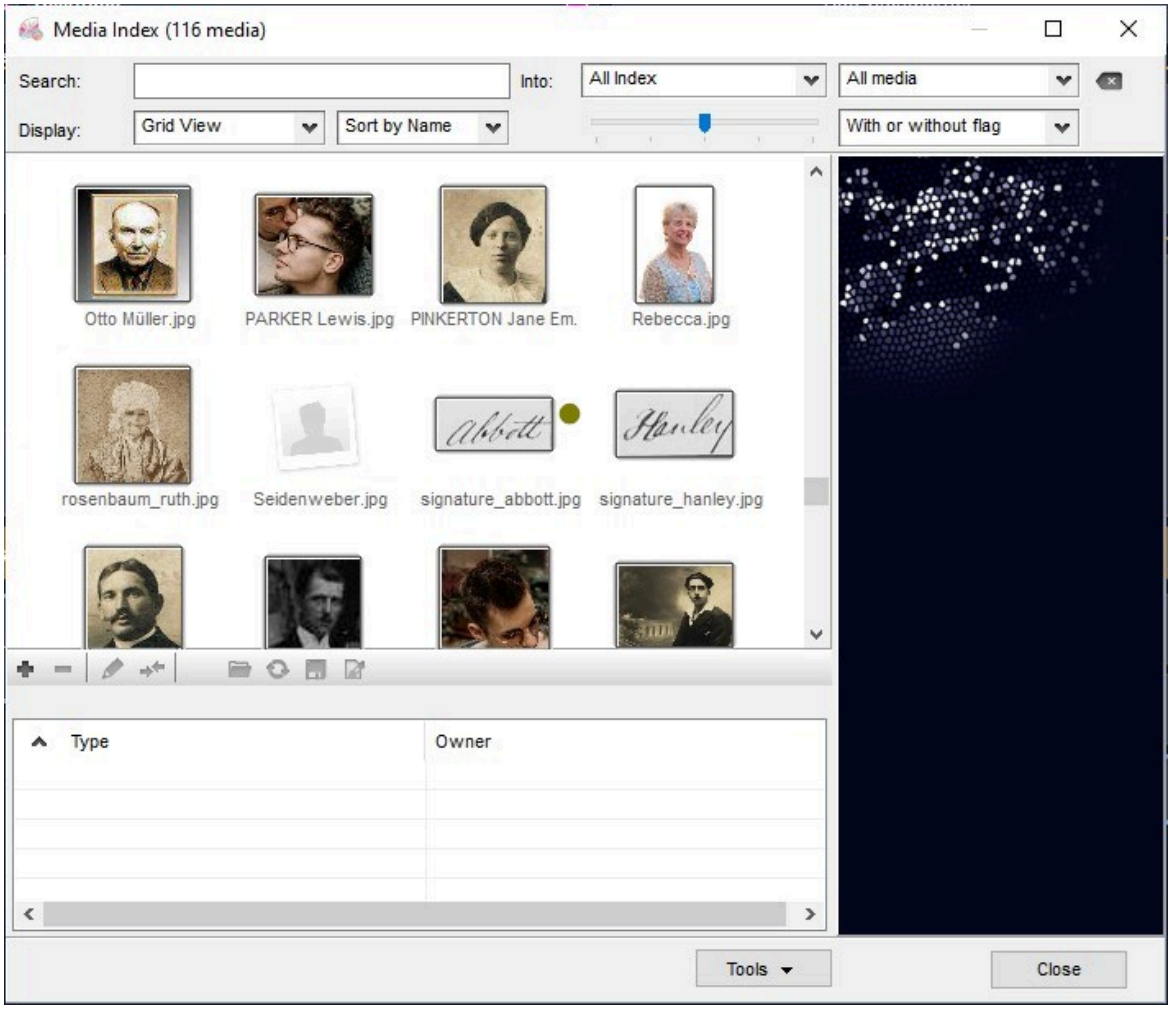
Read also the article Indexes: generalities (see page 412) for tools available on all indexes.

The media index is fed each time you add a media in Heredis. Whether it is a source media, a person, a union, an event, a place, etc.
For more details, please consult the Media (see page 198) article.

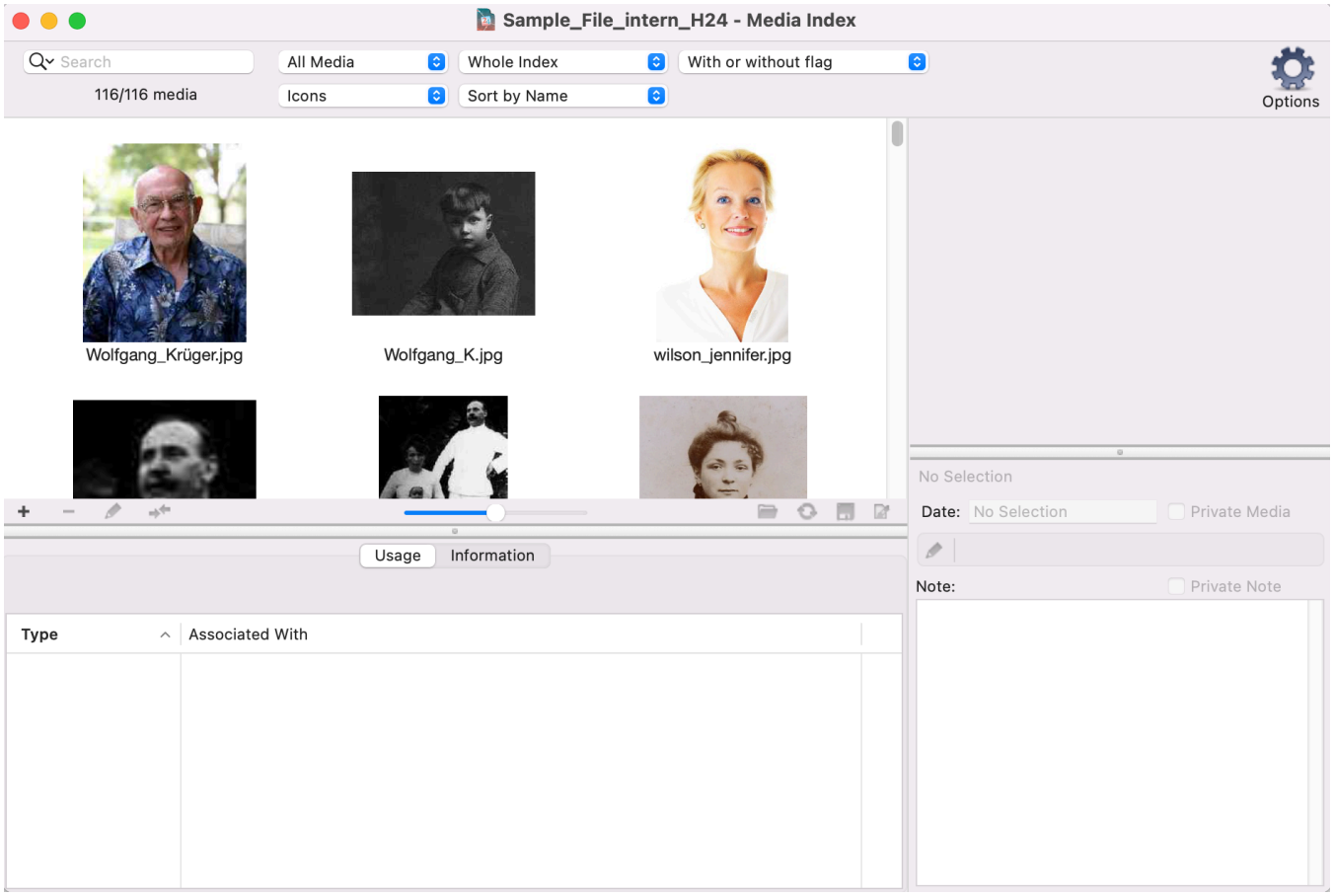
Open the **Media Index**

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

(Windows) Media Index



(Mac) Media Index



Searching

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.

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

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

- The search can be limited to a single type of media by selecting it from the drop-down menu: **All media, 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 other drop-down menu: **All/Whole index**, **Persons, Families, Sources, Events, Surnames, Given Names, Places, Unused Media,** etc.

To better identify the selected media:

- Choose to display a list or icons according to the name of the media or to the date you have entered.
- Sort the media by name or date. You can also enlarge the icons using the zoom cursor.

Info • If you choose to display a list instead of icons, 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.

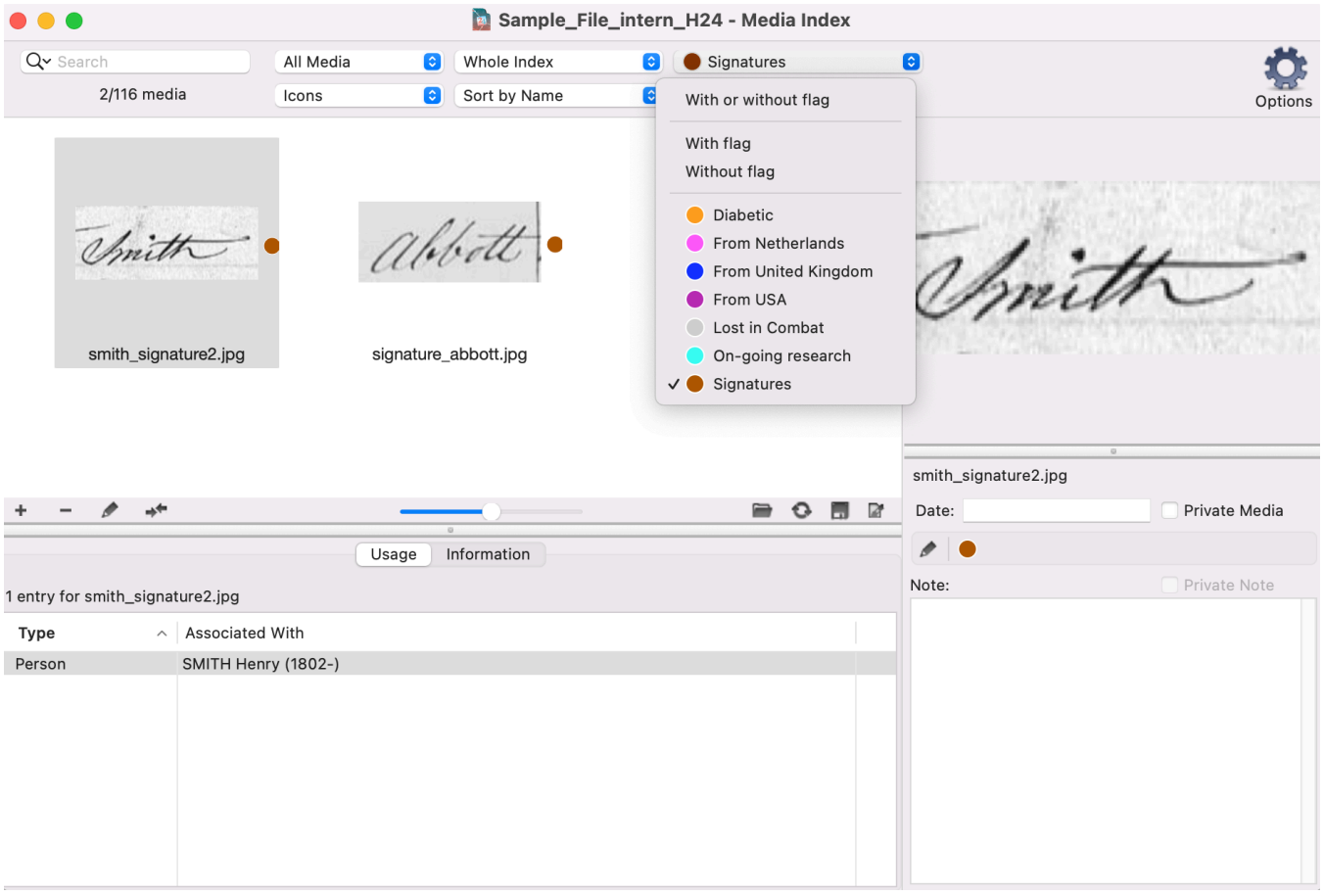
If a media is selected on the list, you can consult the data it is related to by clicking the **Usage** tab. Double-click the data you are interested in and it will be displayed in a new window.

Starting with Heredis 2025, it has been possible to add flags to media. See the Media (see page 198) article for more details.

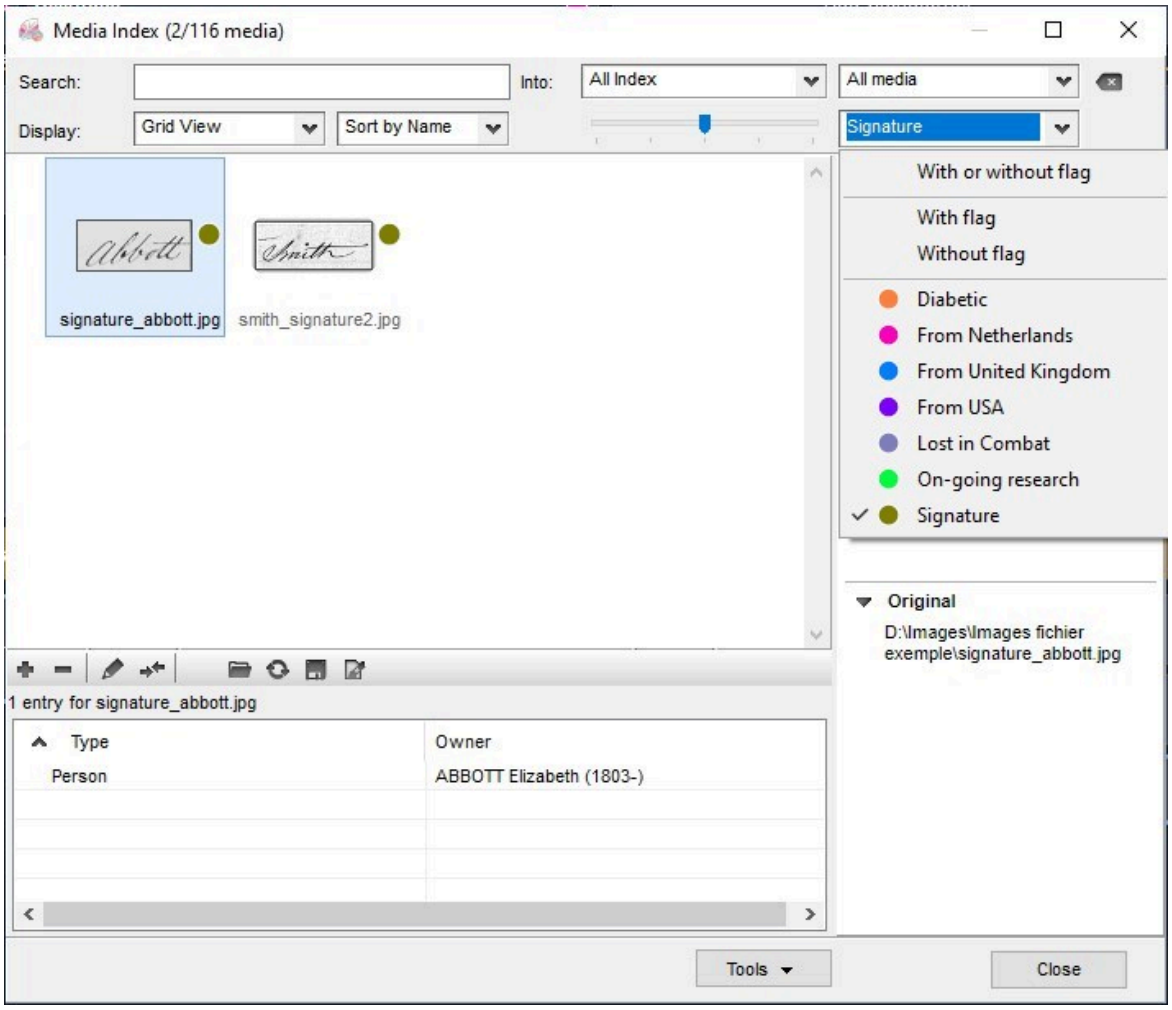
You can filter with or without flags (to get all media), with or without flags, or choose from your list of flags.

For example, if you're looking for all signatures and you've added a Signature flag to your media, choose to filter by.

Mac Flags filter



Windows Flags filter



The button bar

Below the media list or thumbnails, you'll find a button bar.

adds a media.
deletes the selected media.
lets you edit the selected media. You can date it, add a note, do some simple retouching or even identify individuals in the photo. See the Photo Tool (see page 540) article for full details.

The **Replace with** button lets you replace one media item with another from the media dictionary. If, for example, you have duplicates, this function replaces the uses of the duplicate with the other media.
The **Replace with computer media** button lets you tell Heredis that media A is to be replaced by media B. This is very useful if you have renamed your media outside Heredis.
The **Update from original** button is useful for updating the selected media if, for example, you have made changes in a photo editing program.
The **Save as** button lets you save a copy of the media on your computer. It will be of the

same quality as the one in the dictionary.
Finally, the **Rename media** button lets you change the name. Full details in the Rename media (see page 433) article.

Tools (Windows) or Options (Mac)

The **Tools** button on Windows and **Options** on Mac lets you perform a number of actions. Just click on them.

Export media

Click on **Export selected media** to create a Media folder in the name of your family tree, containing all the media in the dictionary.

Delete unused media

Click on (Windows) **Tools** / (Mac) **Options**.
Choose **Remove unused media**. All unused media will be deleted at once.
A message alerts you to the number to be deleted. This deletes the media from the genealogy and therefore from the dictionary, but does not delete the original stored on your computer.

Check media

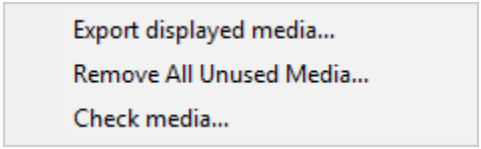
Sometimes, your media in Heredis may be pixelated or even missing (icon with a cross).
There are several reasons for this:

- Heredis no longer accesses the original because it has been moved or renamed or stored in a Cloud.
- Heredis can no longer access the copy of the Heredis file in the media folder.
- You have imported a GEDCOM file and a GEDCOM 5.5.1 never contains the media. For more information on GEDCOMs, see the article What is a GEDCOM? (see page 765)

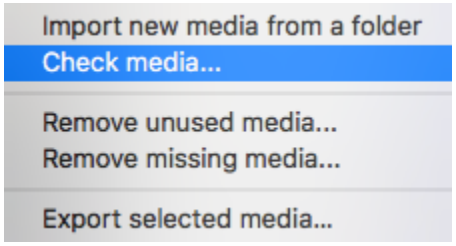
Media verification allows you to reintegrate media in just a few clicks.
For more details on how media works, see the article Media (see page 198).

Open the **Media Index** .
1. Click on the (Windows) **Tools** / (Mac) **Options** (cogwheel) button in the index toolbar.
2. Select **Check media…**

Windows Check Media



Mac Check Media



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

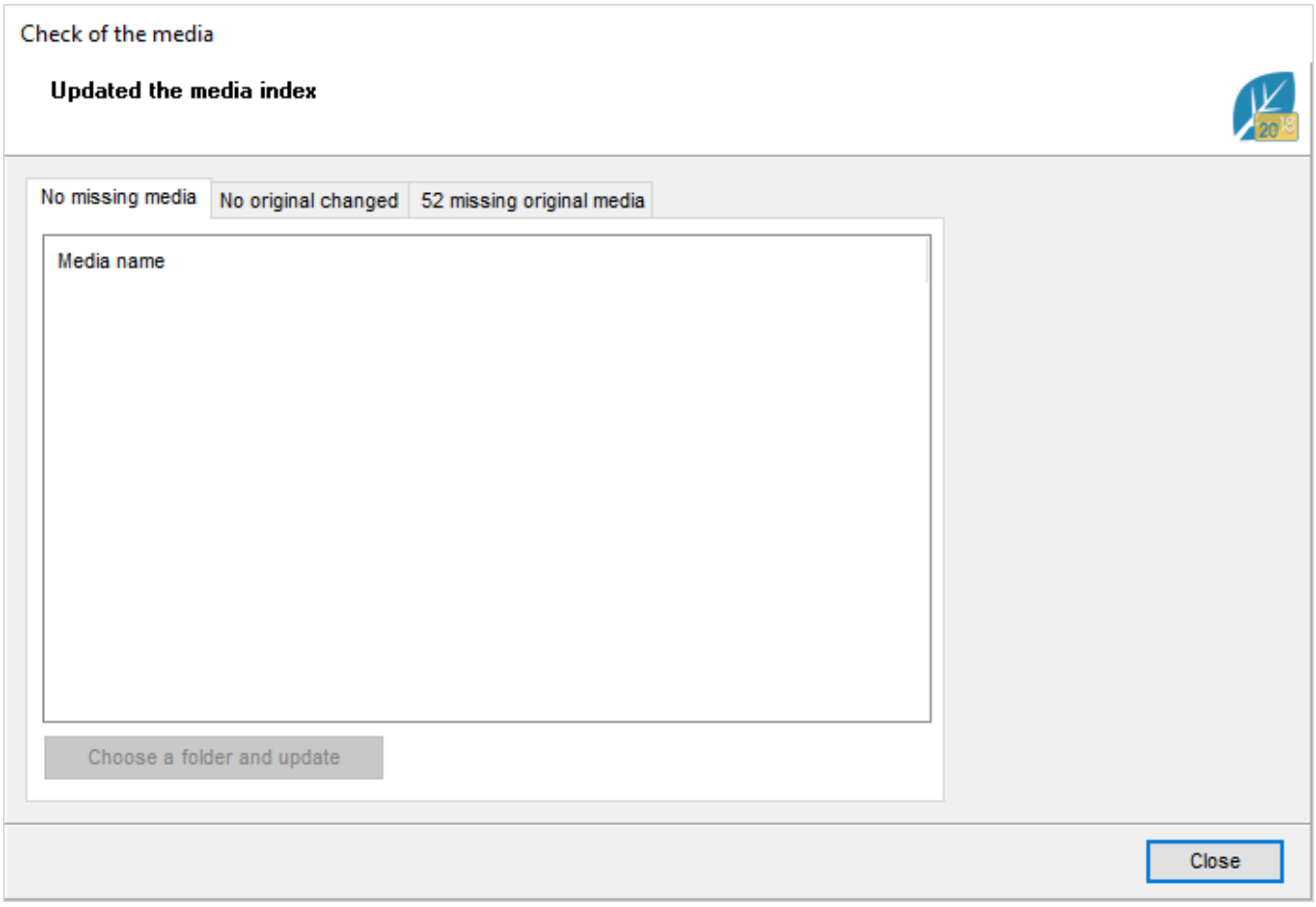
- media not found following deletion from the Media folder managed by Heredis
- media of which the original has been modified by third party software other than Heredis
- and finally, media for which the original has changed location and is no longer present on your computer.

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

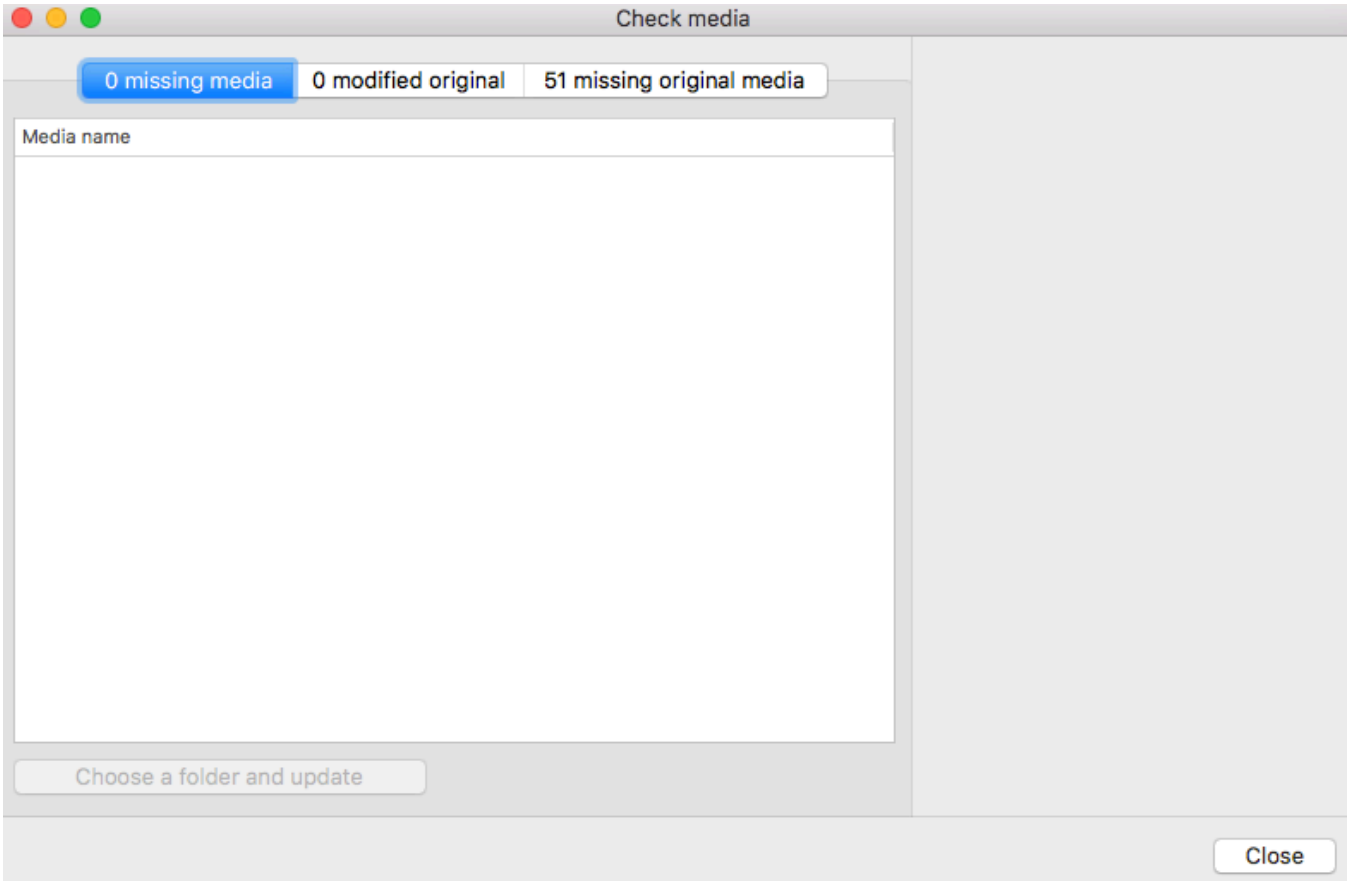
- in the **Missing Media** tab, designate a folder to search and update these media. Click on **Choose folder and update**. Indicate the location of the media on your computer. Heredis automatically reintegrates them if their name has not changed and if they are not media cut with the Photo Tool (see page 540).
- in the **Original changed** tab, select all or part of the media managed by Heredis to update them from the originals. Click on **Update the selection**.
- in the **Missing Original Media** tab, specify the folder where your original is located. Click on **Choose a folder**.

Note: If your media are stored in multiple folders, you will have to do as many times the manipulation to indicate which folder you have folders.

(Windows) Media check window



(Mac) *Media check window*



If your originals have changed their names, Heredis will not be able to reinstate them automatically. Indeed, the software cannot know that the name of a media have been changed. In this case, see the paragraph below.

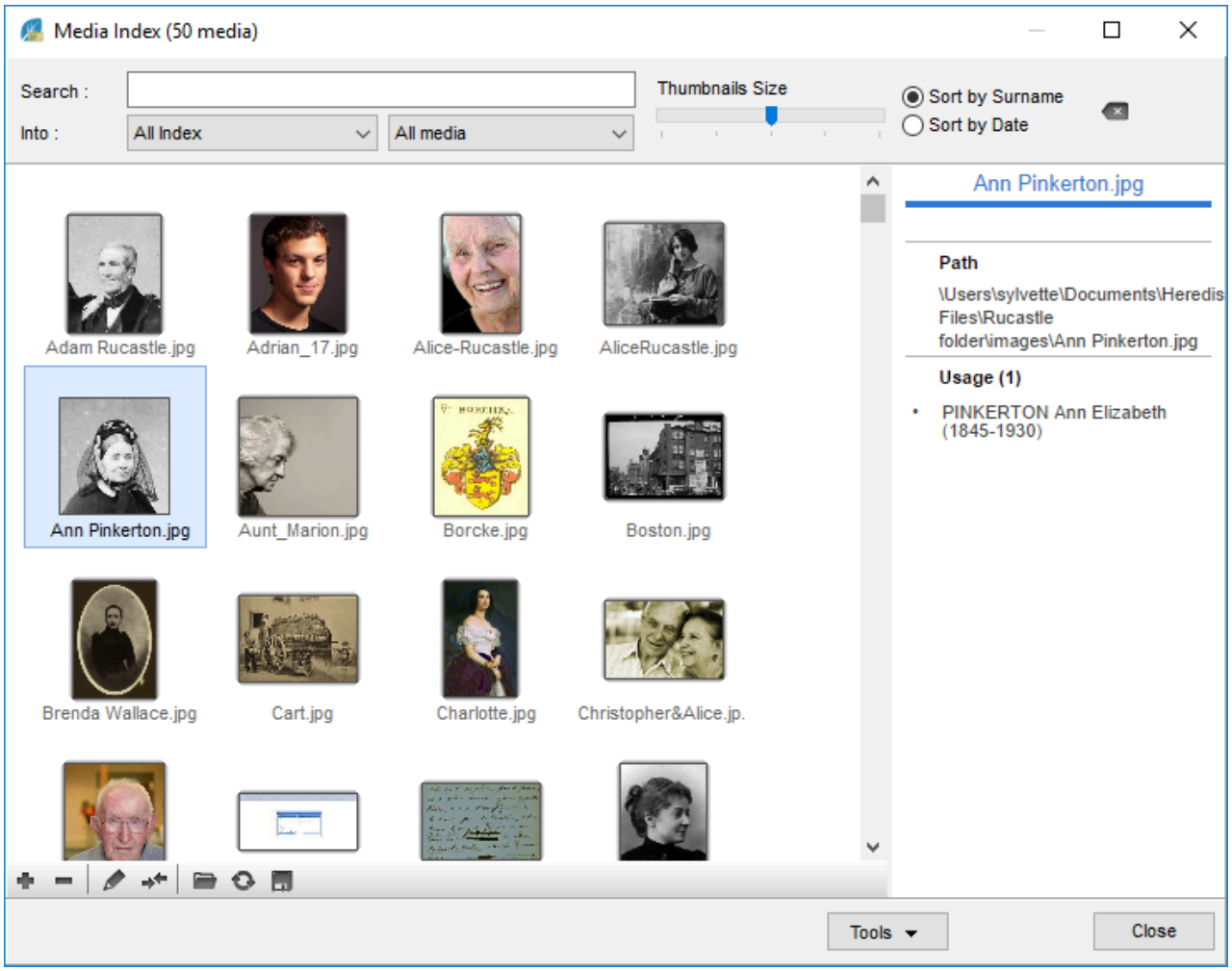
Replacing or deleting media

Replace media with other media

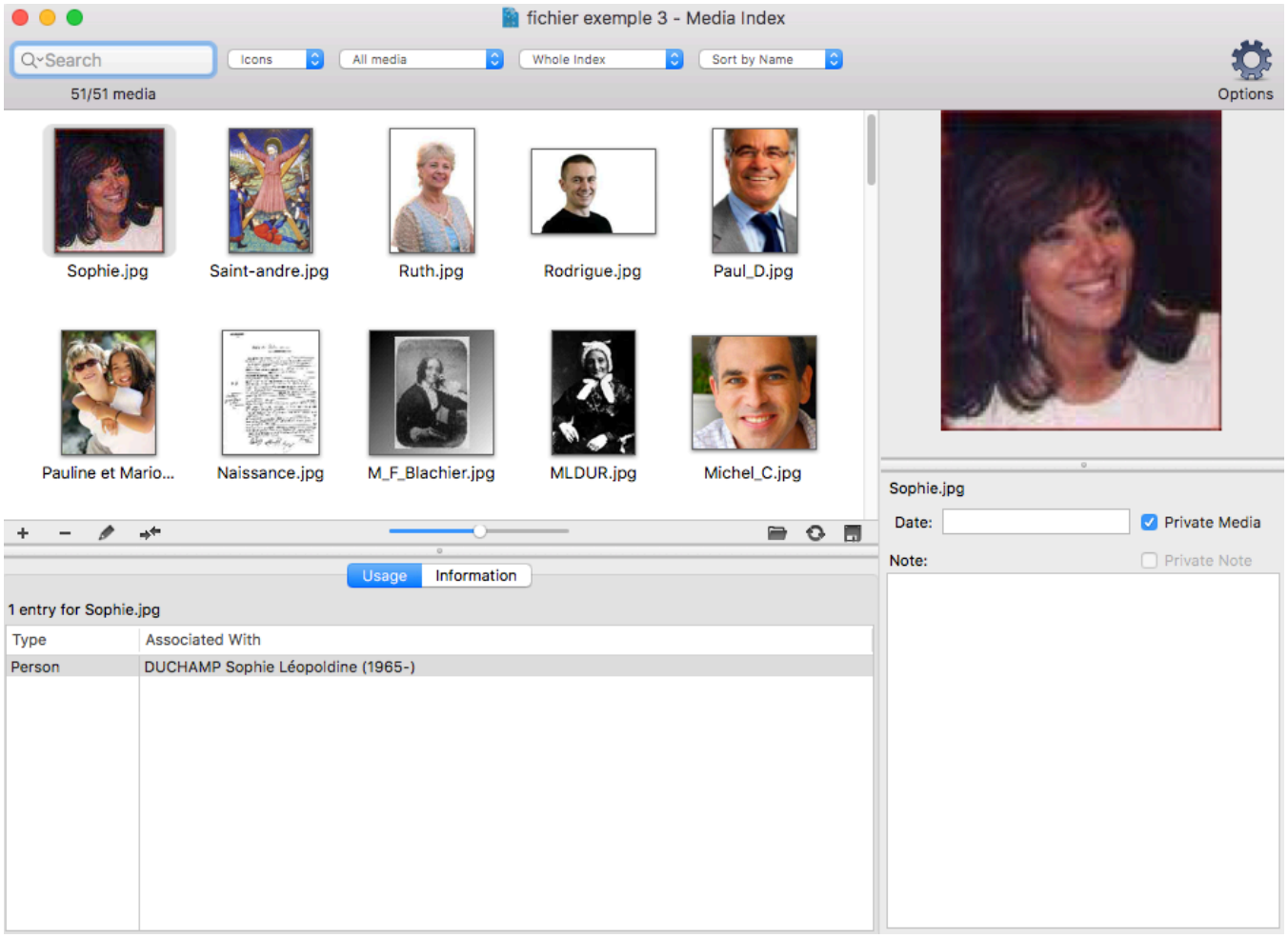
You may have assigned two different media but they were the same (an image of a source saved with two different names, the same image on the selected hard drive and in iPhoto …). You may only keep one assigned media but use it several times.

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

Media Index for Windows



Media Index for Mac



2. Click **Replace with another Media from…** or on the button bar of the display field and choose the duplicate image in the index or the replacement image in its folder on your hard drive.

3. Select the media to be kept and click the **Choose** button.
The initial media has been replaced by the second for all its uses.

Delete media

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

- Select the media to remove
- Click the (Remove the selected media) button on the toolbar for media management.
- **(Mac)** Right-click the media and choose **Remove…**
- Confirm the deletion of the media with **OK**.

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

Change Private field to

If any of the media in your index are marked **Private**, or if you wish to make them private, click on (Windows) **Tools** / (Mac) **Options > Change Private field to >** choose between **Private** and **Not Private**.

You can do this on a media-by-media basis. If you wish to modify in bulk, select the media to be modified before clicking on the (Windows) **Tools** / (Mac) **Options > Change Private field to >** choose between **Private** and **Not Private** button.

(Mac) import new media from a folder

Click on the **Options** button > **Import new media from a folder**.
Select the location of the folder to be imported.
Confirm.
The media in the selected folder will be added to the dictionary, ready for use in your genealogy.

Select multiple media

You can select multiple media from the media dictionary.

On Windows, press the CTRL key on your keyboard and click on each media item to be selected.
To select a whole list of successive media, press the SHIFT key on your keyboard and click on the start and end media of the list to be selected.

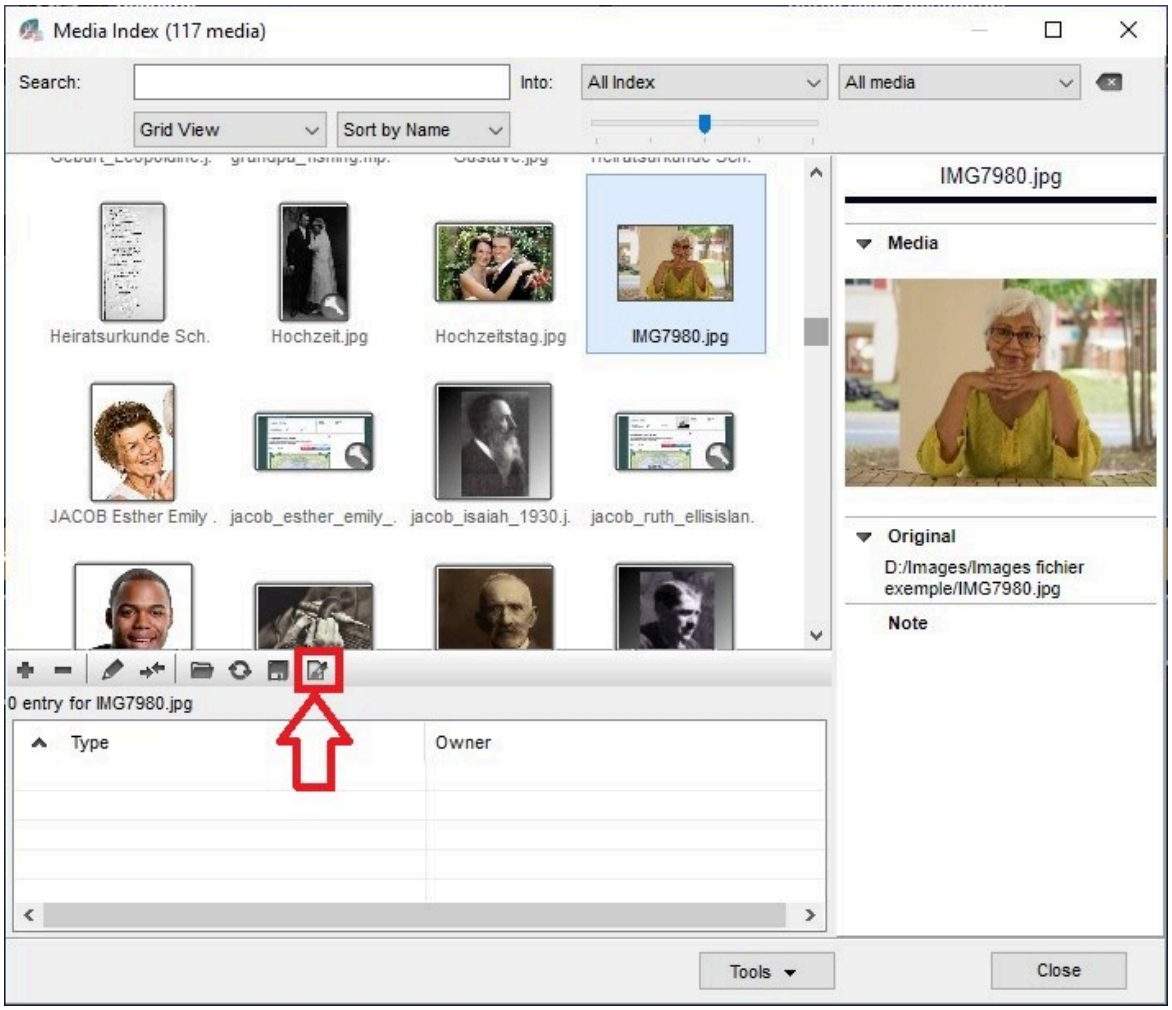
On Macs, press the Cmd key on your keyboard and click on each media item to be selected.
To select a whole list of successive media, press the SHIFT key on your keyboard and click on the start and end media of the list to be selected.

Rename media

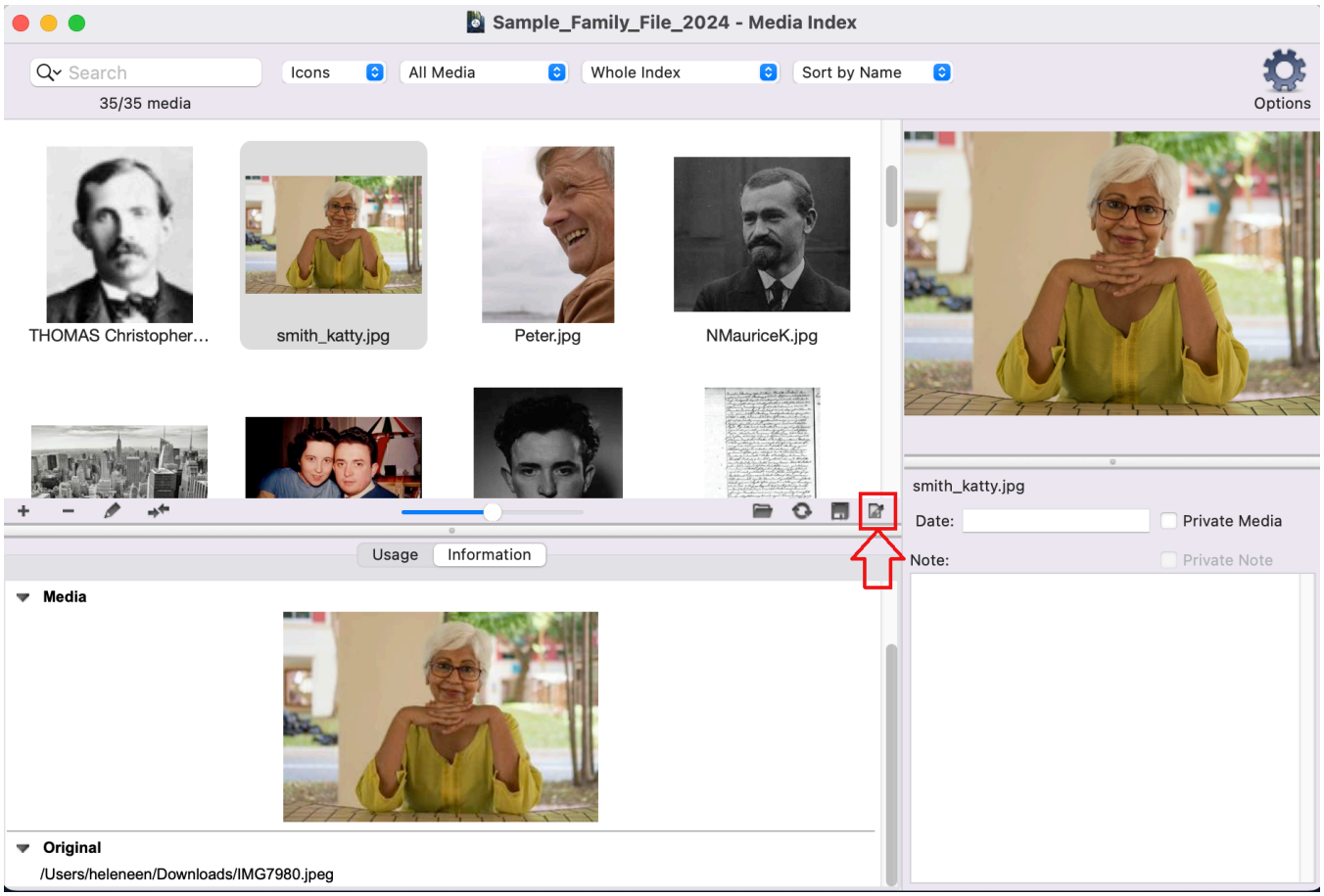
You now can rename your genealogy media directly from your software.

- Launch the **Media Index**.
- Select the media you wish to rename.
- Click on the button located in the index toolbar.

Windows Media Index

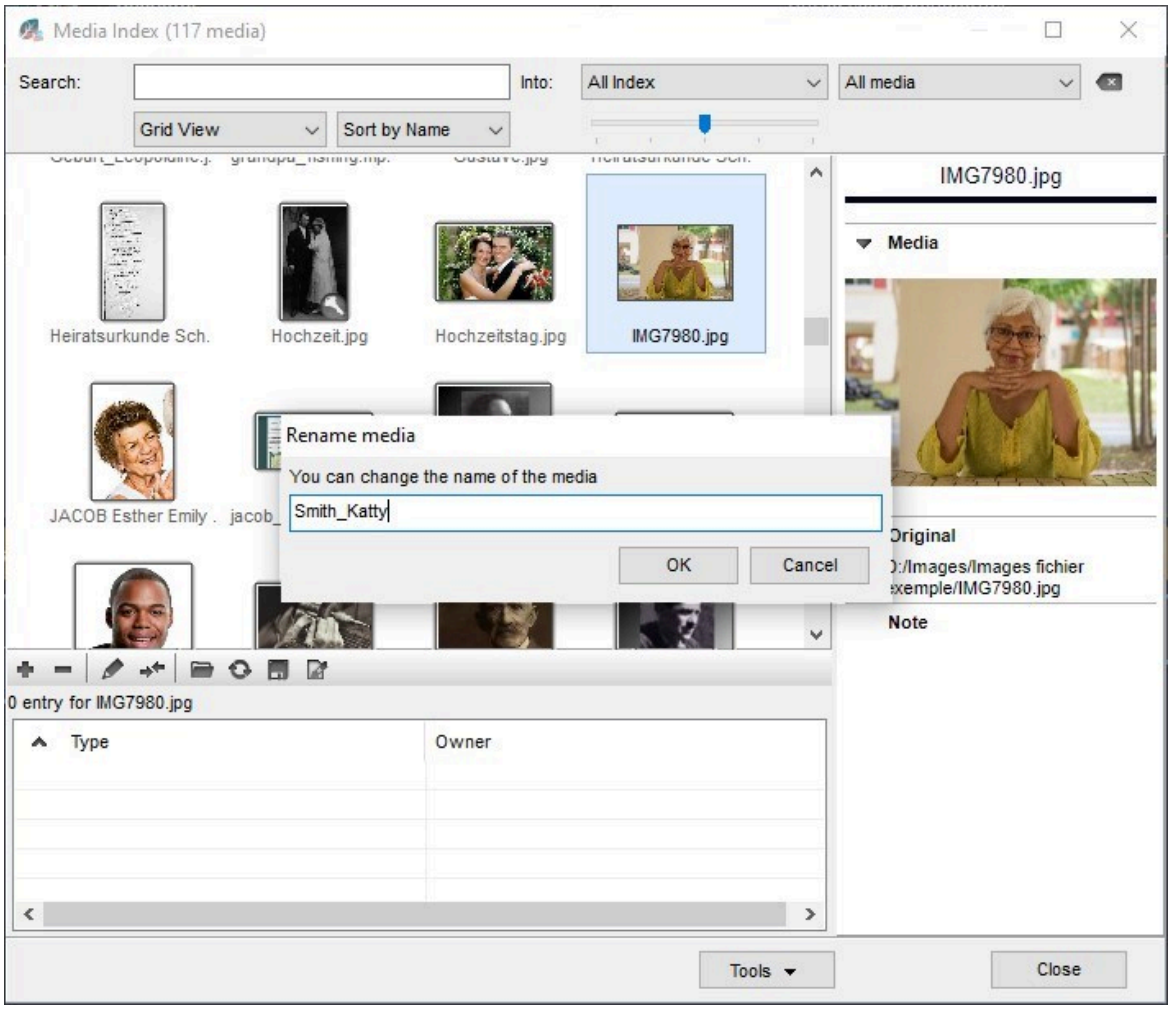


Mac Media Index

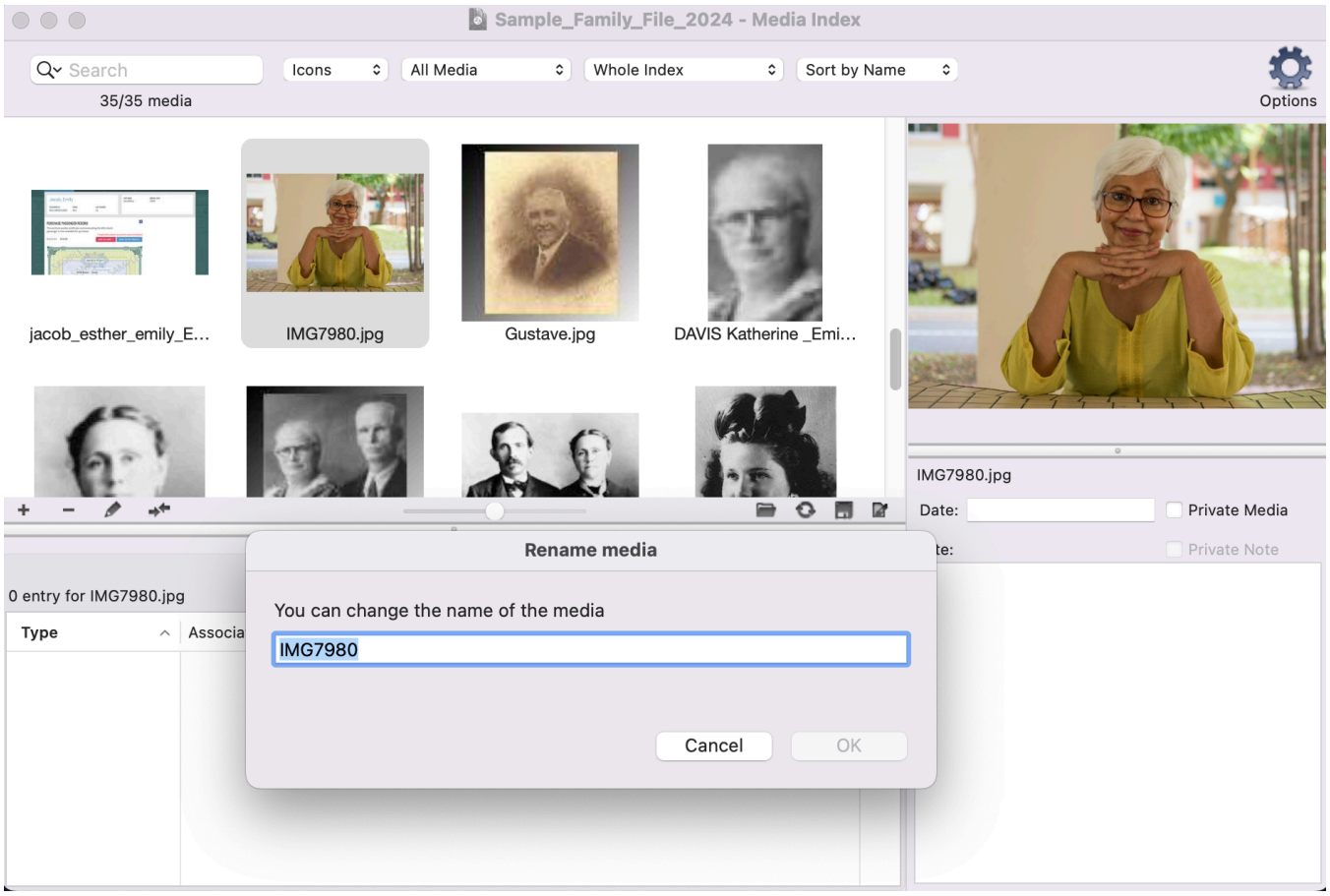


- Rename your media. Avoid using special characters, such as punctuation, symbols or accents, when naming your media.

Windows – Rename media



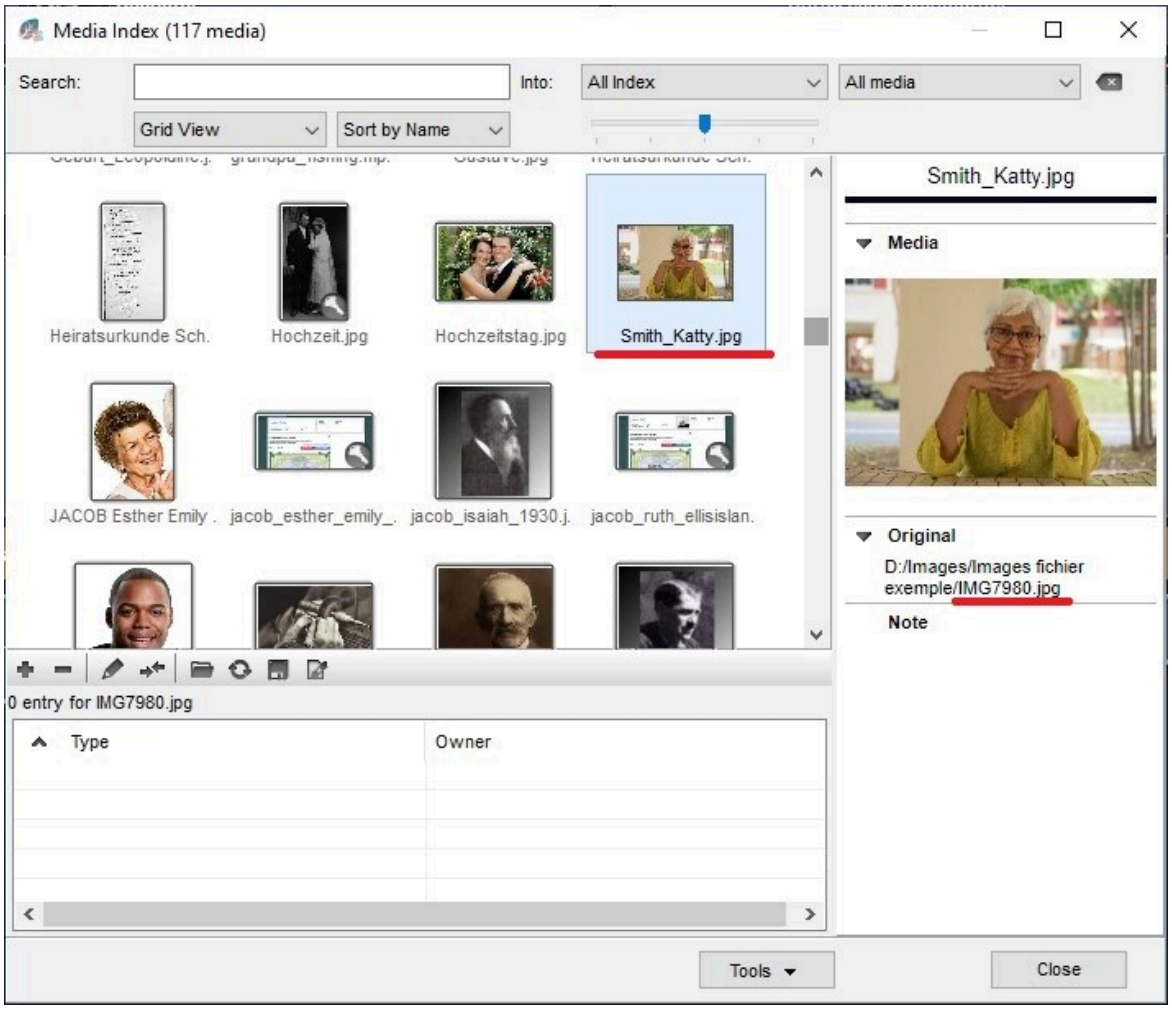
Mac – Rename media



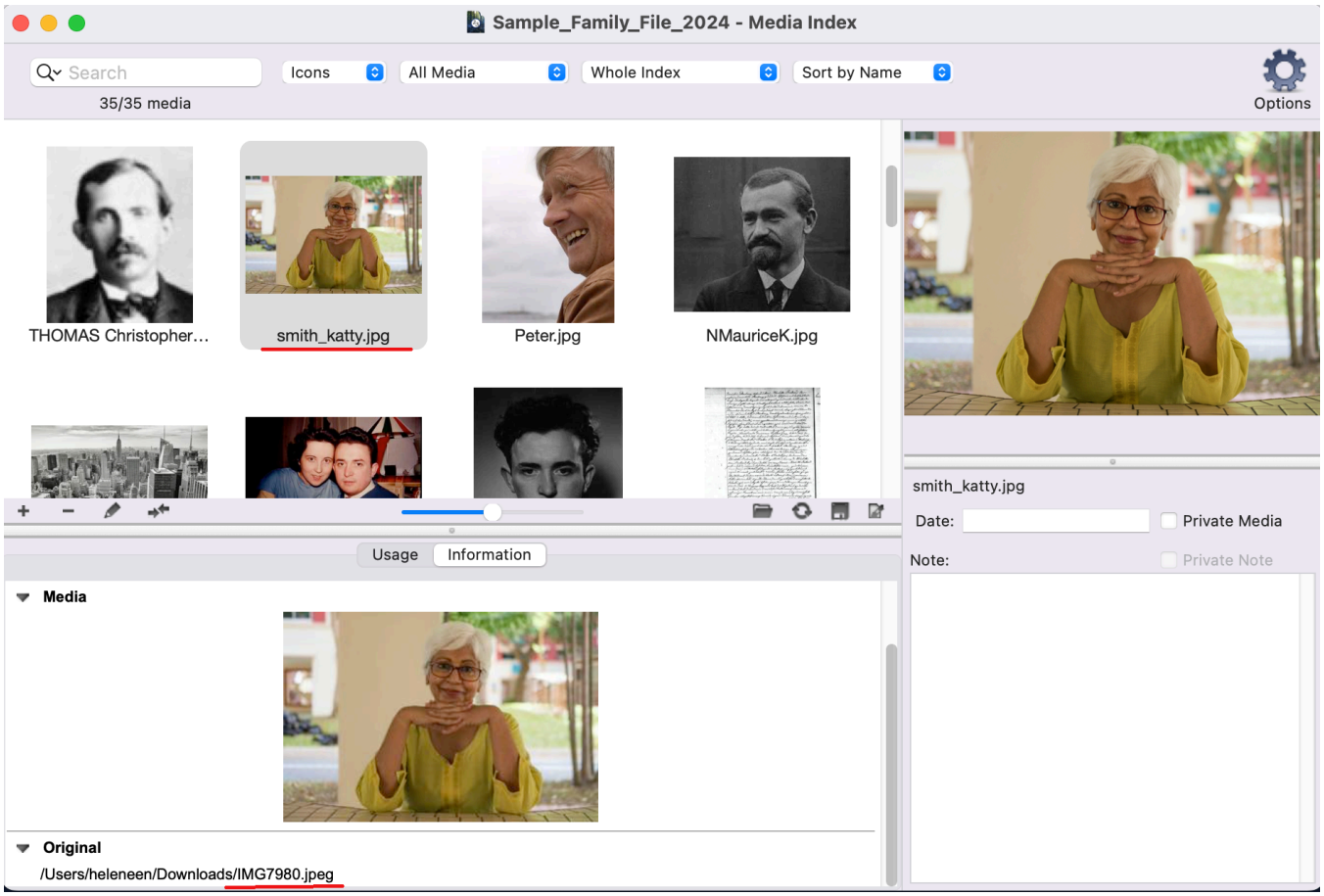
- Click **OK** to validate or **Cancel** to go back to the original name.

Only the media in Heredis will be renamed while the name of your original media on your computer's hard drive remains unchanged.

Windows – Media name

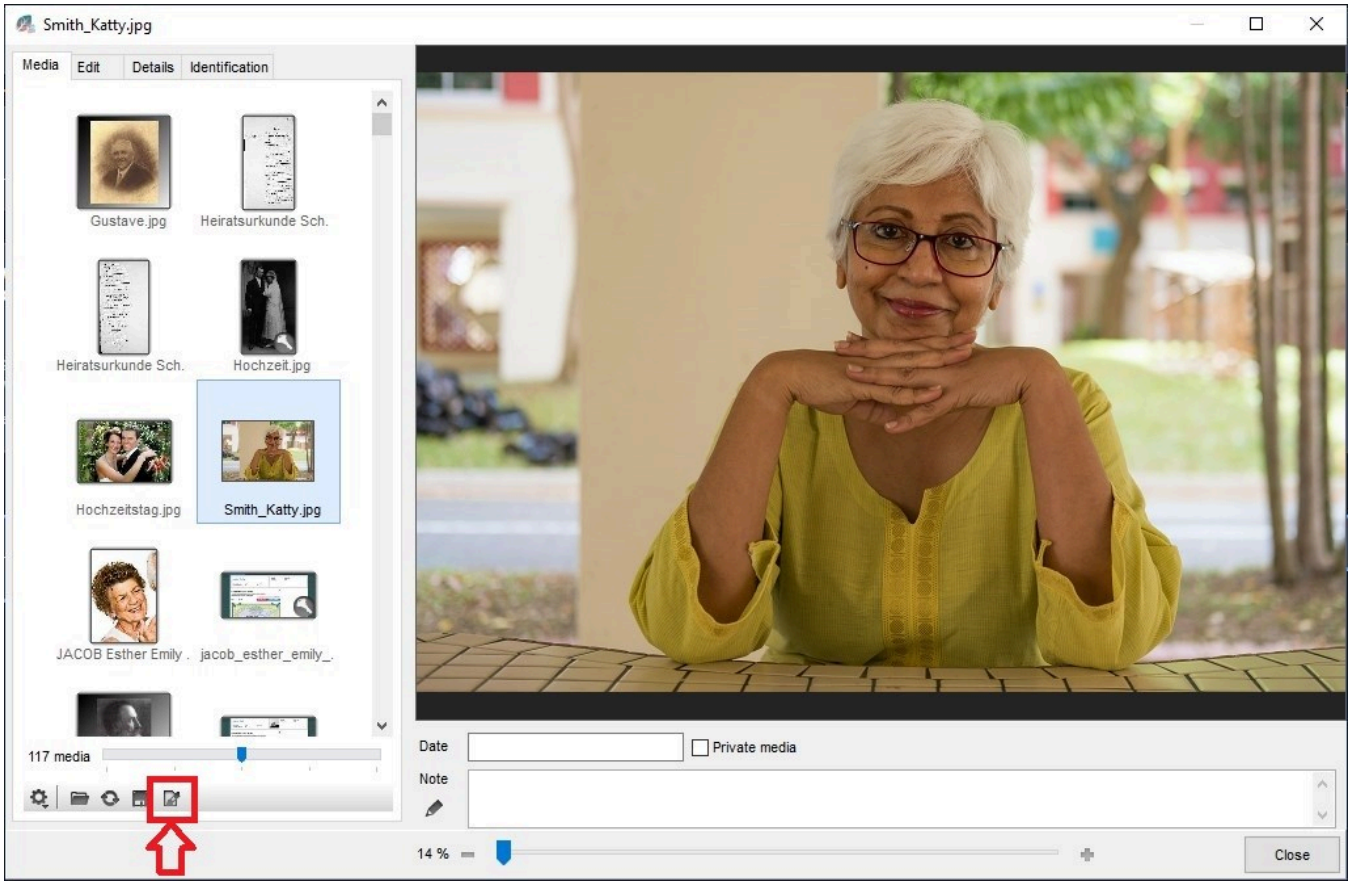


Mac – Media name

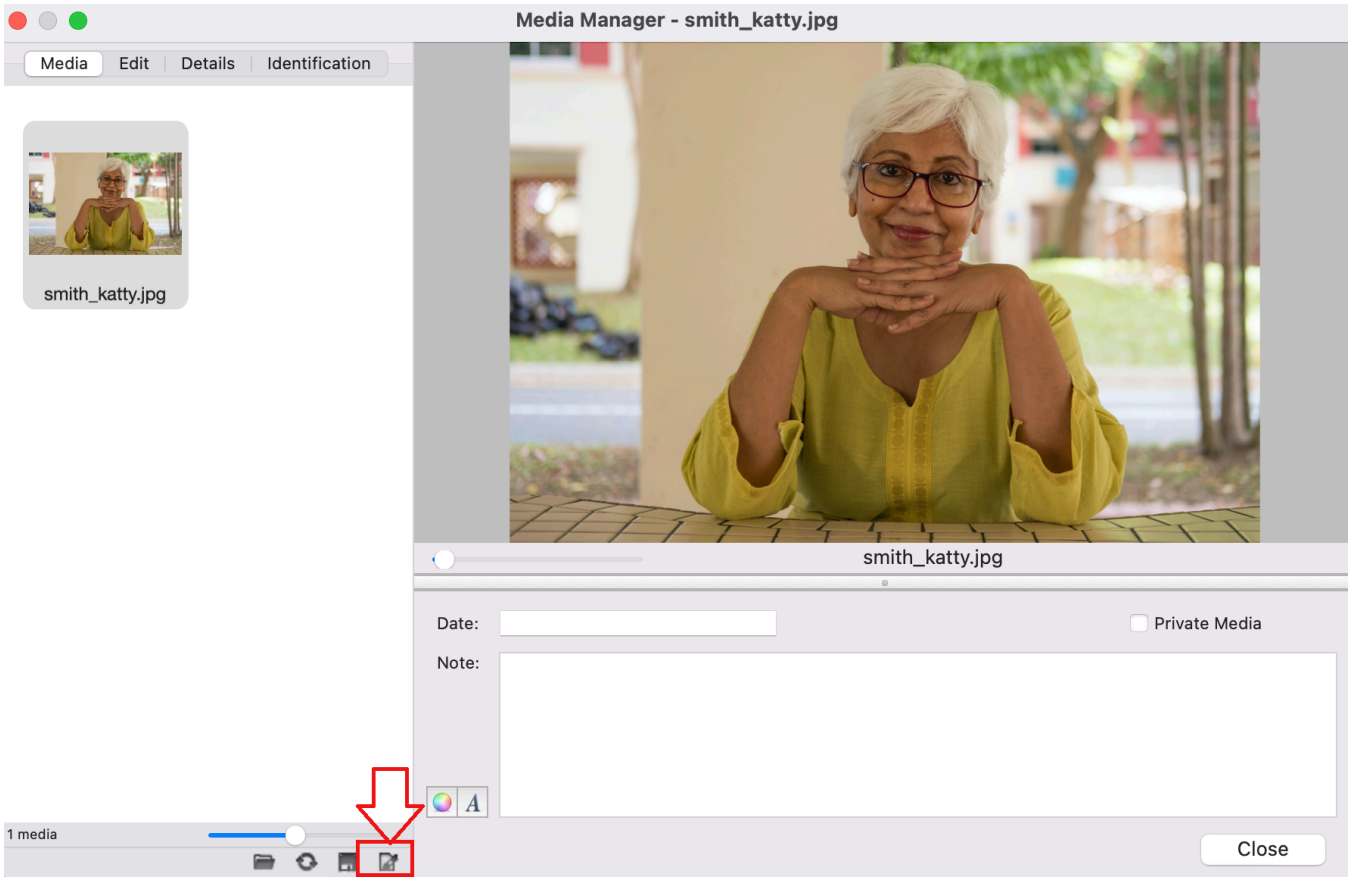


You can also open the **Photo tool** by simply double-click on the photo itself from the Media panel or source, event area etc.
Click on the same button and proceed as previously indicated to rename your media.

Windows – Rename media without opening the Media Index



Mac – Rename media without opening the Media Index



Consult our Media (see page 198) article to learn more about media management.

Flags index

Starting with Heredis 2025, custom flags can now be generated.

Please also see the Personalized Flags (see page 188) article.

Just like any other Heredis indexes, the **Flags Index** lets you manage modifications to be made for every use of a specific piece of data.

Open the **Flags Index**:

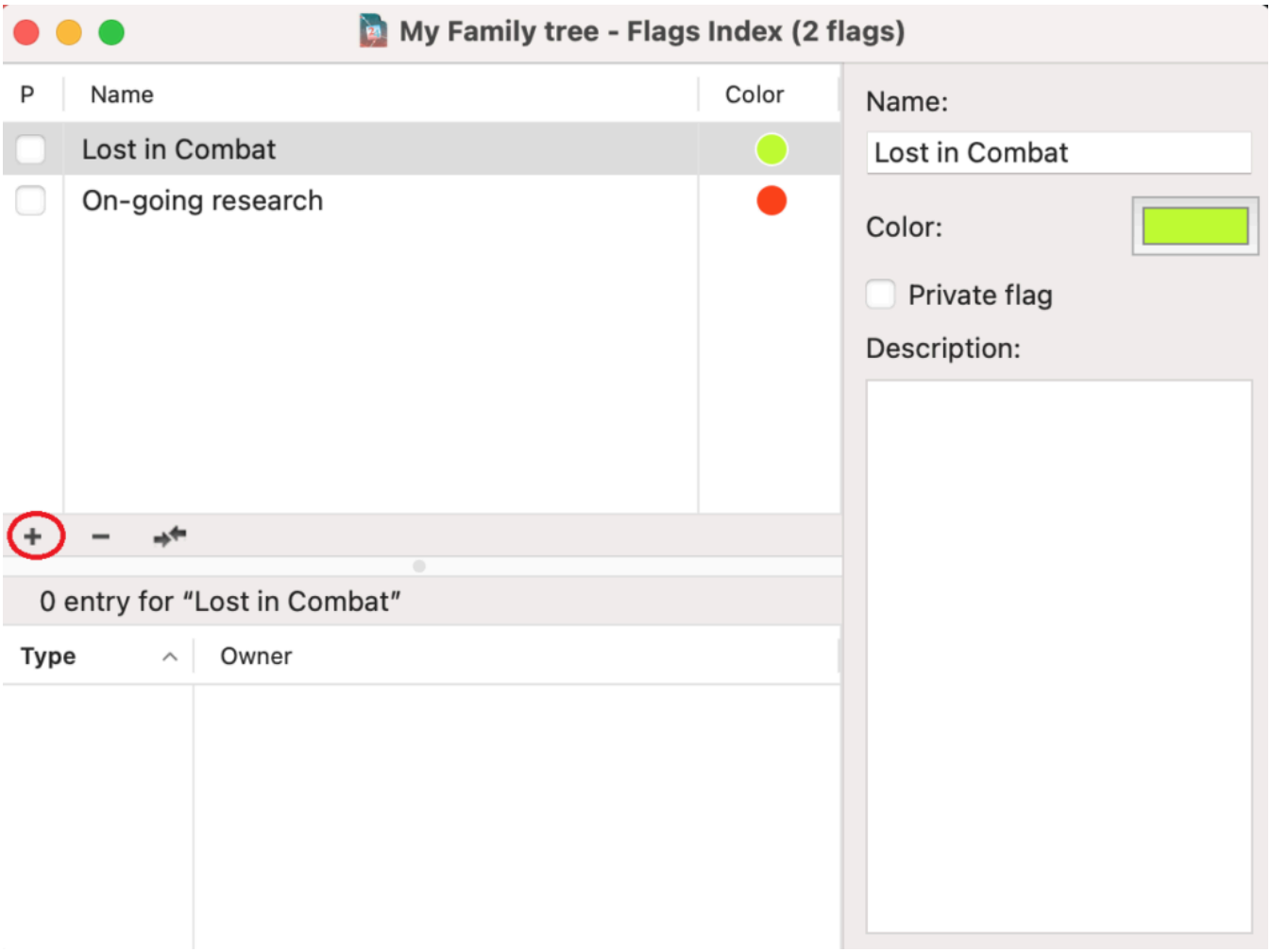
- from the **Index** button **> Flags Index**
- or from the **Tools** menu **> Flags Index**
- or directly from the area where you wish to assign this flag (under the **Data tab>Personal Data** for a person, event, fact, or even within the **Media Index**).

See the Personalized Flags (see page 188) article.

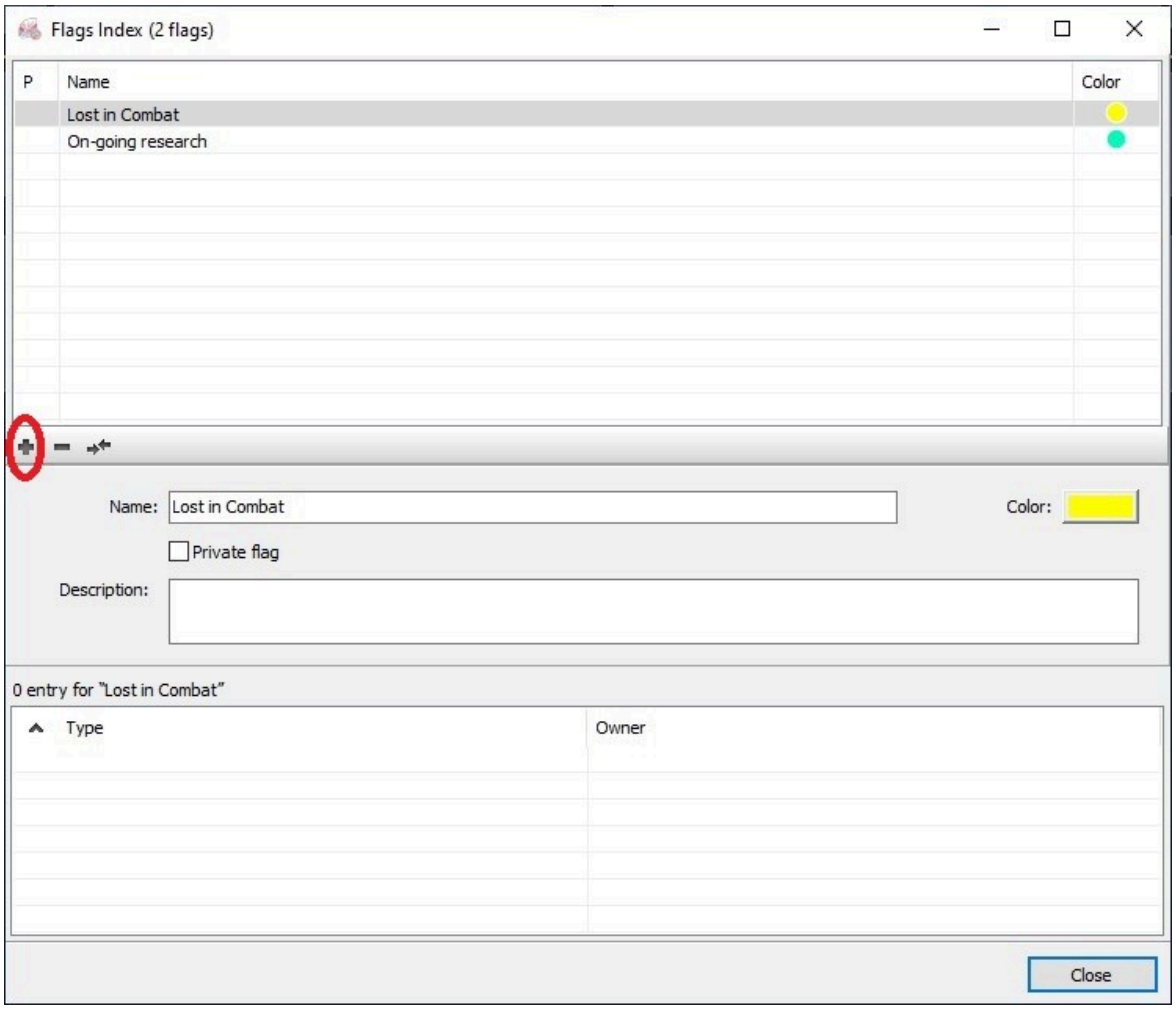
Create a flag

- Open the **Flags Index** (see above),
  Note: Heredis will suggest 2 default flags as examples.
- Click on the ✚ sign to add your own flag.

(Mac) Flags Index



(Windows) Flags Index



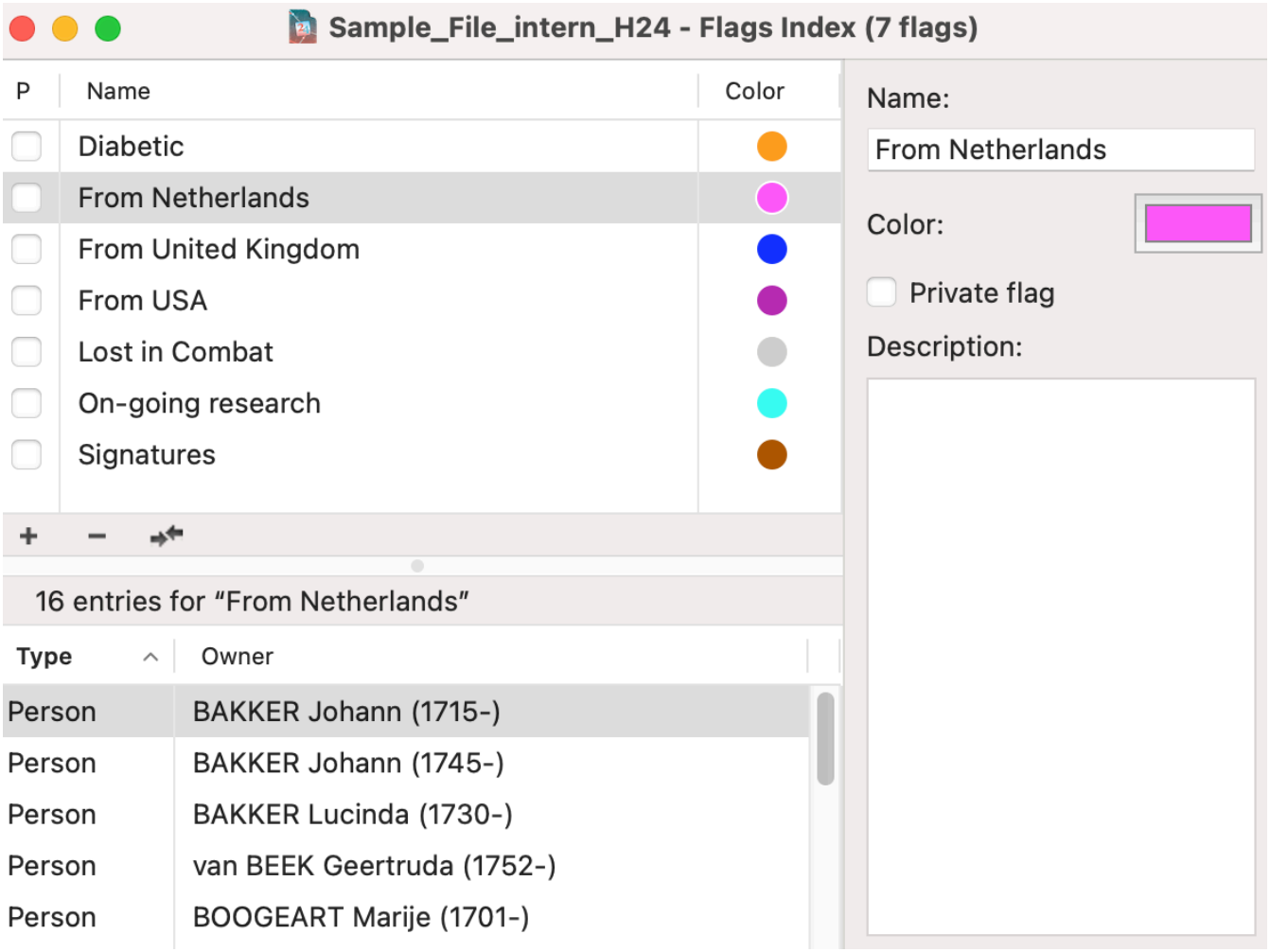
- Enter a name for your flag.
- If necessary, under **Description**, specify the purpose of this flag.
- Click on the color box to select the color of your choice.
- Check the **Private flag** if you don't want this flag to show in your Heredis/GEDCOM exports, documents, and publications.

Check entries related to a flag

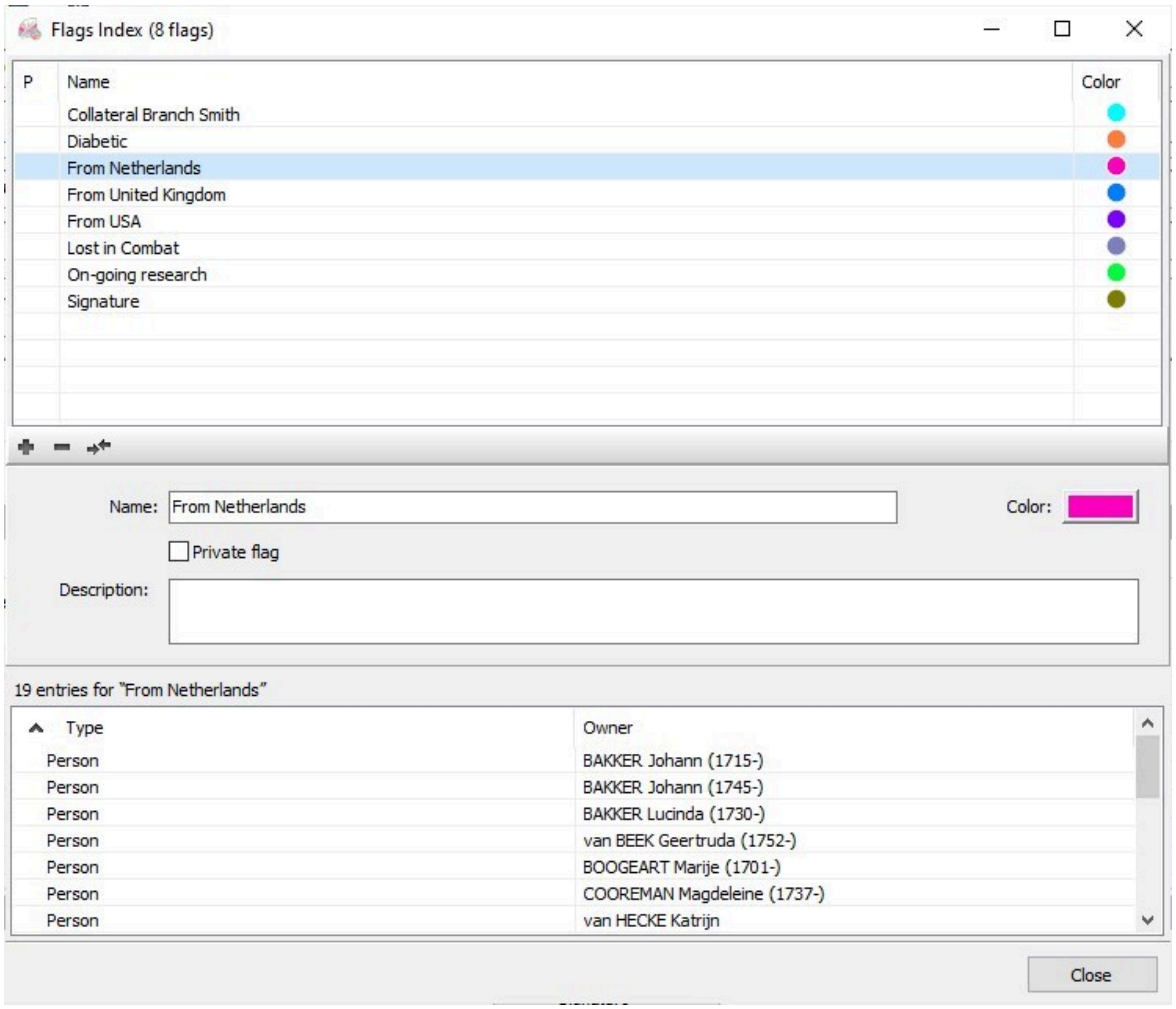
Open the **Flags Index**.

In the bottom part, each entry will be listed, just like it is in the other indexes.

(Mac) Flags Index



(Windows) Flags Index



Delete a flag

- Open the **Flags Index**.
- Select the flag you wish to delete.
- Click on the ➖ sign.
- Click to confirm you really want to delete this flag.

Replace a flag by another one

The same flag name may have been entered in different ways.

e.g.: *Lost in combat* and *lost in combat*

- Open the **Flags Index.**
- Select the flag you wish to replace.
- Click the button then choose among existing flags the one to replace it.
- Click to confirm you would like this flag to be replaced by the other one.

This modification will be applied automatically to all related entries.

Any modification is carried over to all related entries.

Please also see the following articles: Indexes: generalities (see page 412), Personalized Flags (see page 188).

Historical facts index

Since Heredis 2026, you've had a new index of historical facts at your disposal.

It brings together all the historical facts you'll find in the **History** panel.

The historical facts index is shared between all your files. Please note that if you create your own categories, they will be stored on your computer. Remember to back them up.
The format of the category file containing historical facts is .htf.

Historical facts and historical fact categories are linked to the software, not to your genealogy file. So you'll have the same categories and facts for all your computer files. If you have another computer, remember to export the categories you have modified or created, and import them on the second computer.

This index can be accessed from several locations by clicking on :

- **Tools** menu **> Historical facts index**
- the toolbar with **Indexes** button > **Historical facts**
- the index button in the **History** panel on Windows and on macOS
- the index button in the personal and family timeline on Windows and macOS

The Historical facts index groups together different historical facts assigned to a category.

By default, Heredis offers several categories. You can create your own.

Filter facts

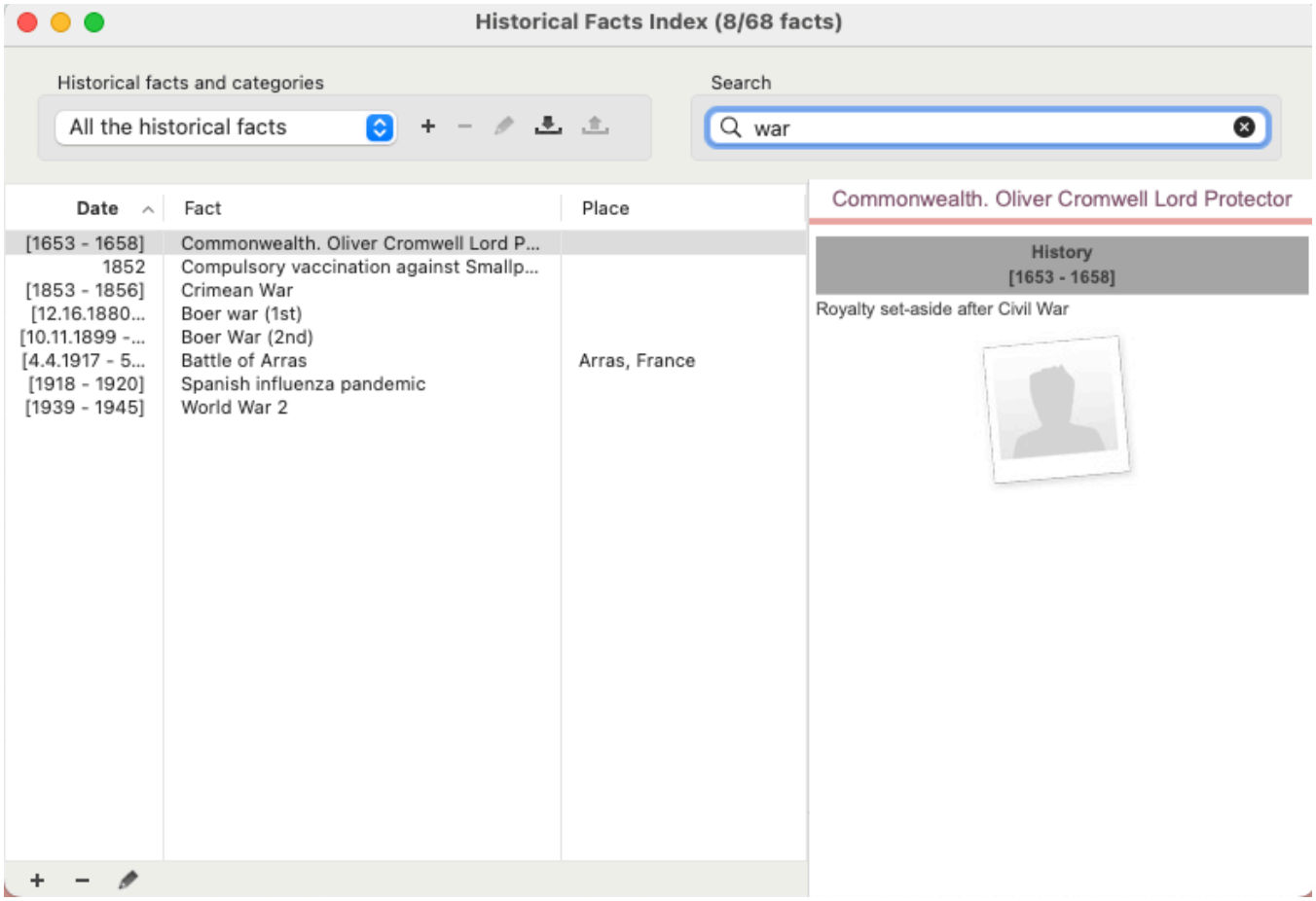
Click on the drop-down menu to filter and display

- **All historical facts** to display all existing facts
- facts of a specific category
- **no category**, for facts that are not attached to a category

The list of existing facts is updated to match the chosen filter.

Use the search bar to display facts containing a specific word.
The search bar searches all historical fact fields: Title, Date, Place, Comment.

Of course, the search bar takes into account your choice of category.
So if you're looking for all facts containing the word War in all categories, make sure you've selected **All historical facts.**

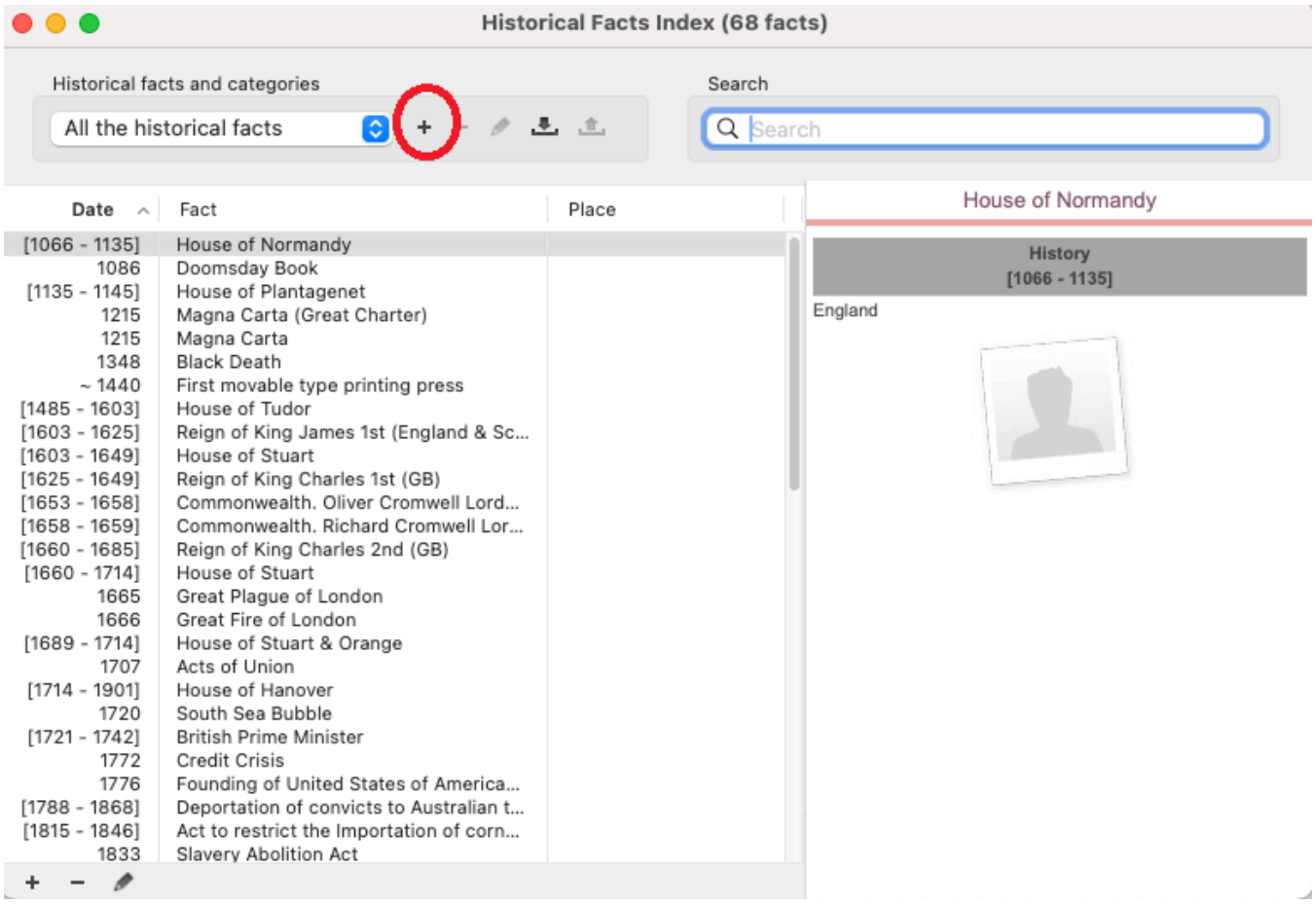


If you'd like to see historical facts containing the word War and attached to the History category, select History from the drop-down menu, then enter War in the search bar.

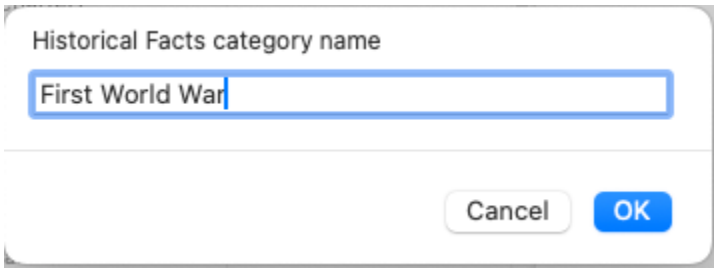
You can create categories and historical facts to customize to your needs.

Create categories

Click on the + to the right of the category filter.



Give the category a name.
For example: First World War.



Click **OK** to confirm.

Use the pencil to change the category name if necessary.

Note: Do not use special characters in category names, only letters and numbers.

Add historical facts

Click on the + at the bottom of the list of existing facts.

If the category All historical facts is selected, clicking + will add a new historical fact with no associated category.

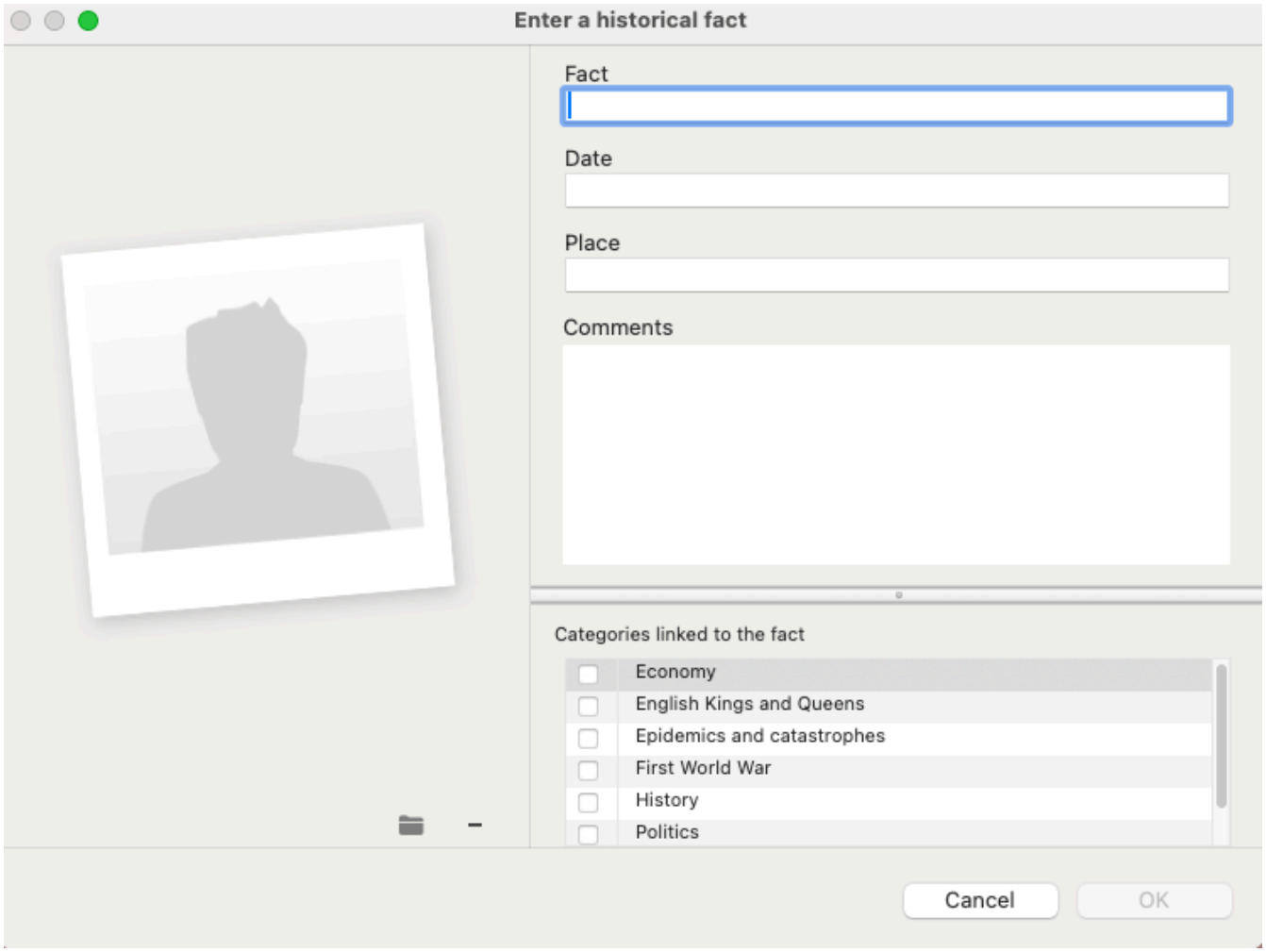
You must then indicate :

- a title in the **Fact** field,
- a specific date or period,

and optionally :

- a more or less precise location
- a commentary summarizing the historical fact
- an image by clicking on the folder button

Finally, select the category or categories with which the fact is associated.



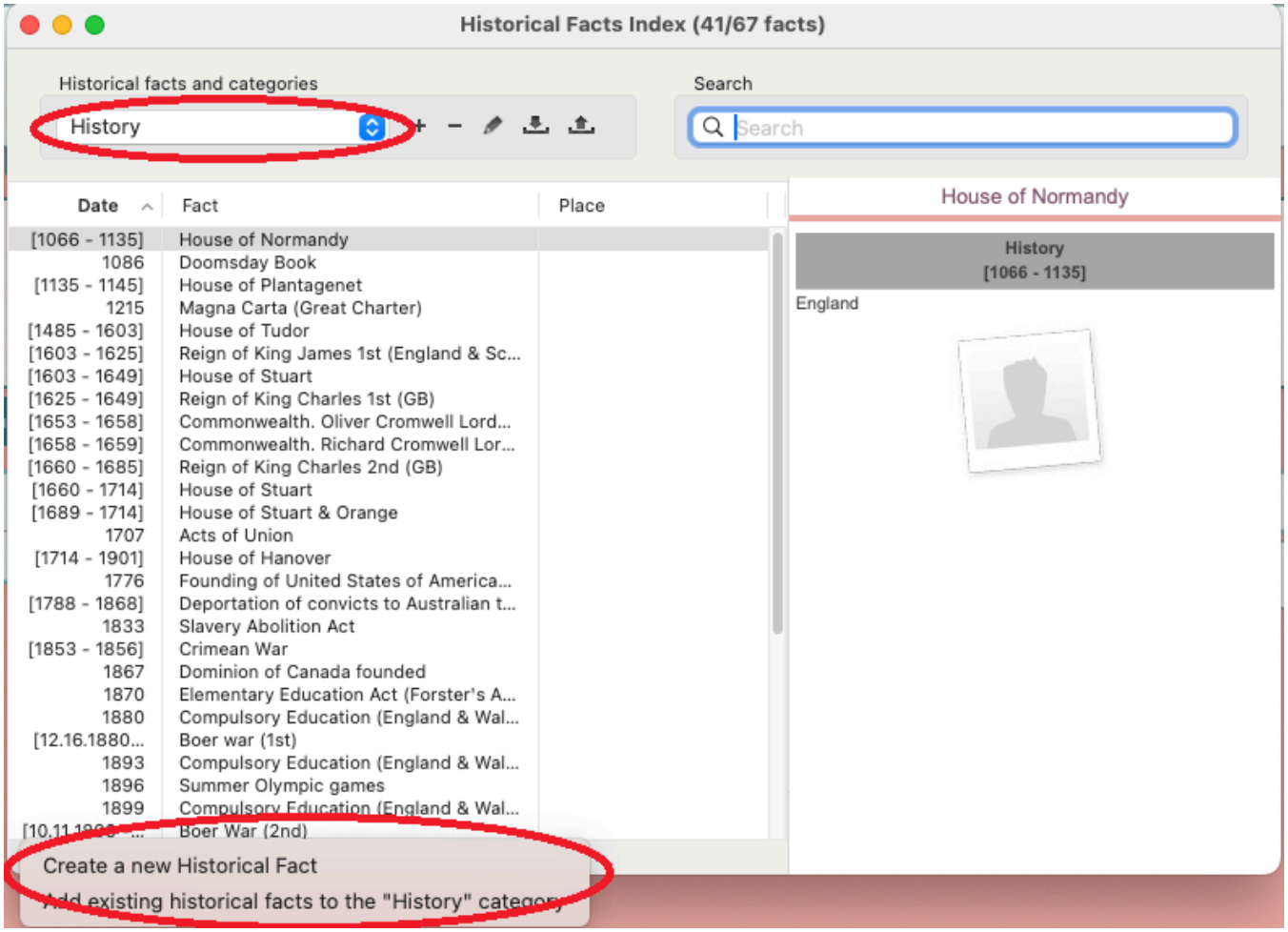
Click **OK** to confirm.

<u>If you have selected a category</u> in the drop-down menu (filter) of the historical fact index, then you will have 2 options:

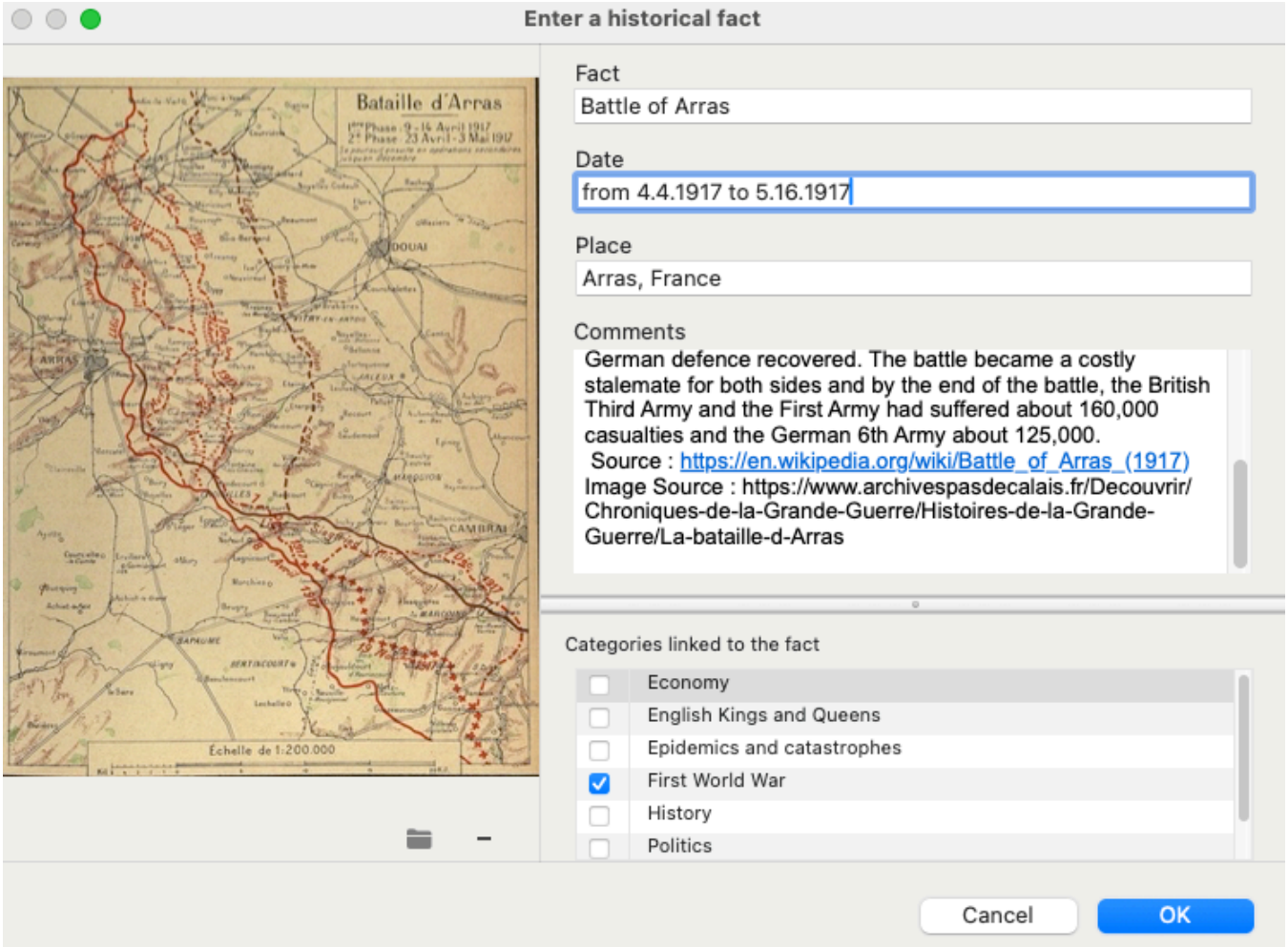
- **Create a historical fact**, you'll get the same window as in the previous case, with the

selected category already ticked.

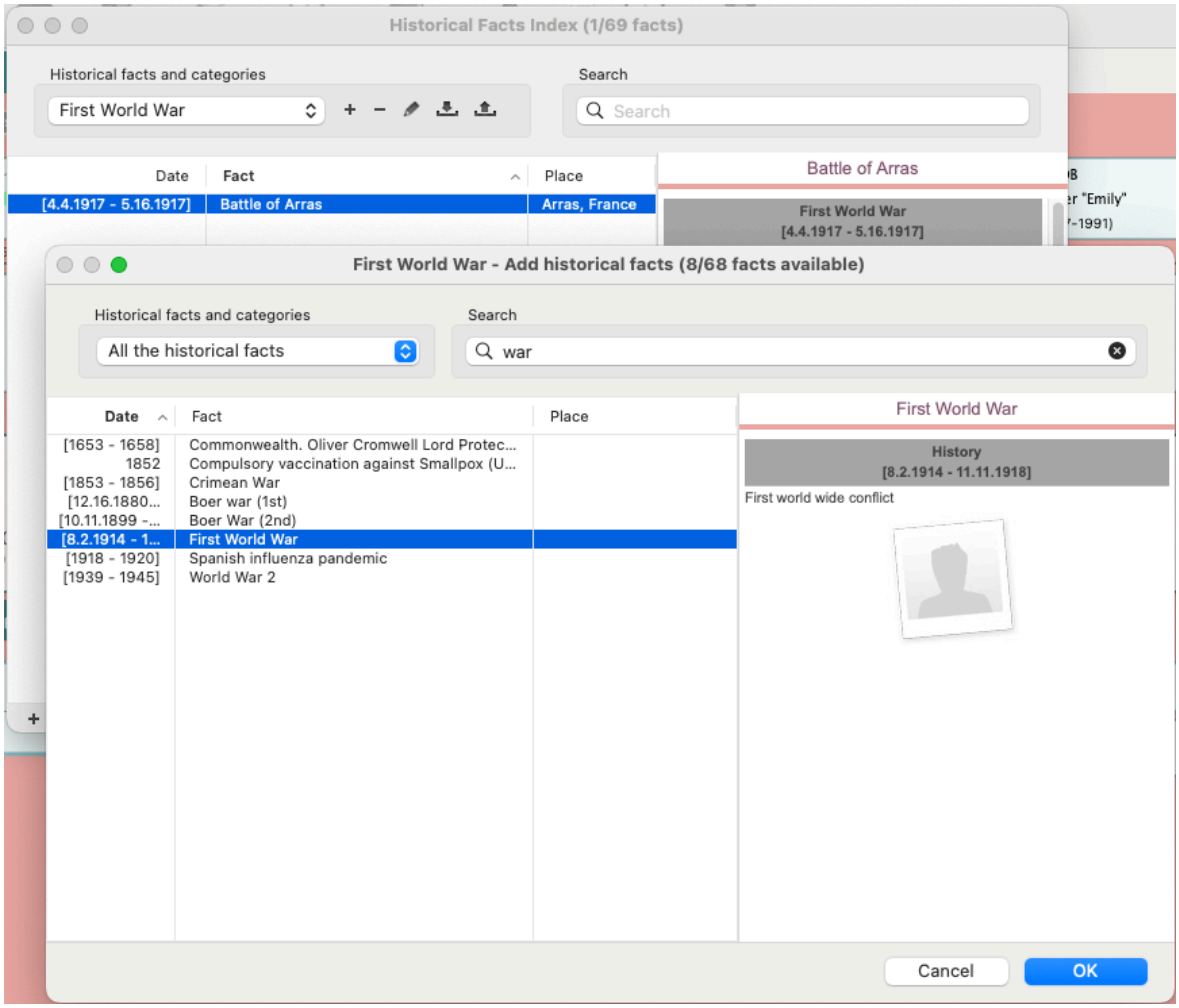
- **Add existing historical facts to the “xxx” category.** This allows you to select facts from other categories and add them to the currently selected category.



For example, I’ve created a First World War category for specific historical facts about that period. I select it in the filter.
I can create a non-existent fact about the Battle of Arras.



I can also add a fact about the Battle of the Somme that already exists in the History category. It saves me time.



Use of historical facts

Historical facts can be used in the **Personal Timeline** and in the **Family Timeline**. See Personal Timeline and Family Timeline for more details.

In addition, historical facts appear for easy reference in the History panel. So you always have them to hand. If a birth date exists for the primary person, Heredis displays the historical facts starting in the year of his or her birth.
If the primary person also has a death date, then a black line is displayed to show you the historical facts that he/she may have lived through.

Windows History panel

macOS History panel

Delete historical facts and categories

Multiselection

Select several facts to delete more than one at a time.

On Windows, hold down the CTRL key on your keyboard and select the facts to be deleted to select several facts one by one.
If they follow one another, hold down the Shift key on your keyboard and select the first and last facts to be deleted. Everything in between will be selected.

On the Mac, hold down the Cmd key on your keyboard and select the facts to be deleted to select several facts one by one.
If they follow one another, hold down the Shift key on your keyboard and select the first and last facts to be deleted. Everything in between will be selected.

Delete a historical fact

To delete a historical fact, select it and click on the – button.

If the **All historical facts** category is selected, clicking on – permanently deletes the selected historical facts. You will no longer have them, even if you open another Heredis file.

If a category is selected, you have 2 options:

- **Detach selected historical facts from category**. The fact(s) are removed from the selected category, but are still available in the index. They are either uncategorized, or in the other categories assigned to them.
- **Permanently delete selected historical facts**. As the message indicates, this action is definitive. You won't get it again, even if you open another Heredis file.

Delete a category

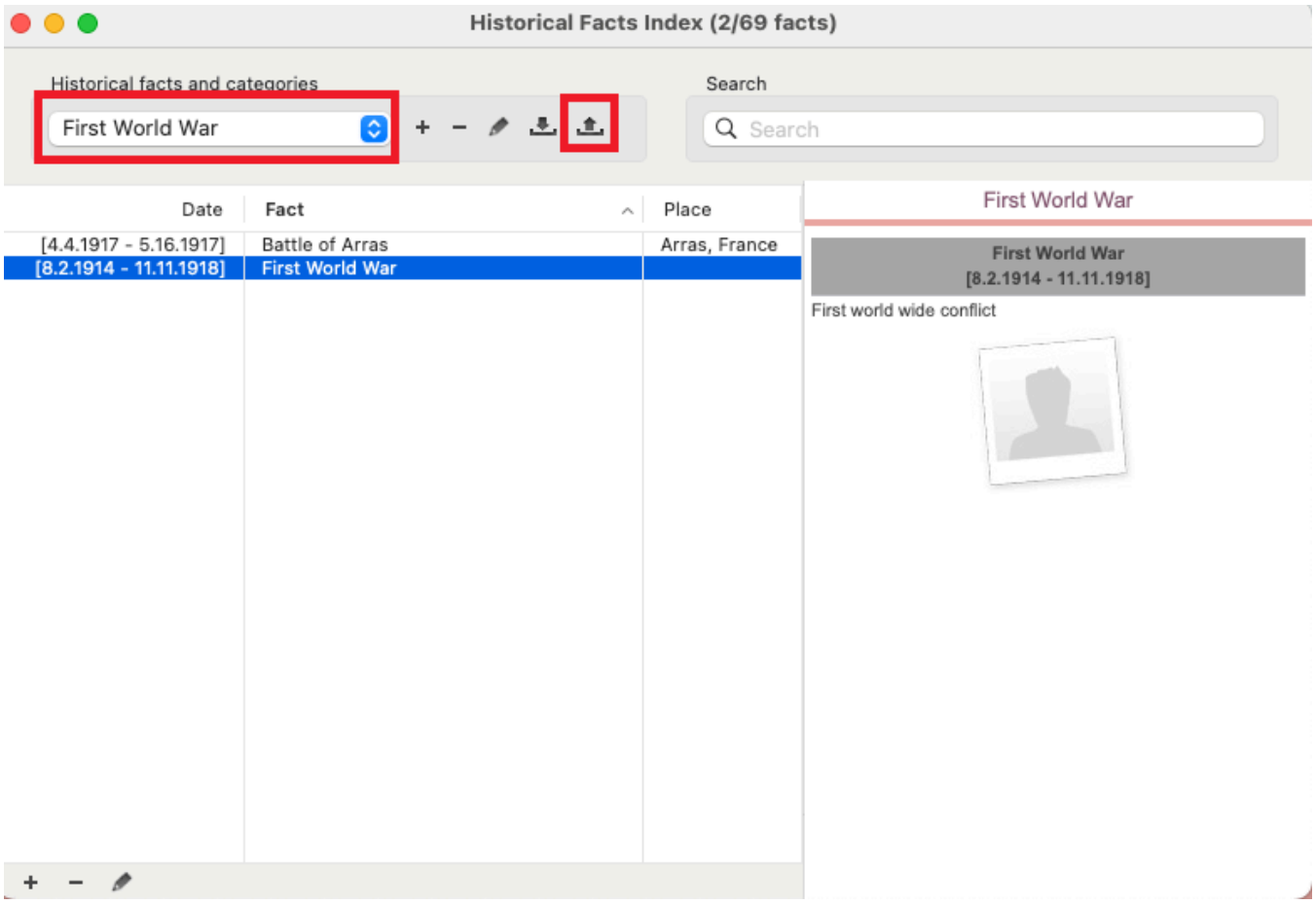
To delete a category, select it from the drop-down filter menu and click on the – button.
As the message indicates, the category will be permanently deleted, and you will no longer have it, even if you open another Heredis file.

Historical facts attached to the category will have no category, unless they belong to several categories, in which case they will always be in the other categories.

Export a category and associated historical facts

To save your historical research work, you can export a category and its associated historical facts.

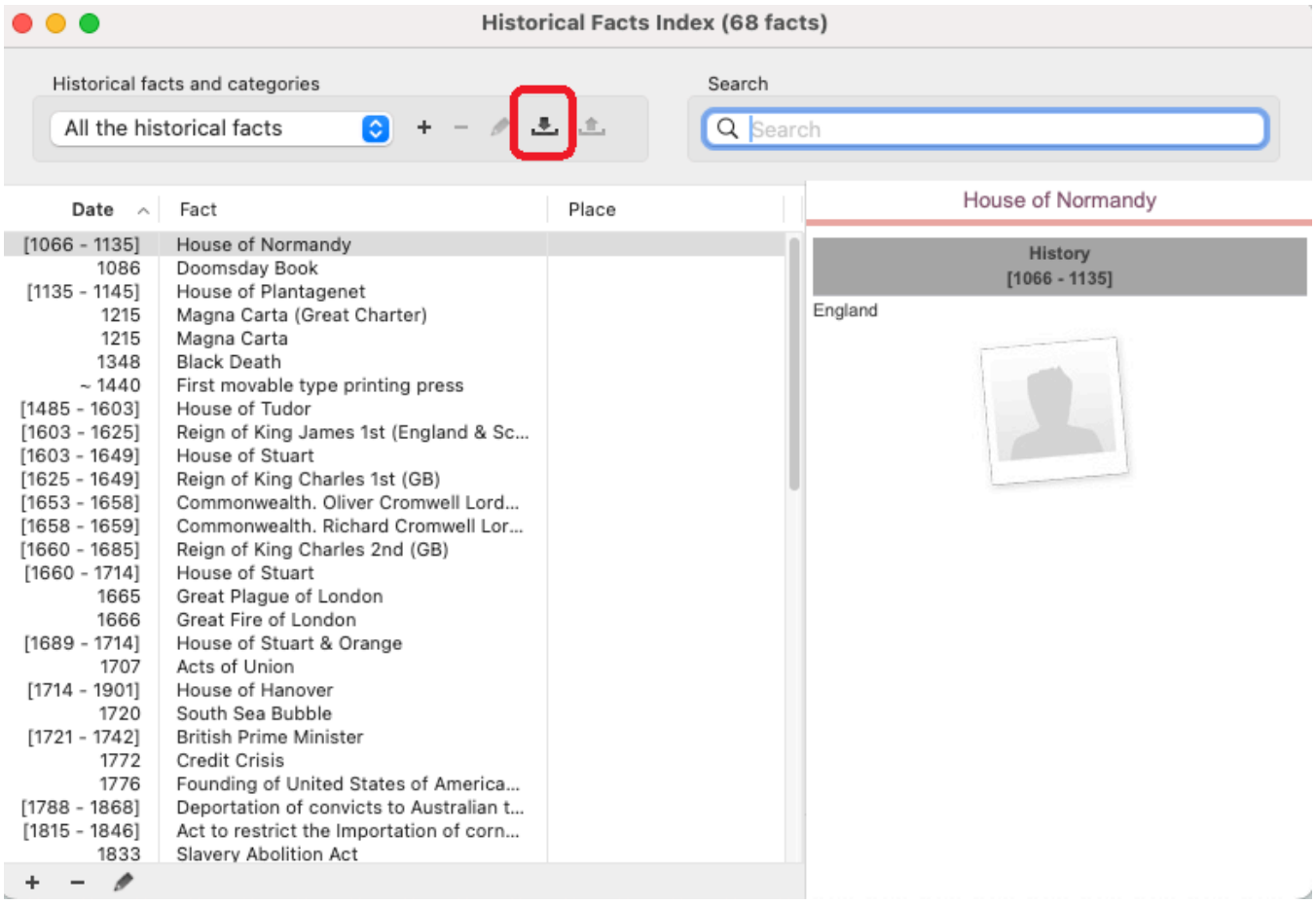
Open the historical facts index.
Select the category to be exported.
Click on the button.
Give it a name if the category name is not appropriate.
Save.



Send this file to a friend who uses Heredis (with a version that can read historical facts) to share your work.
Copy this file onto a USB stick, and then put it on your second computer, and so on.

Import a category and associated historical facts

Someone has sent you an .htf file containing a category with historical facts. You want to import them.
Open the Historical facts index.
Click on the .
Select the .htf file
Confirm.



Heredis adds the category. If it has the same name as an existing category, only the historical facts missing from the existing category will be added.

The Sources Index

The **Sources Index** includes all sources associated with events entered into the genealogical file.

To manage the sources stored in the genealogical file, select the **Tools** menu **> Sources Index**.

New sources can also be entered using the ✚ button in **Sources tab** of an event, or directly in the **Sources Index.** Read the Sources (see page 261) article for more details on creating a source.

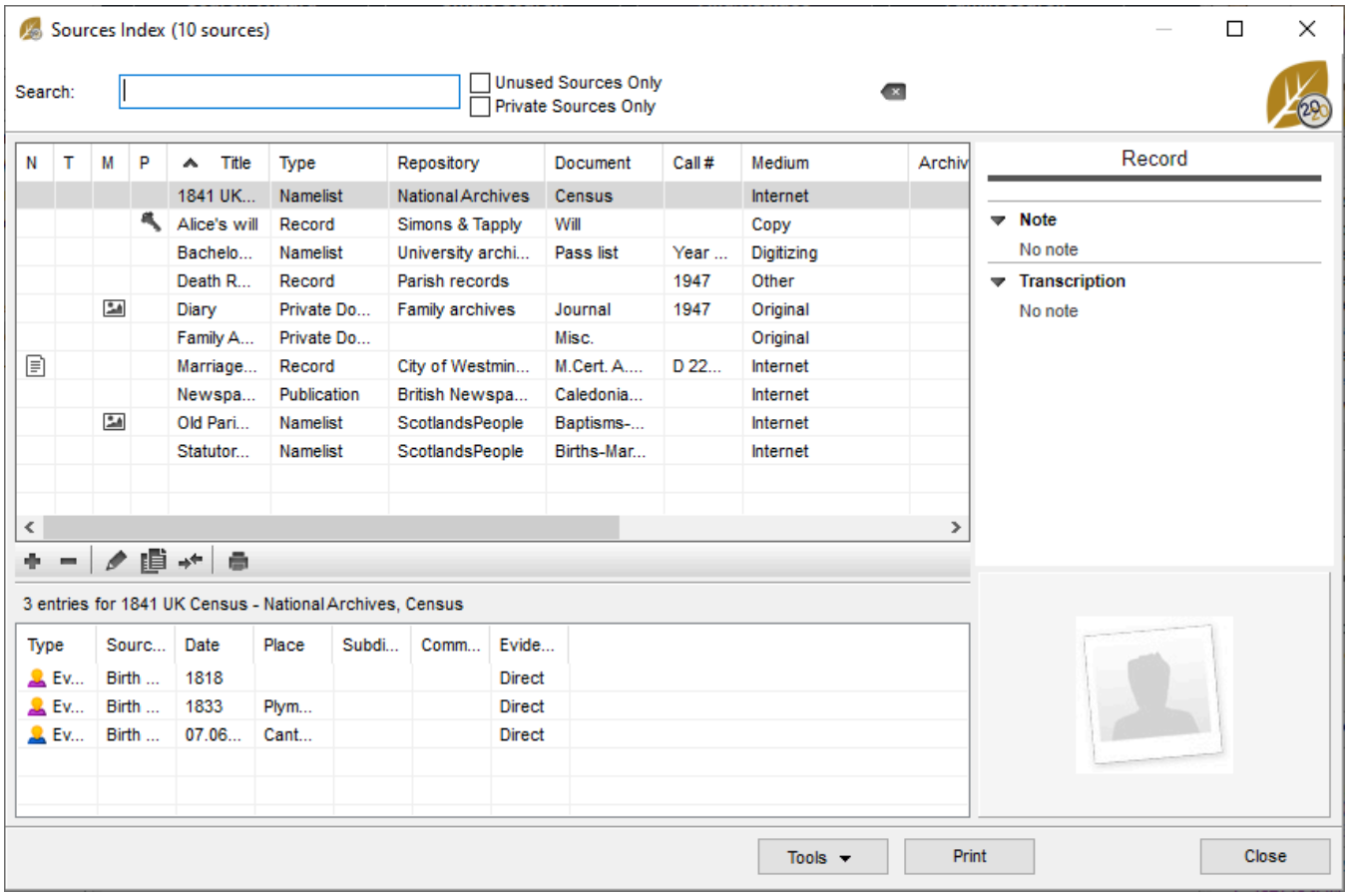
Check out the article Indexes: Generalities (see page 412) for the tools available in all indexes.

Open the sources index

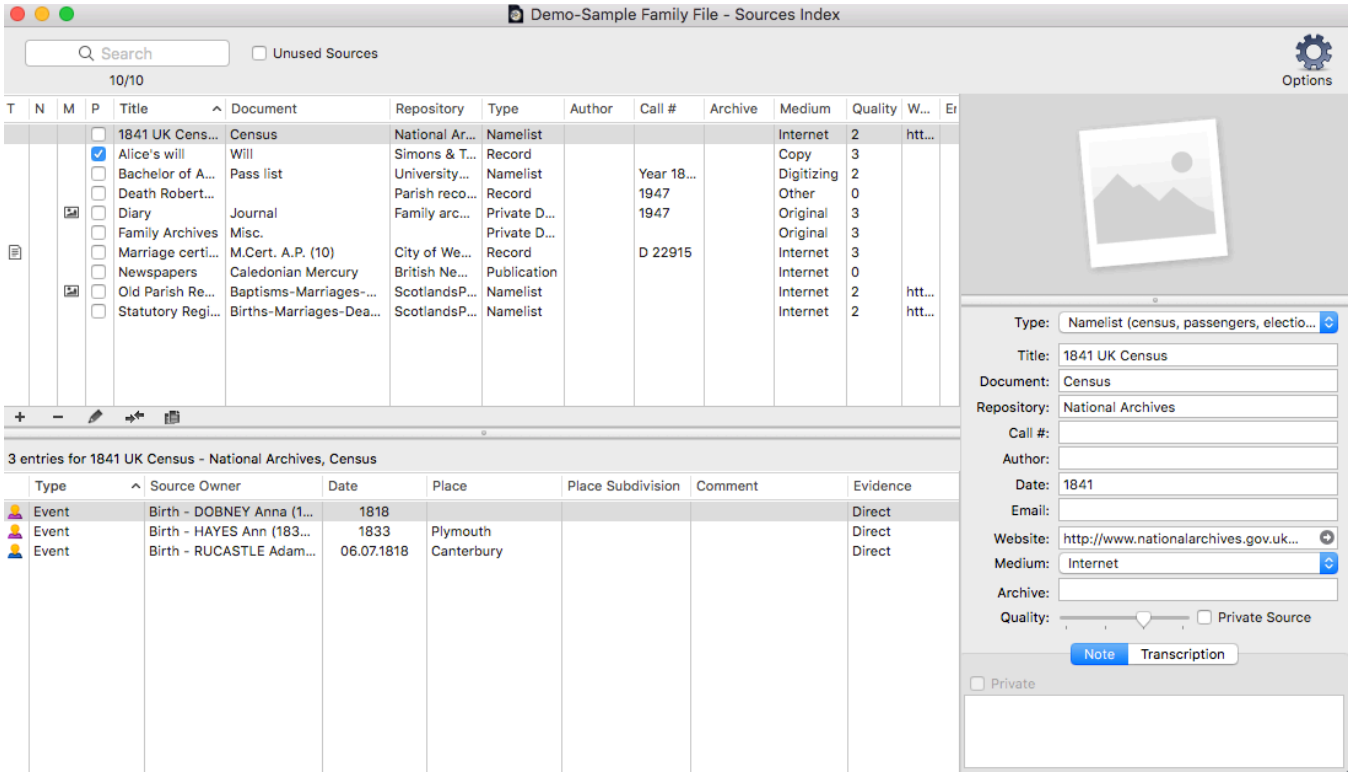
Open the **Sources Index:**

- from the **Tools** menu,
- via the toolbar by clicking on **Indexes** button then on **Sources Index** button in the toolbar,
- **(Mac)** by clicking 🕮 on in the **Sources** panel.

(Windows) Sources Index



(Mac) Sources Index



Duplicate a source

Save time and duplicate a source when you only have the reference to change for example.

- Select the source to duplicate.
- Click the button at the bottom of the source list.
- Edit the duplicate source, it has no use.
- Change the data to get a new source.

Search the sources

In the search area, type a word contained in any input topic of the search source.

The number of items found that match your search is displayed under the search area.

(Mac) Click on the **Magnifying glass** icon to choose the search mode: the search “contains” the entered word, or the search “starts with” the letters entered.

To undo a search on a word, click the erase icon (Windows, Mac) to the right of the search area.

See the list of events in which this source is used in the lower part of the window.

To find a source registered in the **Sources Index:**

- Click directly on the source in the list displayed.
- or Tap the arrow keys of your keyboard to access them.
- or Enter the first letters of one of the items from the searched source in the **Search** area. You can search for a source by name, origin, rating, etc.

You can refine the list of sources displayed:

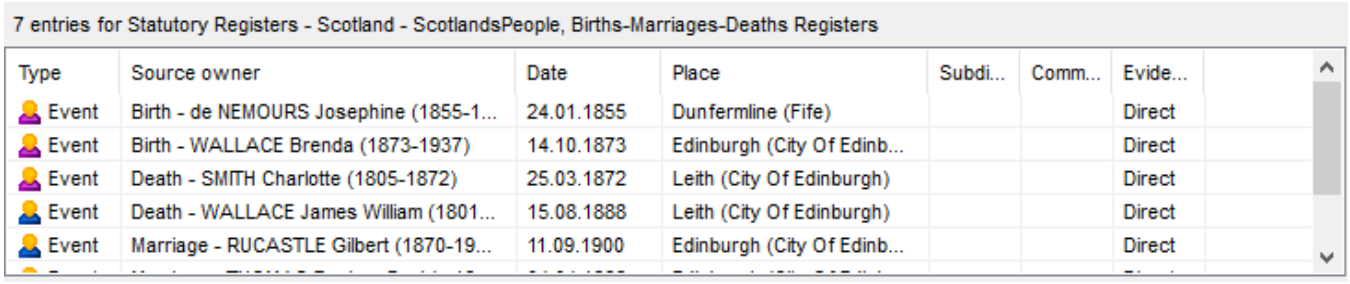
- To limit the list to unused sources, check the corresponding box.
- **(Windows)** To view only private sources, check the corresponding box.
- Click in the column header to see the sources recorded in alphabetical or numerical order of the Title or Repository or Document or Call #, etc. A new click in the header reverses the order displayed. An arrow appears in the column on which sorting is performed. Columns N, T, M, P allow you to sort sources with a Note, Transcript, Media or the Private ones. Click on the header of these columns to see the sources sort as you see fit.

When you select a source from the list, the detail of that source appears on the right (title, name of repository, document, private source, …).

(Mac) You can change the fields of the selected source directly from the detail on the right.

Uses of this source are displayed under the source list.

(Windows) Uses of a source



(Mac) Uses of a source

Double-click on one of the uses to navigate directly to the event or the person concerned. This source is selected and can be deleted or modified. If you modify it, the changes will be made for all the uses of this source.

Merge two sources

You may have recorded several sources in the **Sources Index** that corresponds to the same reference: for example, you created a source with the digitized certificate and created another with the transcript of the certificate.
You can create a single source that will replace the two sources currently in the index.

- Select source A to be eliminated.
- Click the button.
- Select source B to keep.
- Click the **Choose** button.

Heredis indicates the number of changes that will be made.

- Confirm the replacement of source A with source B by clicking the **Yes** button. All events to which source A was attached will be changed.

Delete a source

Select the source from the source list.

- Click the button.
  Heredis warns you when the source is being used. If you confirm the deletion, the source will no longer appear in the list of sources of events to which it was assigned.

Delete unused sources

To remove all unused sources in the genealogical file, select **Remove All Unused Sources** in

the drop-down menu **(Windows) Tools, (Mac) Options.**

Multi-selection

To process multiple sources in a single operation:

- **(Windows)** Press the Ctrl or Maj button and, while keeping that key pressed, click on the different sources you want to select.
- **(Mac)** Press the Command or Maj button and, while keeping that key pressed, click on the different sources you want to select.
- Then choose the appropriate action, deletion, replacement or printing of the list (from Print button on Windows, from Options button on Mac).

Swap two columns

This feature allows you to easily exchange the values of 2 headings from a source.

- Select one or more sources, via multi-selection
- **(Windows)** Click the **Tools** button **> Swap**, then choose the 2 topics to trade.
- **(Mac)** Click the **Options** button **> Swap**, then choose the 2 topics to trade.

Change the value

To change the value contained in one topic by another possible value for this topic:

- Select one or more sources, via multi-selection,
- **(Windows)** Click the **Tools** button **> Change the Value >** select the section > choose the new value for this topic.
- **(Mac)** Click the **Options** button **> Change Value** > select the section > choose the new value for this topic.

Note: Before applying the changes, Heredis displays a confirmation message telling you how many sources are impacted by the desired change. Click the Yes or No button to apply the changes or not.

Print

(Mac) Print the source index

The **Options** button **> Print > Custom reports** allows you to edit the custom report of the sources stored in the file as they are displayed.

If you have done a search, only the results of this search will be printed. Also, Heredis will keep the sorting order you have chosen by clicking on the columns corresponding to the different topics of the sources.

You can also create a list, in the format prior to the custom reports, of all sources. Click the **Options** button **> Print > Print Sources list**.

You'll find all the topics of the source, its uses, and the transcripts you've entered if you wish.

Check out the articles Custom Reports, (see page 598) (Mac) Create and Edit a Report

(Windows) Print the source index

The **Print** button allows you to edit the custom report of the sources stored in the file as they are displayed. You can also launch the printing from **Tools** button **> Print > Custom reports.**

If you have done a search, only the results of this search will be printed. Also, Heredis will keep the sorting order you have chosen by clicking on the columns corresponding to the different topics of the sources.

You can also create a list, in the format prior to the custom reports, of all sources. Click the button in the index toolbar or the **Tools** button **> Print > Sources report**.
You'll find all the topics of the source, its uses, and the transcripts you've entered if you wish.

Check out the articles Custom Reports, (see page 598) .(Windows) Create and Edit Reports (see page 612).

Import an index into a Heredis file

You can import an index into an other Heredis file if, for example, you need to use the data you entered in an other file. See Import an index into a Heredis file (see page 485) article for further details.

Repositories Index

A repository corresponds to who holds the original document. It may be your aunt who keeps the family documents or the State Archives which keep the originals of the registers of civil status.

Every new entry is inserted in the **Repository Index**. Heredis verify every data in the repository section.

To manage all repositories registered in your genealogy file

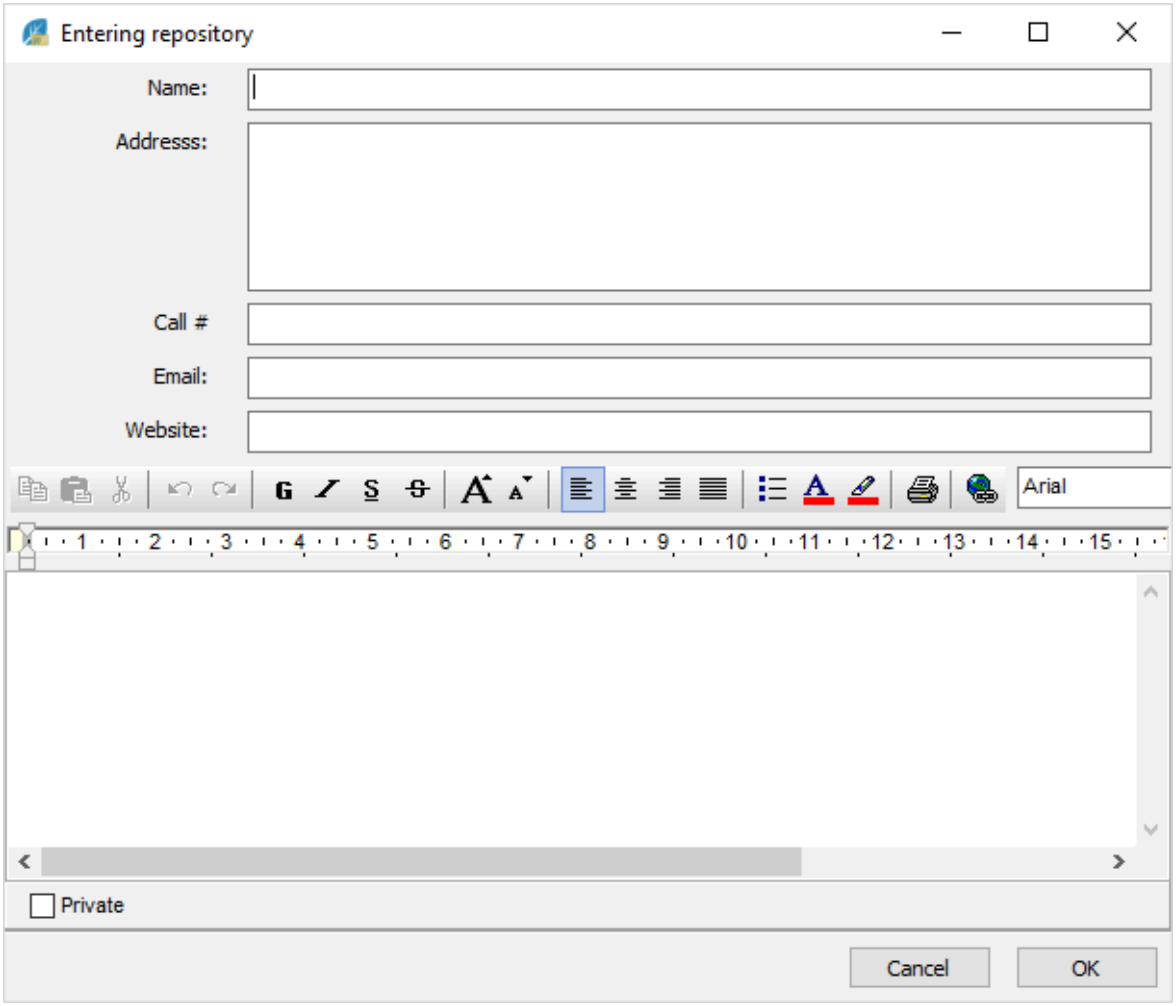
- select the **Tools** Menu **> Repositories Index**
- or directly from the **Sources index**,
- click on **(Windows)** Tools button / **(Mac)** Option (cogwheel) button then select **Repositories Index;**
- or from the toolbar click on the button in the Index button.

See also Indexes: generalities (see page 412).

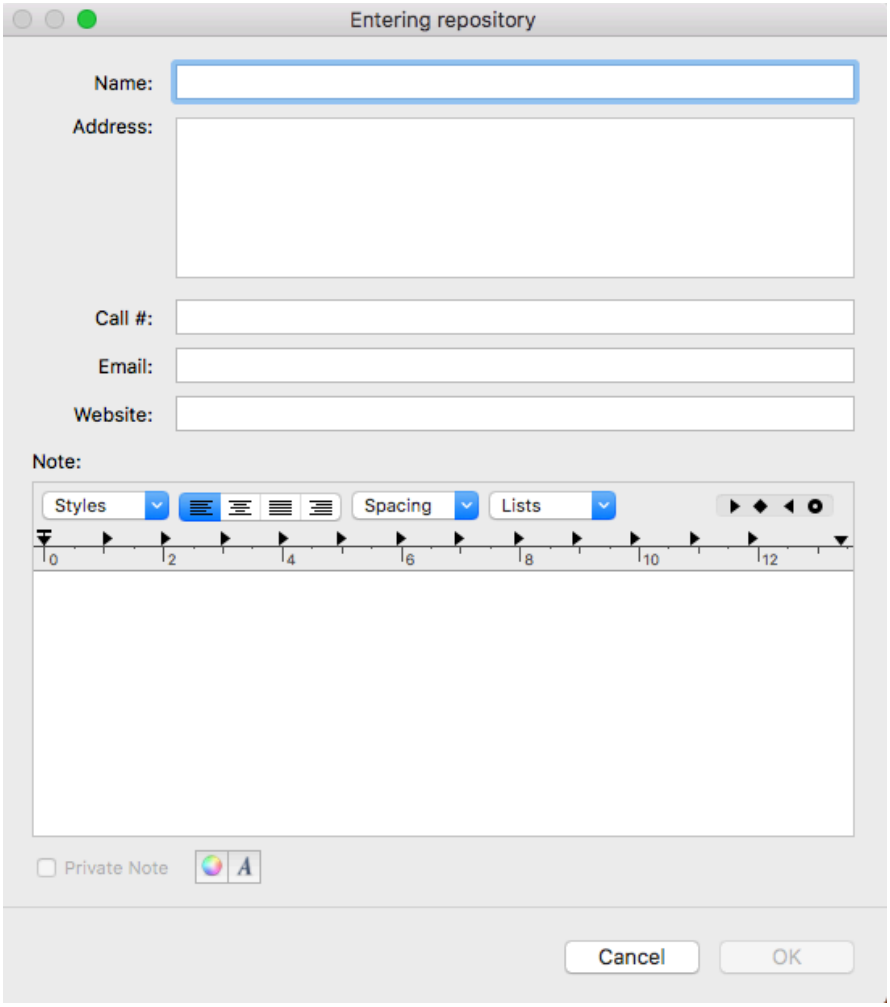
Create a new repository

When entering a new source, the **Entering repository** screen automatically opens if the repository doesn't already exist in your file.

Windows Entering Repository



Mac Entering Repository



To add a new repository from **Repository Index** :

- Click on the ✚ button to enter a new repository.
- Write all the data you dispose of on the new repository in the sections: name, address, call #, email, website.

You can also add a note: write directly in the word pressing, and use the toolbar if you wish to edit.
Check the **Private Note** box to exclude this note from file exports and publishing.

Access to a repository

Click directly in the R**epository index** in the displayed list.
or Press the arrow touch of your keyboard to access it.
or Enter the first letters of the repository in the search bar. You can reduce the repository list by ticking the box “**unused repositories**” to see only the unused repositories and eventually delete them.

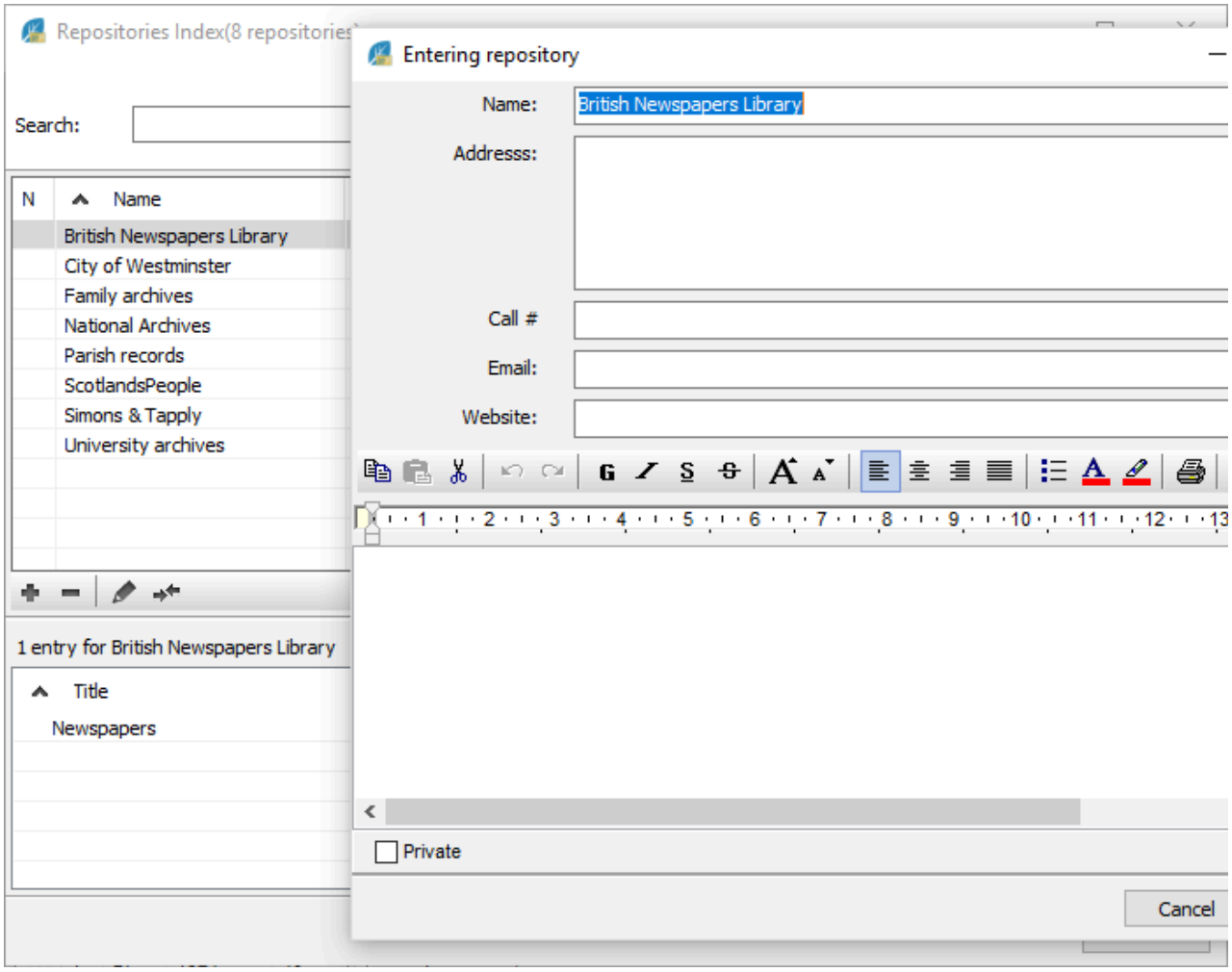
When you select a repository in the list, find directly to the right the entered information: name, address, call #, email, website and note.
The sources using the repository are displayed under the repositories index.

Double-click on one of the use to display directly the detail of the concerned source.

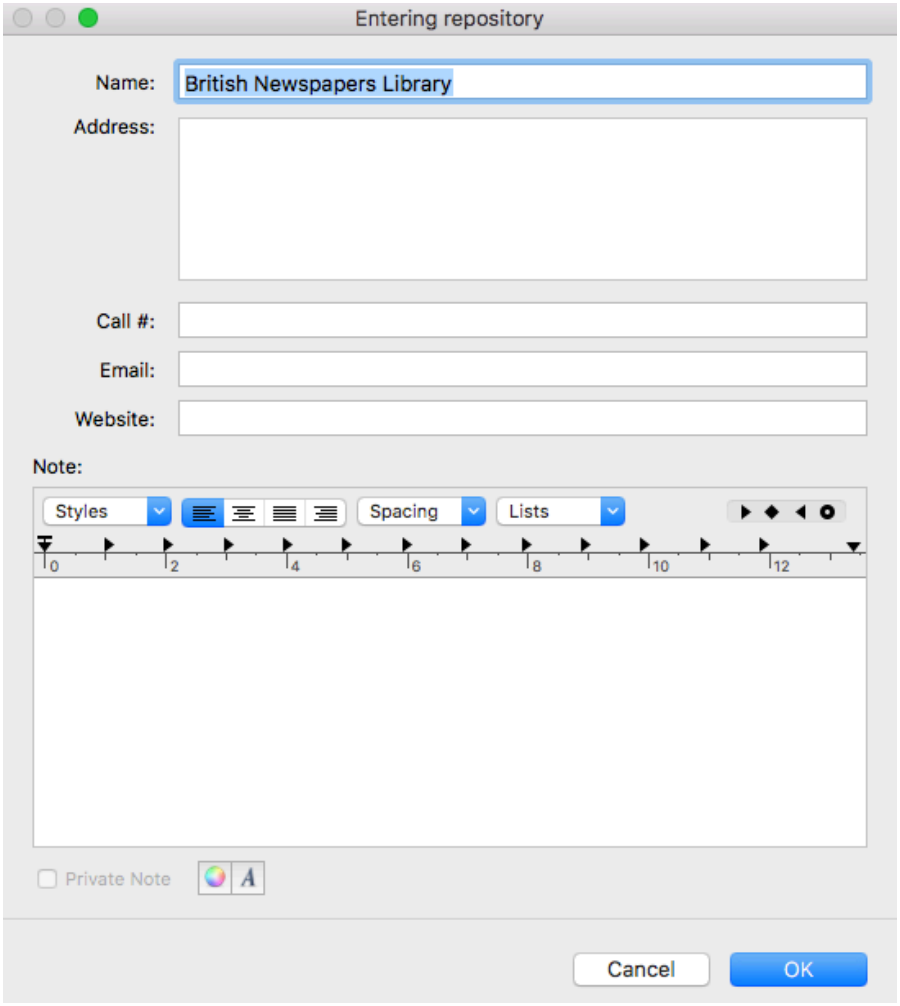
Modify a repository

Heredis allows you to modify a repository at any time.
Select the repository to modify then click on the pencil button.
Or double click on the displayed repository in the list.
Modify directly the sections you want. If you change the name of the repository, Heredis will impact this modification on every source linked to this repository.

Windows Modify a repository



Mac Modify a repository

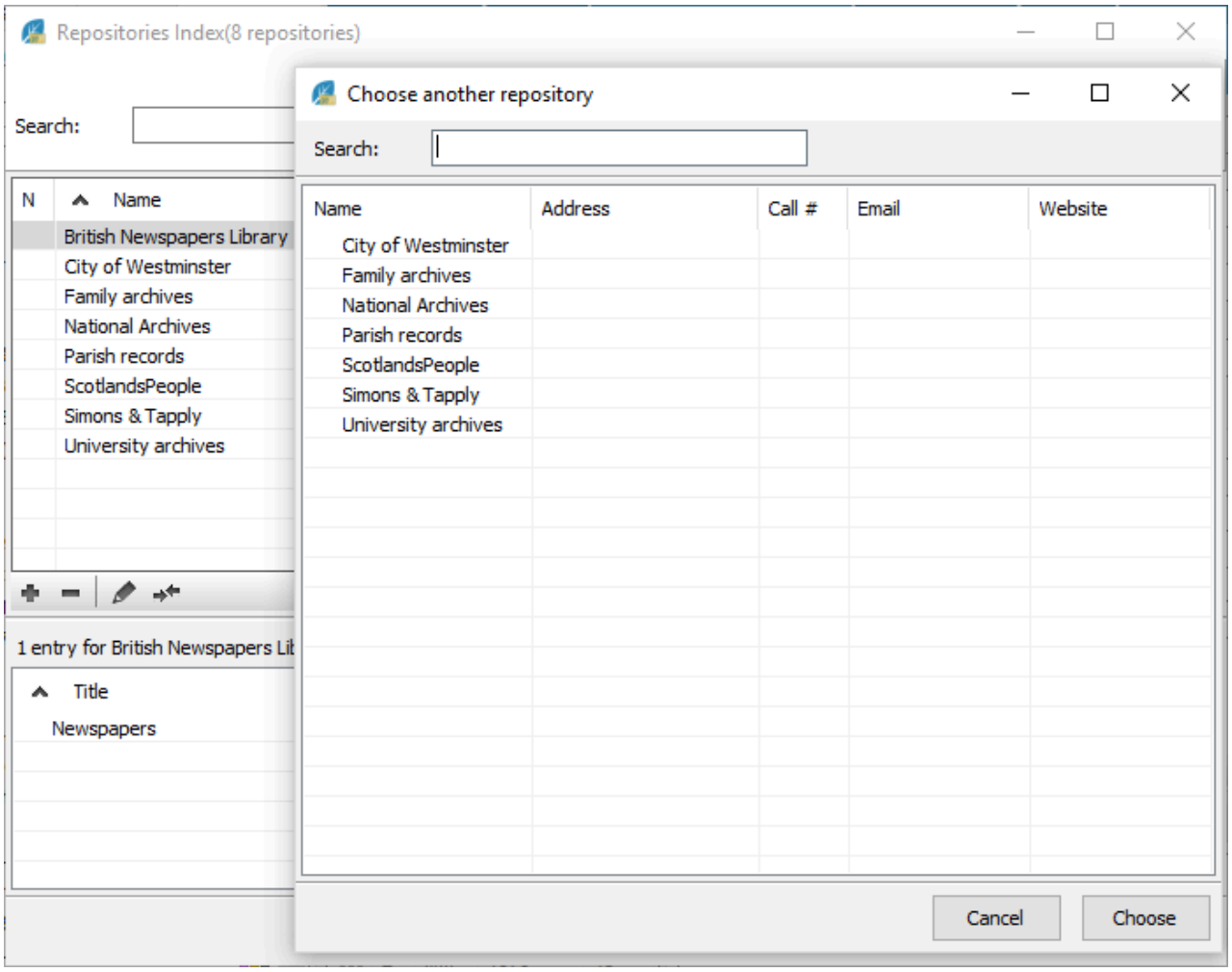


Merge 2 repositories

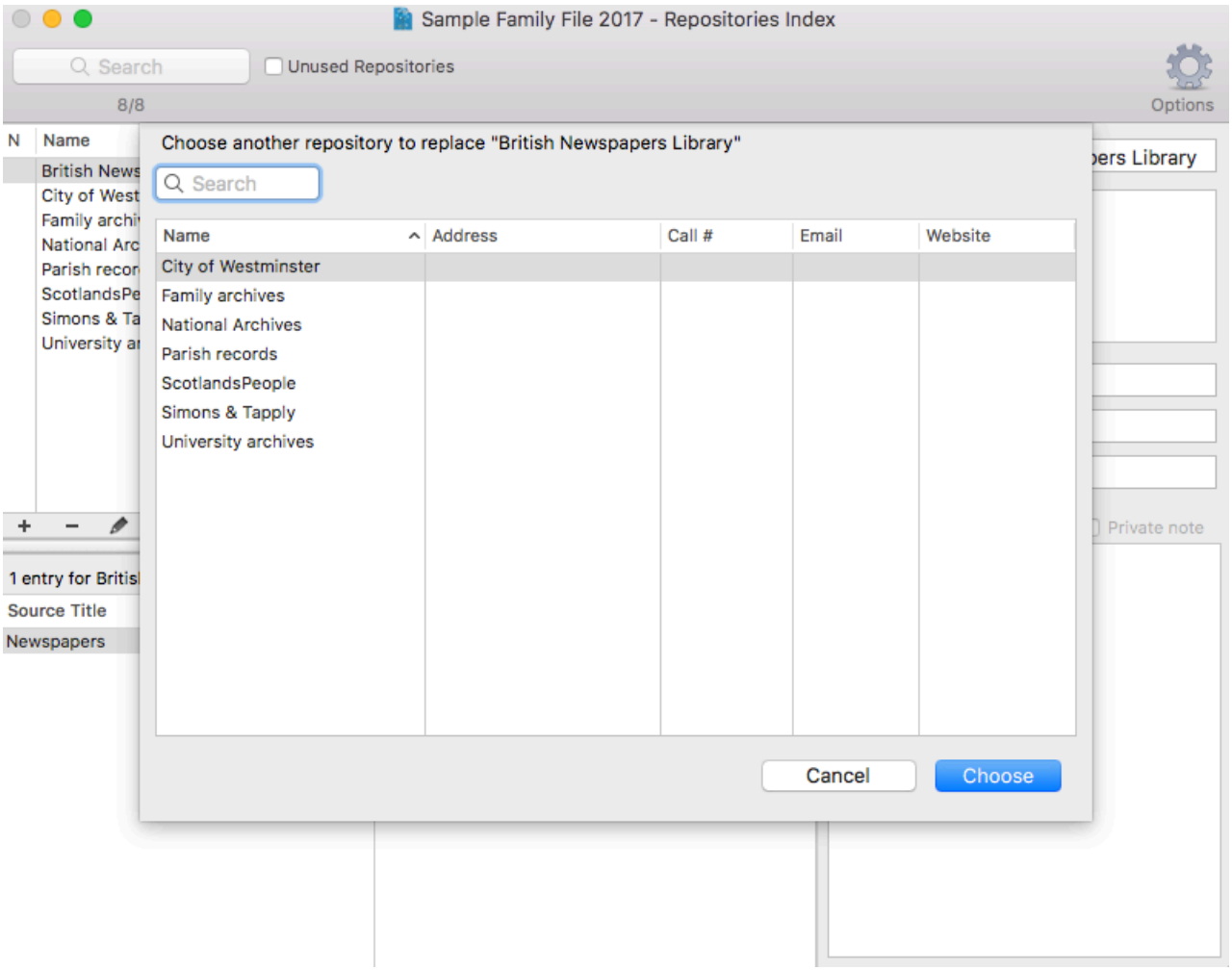
You may have save duplicates in the **Repositories Index**, merge them to keep only one in the **Index**.

- Select at first the repository to erase
- Click on the button
- Select then the repository to keep
- Click on the **Choose** button

Windows Merge 2 repositories



Mac Merge 2 repositories



Erase a repository

- Select the repository to delete
- Click on the − button. If you erase a used repository, it will also be erased from the linked source.

Multi-Selection

To treat multiple repositories at the same time:

- Press the **(Windows)** Ctrl or Maj / **(Mac)** Cmd or Maj key and, while holding this key down, click on the different repositories you wish to select.
- Then choose the appropriate action, erasing or replacement.

Places Index

The places index is updated as places are entered in events and facts. See the Places (see page 229) article for more details.
You can also add a place to the index for future use.

The Places index can be accessed from the **Tools** menu **> Places index**.

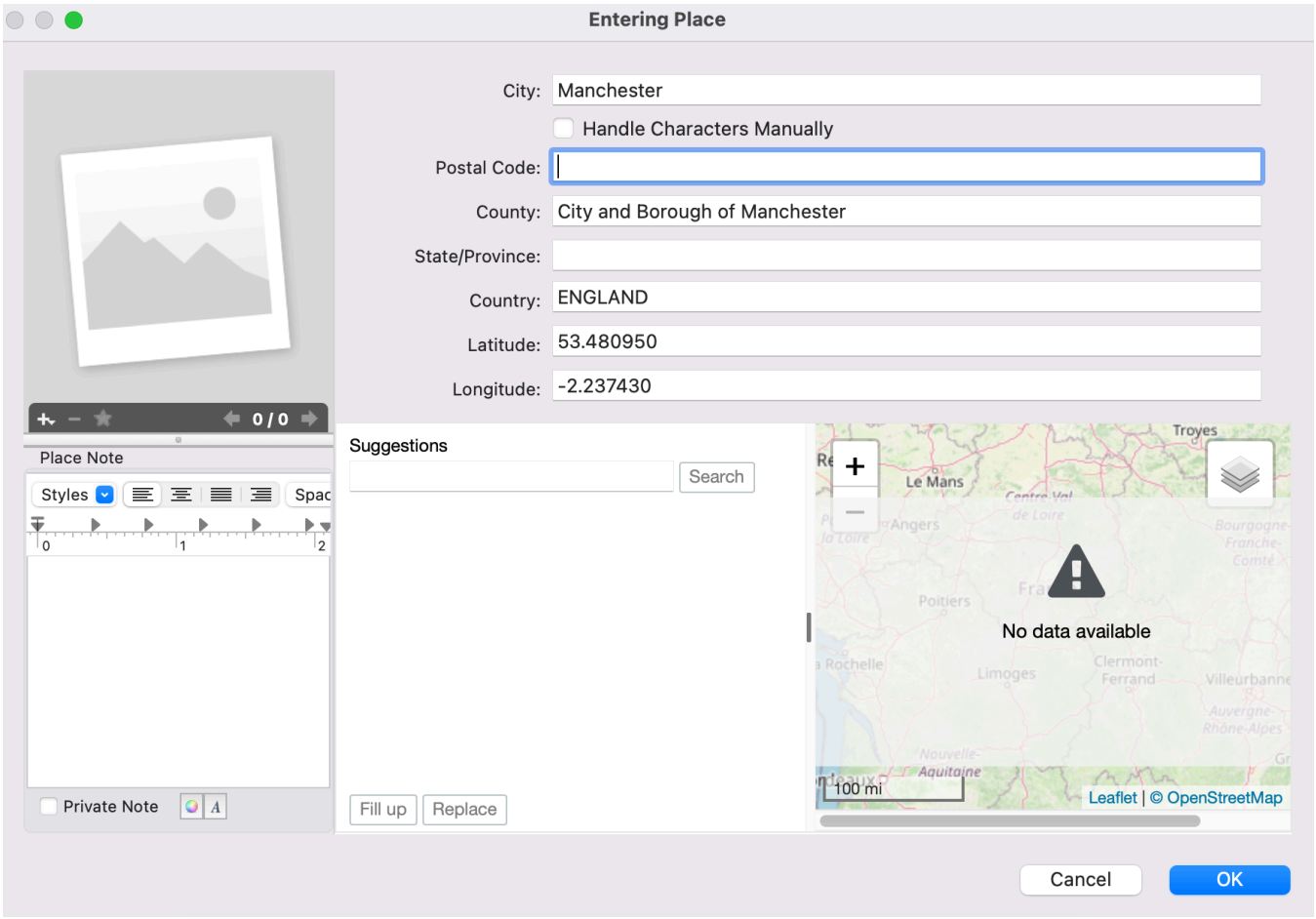
Create a new place to be assigned later

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.

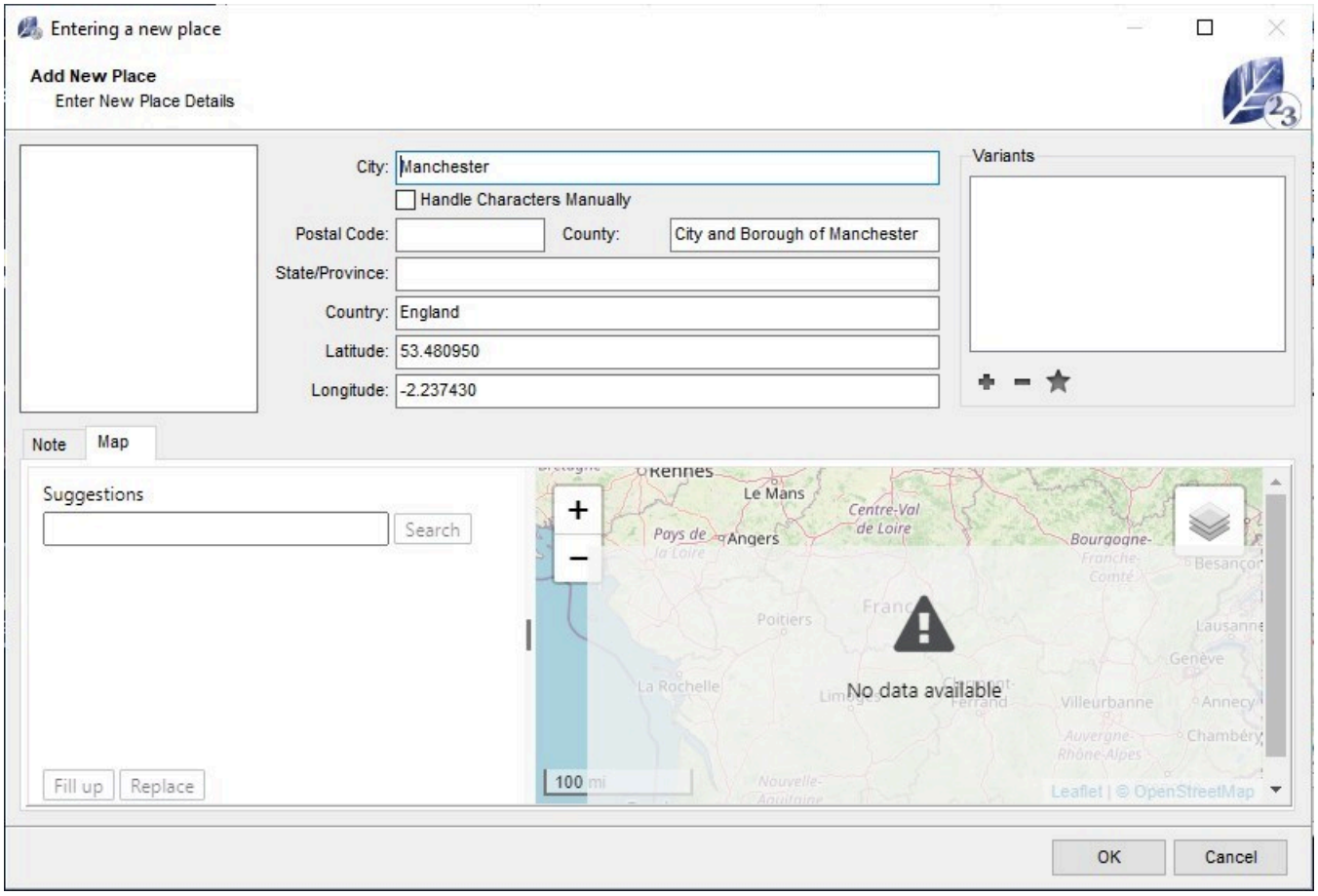
See the Places (see page 229) article to understand how to input a place.

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.

(Mac) Enter new place in Places index



(Windows) Enter new place in Places index



Information for the place

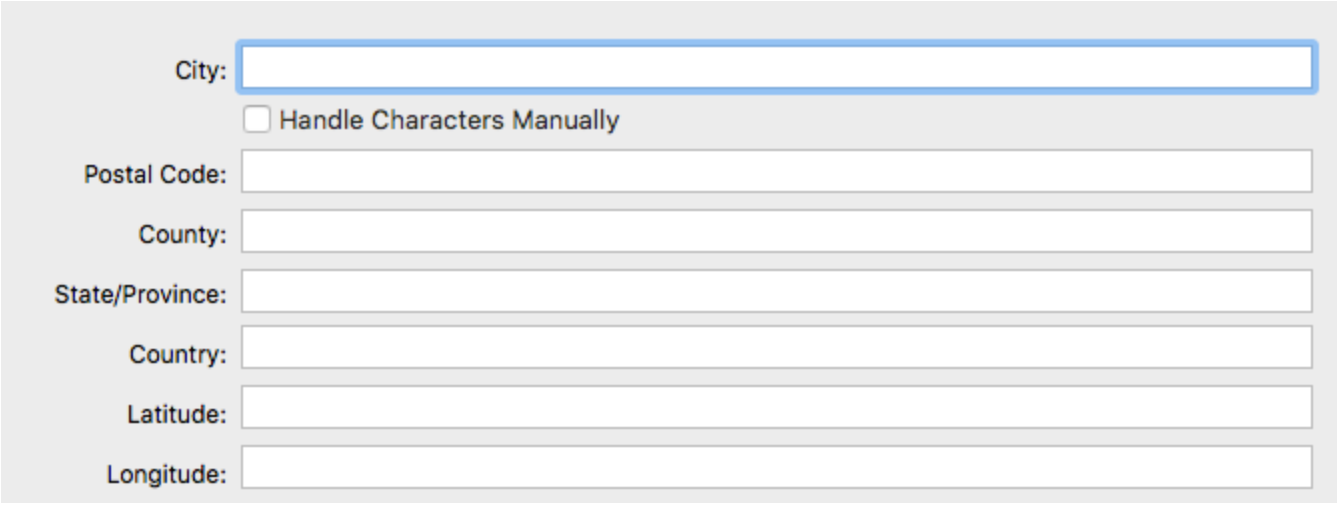
The input and modify screen of the place contains items to be filled in, a Notes field, an assigned media field, a display field for a map, and a field reserved for geolocation if it is not known.

Input fields for the place

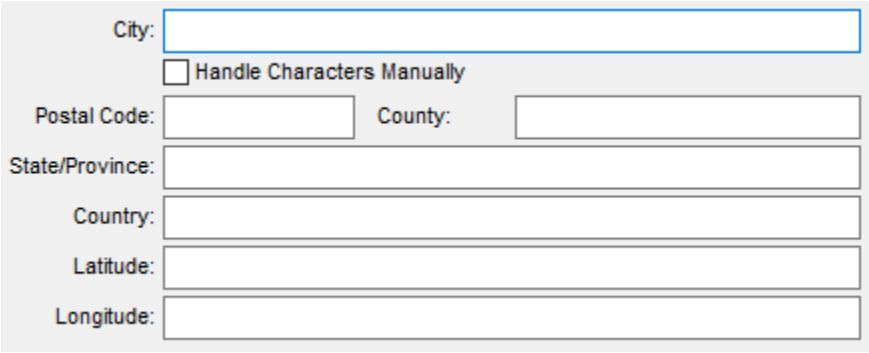
Each administrative item has a separate input field. This organization method allows you to edit documents by town, region, country and facilitates the geolocation of the place where your ancestors lived.
Complete the fields **City – Postal Code – County – State/Province – Country**.

If you know them, you may also complete the **Latitude** and **Longitude** fields. However they will be filled automatically when the geolocation of the town will be done.

(Mac) Administrative item



(Windows) Administrative item

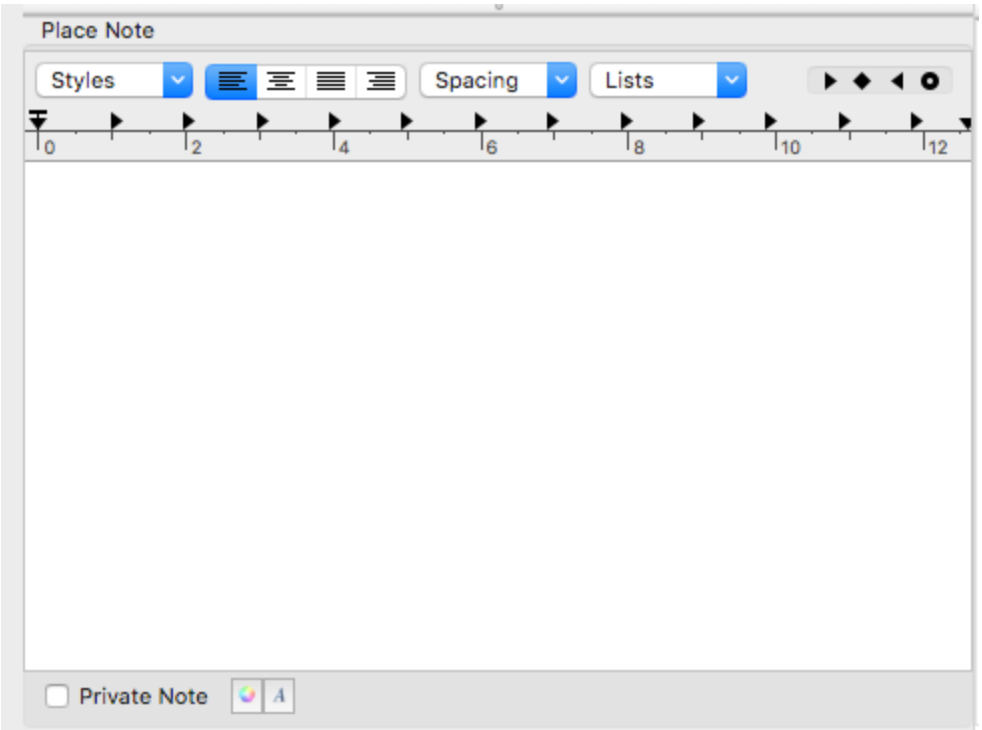


Tick **Handle Characters Manually** box if you don't want the default Heredis Preferences to apply for formatting the place.

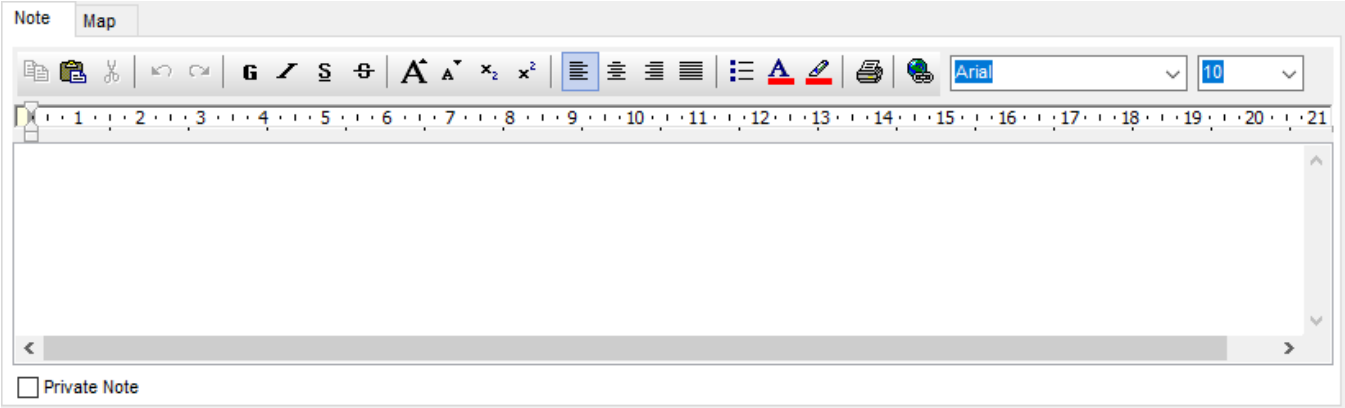
Place Note

Enter information about the place in the **Note** field, for example the history of this place. You have available the text editing tools to format the note.
Tick the **Private Note** box to exclude exports of the note or printed documents.

(Mac) Place's Note



(Windows) Place's Note



Media assigned to the place

To assign one or more media to a place:
• Click the ✚ (Add a Media) button in the display field of the media.
• (**Mac**) Drag and release the media selected from **Media** panel or from the Finder.

(Mac) In Place index, area to add a media

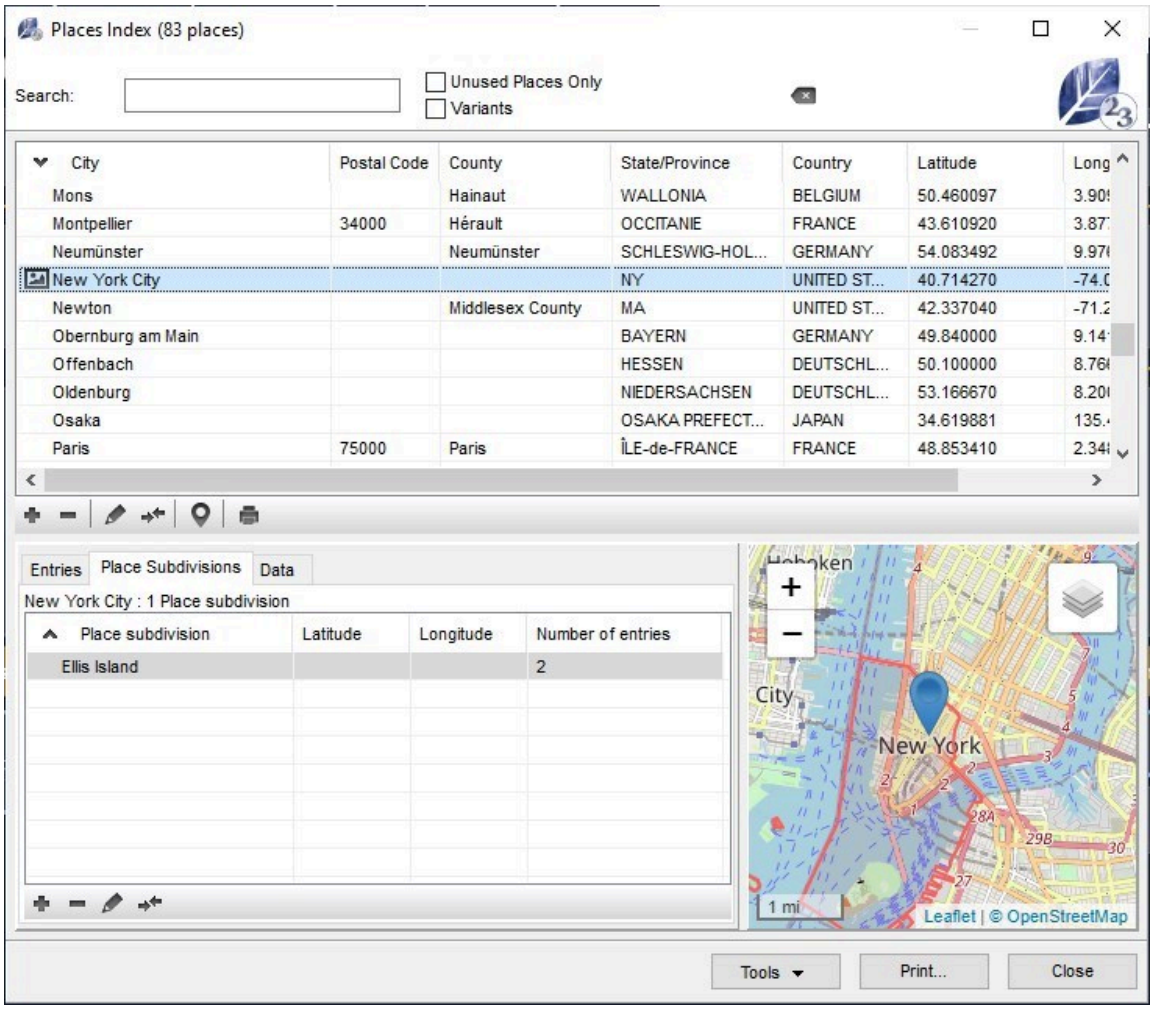
(Windows) In Place index, area to add a media

Mac Info • The right-click menu in the display field of the media provides access to the **Add New Media** option.

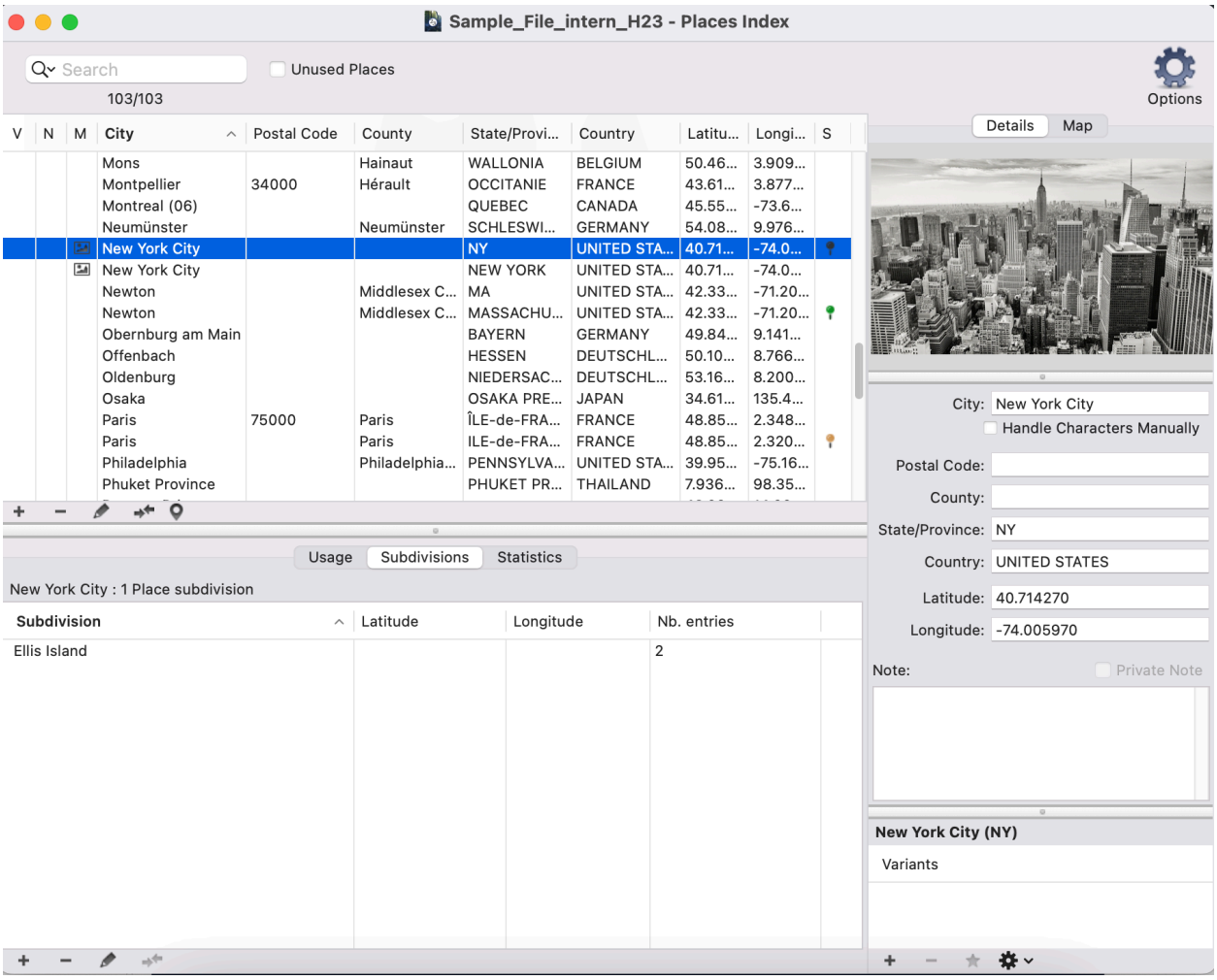
Subdivisions

Subdivisions tab inform you of subdivision attached to the selected place.

(Windows) Places index



(Mac) Places index



By clicking on the pencil button, you can geolocate the selected subdivision.

Use the button below the list of subdivisions to add a subdivision to a location for future use.

Use the button below the list of subdivisions to delete a subdivision from a location.

The button allows you to replace a subdivision by an other one, if for example, you entered “main street” and “Main Street”.

Also check Geolocating place subdivisions (see page 495).

Starting with Heredis 2025, you can delete unused subdivisions with just a few clicks. To do this, open the places index, click on the (Windows) **Tools** / (Mac) **Options** button and then click on **Remove all unused subdivisions**.

Manage variants

The concept of a variant allows you to combine several elements of an index. You can define variants of Places.
The names of places have sometimes changed over the centuries. As part of your genealogical research, you will find a number of variants for the same place. Lunden was

renamed London.

Declaring variants

1. Open the **places index**.
2. Select the place you want to be the main one.
3. In the **Variants** section:

- **(Windows)** at the bottom of the window in the **Data** tab, click on **edit** and then on the button ✚ in the variants area.
- **(Mac)** at the bottom right of the window, click on the button ✚(Add a variant).

4. Select the item which will be the variant and confirm with the **Choose** button.
You can repeat this operation as often as necessary to add several variants to the main element.

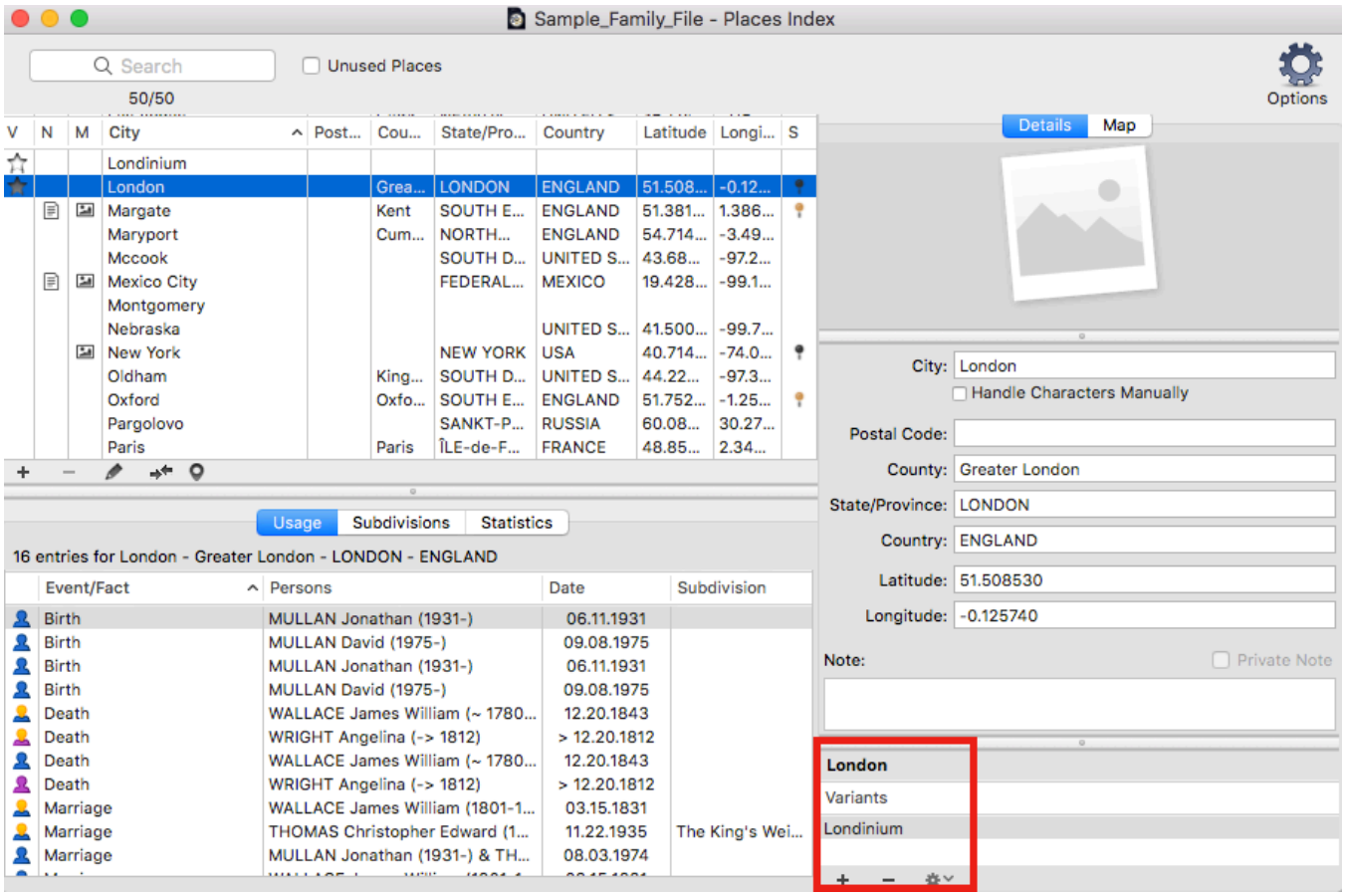
Add an old town

You can enter old towns and link them to the new one using the variants.
See the article Geolocating places (see page 489) paragraph Geolocating unrecognised places.

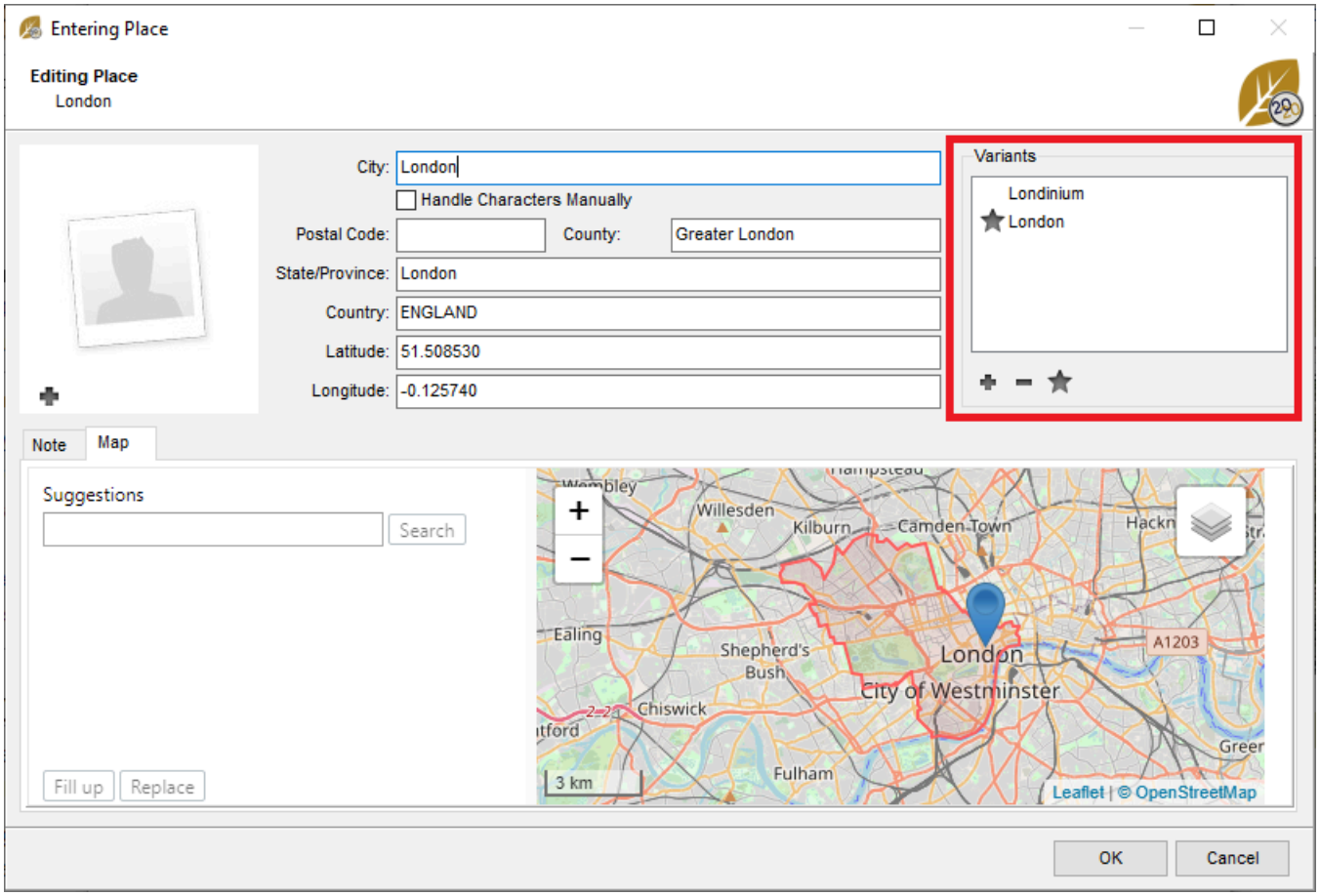
Once the old and new towns are available in the places index.
Tell Heredis that the old town is a variant of the new one.

To do this, open the places index.
Edit the new town by clicking on the pencil ✎.
Click on the ✚ under the variants area to add the old town as a variant.

(Mac) Add a variant



(Windows) Add a variant



For more details, see the article Indexes: generalities (see page 412).

The button bar

Below the list of locations, you'll find a button bar.

allows you to add a place.

delete the seleted place(s).

allows you to edit the selected place. You can add a note, a media item or change the administrative information.
The **Replace with** button lets you replace a place with another in the places index. If, for example, you have duplicates, this function replaces the uses of the duplicate with the other place.

Use the button to launch **Zoom in on a place** function. See the Zoom in on the World – Zoom in on a Place (see page 502) article for full details.

On Windows, you can use the button to create a place sheet of the selected place and print it out using your word processing software.

Select several locations

To process several locations in a single operation :

- (**Windows**) Press the Ctrl or Shift key and, while holding down this key, click on the different locations you wish to select.
- (**Mac**) Press the Command or Shift key and, holding down the key, click on the different locations you want to select.

Then choose the appropriate action: delete, replace or print the file.

Tools (Windows) or Options (Mac)

The **Tools** button on Windows and **Options** on Mac lets you perform a number of actions. Click on them.

(Mac) Print the place index

The **Options** button **> Print > Custom reports** allows you to edit the custom report of the places stored in the file as they are displayed.

If you have done a search, only the results of this search will be printed. Also, Heredis will keep the sorting order you have chosen by clicking on the columns corresponding to the different topics of the places.

You can also create a list, in the format prior to the custom reports, of all places. Click the **Options** button **> Print > Print Places list**.

You'll find all the topics of the places, its uses, and the transcripts you've entered if you wish.

Check out the articles Custom Reports (see page 598), (Mac) Create and Edit a Report

(Windows) Print the place index

The **Print** button allows you to edit the custom report of the places stored in the file as they are displayed. You can also launch the printing from **Tools** button **> Print > Custom reports**.

If you have done a search, only the results of this search will be printed. Also, Heredis will keep the sorting order you have chosen by clicking on the columns corresponding to the different topics of the places.

You can also create a list, in the format prior to the custom reports, of all places. Click the button in the index toolbar or the **Tools** button **> Print > Places report**.

You'll find all the topics of the places, its uses, and the transcripts you've entered if you wish.

Check out the articles Custom Reports (see page 598), (Windows) Pre-established reports (see page 612).

Import an index into a Heredis file

You can import an index into an other Heredis file if, for example, you need to use the data you entered in an other file. See Import an index into a Heredis file (see page 485) article for further details.

Remove all unused places

In order to clean up your file, you can remove at once all the unused places.

Click on (Mac) **Options** button / (Windows) **Tools** button **> Remove all unused pla**ces.

If a place is used, Heredis will alert you and won't delete them.

Unlink all variants

To delete all location variants from the genealogy file :

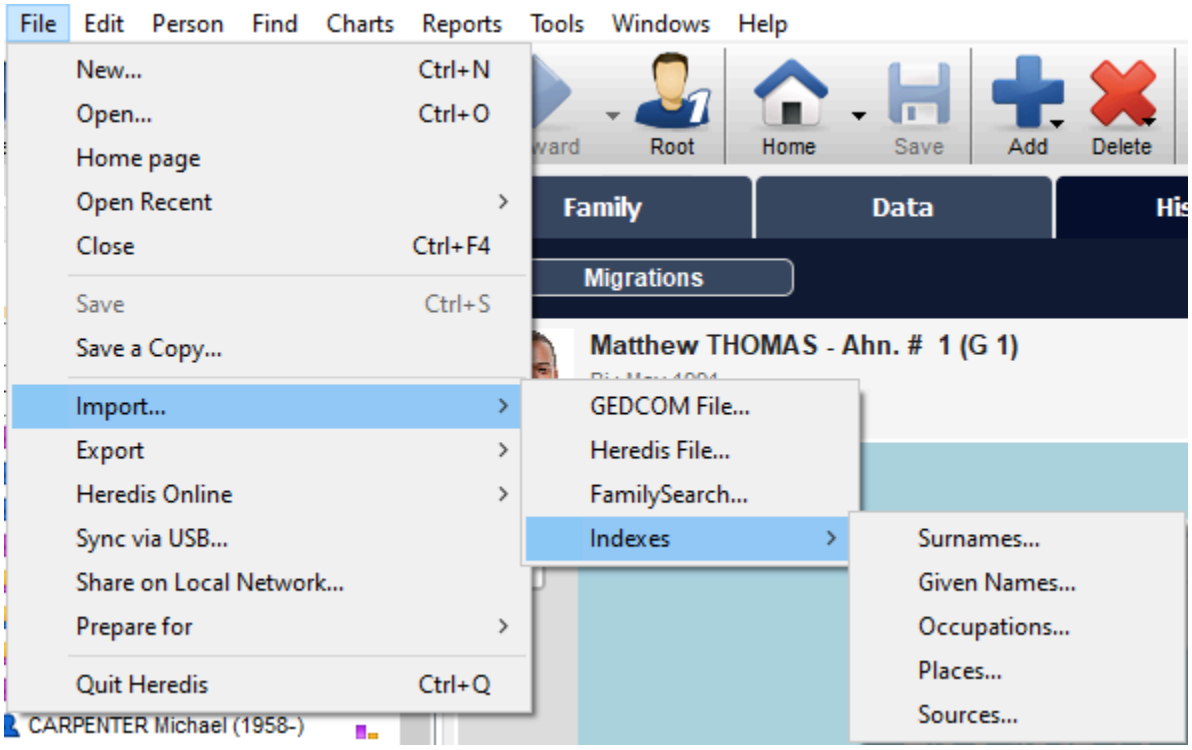
- Click the (Windows) **Tools** / (Mac) **Options** button.
- Select the **Unlink all variants** option.

Import an index into a Heredis file

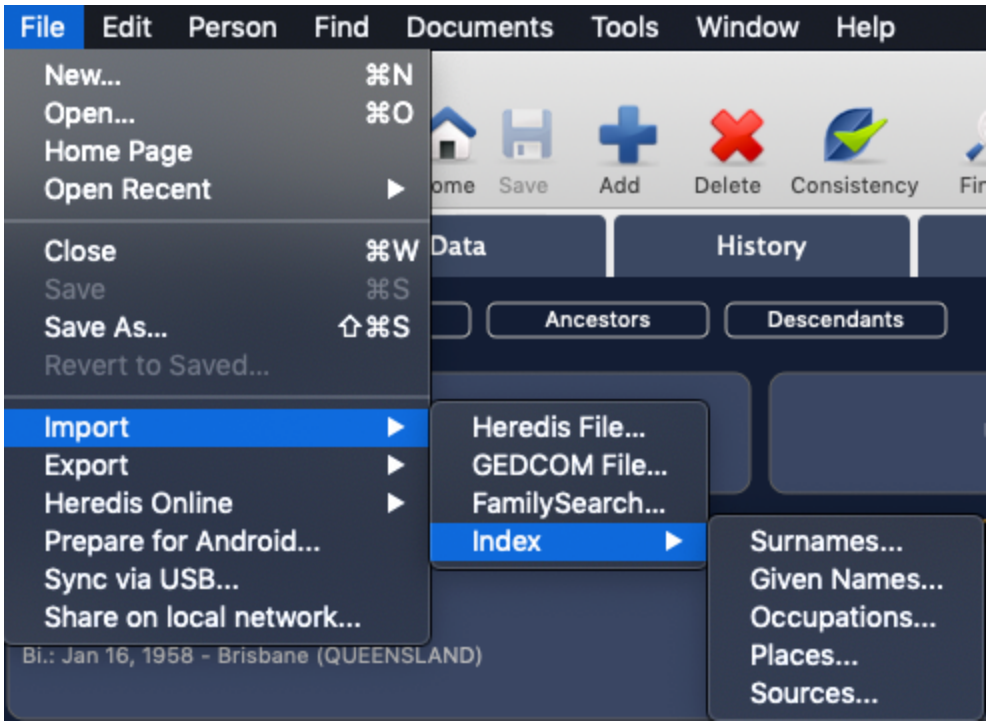
You have studied surnames, places or occupations. Heredis allows you to share your indexes with another file, so you don't have to re-enter everything in your wife's file, for example. Convenient when working with someone who has researched the origin of your family names or locations. You will be able to add to your own file one of the indexes in the Heredis file someone provided you.

- Open the file in which you want to add the index.
- Click on the **File > Import > Indexes** menu and choose from the indexes suggested: **Surnames, Given Names, Occupations, Sources, Places.**

(Windows) Importing an index

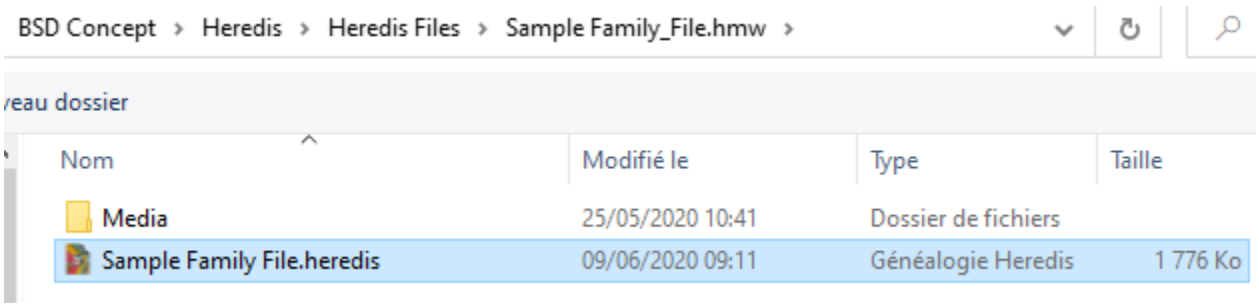


(Mac) Importing an index

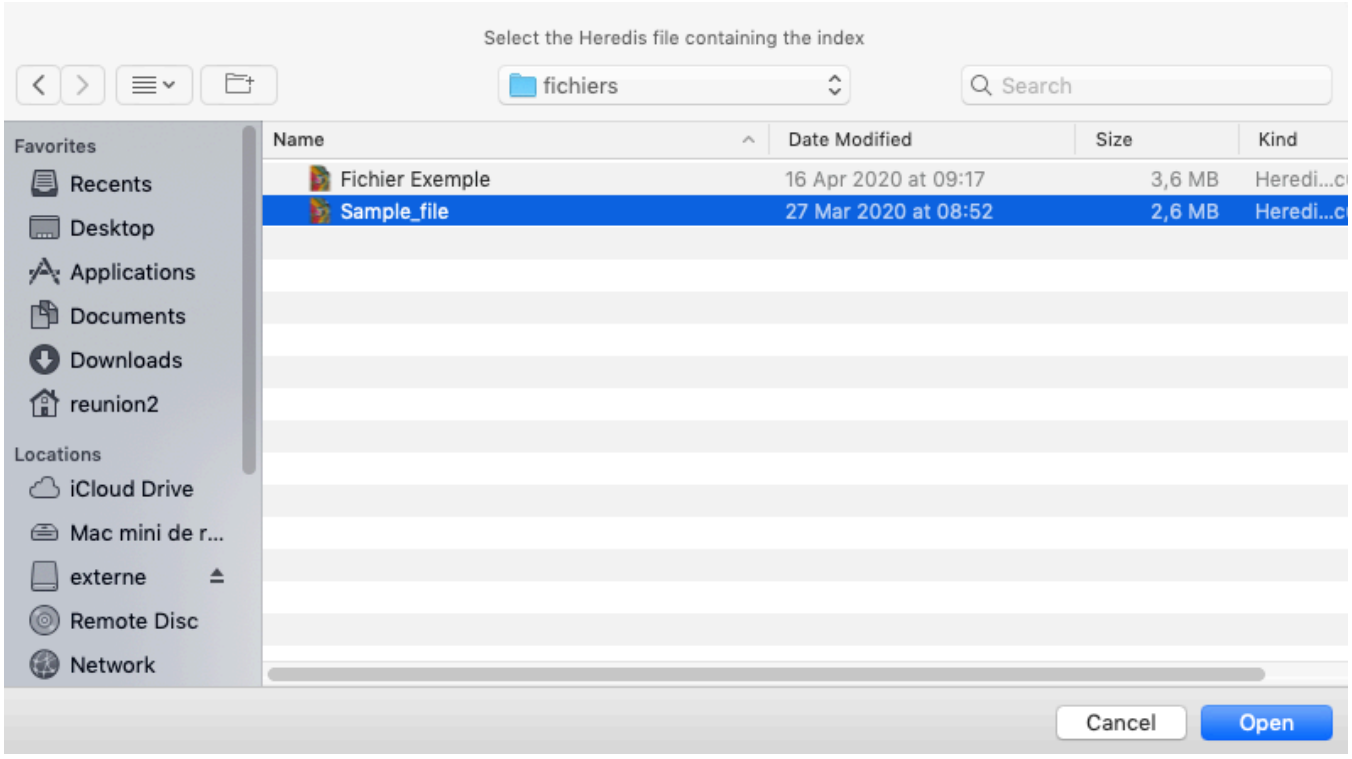


- (**Windows**) Choose the .heredis file that matches the one containing the index to be imported.
- (**Mac**) Choose the .hmw file that matches the one containing the index to be imported.

(Windows) Heredis file selection



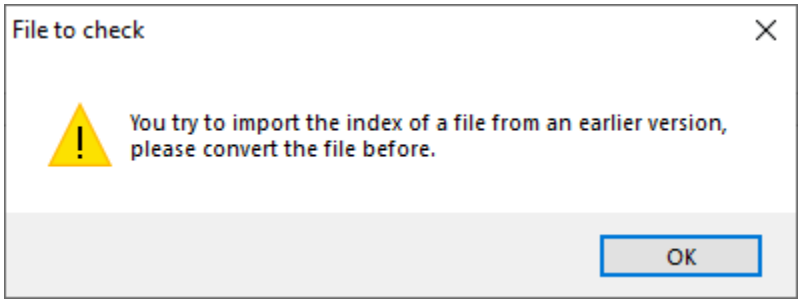
(Mac) Heredis file selection



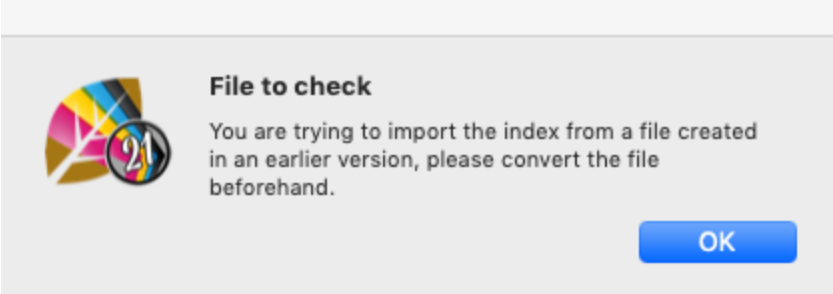
- Confirm by clicking on **Open**. You will be asked to open the corresponding index or not once the import is complete.

Important: The Heredis file must be in the same version as your file. Heredis 2021 will be able to import a Heredis 2021 file. If the file is not in the same version of Heredis format, a message will invite you to do the conversion. Click **OK** to validate the message. Then open the file with your version of Heredis, it will convert on its own and you can then return to your file in which you want to import that index.

(Windows) Import alert message impossible if the file is not of the same version



(Mac) Import alert message impossible if the file is not of the same version


File to check
You are trying to import the index from a file created in an earlier version, please convert the file beforehand.
OK

Geolocating Places

Consulting Places maps

Heredis does everything for you to visualize the places where your ancestors lived.
The **Places Index** will display an interactive map for the selected place. If Heredis has been unable to identify the place, you can yourself indicate where it is by using the geolocation tool.

Visualize the map

- Display the Map of selected place from the **Map** tab in each event or in the **Places index**.

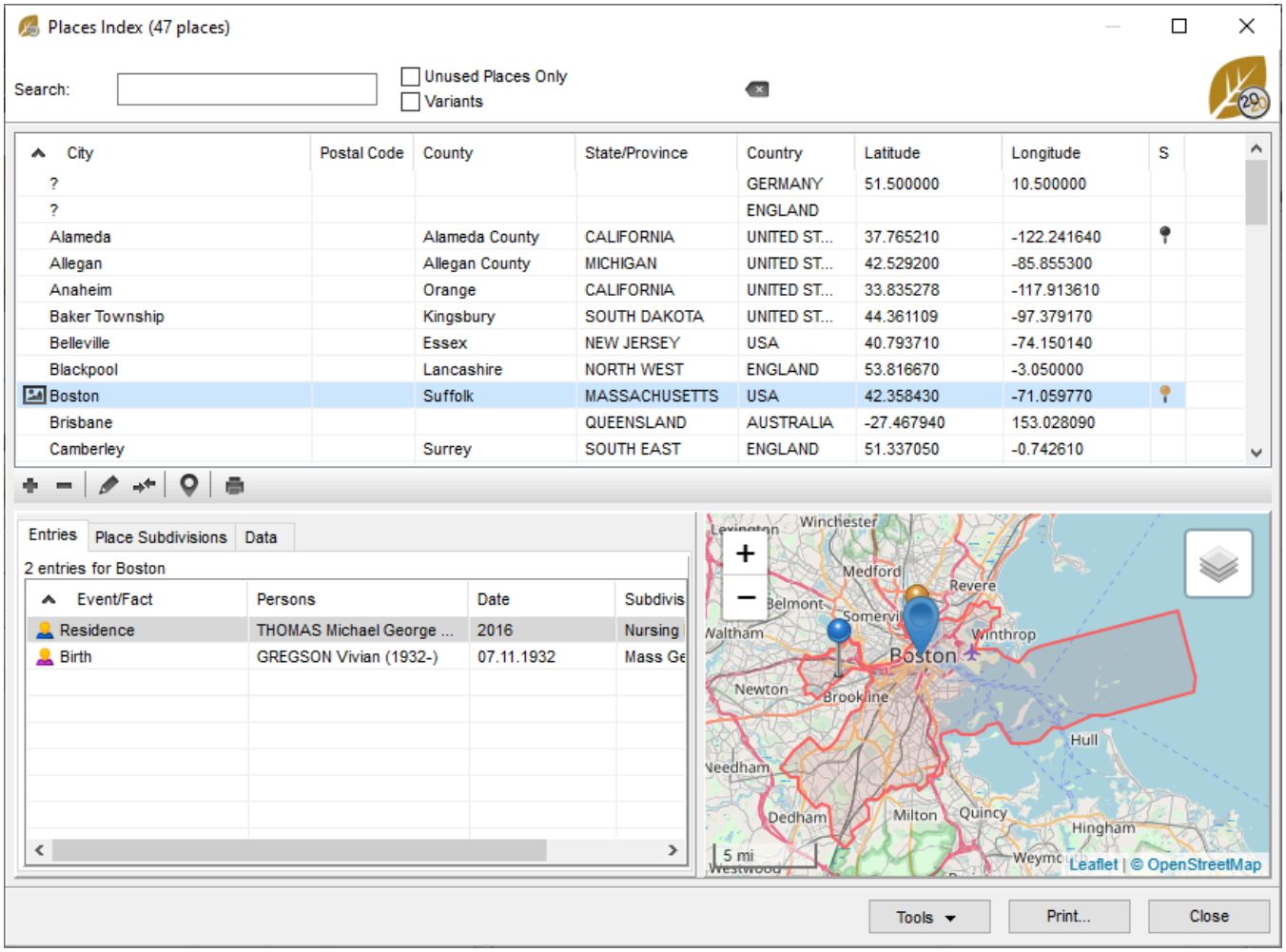
  Open the **Places index**.

(Windows) The map is displayed on the bottom right of the index when you have selected a place.

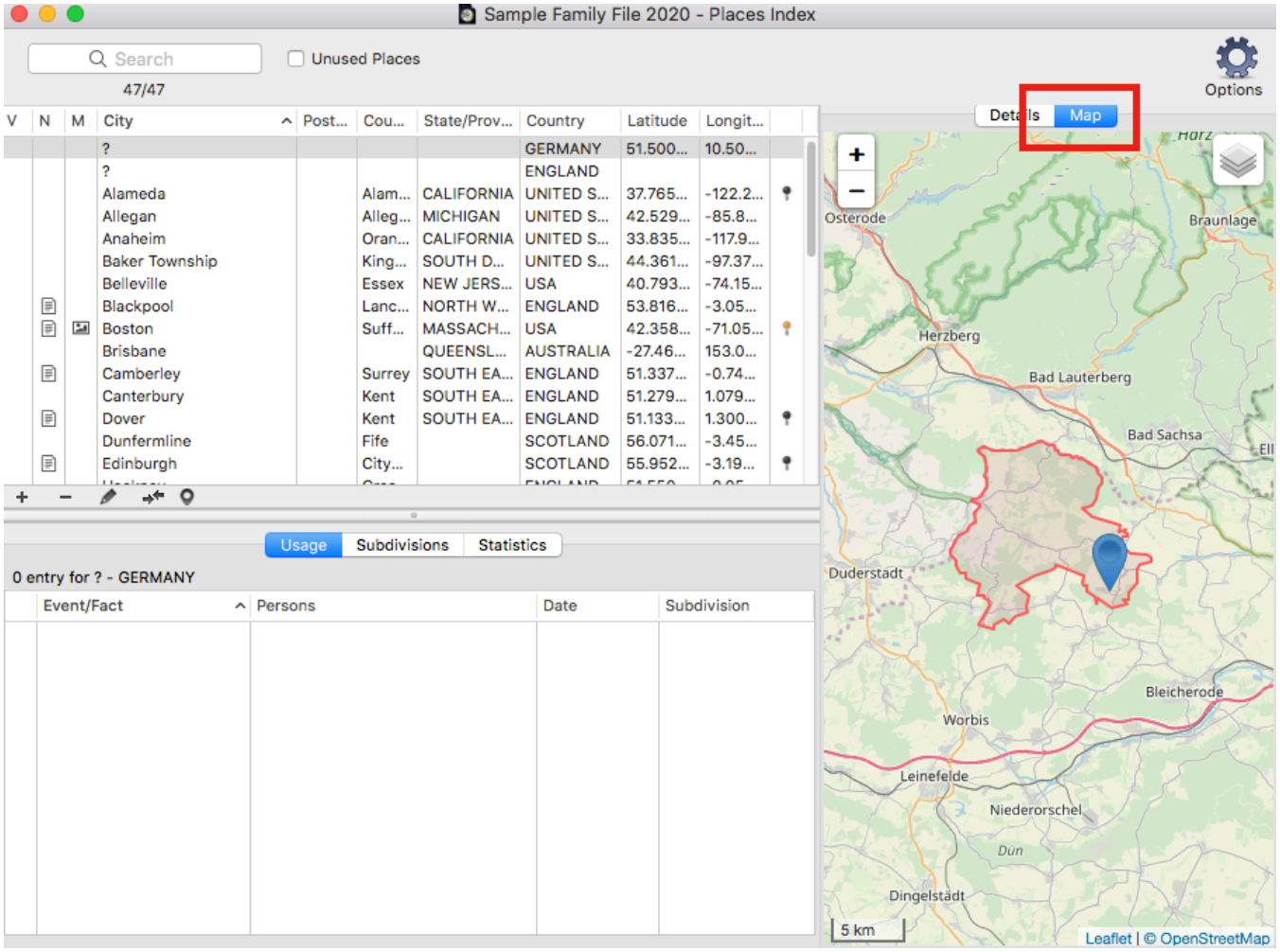
(**Mac**) Click on the **Map** tab on the right part of the screen when you have selected a place.

- Browse the map using the navigation tools. Zoom or reduce to get a better understanding of the geography of the place.

(Windows) Map


Places Index (47 places)
Search:
Unused Places Only
Variants
City
Postal Code
County
State/Province
Country
Latitude
Longitude
S
? GERMANY 51.500000 10.500000
? ENGLAND
Alameda Alameda County CALIFORNIA UNITED ST... 37.765210 -122.241640
Allegan Allegan County MICHIGAN UNITED ST... 42.529200 -85.855300
Anaheim Orange CALIFORNIA UNITED ST... 33.835278 -117.913610
Baker Township Kingsbury SOUTH DAKOTA UNITED ST... 44.361109 -97.379170
Belleville Essex NEW JERSEY USA 40.793710 -74.150140
Blackpool Lancashire NORTH WEST ENGLAND 53.816670 -3.050000
Boston Suffolk MASSACHUSETTS USA 42.358430 -71.059770
Brisbane QUEENSLAND AUSTRALIA -27.467940 153.028090
Camberley Surrey SOUTH EAST ENGLAND 51.337050 -0.742610
Entries
Place Subdivisions
Data
2 entries for Boston
Event/Fact
Persons
Date
Subdivis
Residence THOMAS Michael George ... 2016 Nursing
Birth GREGSON Vivian (1932-) 07.11.1932 Mass Ge
Winchester
Medford
Revere
Somervi
Waltham
Winthrop
Boston
Newton
Brookline
Hull
Needham
Dedham
Milton
Quincy
Hingham
5 mi
Leaflet | © OpenStreetMap
Tools
Print...
Close

(Mac) Map



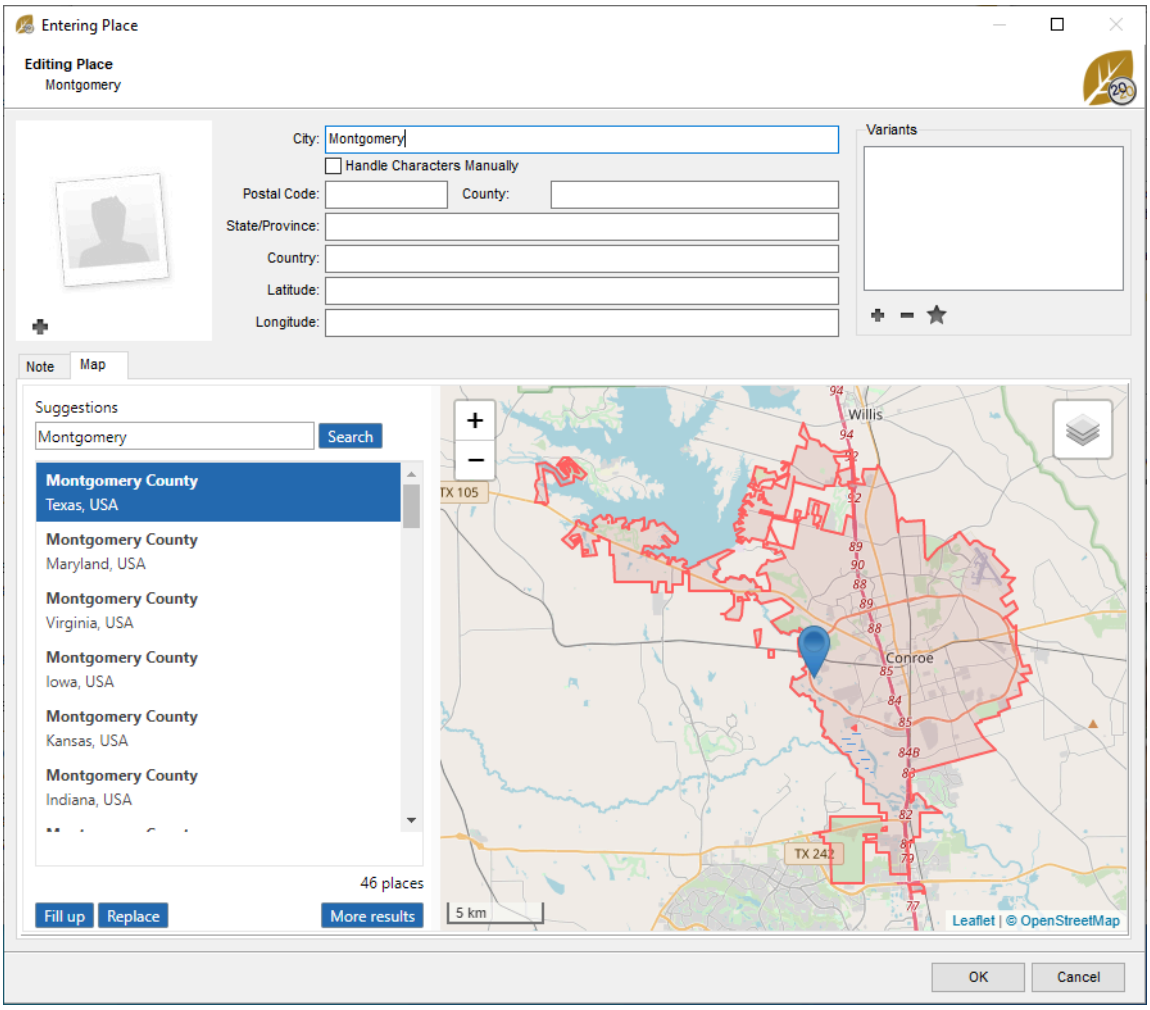
Geolocate unrecognized places

Edit the place by double-clicking on it or by using the pencil button after selecteing the place to edit.

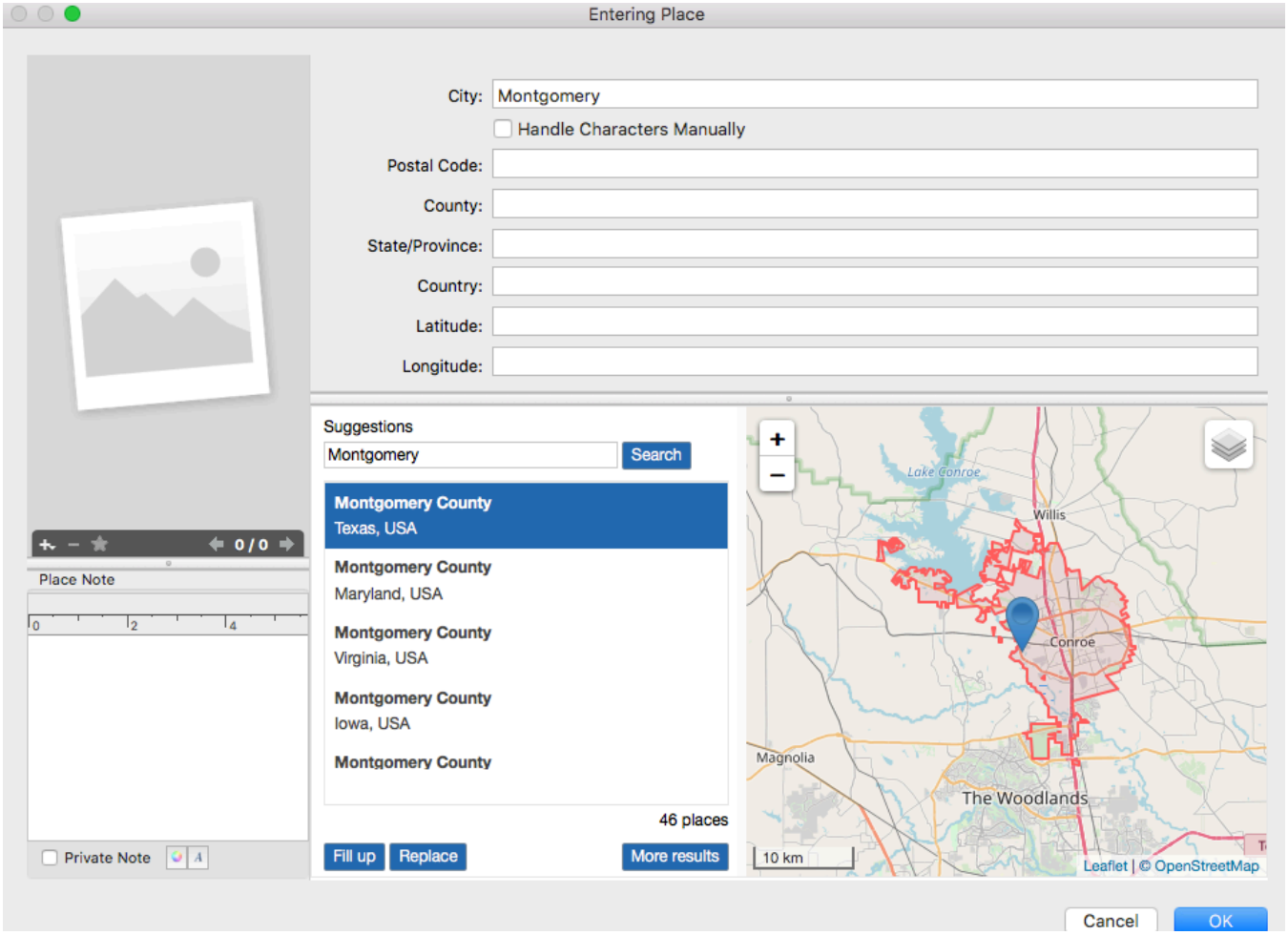
If no map appears on the **Map**, you must specify the coordinates of the place. If no latitude and longitude are available, Heredis will not be able to localize this place. For example, you can enter the old name of a city in the city field and search the **Suggestions** field with the current name. Heredis launches a search in OpenStreetMap and will geolocate the current location.

Click on **Fill up** to complete the missing data or click on **Replace** to modify the fields entered by the OpenStreetMap indications.

(Windows) Geolocate unrecognized places

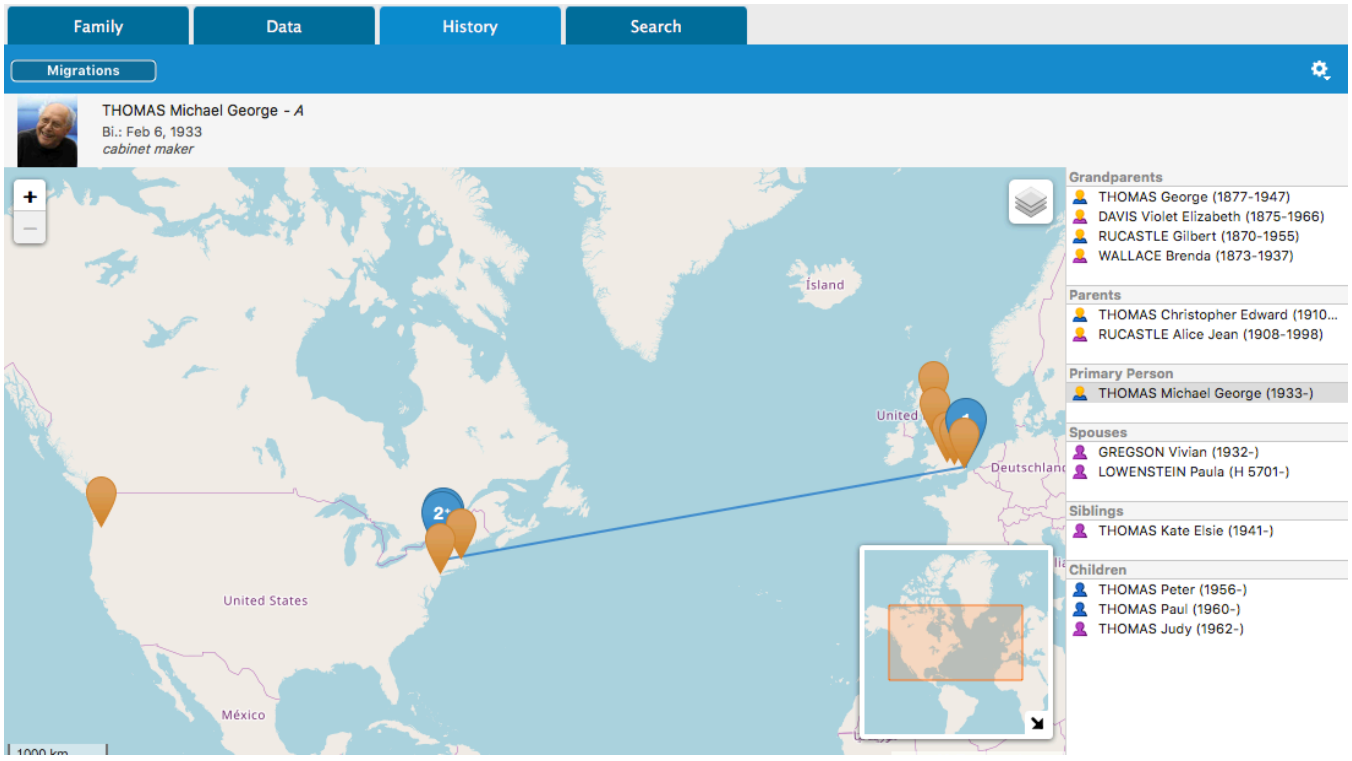


(Mac) Geolocate unrecognized places



See also Places index (see page 472) article.

Info • You may also access the map of the place in the **History > Migrations** tab, in the **Search > Search Wizard > Map** tab and in the **Data > Personal Data** tab. Click the **Map** tab for each event provided that a place has been entered.



See also Geolocating Places subdivisions (see page 495), Zoom in on the World – Family Tree Mapping (see page 508).

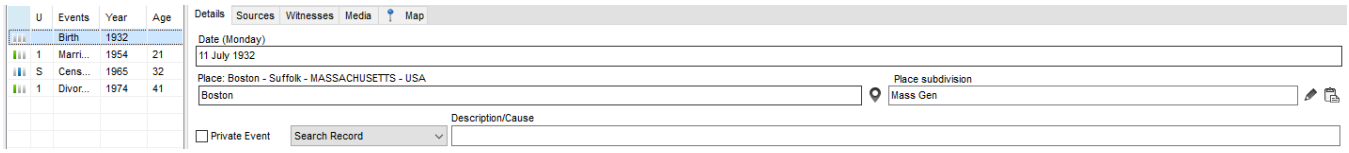
Geolocating Place subdivisions

Place subdivisions can now be geolocated. The **Place Subdivision** field is intended for specific details on a place, such as an exact address, a hamlet, or any other place name.

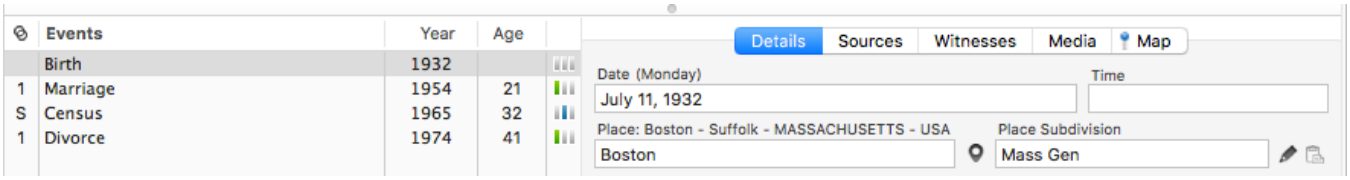
Edit

To access this feature, select an event under the **Personal Data** tab. Click on the **Details** tab then on the pencil button displayed to the right of the **Place subdivision** field.

(Windows) Details tab for an Event

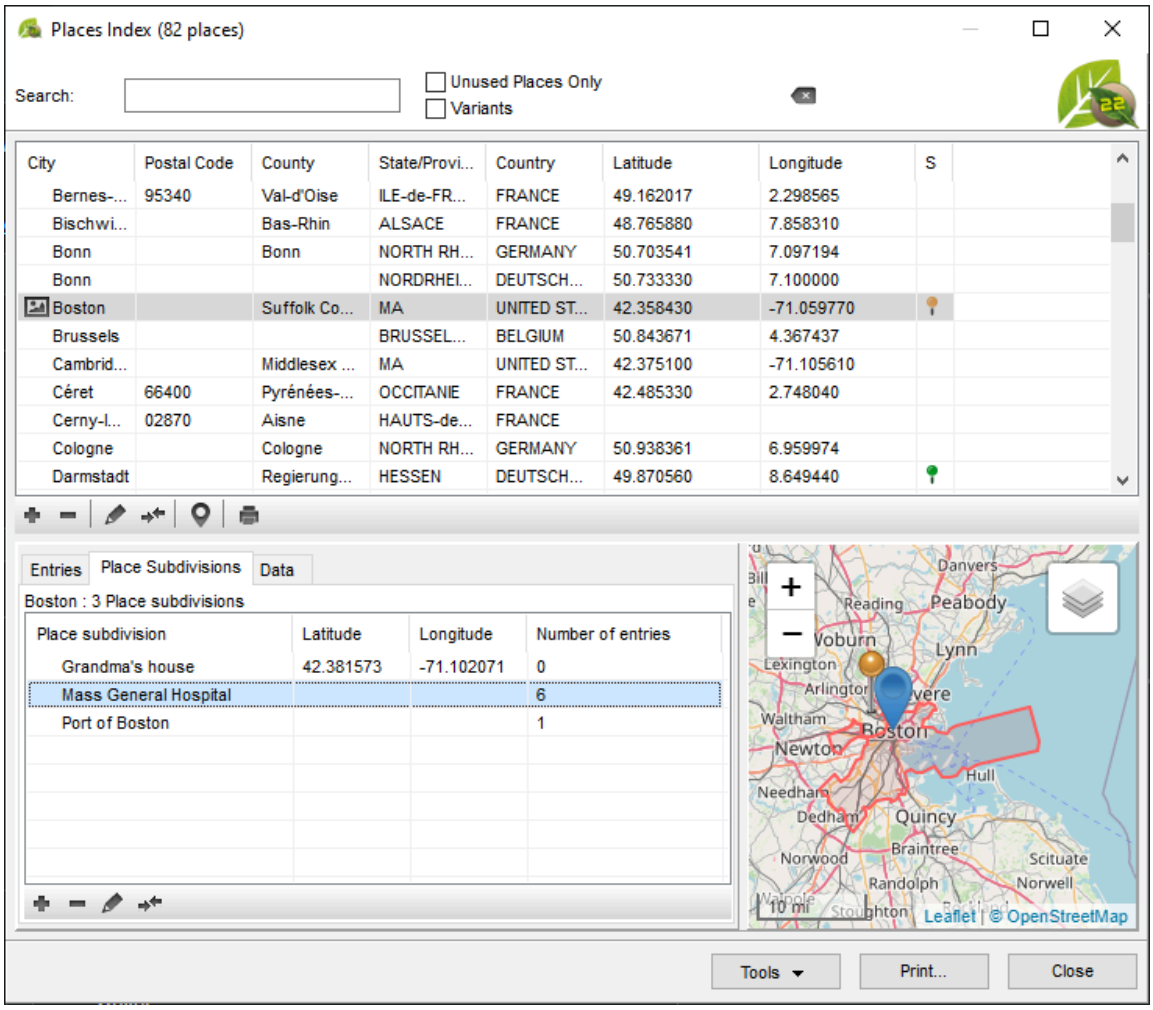


(Mac) Details tab for an Event

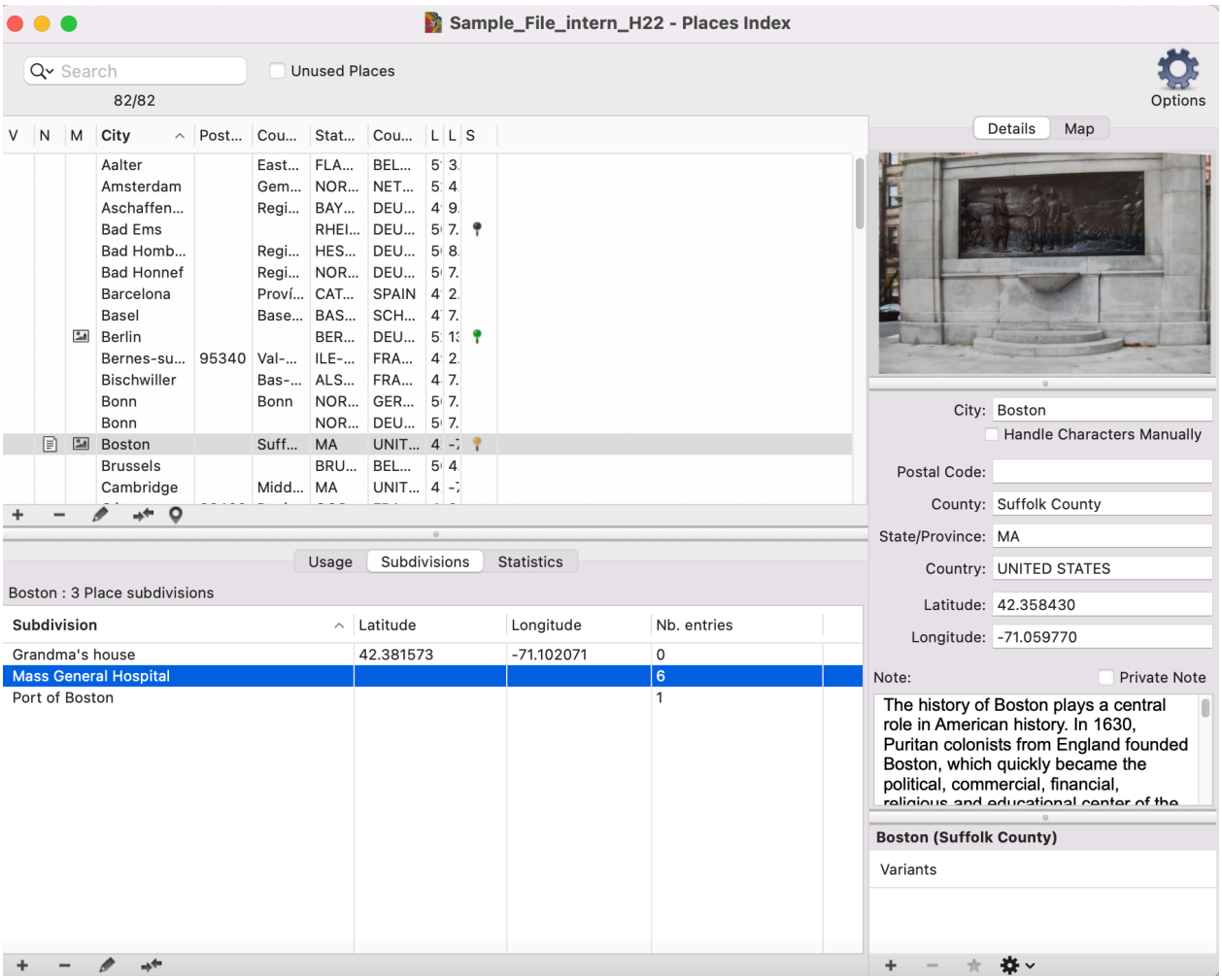


You may also access it from **Places Index > Subdivision** then click on the pencil button. Since Heredis 2022, you can add a subdivision in the Place Index by clicking on and delete it by clicking on the on the Subdivision tab of a location.

(Windows) Places Index



(Mac) Places Index



You can enter the name and coordinates manually or paste a place's data (in its entirety or only the coordinates) by clicking on the button.
See the article entitled Zoom in on a Place for more details.

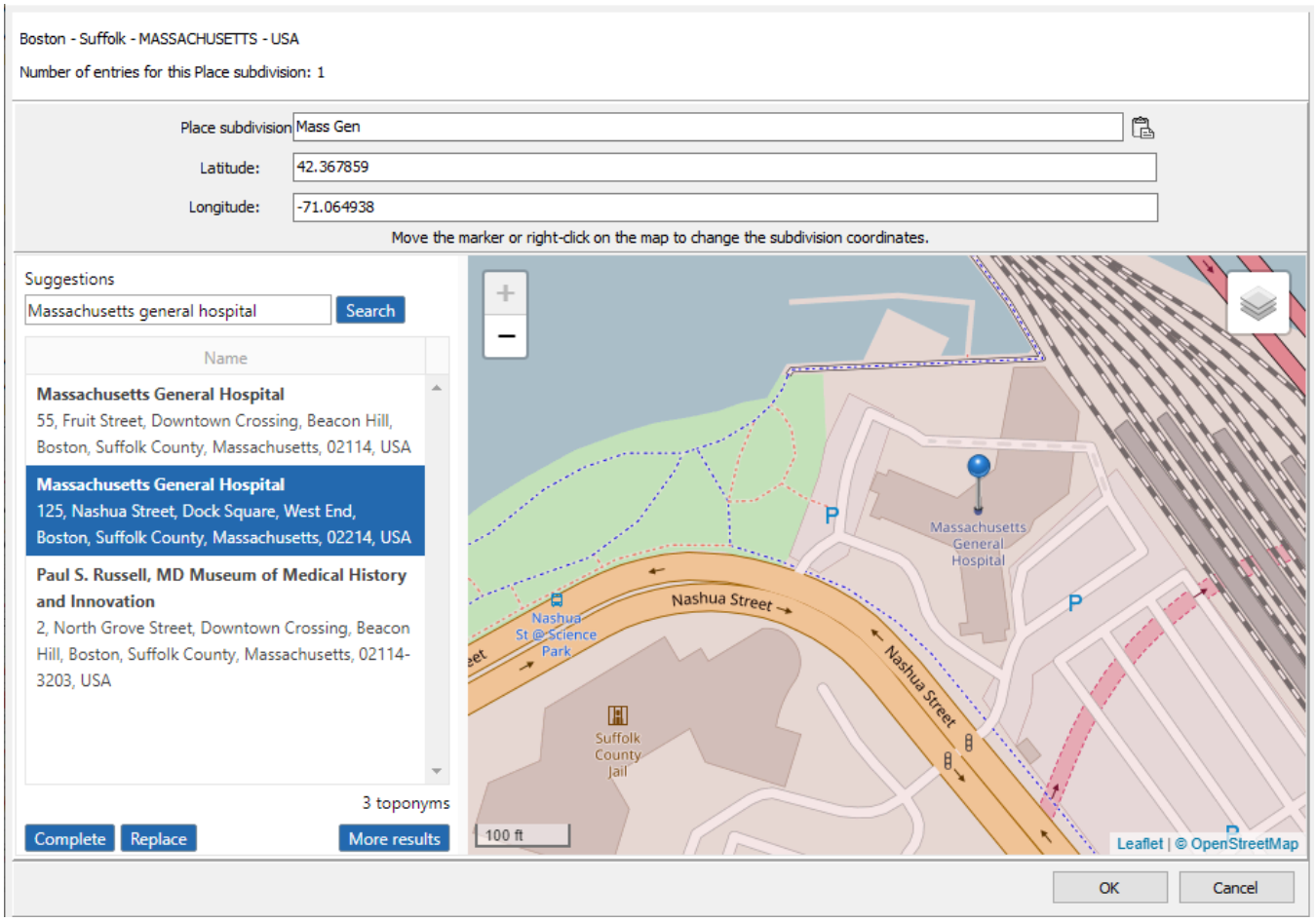
Search

If the subdivision name is precise enough, Heredis will perform an automated pre-search. Browse through the list of propositions.

If your subdivision cannot be located – for instance « at her grandma's house » – Heredis will not be able to offer any potential geolocation. You should therefore modify the field content under **Suggestions** then click on **Search** to launch the search again.

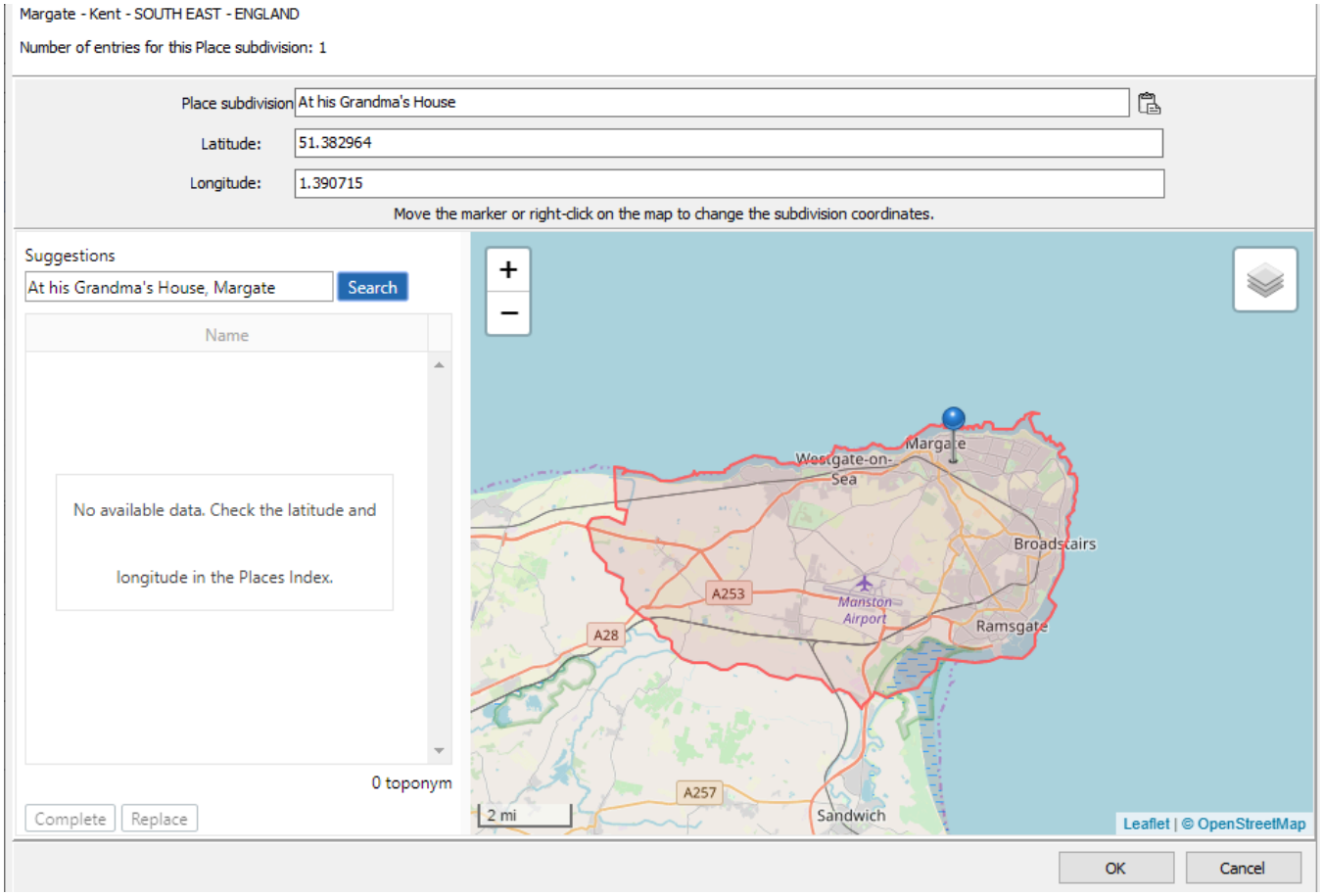
Note: Avoid using commas and unnecessary spaces at the end of the text in the Subdivision field to ensure that the automated search will be able to find the designated places.

Edit a non-geolocated subdivision



In the same way you search for a place's geolocation (please refer to Geolocation), click on:
• **Fill up** to keep the subdivision name and add coordinates,
• **Replace** to replace all data previously entered for the subdivision.
Click **OK** to validate.
If you know where the person's grandmother used to live and prefer to leave « at her grandma's house », then drag and drop the marker or right-click on **Position the marker here**. Coordinates (latitude and longitude) will then be displayed.

(Windows) Edit an unrecognized subdivision

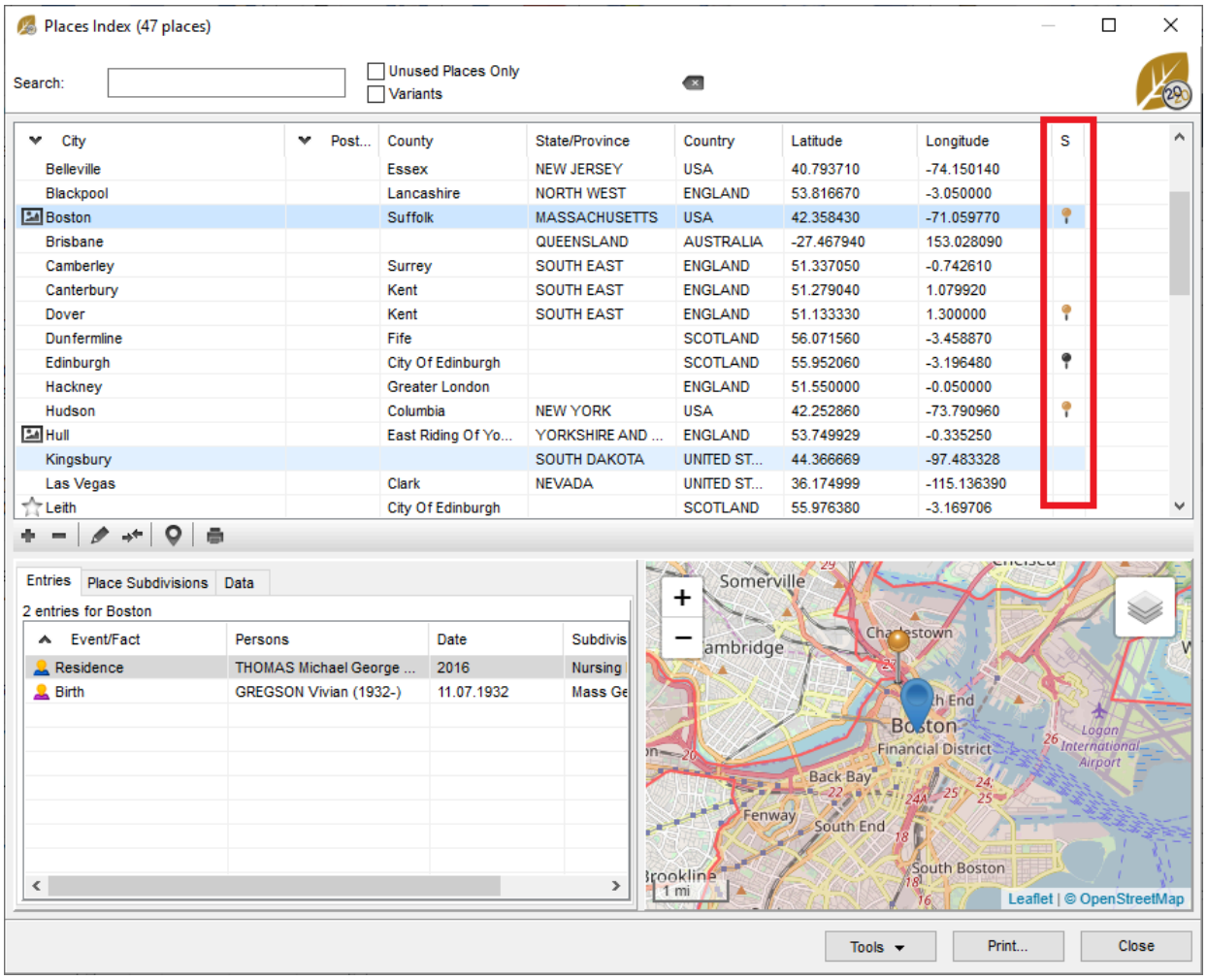


Display

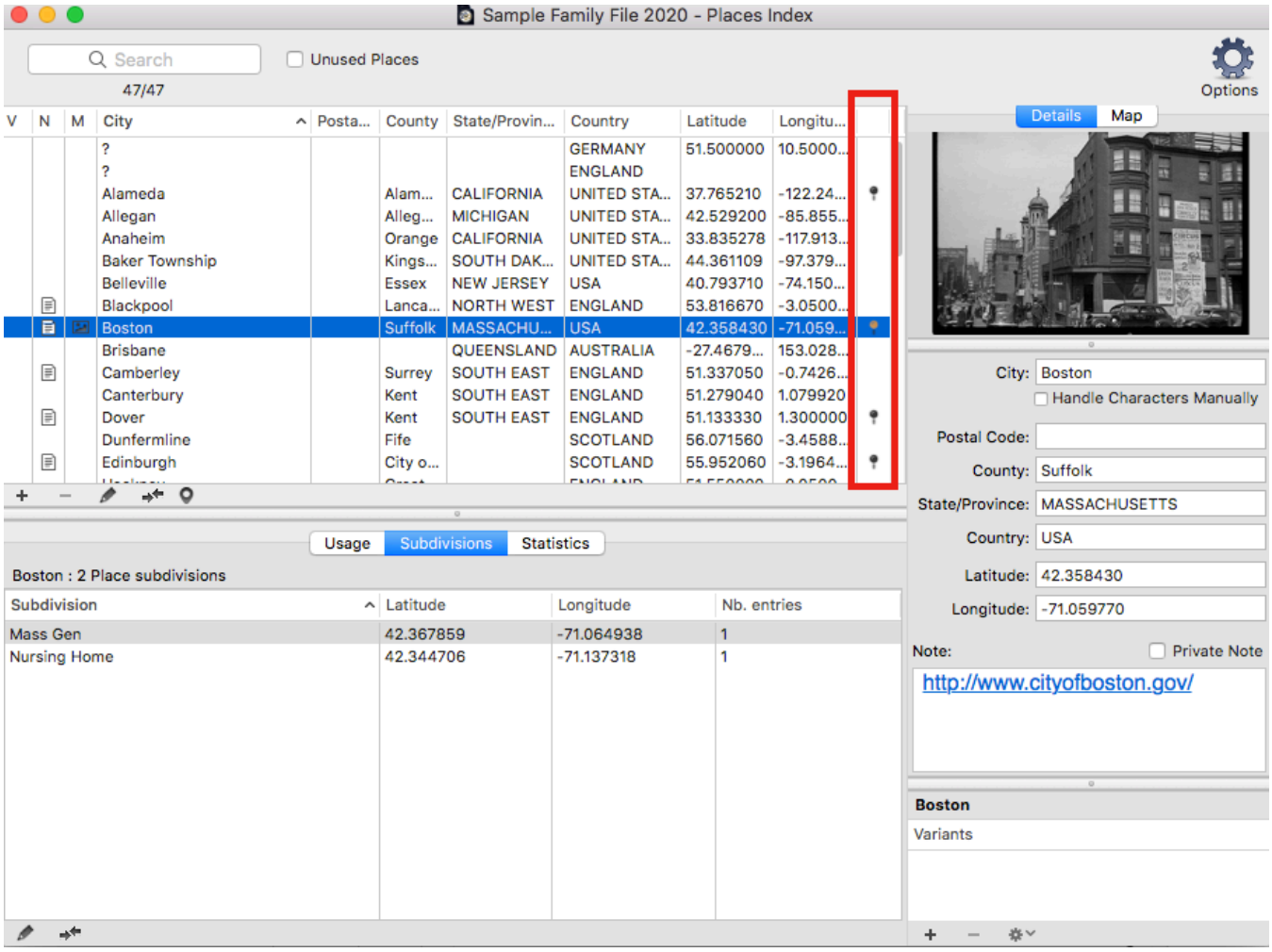
From the Places Index

In the list of places, the S column will display markers to indicate whether there is one subdivision or more. When they are not geolocated, the marker is black . When at least one subdivision has been geolocated, the marker is yellow .

(Windows) Places Index – The S Column



(Mac) Places Index – The S Column



From maps

Subdivisions are visible thanks to yellow markers on the **Events** maps, **Zoom in on a Place** maps, as well as on **Migrations** maps (under the **History** tab).

You can right-click on any of the Heredis maps and **Copy the coordinates**. You will then be able to click on the **Paste** button in the **Place subdivision** field under **Events**. However, to be able to do so, make sure a name has been entered in the subdivision field – otherwise the button will not be activated.

Zoom in on the World – Zoom in on a Place

Zoom in on the World provides several tools that will assist you in locating your ancestors.

Heredis will help you get a better understanding of your ancestors' environment by offering an array of miscellaneous information related to places.

To access **Zoom in on a Place**, all you need to do is either click:
• on the button, from **Data > Personal Data > Events > Details** tab,
• on the button, from **Family Tree Mapping > Places** tab,
• from the **Tools** menu **> Zoom in on the World > Zoom in on a Place**,
• on the **Zoom in on a Place** button in the toolbar,
• from the **Places Index** or the **Places** panel, on the button.

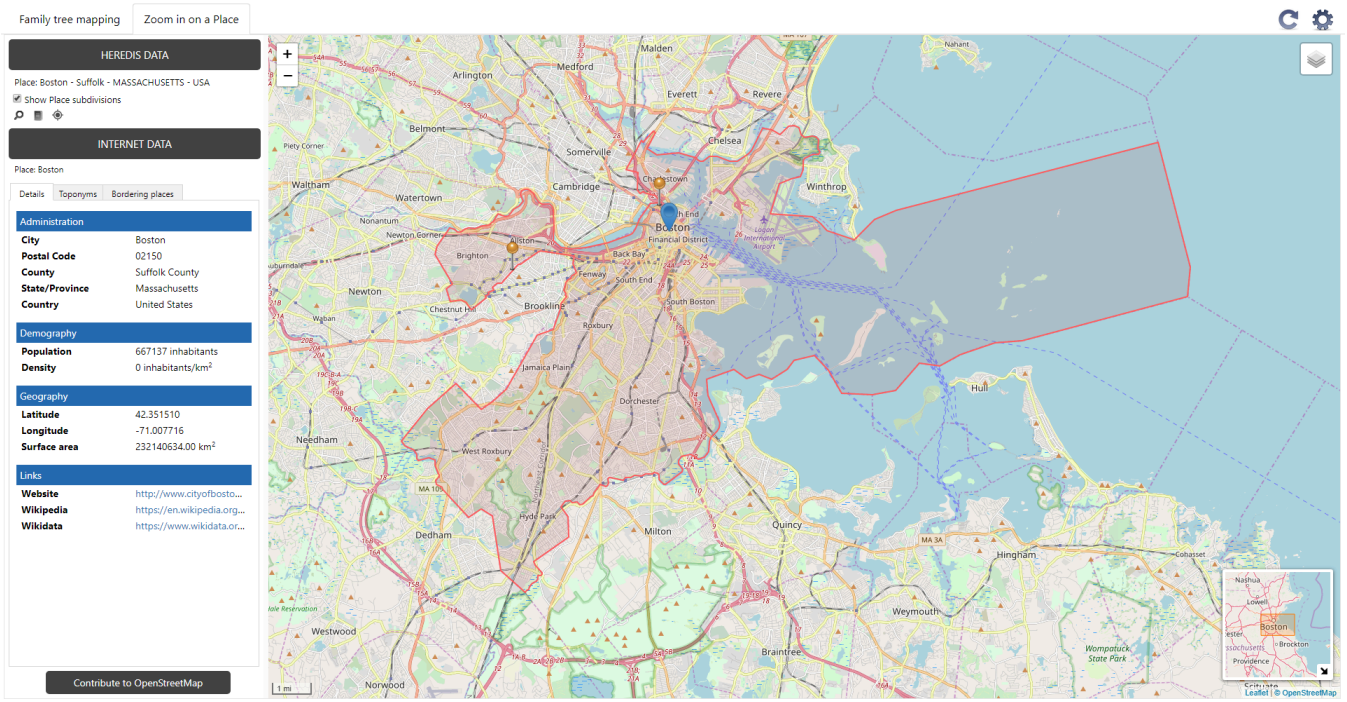
In the upper part of the side panel, under Heredis Data, you will find the information for the location currently displayed in Heredis. You can tick or untick the box entitled Display place subdivisions to show or hide the subdivisions of your genealogy file that are linked to this place on the map.

Change places by clicking on the magnifying glass. Open the **Places Index** by clicking on the button. The button allows you to zoom back on the place indicated under Heredis Data if you have been navigating on the map of a bordering place.

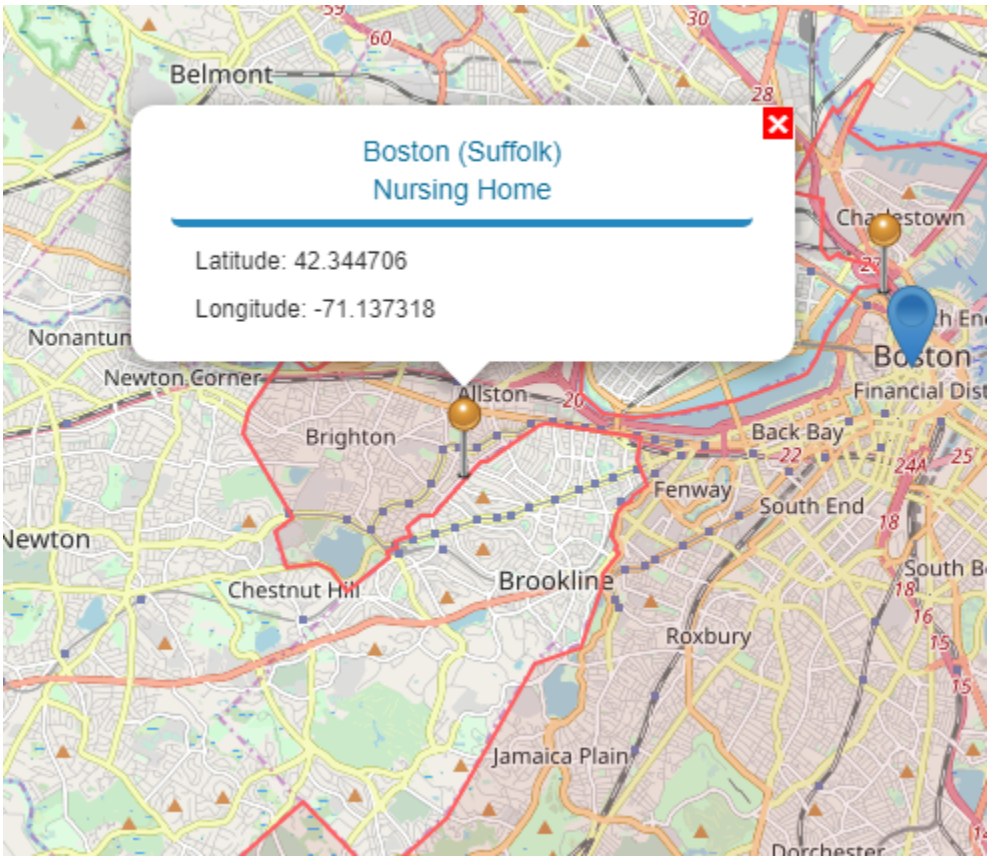
Please see the paragraph entitled Bordering Places (see page 504).

Details tab

Under this tab, Heredis will display the information on this place found on the internet in OpenStreetMap's and Wikidata's databases, as well as a map zoomed in on this place. Administrative levels such as city, county, state/province, or country are clickable links that will allow you to modify the zoom level on the map.



Heredis is also defaulted to display on this map every subdivision already geolocated in the current genealogy and linked to this place. Yellow markers indicate their position on the map.
With just one click on a marker, the data related to this subdivision will be displayed.



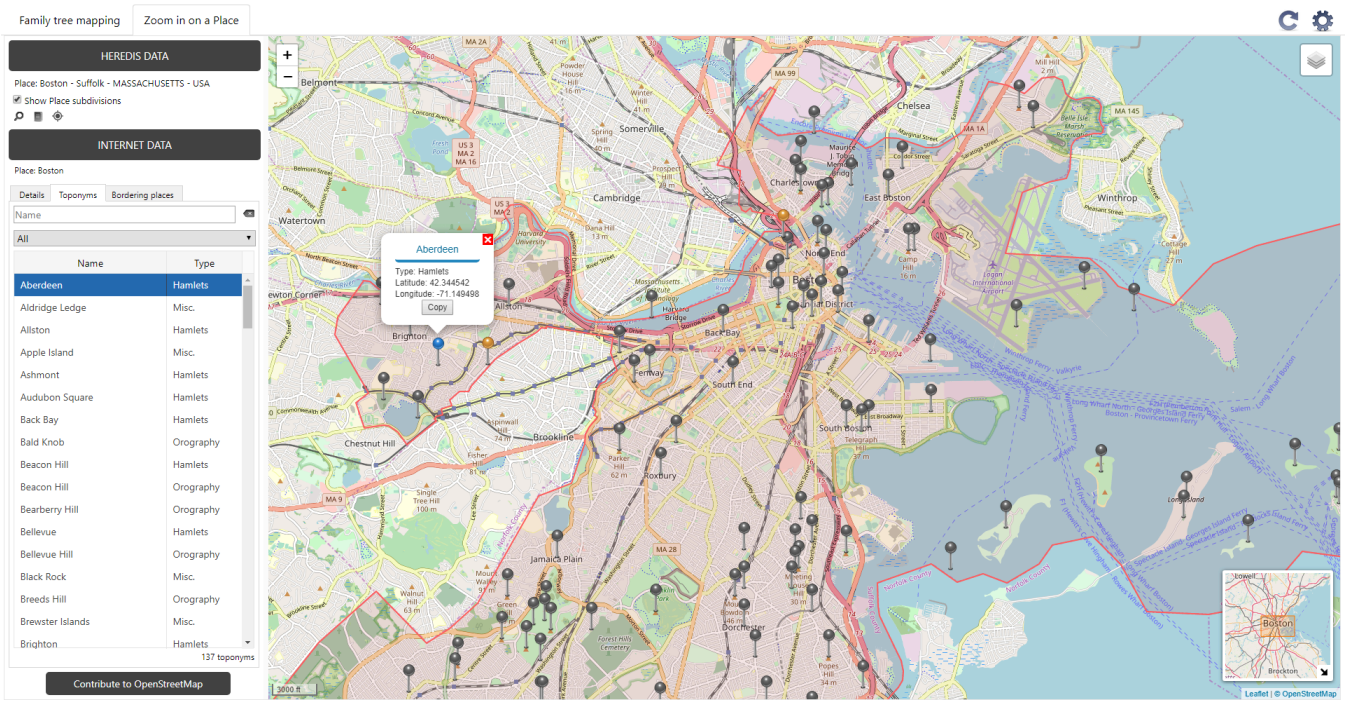
You can untick the box entitled **Show place subdivisions** to hide the geolocated subdivisions markers.

Toponyms tab

Under this tab, you will find every toponym available in the OpenStreetMap database. The color of the marker, grey or blue , indicates whether the toponym has been selected in the list of toponyms.
Click on a toponym's marker to visualize its data and to copy it, if you wish to, by clicking on the **Copy** button. Such data will allow you, for instance, to precisely locate an event in your genealogy.

Click on a toponym to copy and paste its name and coordinates into **Personal Data > Events > Details**, by clicking on next to the Place subdivision field (all data or coordinates only).

For more information on geolocating subdivisions, please consult the article entitled Family Tree Mapping subdivisions.

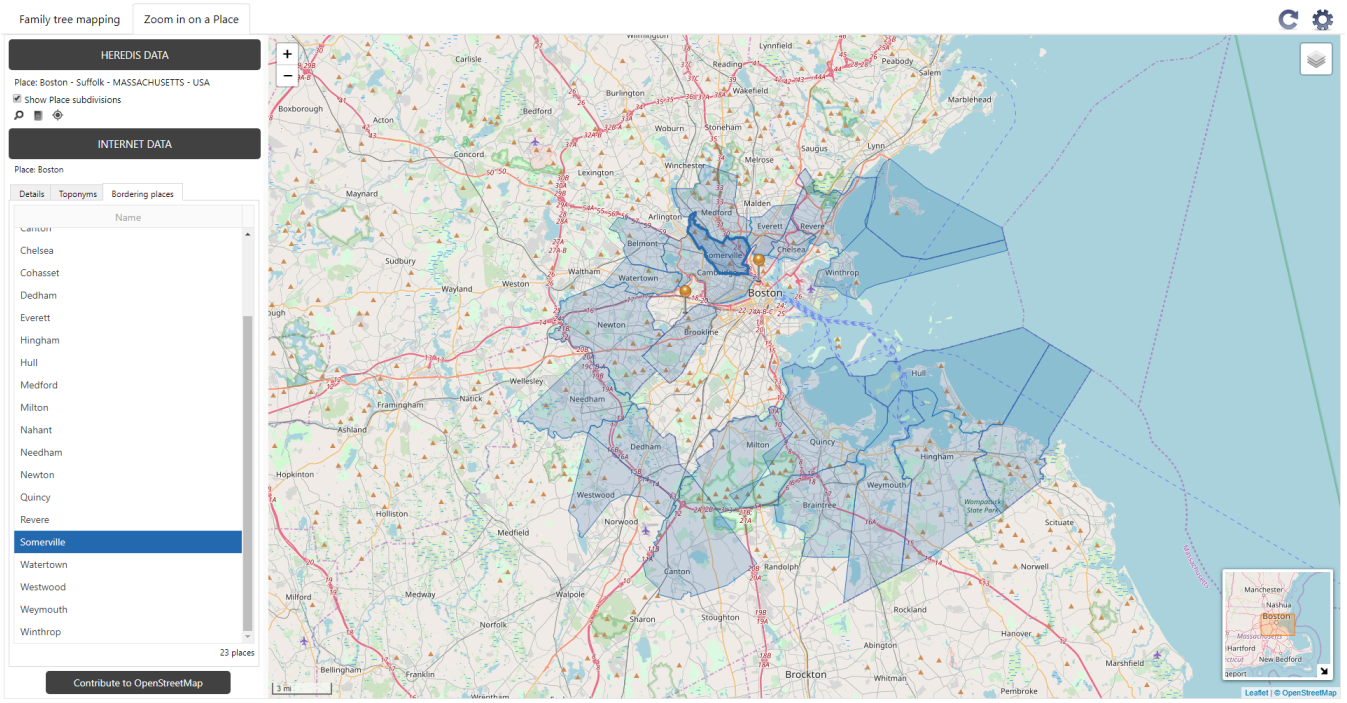


Note: yellow markers indicate subdivisions that have already been located in your current genealogy.

Bordering Places tab

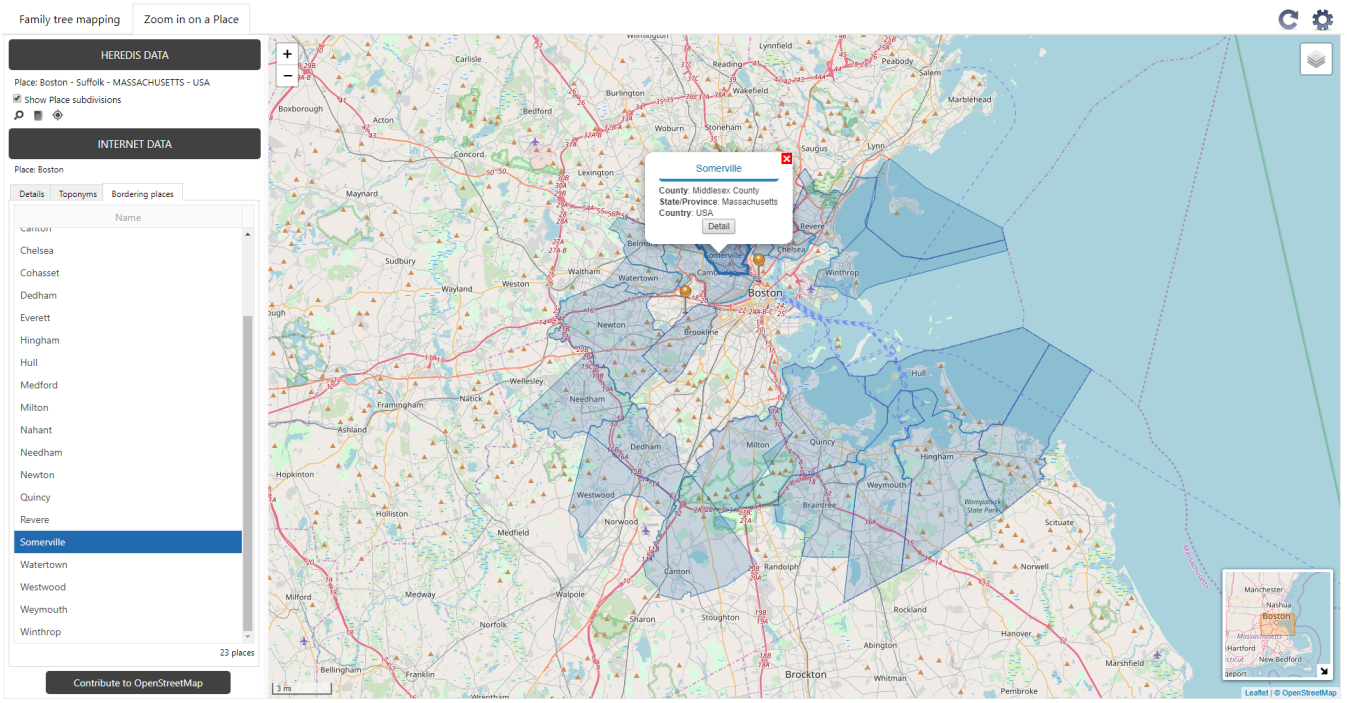
Heredis will display the places bordering a city. You might be able to finally locate the impossible-to-find death certificate of your ancestor in one of these bordering places. Indeed, it is quite common to hit a wall when desperately looking for an event in the place where your ancestors' family resided while sometimes all it takes is to search in a neighboring village.

Click on **Bordering Places**. On the map, Heredis will display all registered cities that are on the same administrative level and directly surrounding your ancestors' place.

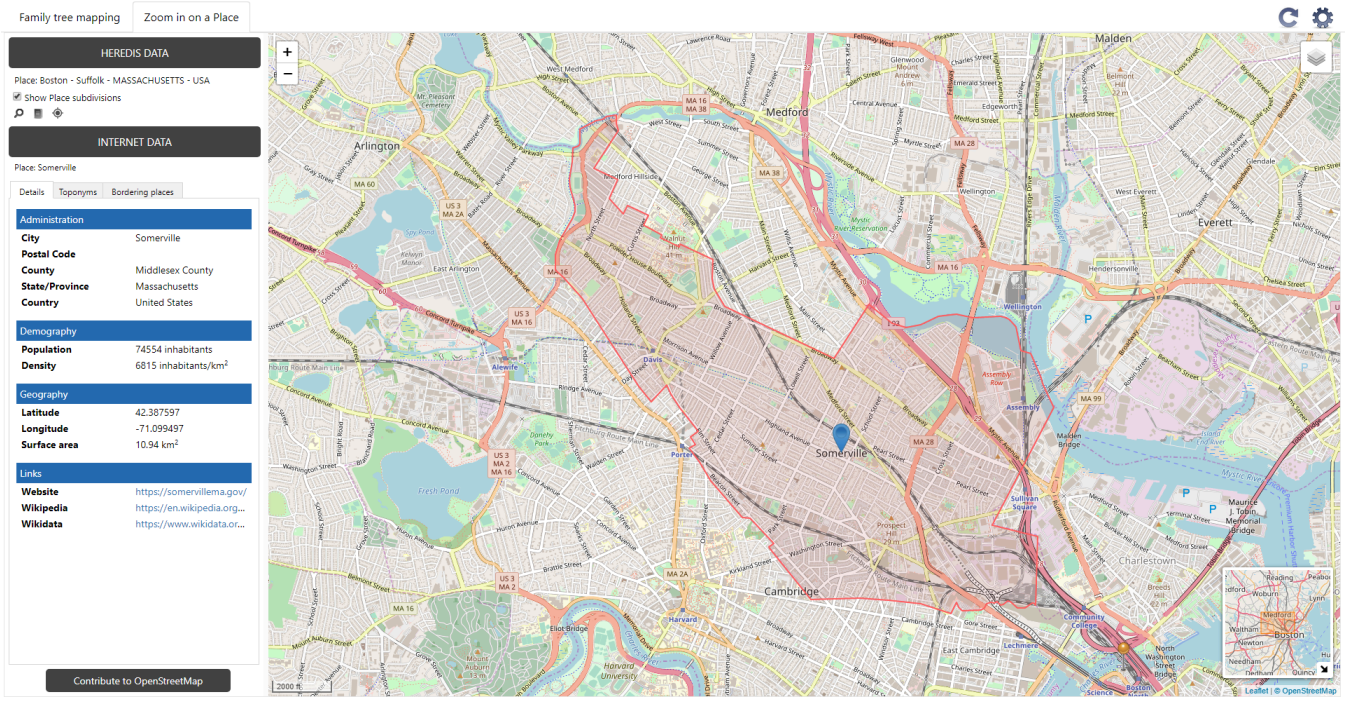


Note: Heredis can only display bordering places that are on the same administrative level as the place you have selected. Other bordering places may be on a different administrative level and therefore will not be highlighted.

When you select a city on the list, its city limits will be outlined. Click on the city displayed on the map and some concise data will pop up.



You can click on the **Detail** button to obtain more detailed information on this place. Heredis navigates on the Details tab in Zoom in on a Place and zooms in on this place on the map. You can access the various toponyms for this place under the **Toponyms** tab.



Click on the button under Heredis Data to zoom back on the place you had selected in your Heredis file.

Right-clicking on the map of bordering places enables you to **Copy coordinates** and paste

them in the **Place subdivisions** field of an event by clicking on (all data or coordinates only).

For more information on geolocating subdivisions, please consult the article entitled Geolocating Place subdivisions.

Updating your data and options available in Zoom in on the World

You can leave **Zoom in on the World** open and simultaneously work on your genealogy. For your latest data entries to be accounted for, click on the button .

The button allows you to access various options and create a customized display:

- choose where you want the side bar and its various tabs to be located – you can either display it on the left- or right-hand side.
- decide whether you want to display boundaries at the various administrative levels (Borders), if such data is available in the OpenStreetMap database.

Contribute to OpenStreetMap

OpenStreetMap is a community database. Should you notice any missing data, e.g. some toponyms, feel free to add them yourself.

Click the **Contribute to OpenStreetMap** button and follow the instructions in the article entitled Contribute to OpenStreetMap. Heredis frequently updates its data from OpenStreetMap's. Data reported by worldwide users will then be integrated.

Zoom in on the World – Family Tree Mapping

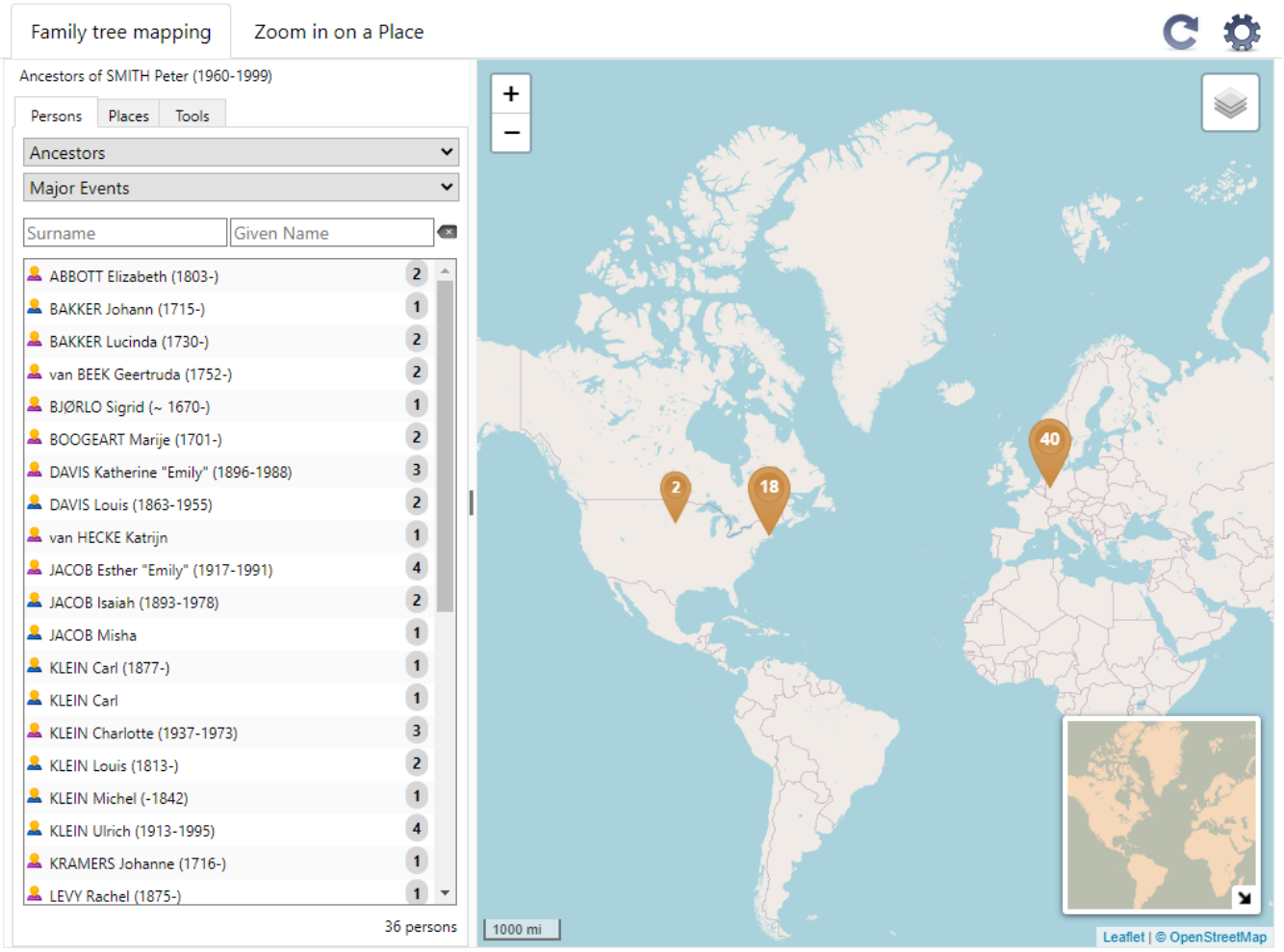
Zoom in on the World provides several tools that will assist you in locating your ancestors.

Heredis will help you get a better understanding of your ancestors' lives, geographical implantations, and migrations.

Select the **Tools** menu **> Zoom in on the World > Family Tree Mapping** or click on the button in the toolbar for the various events of the persons in your genealogy to be displayed on interactive maps.

You can zoom in and out on the maps and play them in a slideshow to view the geographic mobility of the persons in your genealogy through time and generations.

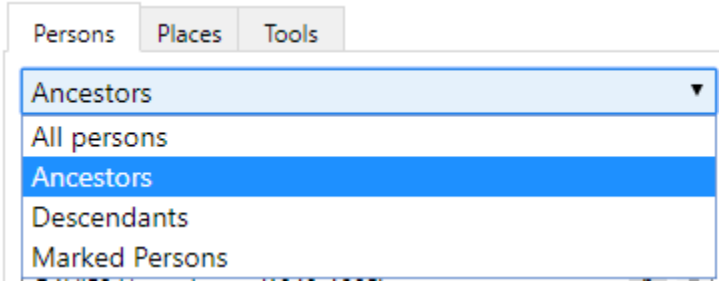
When you first open **Family Tree Mapping**, Heredis is defaulted to display the main events of the primary person's ancestors.



You can simultaneously work on your file and leave this tool open.

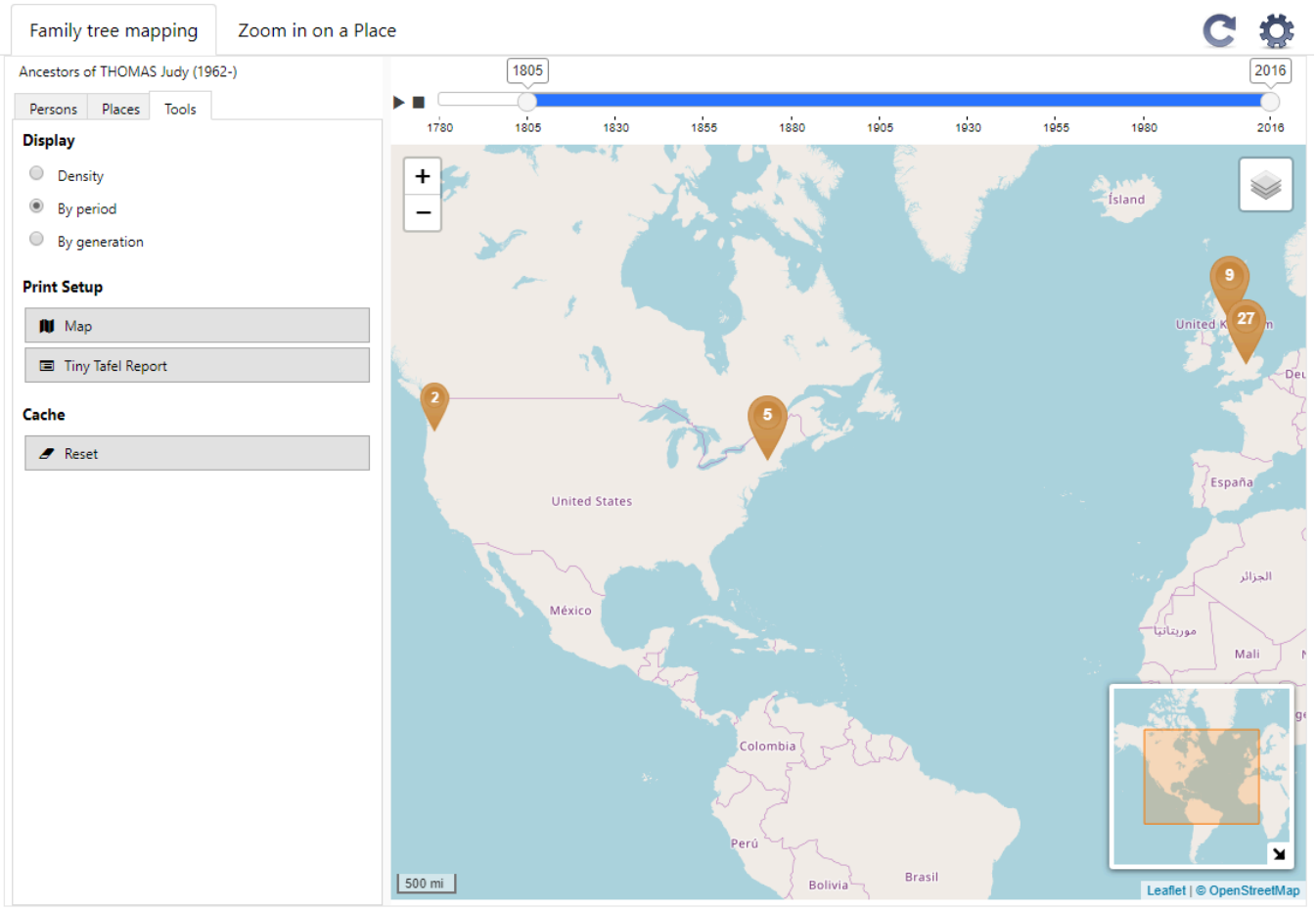
Filters and display options

At any time, you are free to modify the filters in the window's side bar and choose to display every person in your file, or the primary person's ancestors or descendants only, or the persons you have marked beforehand in your genealogy.



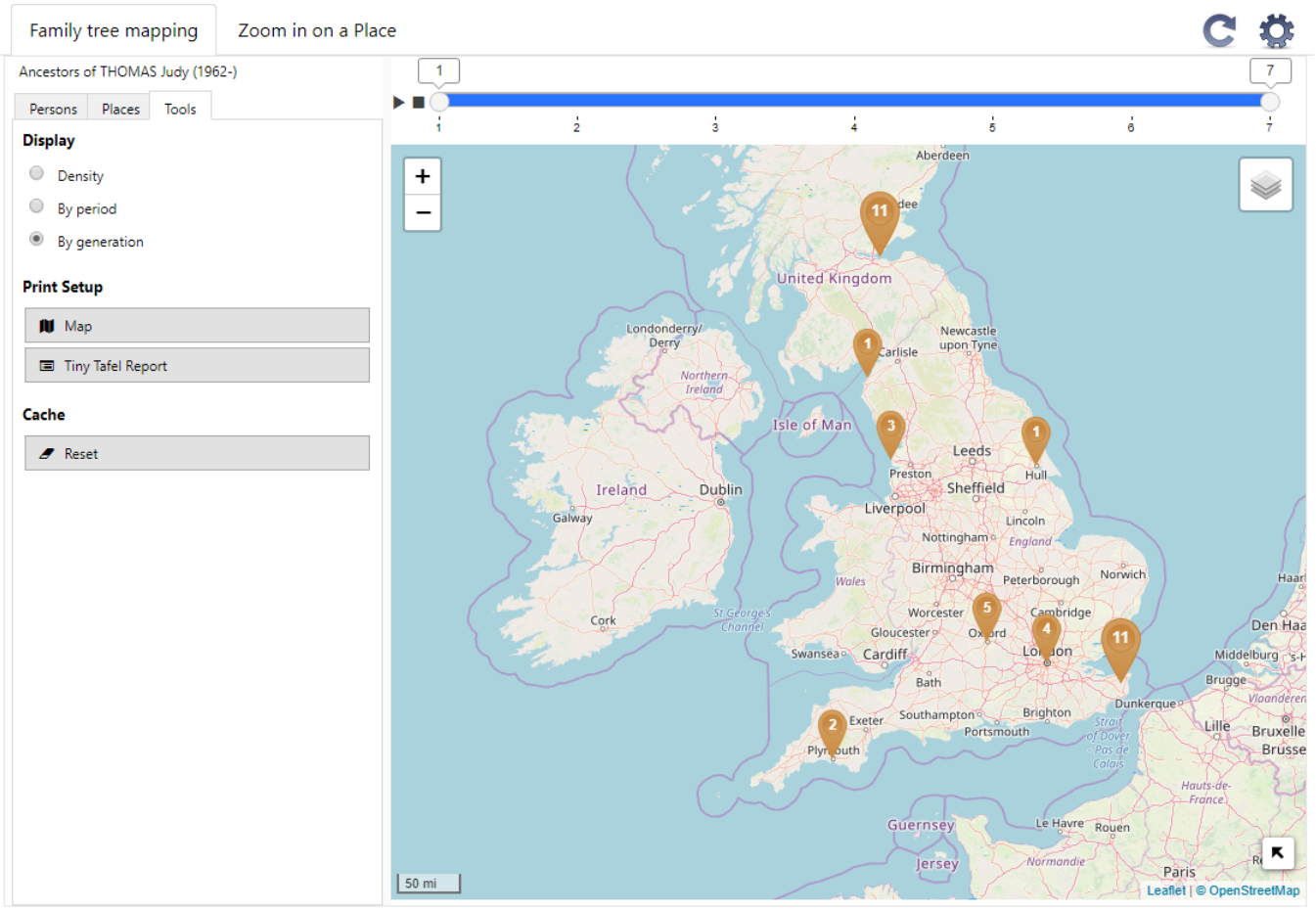
If you have just entered new events or new persons in your genealogy, click on the button to retrieve this data in **Family Tree Mapping**.

Heredis is defaulted to preselect the **Density** representation mode when displaying your data. If you wish to get a preview of the mobility of the persons in your genealogy, select the **By period** representation mode under the **Tools** tab in **Family Tree Mapping**. A timeline will be displayed above the map, with intervals starting and ending at the most extreme dates in your file. Click on the **Play** button and watch the events appear on the map through each time period. Before to press play, make sure to zoom out so you can see all the markers displayed on the map. Press the **Pause** button to be able to zoom in and zoom out as you please and study the mapping.



Note: the display and reading pace of the timeline are automatically calculated based on the most extreme dates in your file. If you prefer to study a specific time period, move the sliders at each end of the timeline to select the desired intervals. The map will then only display the events on the time period you have selected.

Heredis also offers a representation mode **By generation** which is operated the same way as the **By period** mode. You only need to select ancestors or descandants of the primary person in the **Persons** tab to use it. The dates intervals above the map are simply replaced by the number of generations.



Map display

Several types of maps are available for you to display your data. Select the theme that will best highlight your data on a map by clicking on .

To easily zoom in and out on the map, simply click on the + and – buttons or use the scroll wheel on your computer mouse. It will allow you to get a closeup on a specific geographical area or, on the contrary, to go back to a wider view of the map by zooming out.

To move around on the map, hold down the left mouse button (or the mouse wheel) and drag the mouse in the desired direction in order to center the map on another area.

Right-clicking on the map will let you **Copy coordinates** so you can paste them into the **Place subdivision** of an event. Please refer to the article entitled Geolocating Place subdivisions for more information.

You may notice markers of various colors and sizes displayed on the map. The size of the marker is directly linked to the number of places it is indicating.

Smaller size markers or indicate events located in one single place. If you click on this

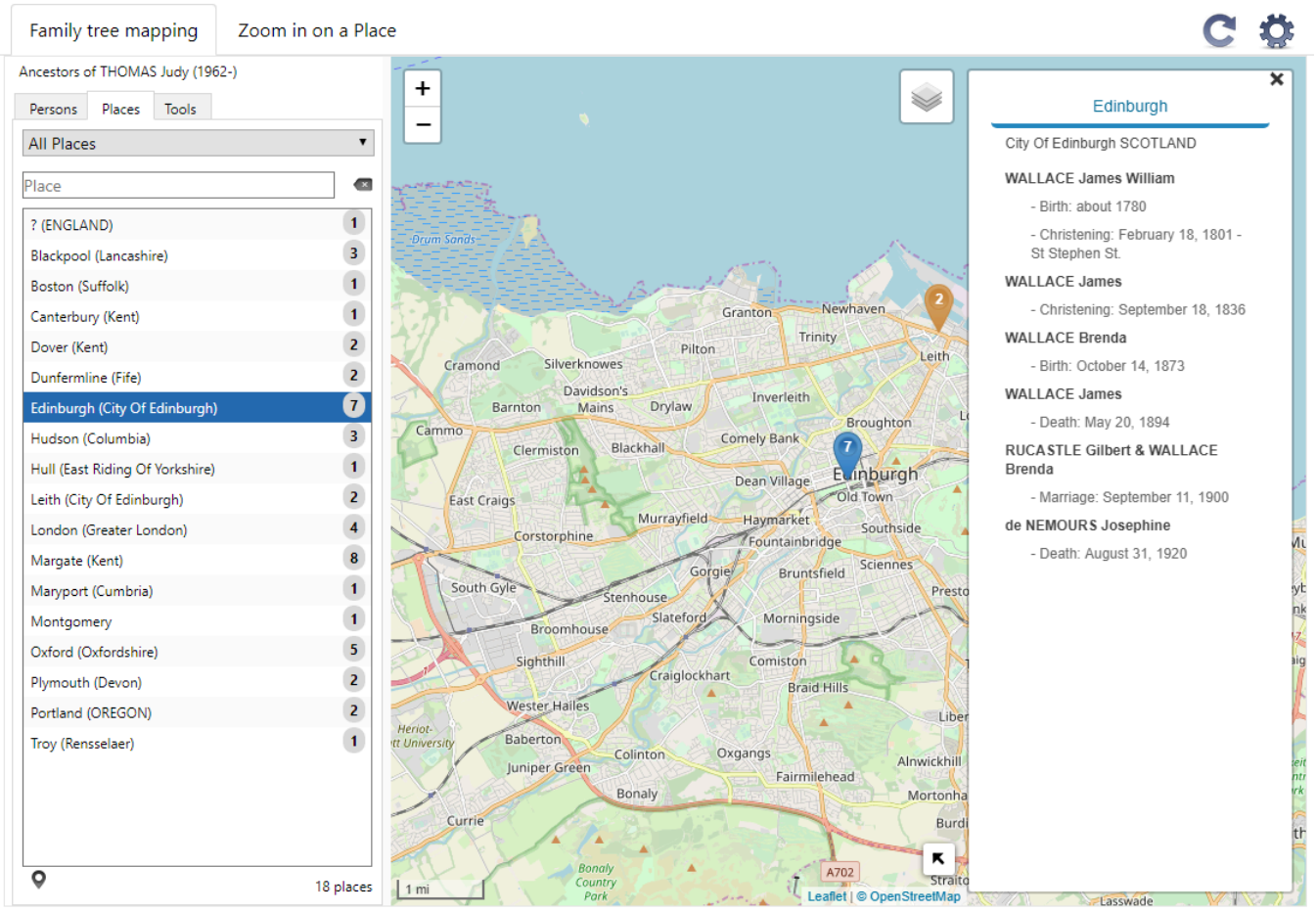
type of markers, a popup window will open to show the exact place and the list of persons with events in this one place.

Larger size markers or indicate events located in a grouping of places. If you click on this type of markers, Heredis will automatically zoom in to show you a more detailed map.

The number of events held in a place or in a grouping of places is indicated on each marker.

Search lists

Search lists displayed in the vertical side panel allow you to do searches on places or persons. In these lists, to the right of the place's or person's name, Heredis specifies the number of events that were found.



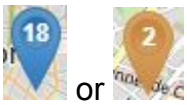
Select the **Places** or **Persons** tab and enter a name in the search field to obtain a selective list of the matching places or persons. The list displayed below is automatically updated as you enter the name.

Navigating from the Persons or Places tabs

Places and persons displayed in the floating panel or in the popup windows are clickable links that will allow you to access directly, with just one click, the Places Index or a person's family tree, without closing **Family Tree Mapping.**

It will, for instance, enable you to correct or complete a person's data, modify or geolocate a place (for more details on how to geolocate a place, please consult the article entitled Geolocating Places and Geolocating Place subdivisions) and then to display this updated data in the **Family Tree Mapping** window by clicking on the button .

Legend



or Geolocated place

Legend

or

Grouping of geolocated places

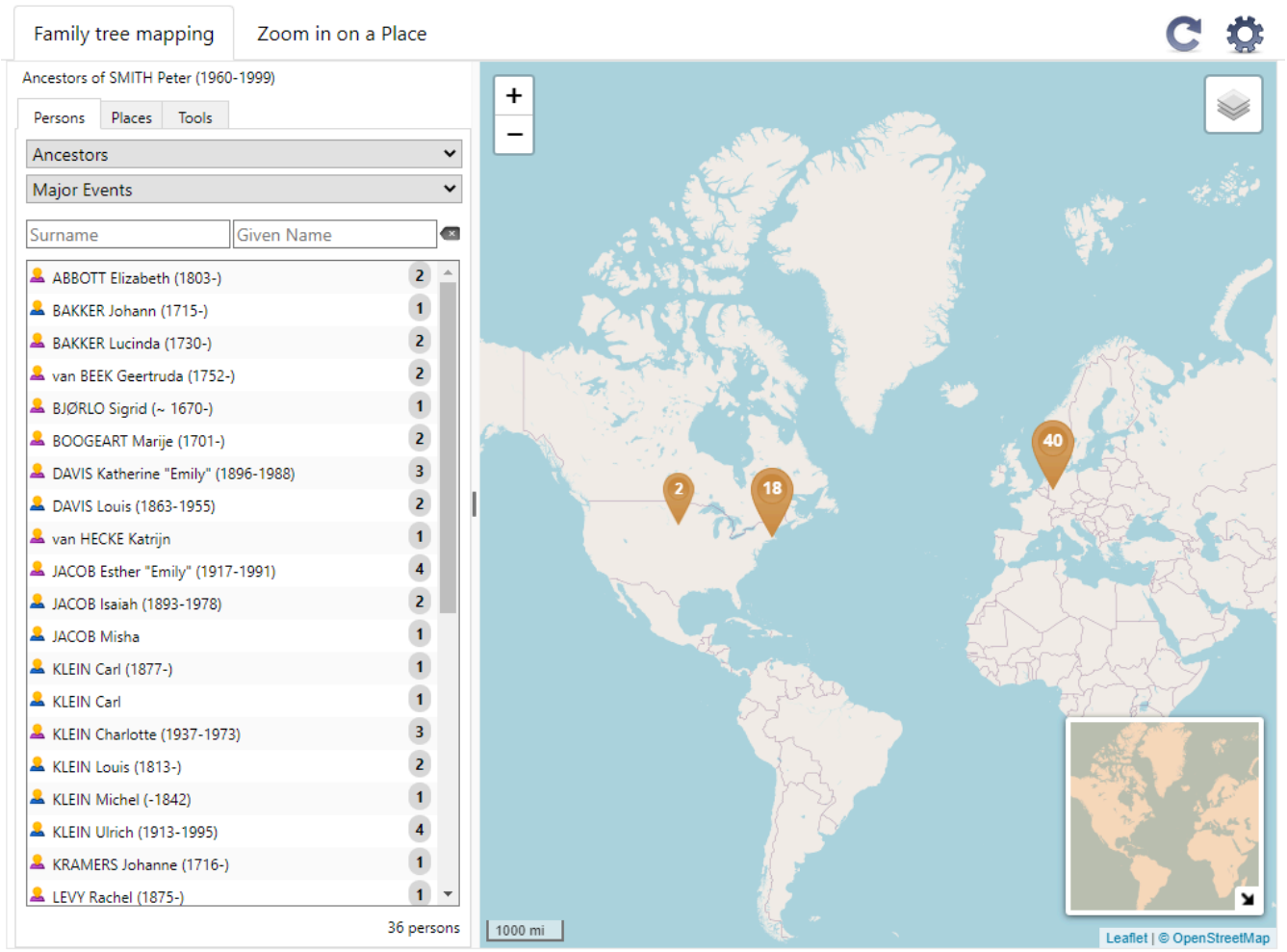
Note: the color blue indicates that at least one place has been selected under the **Places** tab in **Family Tree Mapping** or in the floating panel of a person (by clicking on the button). The number displayed on the marker indicates the number of events linked to a place or to a grouping of places.

Persons tab

Under this tab, if you click on one of the names on the list, Heredis will display a floating panel listing every event that has been geolocated for this person. Click on the button in this floating panel to zoom in on the location of the selected event on the map. The marker will turn from yellow to blue .

Feel free to use the proposed filters to display every person in your file, or the primary person's ancestors or descendants only, or the persons you have marked beforehand in your genealogy.

Click on any person on the list to display markers for related places. A list of all places and events linked to this person will pop up.



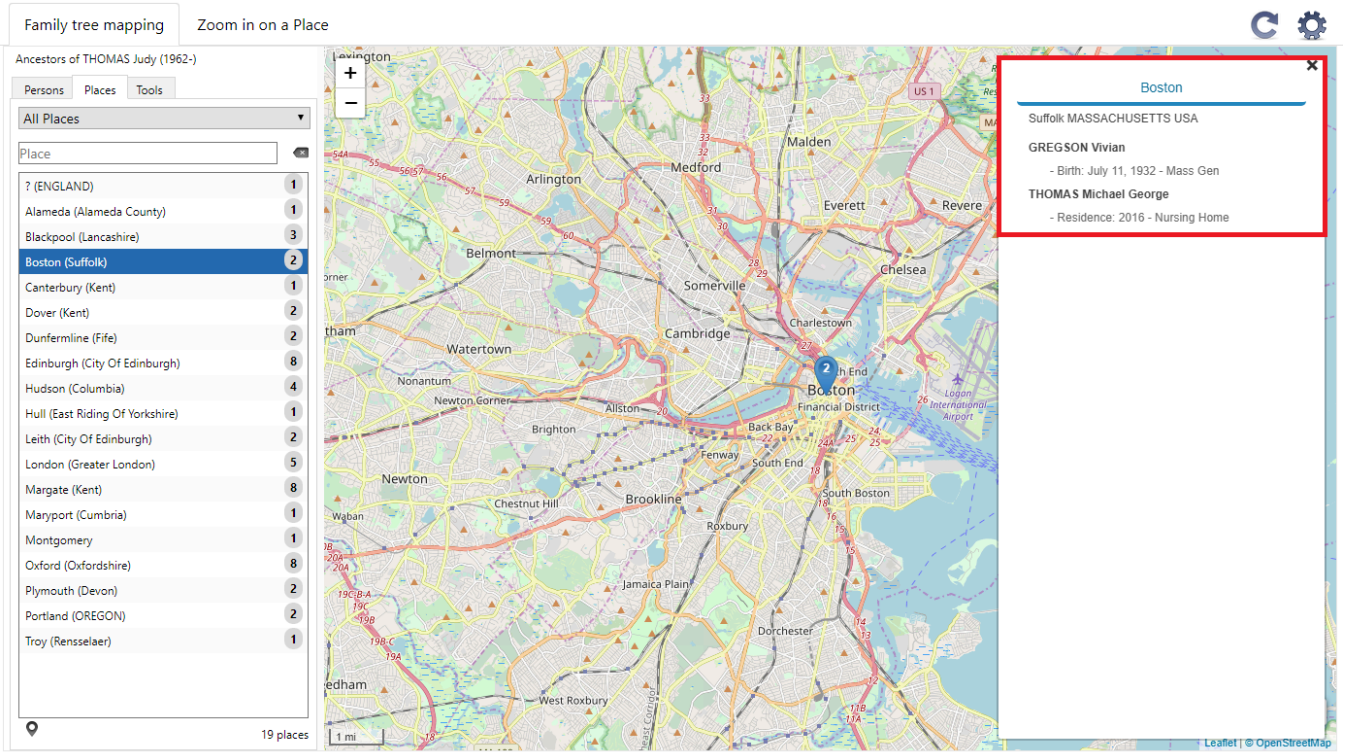
From the **Persons** tab, you will find the icons indicating whether the person is of the Ahnentafel lineage or not and whether he is a man, a woman or an undetermined sex. For more details on the icons see Persons icons and their color coding (see page 197).

The numbers displayed on the markers indicate the number of events from the persons' list that are located in this place.

Clicking on the marker will open a popup window listing every event that took place in this location. Click on the name of a person or on one of the events listed in this popup window in order to navigate onto this person or event in Heredis.

Places tab

Under this tab, if you click on one of the names on the list, Heredis will zoom in on this place on the map; every event linked to this place will be listed in the floating panel anchored on the map.



Search filters are available. Heredis is defaulted to preselect the **All places** filter. You can switch to another filter by using the dropdown list at your disposal and choosing from:

- **Most represented places**: places are listed from the highest to the lowest number of events found for each place
- **Geolocated places**

- **Non-geolocated places**: places displayed on this list have no geolocation coordinates and therefore cannot be mapped. To complete the data for these places, click on the place name in the floating panel
- **Visible places**: this list only shows places that can be seen on the map currently displayed on the screen.

Note: If you double-click on a place under the **Places** tab or if you select it and click on the button at the bottom of the panel , the place will be displayed under the **Zoom in on a Place** (for more details on this feature, please consult the article entitled Zoom in on a Place).

Updating your data and options available in Zoom in on the World

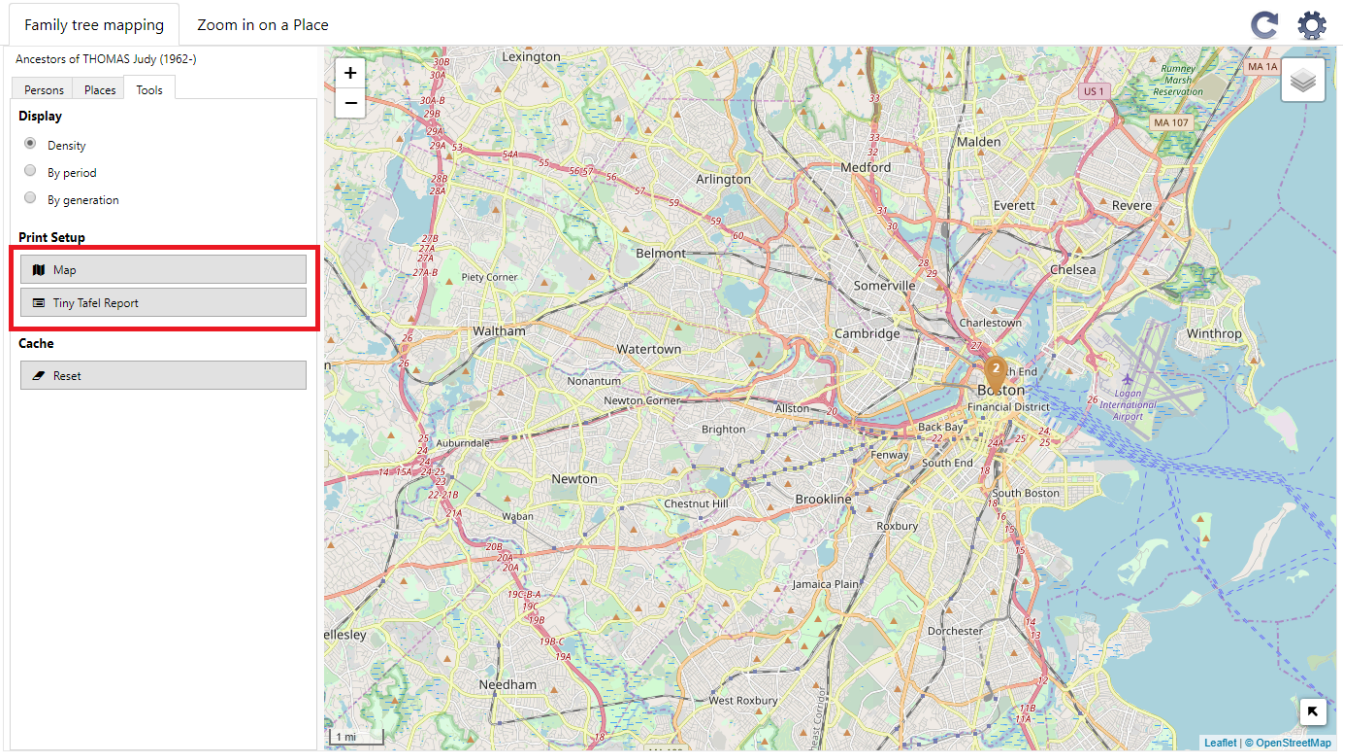
You can leave **Zoom in on the World** open and simultaneously work on your genealogy. For your latest data entries to be accounted for, click on the button .

The button allows you to access various options and create a customized display:

- choose where you want the side panel and its various tabs to be located – you can either display it on the left- or right-hand side.
- decide whether you want to display boundaries at the various administrative levels (**Borders**), if such data is available in the OpenStreetMap database.

Printing Map and create Tiny Tafel Report

You can edit and print the map you are seeing on your screen by clicking on the **Map** button in the **Tools** tabs.



(Mac) Click on **PDF** button at the bottom of the printing windows or click on **Print** to launch your printer.

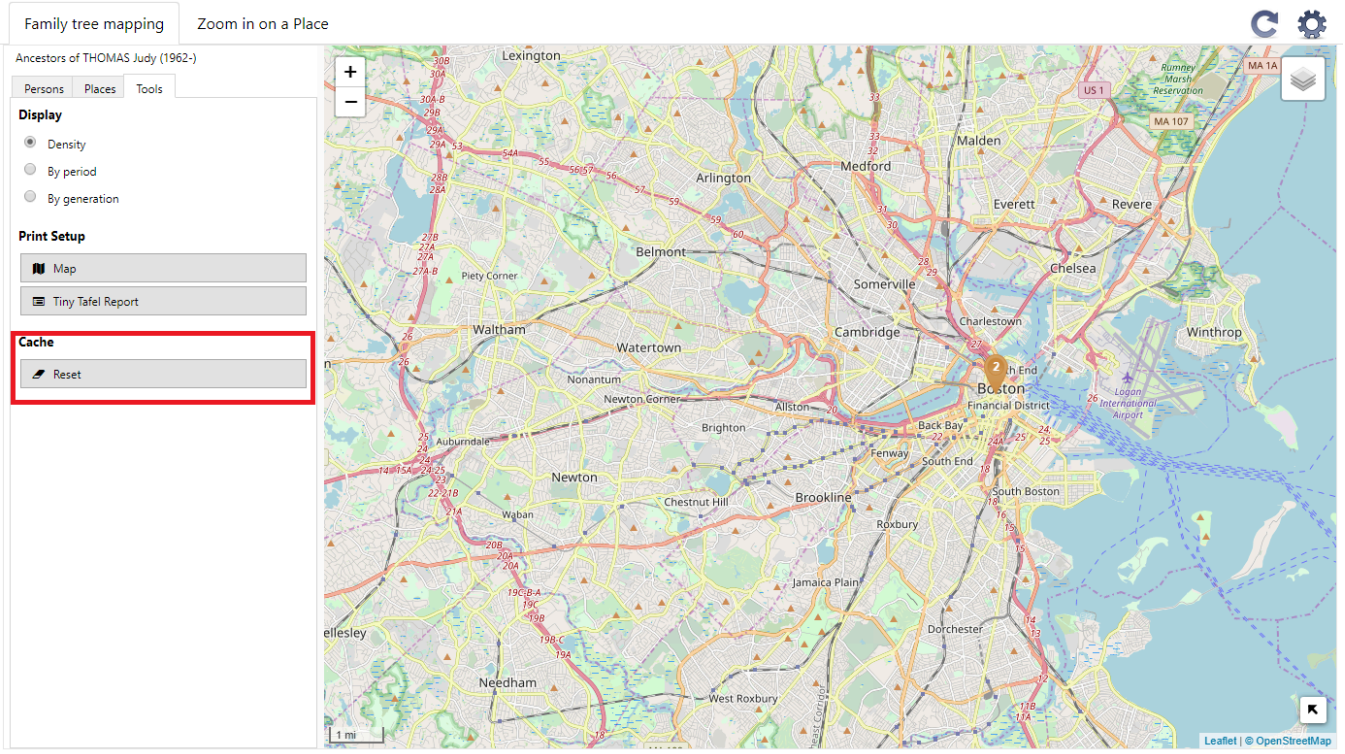
(Windows) Setup the parameters of the PDF export (size of the page, orientation) then click on **OK** button. A PDF will open so you can print it.

Create a Tiny Tafel Report by clicking the button **Tiny Tafel Report.** Setup the Tiny Tafel parameters.

See (Windows) Create and Edit a Report (see page 612) or (Mac) Create and Edit a Report for further details.

What to do in case of a slowdown or malfunction issue?

If your data is not displaying correctly, click on the **Tools** tab then on the **Reset** button.



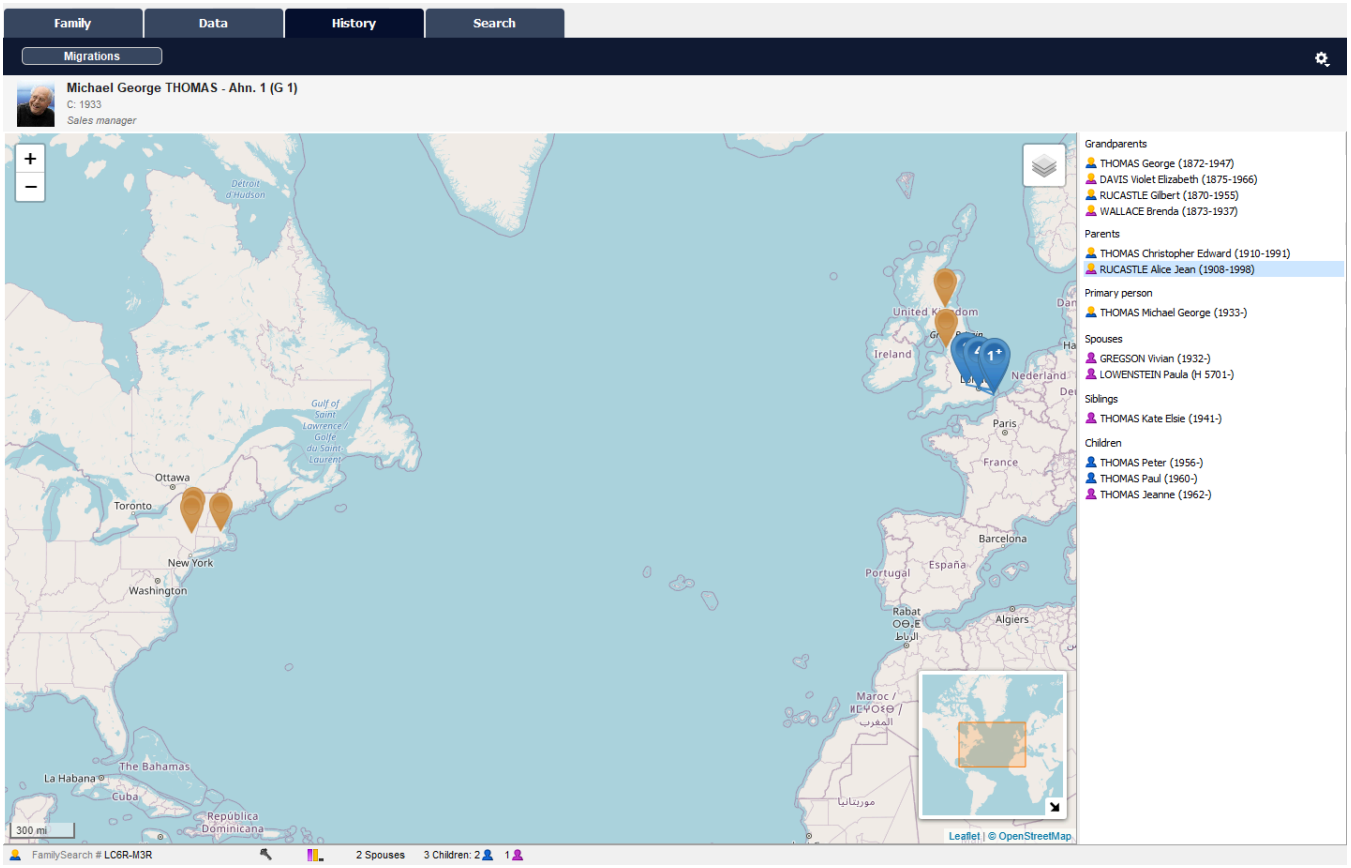
Migrations

Migrations place the living places of the primary character or another family member on a map. The markers are numbered to know the chronology of movements. Each location marker shows the list of events listed in that location. You can see the movements of all members of the immediate family at the same time.

The number of events displayed is now dynamically managed.

The navigation thumbnail, displayed at the bottom right in the **Migrations** tab map and in the **Search Wizard** of the **Search tab, allows** you to easily move around.
Select the frame with the left click of the mouse, by moving it, you navigate through the viewed map.

Use the cogwheel to choose whether or not to display the events of immediate family and/ or, from Heredis 2020, the subdivisions you have geolocated.



Note:
Blue markers are those associated with the person selected from the list displayed to the right of the map
orange markers correspond to the events of other persons on this list
the star displayed next to a blue marker indicates that several events have been recorded at a

location that concern the selected person.

My dashboard

The Heredis dashboard is a tool that allows you to control your family tree on a daily basis. The different available indicators, whether quantitative or qualitative, give you a global vision of your genealogical data and also inform you about the progress of your work.
The dashboard can be accessed from the **Tools > My Dashboard** menu. You can also add the button to your toolbar if customized. (See Customize Heredis\Select the toolbar)
It consists of four tabs: **My Dashboard**, **File Info**, and **Statistics** 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 cogwheel button at the top right of the page and select

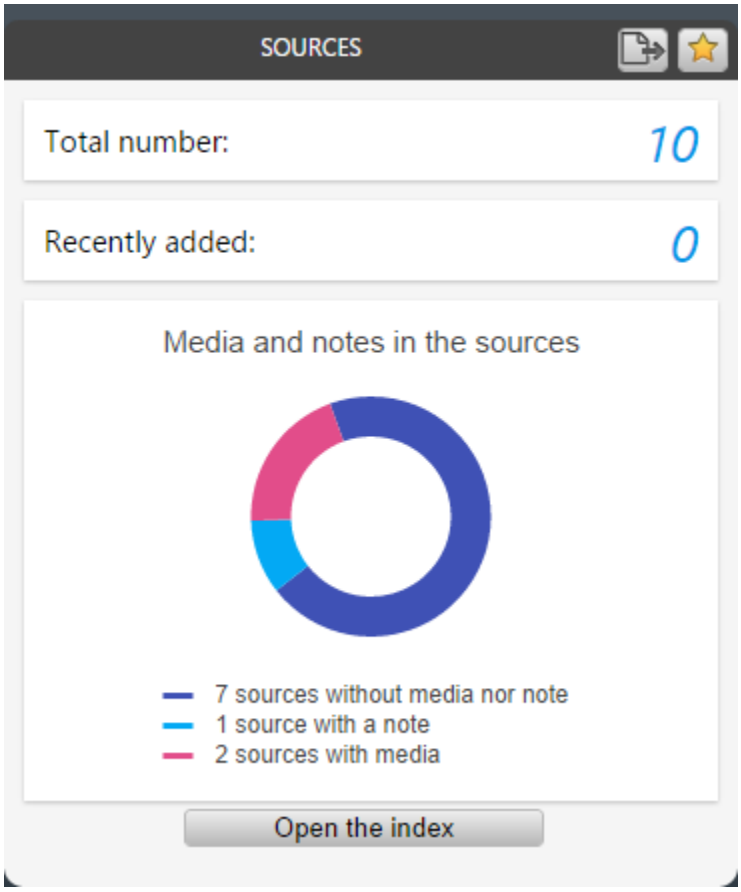
the filters that best fit your way of working:
• Filters showing recent additions: Today / Less than a week ago / There is less than one Month / Less than a year ago.
• Filters on persons: Entire file / Direct line ancestors/ Ancestry.
Then click on the **Validate** button, all widgets in the dashboard 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

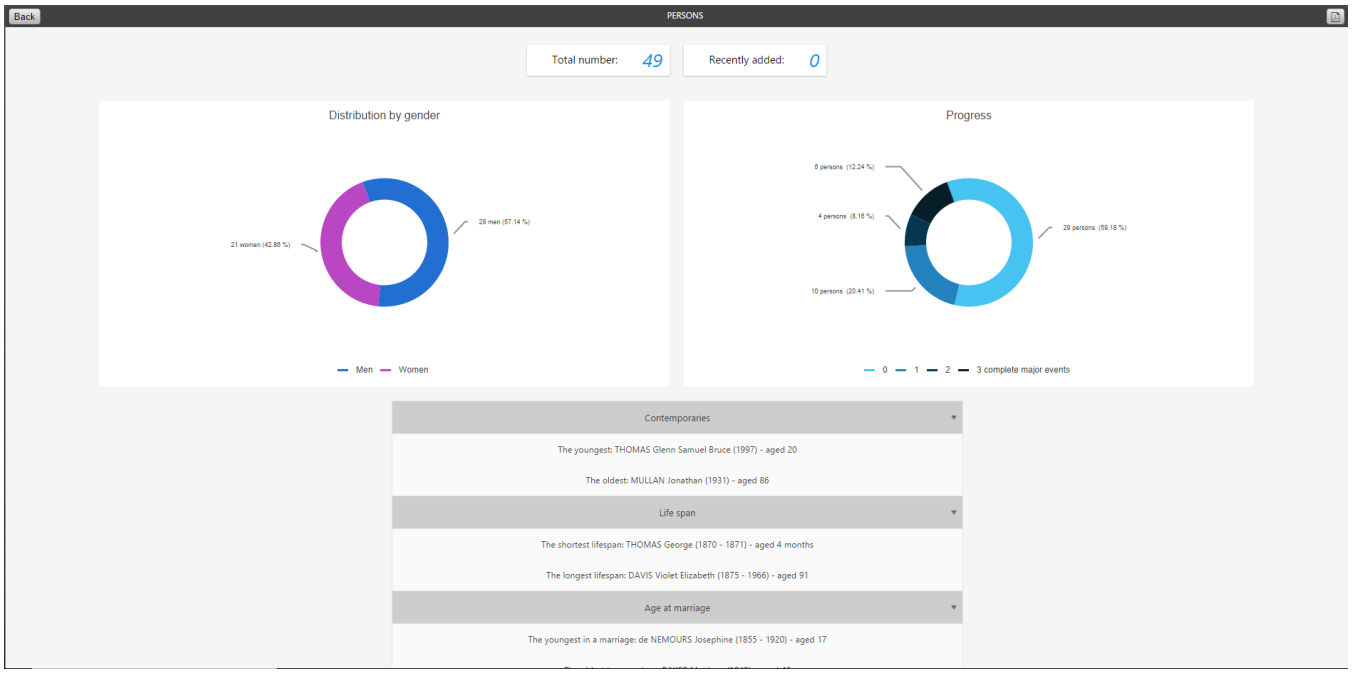


Widgets in simple view display a limited amount of information. Their size is variable based on what you display. They feature a button to export the contents of the widget displayed in PDF or PNG format.
Info • Note that as you hover over certain widgets, you have more accurate information. For

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 .

BIRTHDAYS

Starting with Heredis 2025, Heredis informs you of upcoming birthdays and today's birthdays of persons assumed to be alive.

Note: Be sure to set consistency in Heredis' Preferences for maximum males and females deaths. Do not exceed 120 years, otherwise you will no longer have any inconsistencies in the event of typos. See the article on Heredis' Preferences (see page 107) in the paragraph on the Consistency tab.

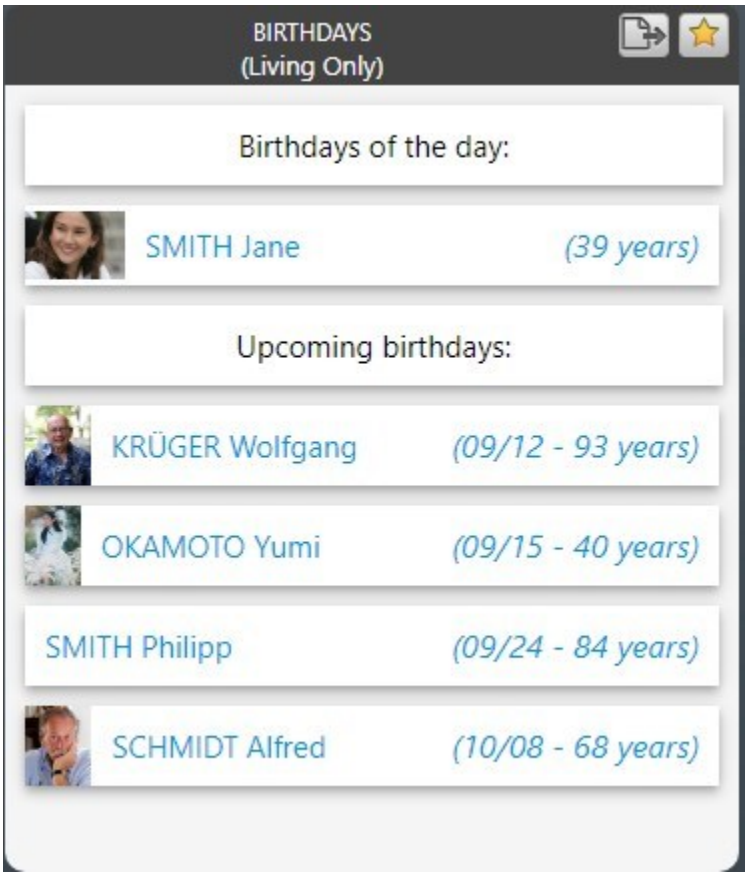
If not already present in your toolbar, add the **File Informations** icon .

The icon changes its appearance and takes the shape of a cake when there are birthdays today. The number indicates the number of birthdays on the day, so it varies.

Info: the icon refreshes every 4 hours if the file is open. So, if you modify a date to set today's date as the date of birth of a person assumed to be alive, the icon won't change until 4 hours later.

To access the **Birthdays** widget, click on the

- the File Informations icon or in the toolbar
- or on the **Tools > File informations** menu.



Click on a person’s name to navigate to the Family tab and view their information.

HEREDIS ONLINE Widget

To view the content of this widget, you must be logged in to your account. If you already have an account, click on **Sign in** button and enter your username and password otherwise, create one. (see the article “Heredis Online”)
Once connected to your account, this widget displays the date of the last publication of your file. You can access it directly by clicking the link “**Visit Website**”.

You can see it has been a while since the last publication? You can publish at any time from the dashboard by clicking the **Publish** button.

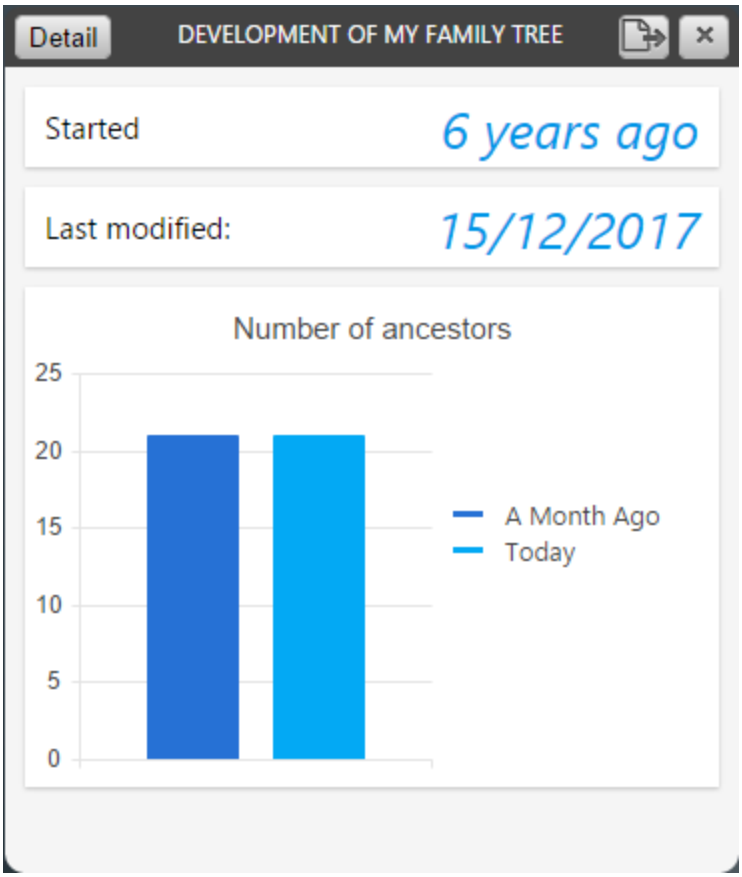
The detailed view shows you some new information. The first section shows you what you have recently be done on the open file: the last time you published it, the number of persons, of unions, of sources it contains.

All sections are foldable, just click on the title banner of the section to hide or display it.

For more details on Heredis Online, see Heredis Online (see page 844) and Publish with Heredis Online (see page 854).

DEVELOPMENT OF MY FAMILY TREE widget

Simple view of Development of my family tree



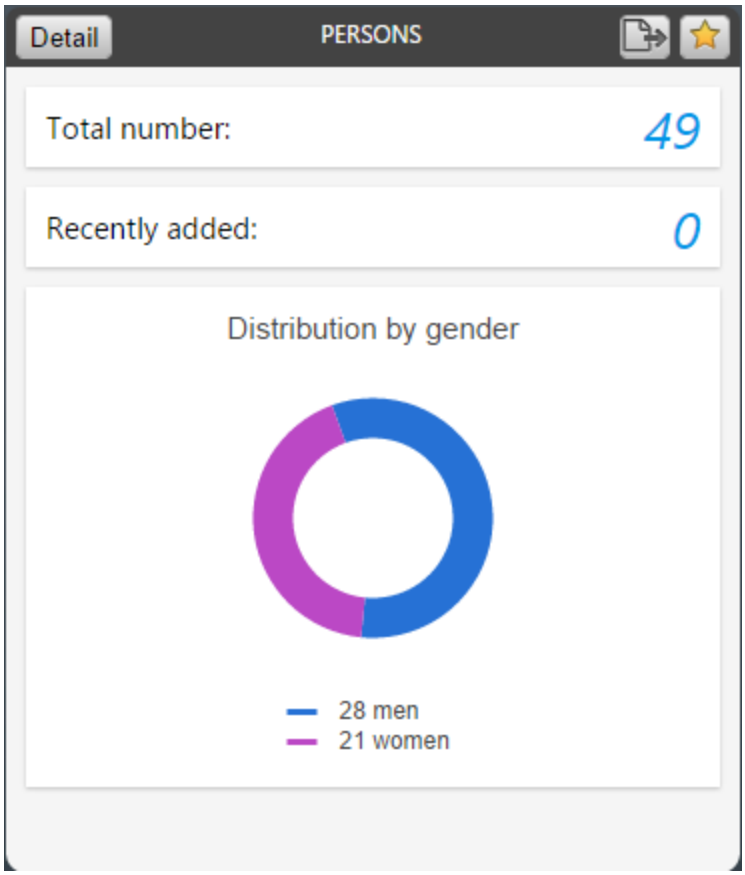
This widget shows you the evolution of your file in time:
– The date when you started your work, referring to the first person you created or imported in Heredis.
– The date of the last modification
– The number of ancestors (direct line) and persons found.

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 comtemporaries? Who had the longest or shortest life? Who was the youngest or the oldest when they got married? Which couple had the largest family…

Every section is foldable, just click on the title banner of the section to hide or display it.

EVENTS widget

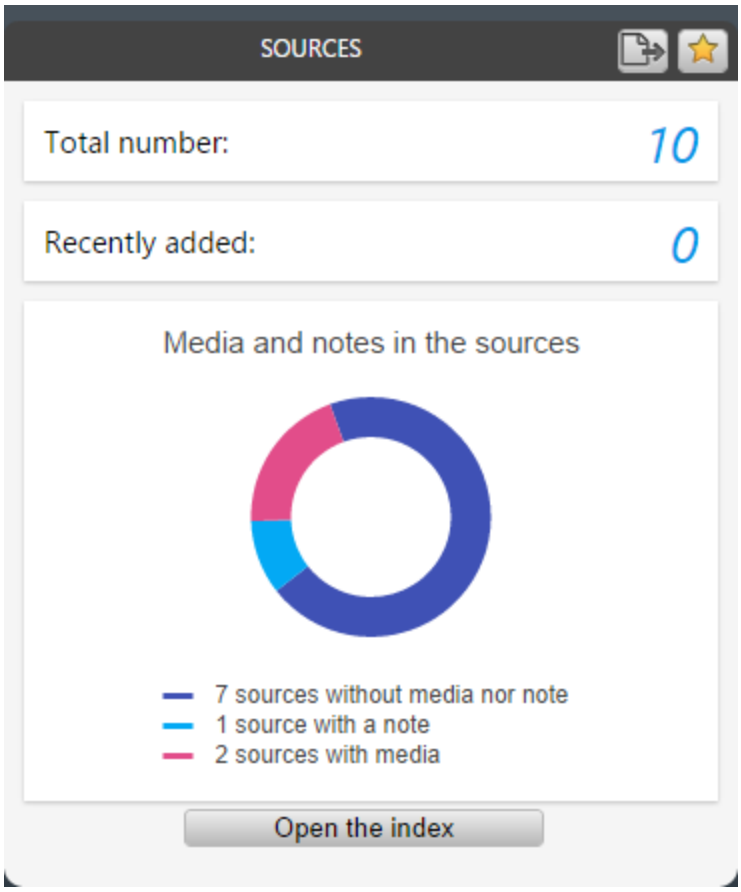
Simple view of Event's

The simple version displays the total number of events, the total number of major events and the total number of family events.
The detailed version offers a zoom on the major events and displays in addition to the total number, the oldest event and the most recent event. For each event you can browse the person concerned with a single click.

SOURCES widget

The Simple Source Widget presents, in addition to the total number of sources and those recently added, a ring graph that allows you to analyze the quality of your sources.

Simple view of Sources' widget

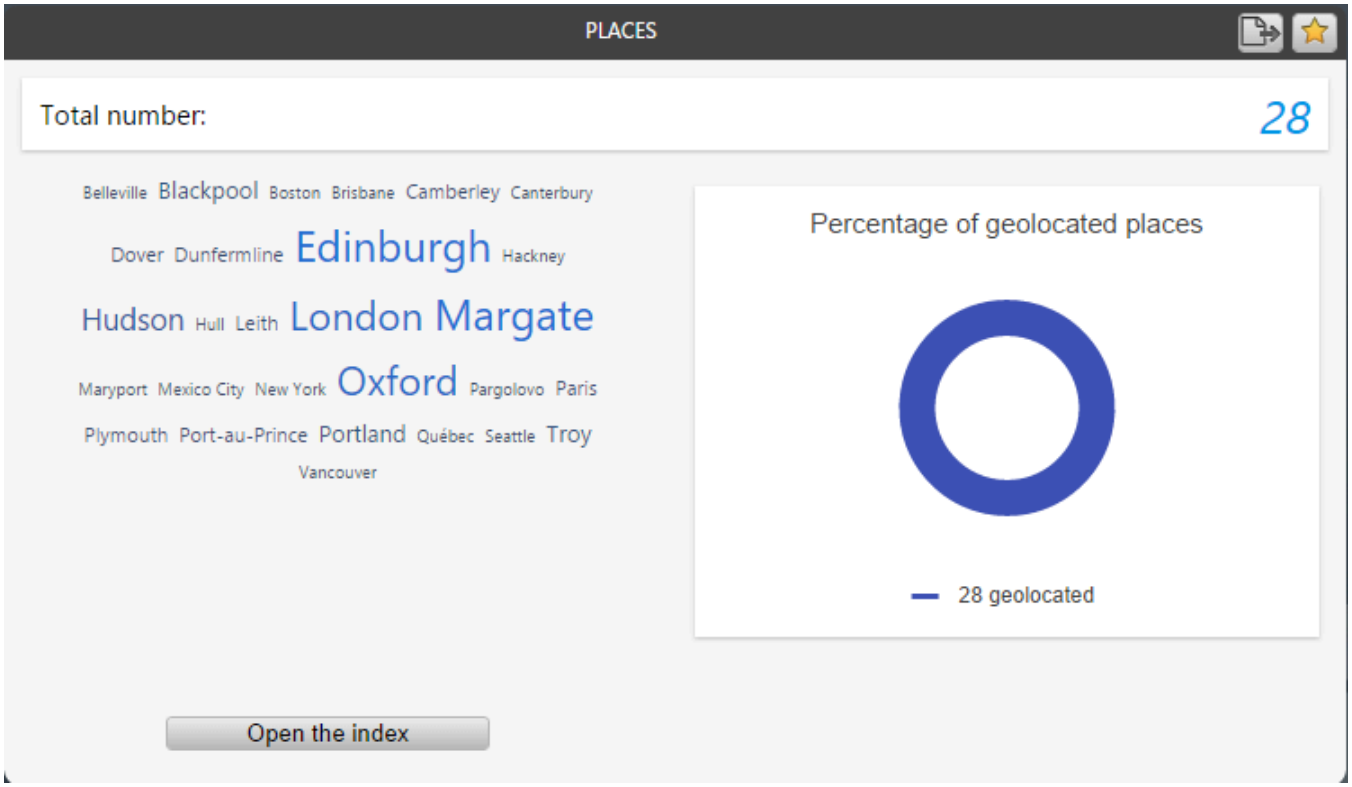


In this graph, we distinguish sources without media nor note, sources having only a note, sources with only media, and sources with a note and media.
To access the list of all your sources, click the button **Open the index**.

PLACES Widget

In this widgets, the frequency is shown by a word cloud. In this type of representation, the most commonly used places, for example, are displayed with a font size which varies according to the number of uses. When hovering with the mouse, an info bubble indicates the number of uses.

Places widget

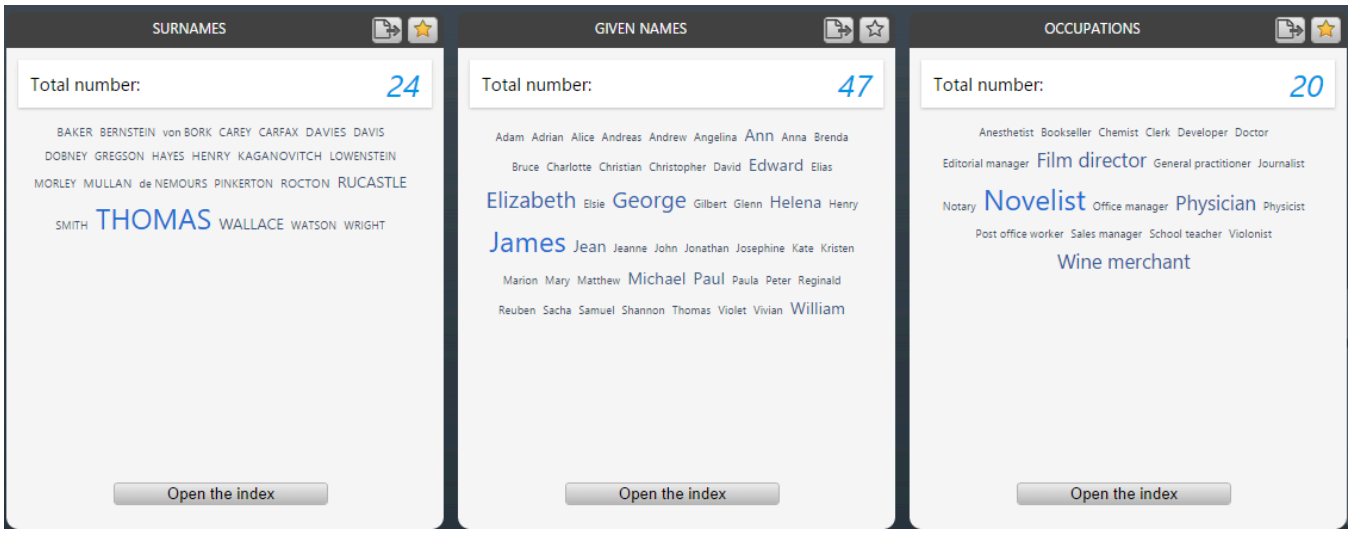


If you click on a place, Heredis opens the Index with this selected place and displays all information on it.
The Place widget also indicates the total number of places in your file and the places that were not geolocated (places without latitude and longitude information).
You can directly access the dictionaries by clicking on the button **Open the index**.

NAMES, GIVEN NAMES, OCCUPATIONS and MEDIA widgets

These widgets indicate the frequency of given names and occupations, as well as the number of uses in the genealogy file.

Names, Given names and Occupations' widget

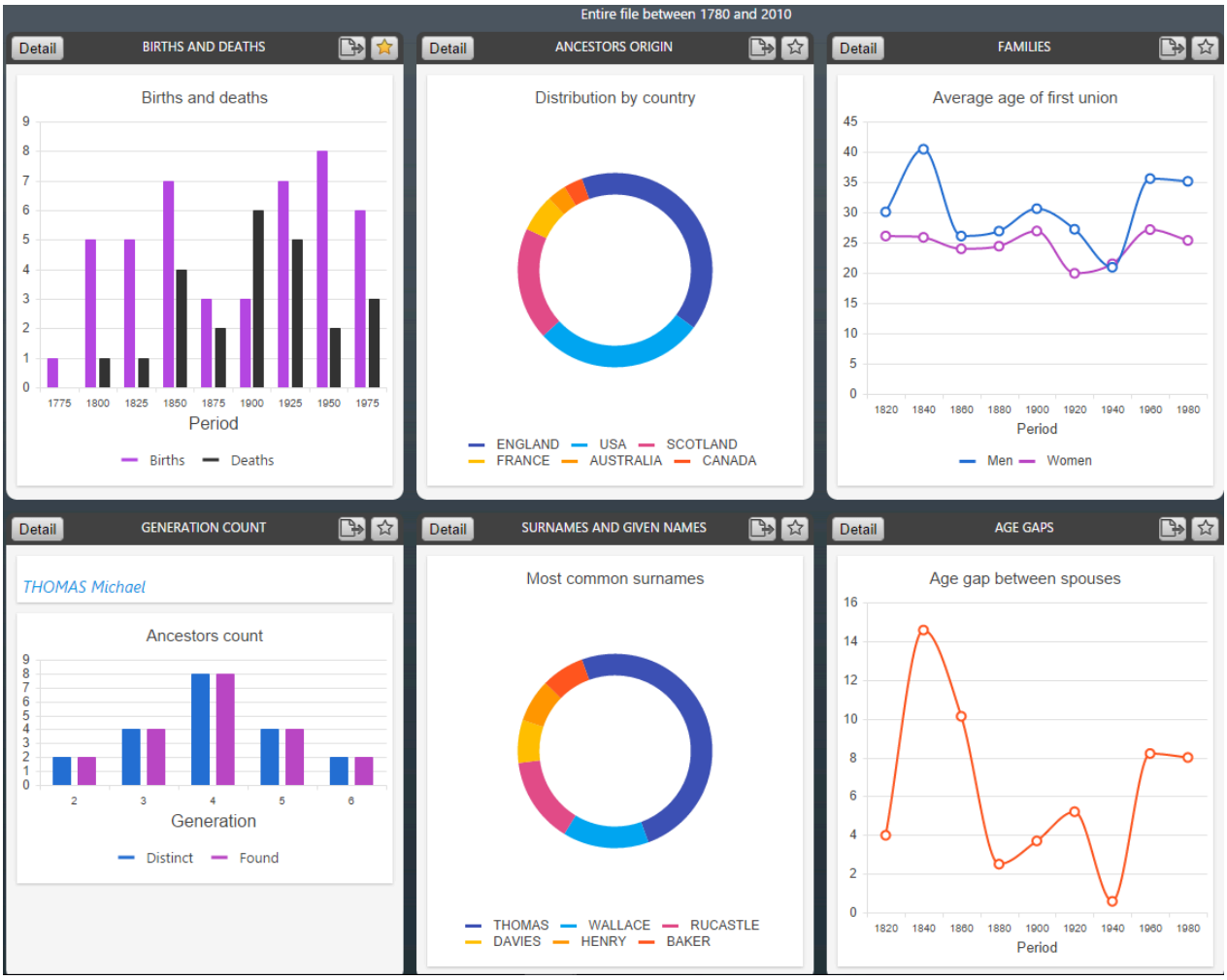


For the Names, Given Names, and Occupations widget, the frequency is represented by a word cloud, just like for Places.
The Media widget is a ring-shaped chart indicating used and unused media. For all of these widgets, you can directly access the indexes by clicking on the **Open the index** button.

Statistics tab

In this tab, Heredis offers various genealogical and demographic analysis.

Statistics' tab



To access this function, from the dashboard, click the **Statistics** button or select the **Documents > Statistics** menu or click on the statistics button directly from the toolbar, if you personalized it.

The different analysis available are grouped into several widgets, **Births and Deaths**, **Surnames and Given names**, **Families and Generation count**…
In the simple version, these widgets present a simplified graph on births / deaths, the most common surnames, the average age at the first union and the ancestors count of the root person or the central person of your file.

You can easily export each chart displayed in PDF or PNG format by clicking on button located in the title bar, to share it or document your genealogical work.

In the detailed version, each widget gathers different analyzes and displays the graphs and data tables associated with them.

In order to use this data outside Heredis you can:

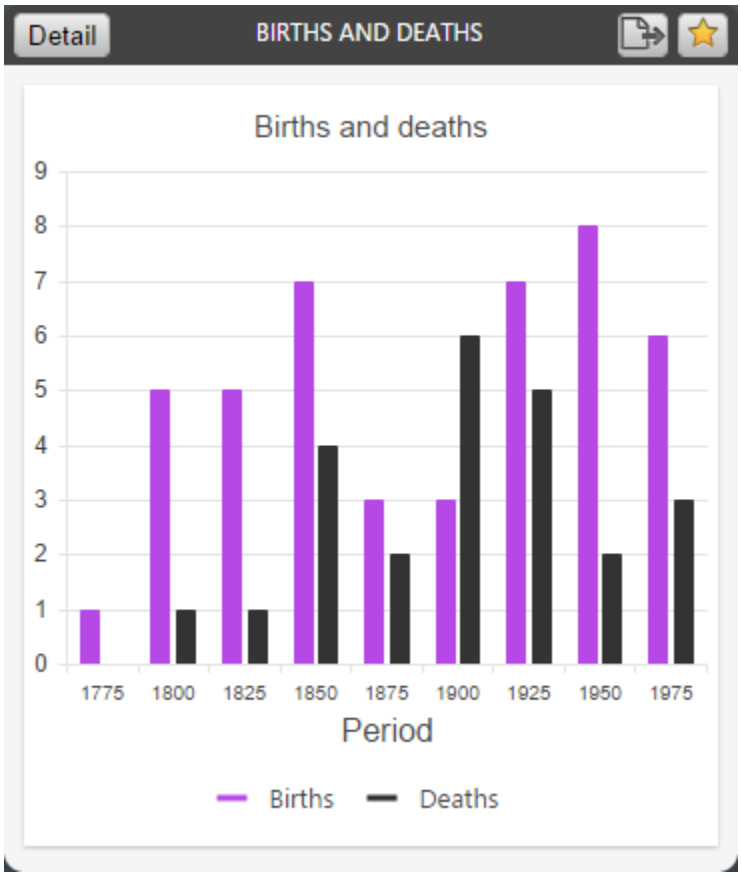
• export all the charts and data tables of the widget by clicking on the button, located in the title bar of the widget. Heredis displays an overview of the widget you can save to PDF.

• export a specific data table by clicking Details then on the button in the title bar of the

data table. Heredis suggests that you save this data in Excel format on your computer. You can then analyze them using your spreadsheet.

BIRTHS and DEATHS widget

Births and Deaths' widget

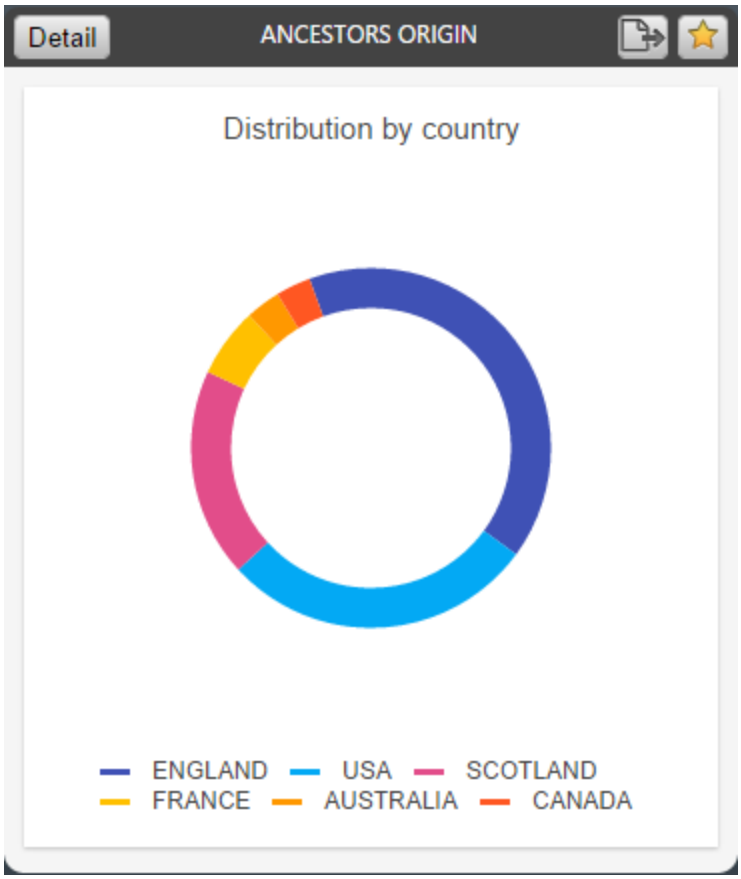


This widget contains the following analyses: distribution of births and deaths, life span and census.
You can choose between one display per period with different possible intervals or one display by month according to what you want to highlight from your analysis.

In the Census widget, Heredis displays the number of persons who have lived in each period, based on their main events of birth and death on the one hand and the maximum age at death of the general preferences of Heredis on the other.

ANCESTORS ORIGIN widget

Ancestors Origin's widget



This widget allows you to visualize the distribution by country, state/province, and county of the persons in your genealogy.

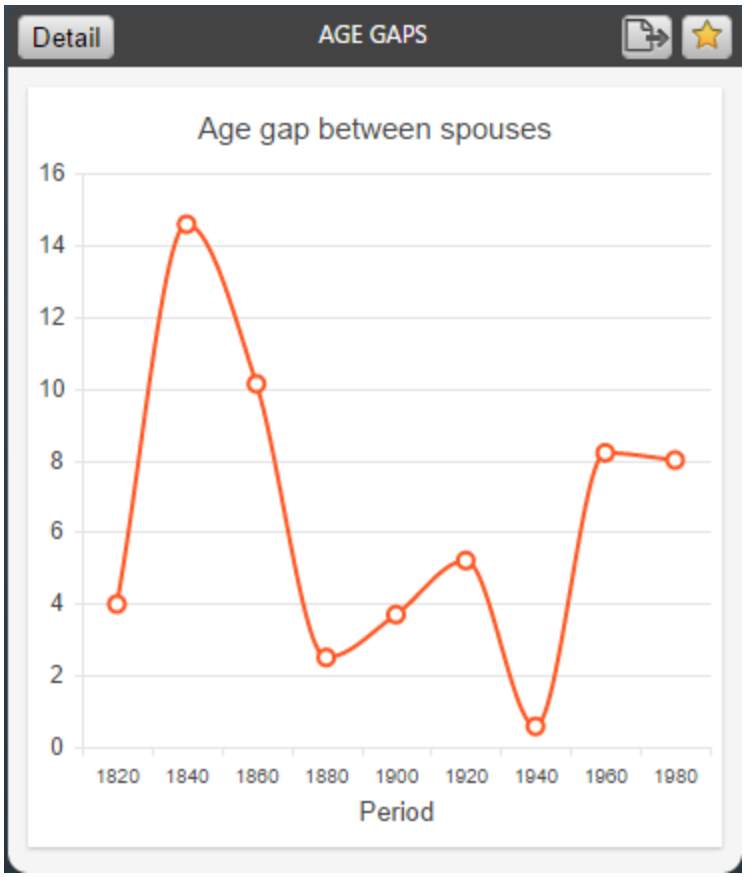
If you have selected **Entire File** as the Scope, the analysis will include every single person in your file. You can choose to narrow it down to the ancestors of the root person or of the primary person in your genealogy by setting the Scope to **Direct-line Ancestors** or **Ancestors**. To modify this option, click on the cogwheel in the upper right corner.

In the simple view widget, Heredis groups the persons according to their place of birth and displays a ring graph showing the most representative data by country, state/province or county.

If you click on the **Detail** button, Heredis will provide a full analysis by country, state/province and county along with a table indicating the number of persons found and the start/end years for the Period of appearance.

AGE GAPS widget

Age Gaps' widget



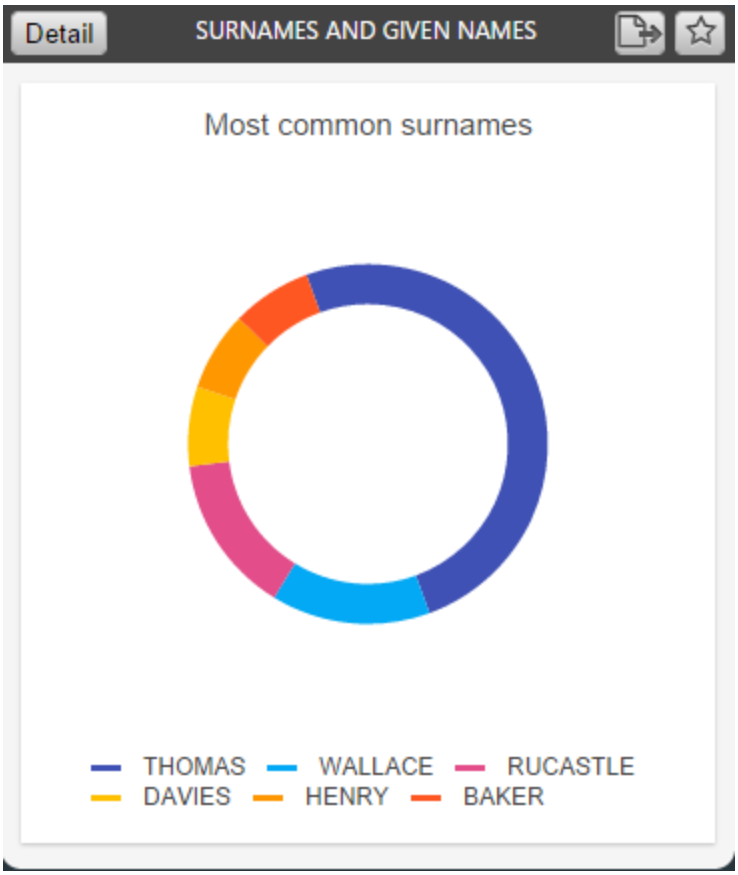
This statistical analysis focuses on the age difference between spouses and on the age gap between siblings in your genealogy. Just like in the previous widget, the scope of persons included in this analysis is set by you in the General Options of the dashboard.

In Simple view, Heredis displays a line chart showing the average age difference between spouses.
In Detail view, this same line chart is displayed along with a table filled with matching data and with another chart showing the average age gap between the first and last born among siblings.

Note: These charts only include couples with a minimum of one union entered with a date (Marriage, Religious Marriage, or other type of official marriage) and marital unions with at least two children properly entered with a date of Birth or Christening.
The default analysis interval is set to 50 years but you are free to modify this interval if you wish to adjust the data displayed in the charts and tables.

SURNAMES and GIVEN NAMES widget

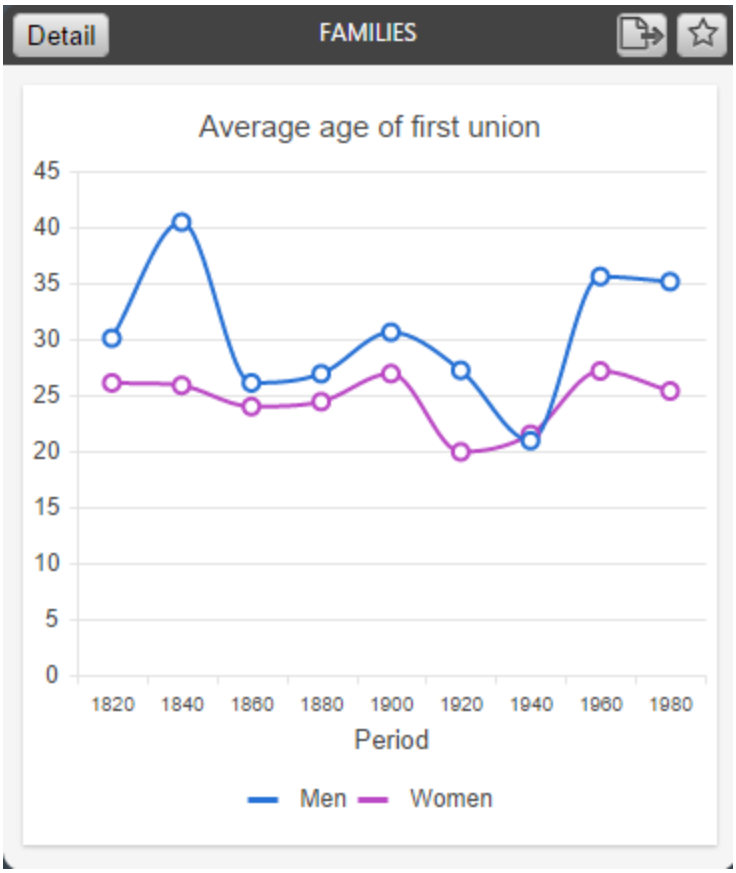
Surnames and given names' widget



This widget provides you with a distribution of the most common surnames and given names of your genealogy that you can filter by gender.
On the graph, Heredis displays a selection of surnames, the most common given names and regroups all the others in the category «Other». For each surname / given name we specify on the graph, the number of holders and the percentage that it represents on the total names or given names of the file.

FAMILIES widget

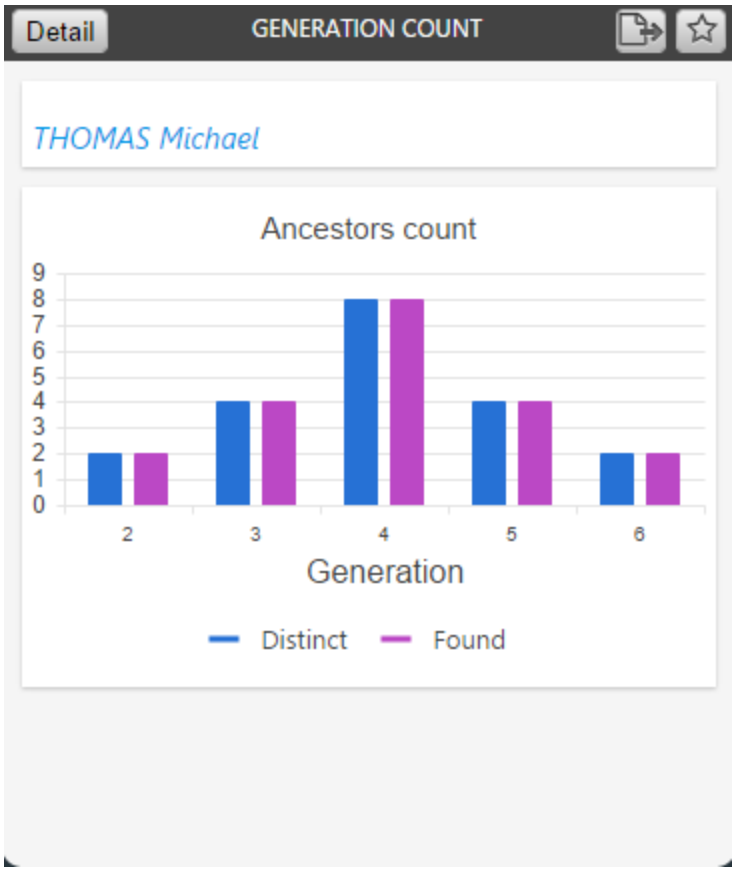
Families' widget



This widget contains the following analyses: average age at first union, number of children per family and the number of families.
You can choose between one display per period with different possible intervals or one display by month according to what you want to highlight from your analyses.

GENERATION COUNT widget

Generation Count widget



In this widget, Heredis offers to analyze the direct ancestors and descendants of root person of your file, if you selected «Entire File» or «Direct ancestor line» in the options of the dashboard, if not then the ascendants and descendants of the primary person if you selected «Ancestors». The display, by generation, of the number of ancestors and descendants, found and distinct, makes it possible to highlight duplicate branches in your family tree.

What is a duplicate branch? Everyone, in their family tree, has a real number of ascendants that is lower than the theoretical number of ascendants because we descend several times from a same person because of marriages between more or less close cousins, we are then in the presence of a case of duplicate branches. Hence the importance of putting forward the distinct ancestors or descendants: when they are inferior to the found ancestors or descendants, it is because there is a duplicate branch.

Note: Changing the period and the analysis interval applies to all charts of the widget.
All events with a calculated date are excluded from statistical analysis.

Photo Tool

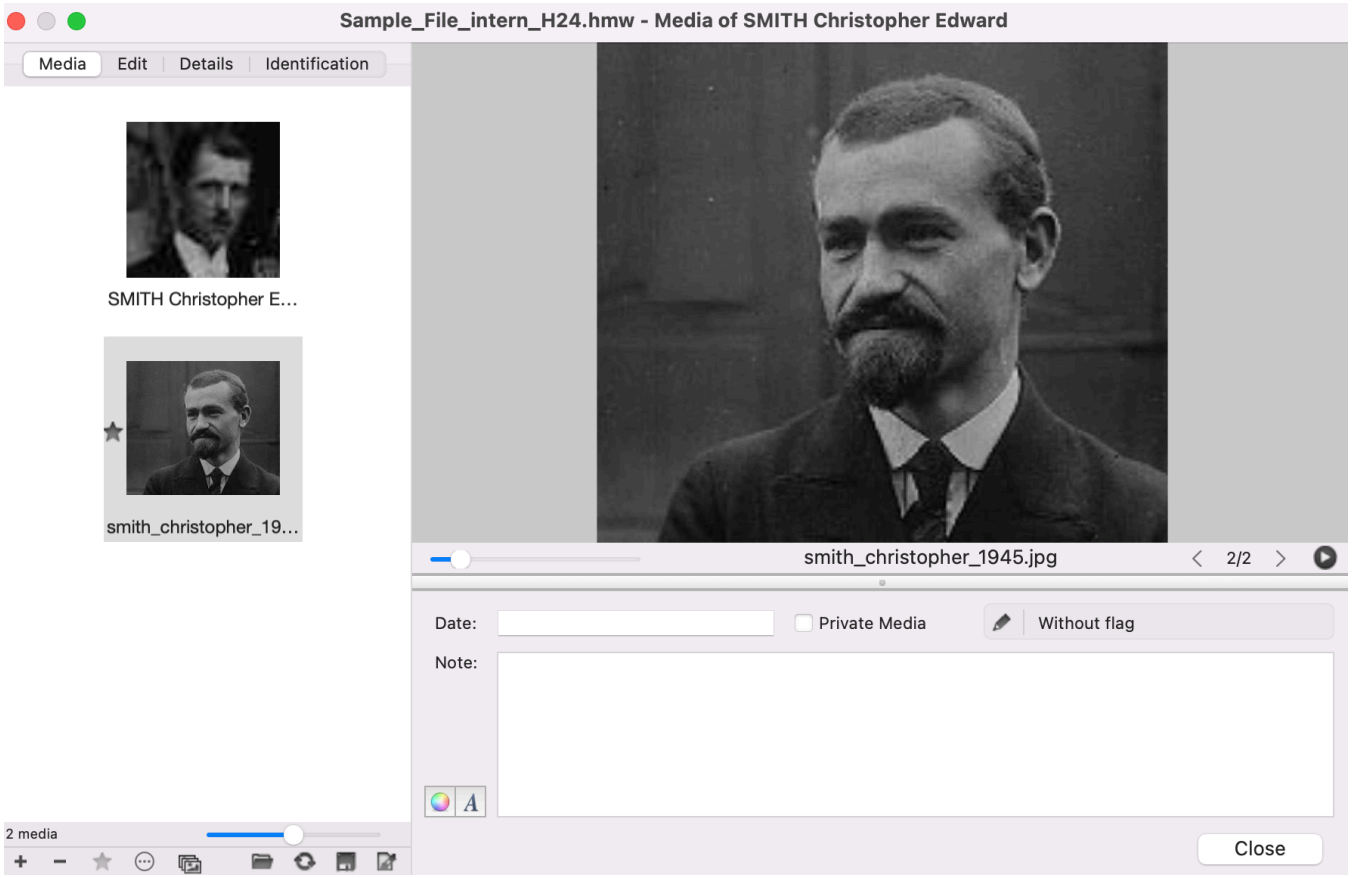
Heredis offers an ideal tool for enriching your Genealogy. Very simple to use, it allows for example, for all genealogists to identify persons in a group photo or in an act and capture faces or signatures.

If the pictures or captures of acts are not perfect, you may correct them with the photo editing tool.

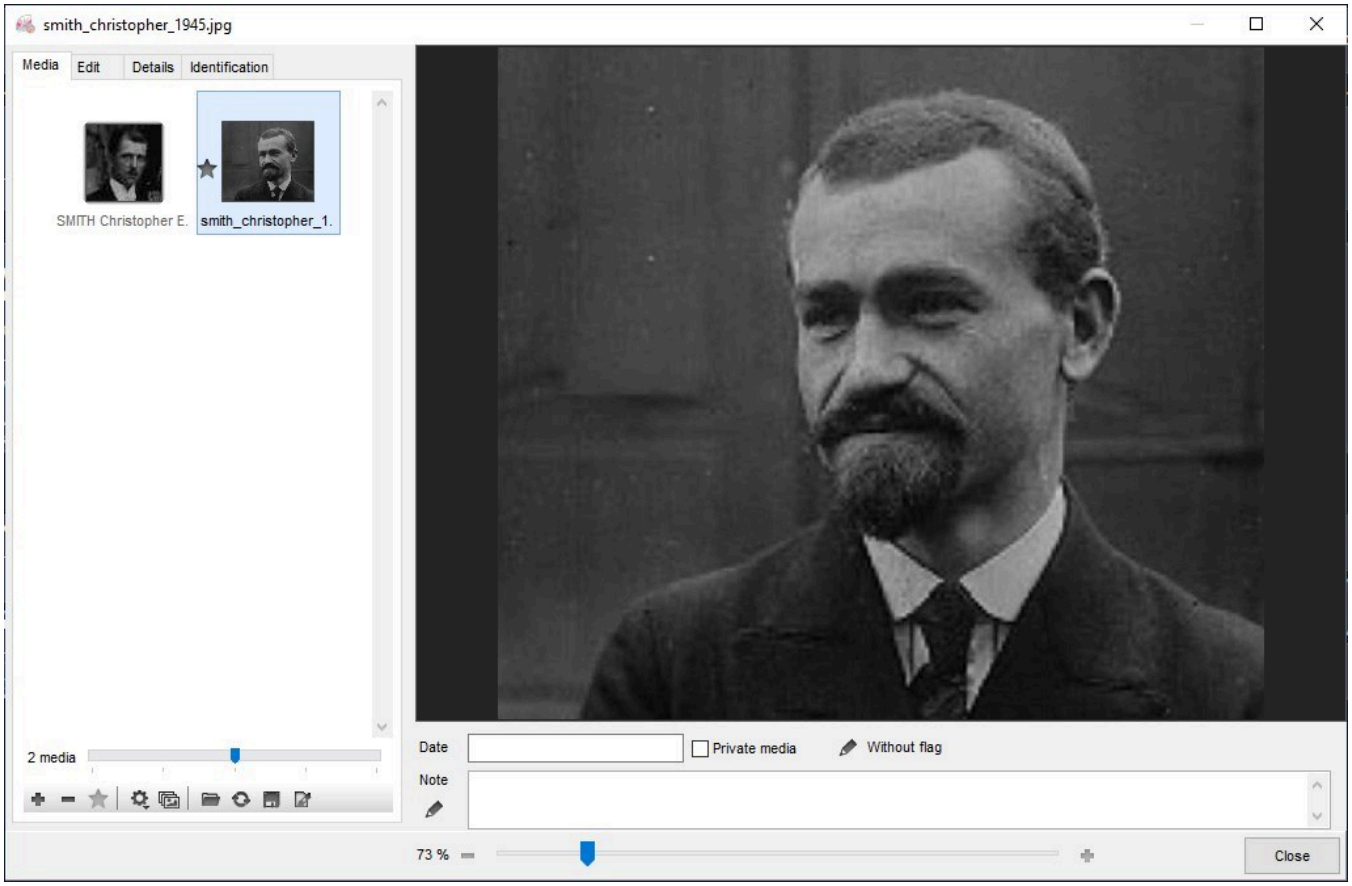
The photo tool is available in your software from the **Immediate Family, XXL Family, Personal Data** and **Family Group Data** tabs but also from the **Media research** panel and from the various indexes.

- Select for example the **Immediate Family** in the **Family** tab and double-click on the media of the primary person
- or click the button if it is in your toolbar
- or click on the **Tools** Menu **> Photo Tool**

Mac Photo Tool



Windows Photo Tool

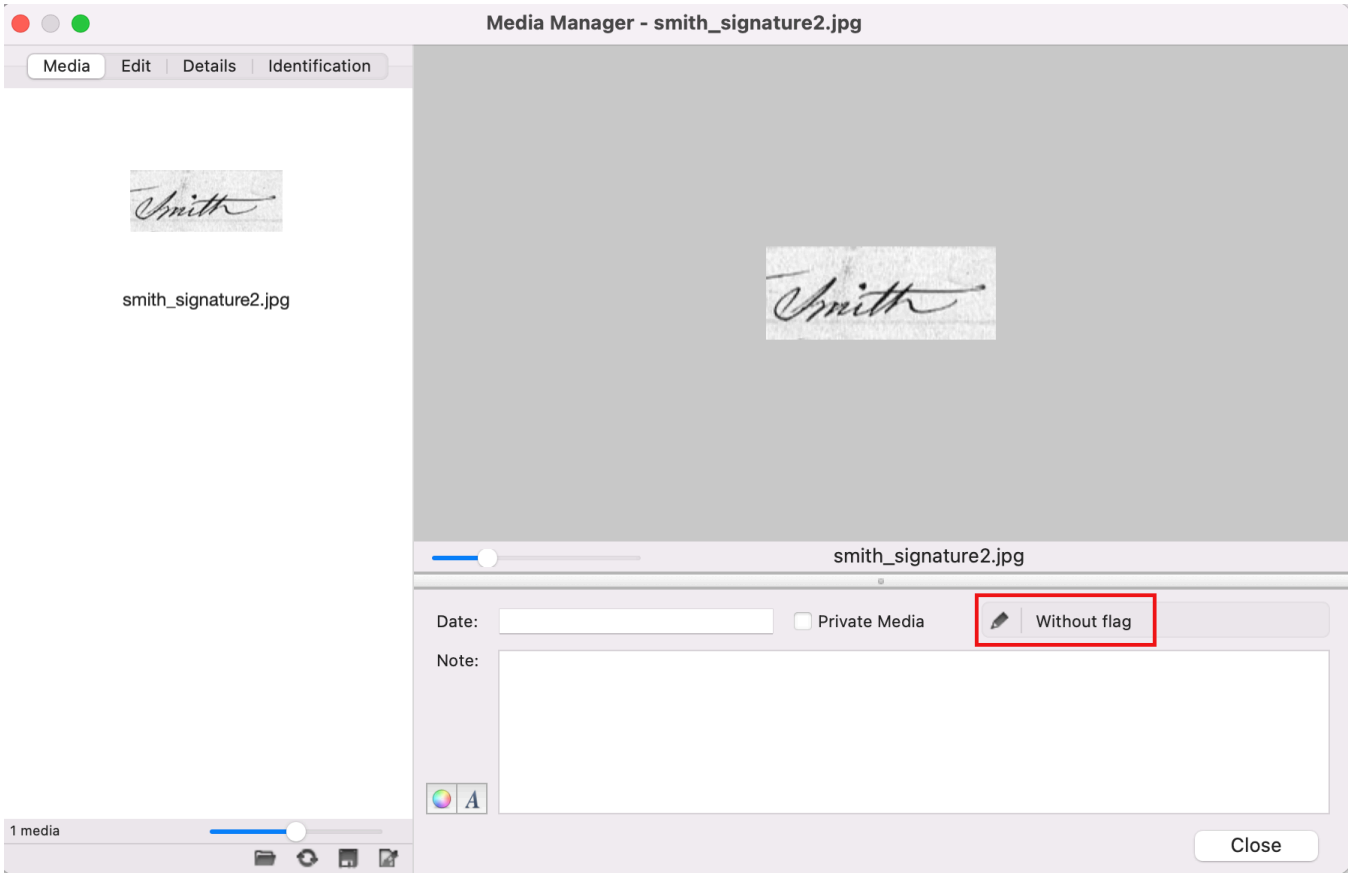


This tool consists of four tabs, **Media**, **Edit**, **Details** and **Identification**, a display area for the image and input fields to complete media information.

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.

Starting with Heredis 2025, you can add a flag to your media.
For example, indicate that it is a signature or a portrait. See the article Personalized flags (see page 188) for more details.
Click on the pencil to the right of the Private Media box.

Mac Photo tool flags

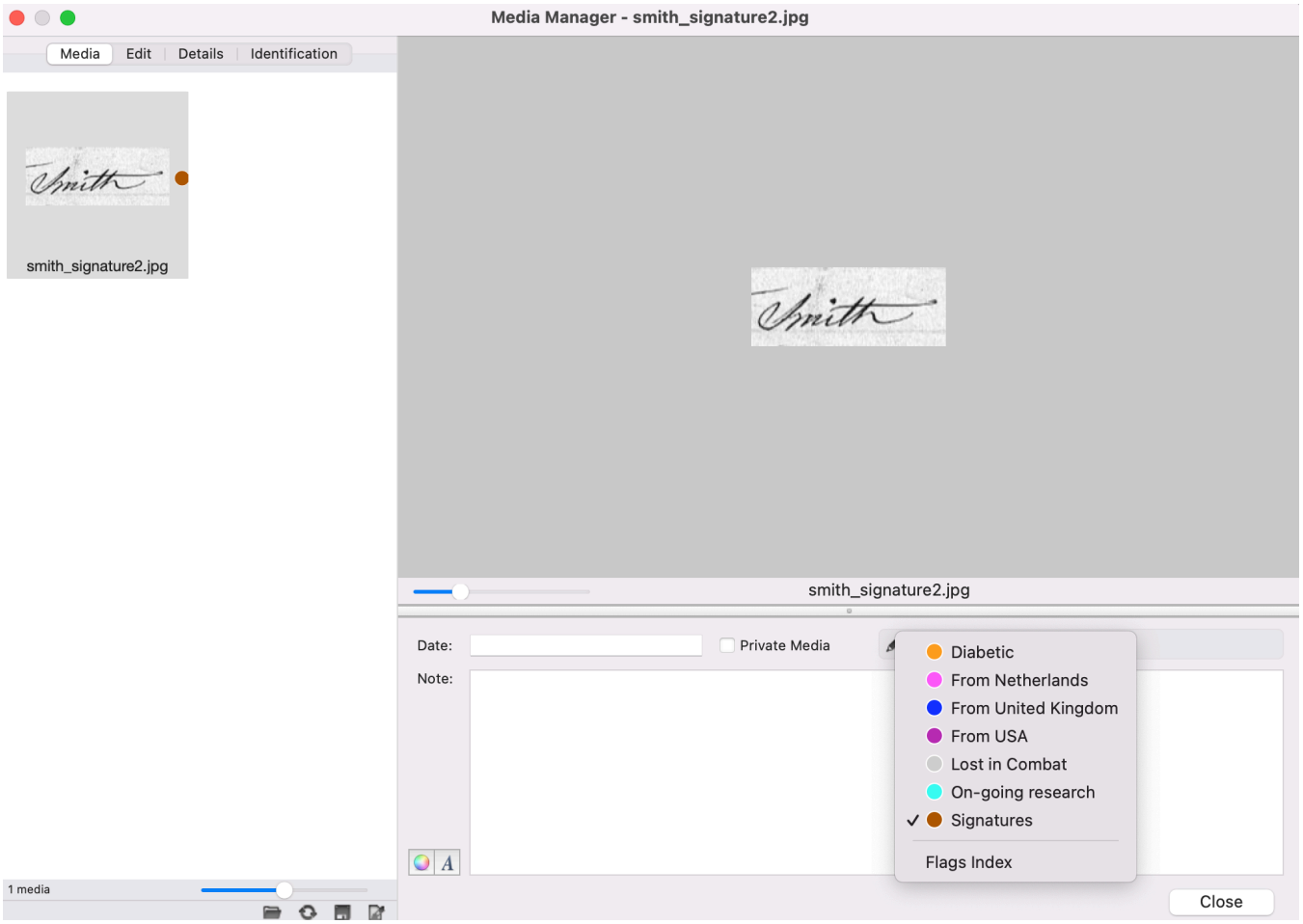


Windows Photo tool flags

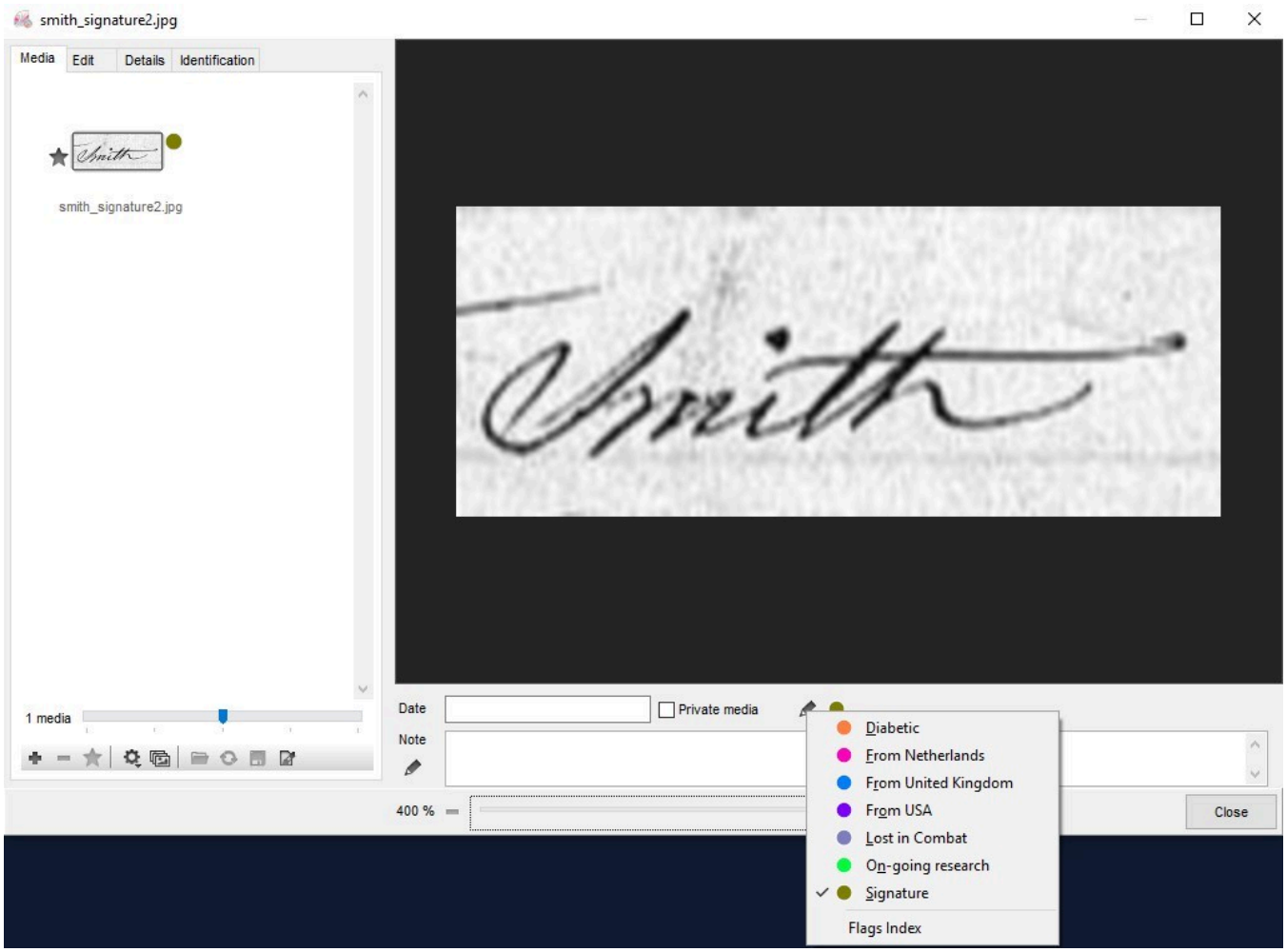
If the desired flag exists, select it. If not, click on **Flags index** to create it. See the article Flags index (see page 441) if necessary.

Once the flag has been created, don't forget to attach it to the media. Click on the pencil again and select the flag.

Mac Media flag



Windows Media flag



A zoom slider under the image allows you to adjust the size of the displayed picture.

The Media tab

A list of media appears in this tab in the form of photo thumbnails. This list will depend on the context of launching of the photo tool.

For example, if you run the tool from the thumbnail of the Primary Person in the **Immediate Family**, the media displayed will be those of the Primary Person.

If you run the tool from a picture of the union in the **Personal Data** tab, Heredis will only list the media for that union.

A zoom slider at the bottom of the tab to the right of media counter allows you to adjust the size of the thumbnail displayed.

You have a series of buttons to act on the media displayed:

- Button ✚: You can add a media from the hard disk, the index or the clipboard.
- Button ━: press this button to detach the media of the Primary Person without removing it from the Media index.

Info • + and − buttons are not displayed if you launch the photo tool from the Media index.

- Button ★: the star symbol identifies the photo you have selected as a favorite. It is this photo which will illustrate the person in question in all documents. Select a thumbnail from the list and click this button to place it as the favorite.
- **Show all media linked to primary person** button: this button will display all the media concerning the person and you will see the wedding picture or pictures of the Primary Person, as well as those associated with his or her name…

Info • the Star and All Media buttons only appear when you display the media of the Primary Person.

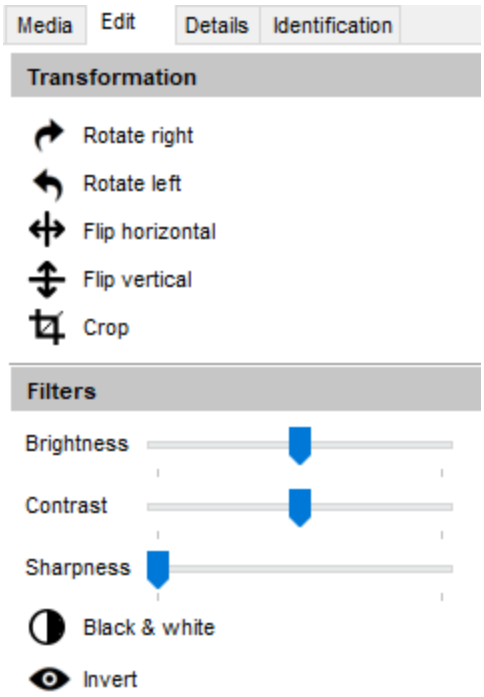
- button: to find a media more easily in the displayed miniatures, you can sort them by name or date.
- button: if you have made a mistake in adding a media, click this button to replace it with another media on your computer.
- button: you have made changes to a photo which do not suit you and you want to go back to the original version of this photo: click the Reload button. Heredis will automatically reload the original picture saved on the computer.
- button: You can save a copy of the displayed picture to the **Photo tool** on your computer.
- button: allows you to rename media. See Rename media (see page 433).

The Edit tab

Editing is possible for images media: . jpg, . jpeg, .png… It is not possible to touch up a PDF or a .docx. It is therefore preferable to put image-type media even for your deeds rather than PDFs.

If your photo is not perfect, you can easily modify it.

For example, crop the image to remove unwanted parts with the **Crop** button. When you click the button, a selection box appears on your capture. Adjust the dimension with your mouse cursor by stretching or narrowing one of the 4 corners of the selection area. The cursor changes shape when you position it on the dotted lines of the selection area: hold down the left click and drag the window to move it. When the selection area is adjusted, click **Crop**. Your image is now well framed.



If you want to orientate your photo in any other way, rotate the image in the right direction by using the orientation buttons **Rotate Left** Button, **Rotate Right** button. You may flip the image horizontally with the **Horizontal Flip** button but also vertically with the **Vertical Flip** button.

With Heredis, you do not need any other software to embellish your photos. You can adjust **brightness**, **contrast**, or **definition to sharpen** an image to its true value.

You can also change a color photo to black and white by clicking the button but also reverse the colors of the photo by clicking on the button .

Do not hesitate to try different changes, because you can always return to the original photo with the **Cancel** button.

Once your image is satisfactory, you may confirm the changes by clicking the **Apply** button.

The Details tab

With this tab, Heredis informs you of the different uses of the image displayed and shows you where the original is located on your computer. If you click on the displayed path, **(Windows)** Windows Explorer / **(Mac)** Finder will open.

See also Media Index (see page 422) and Media (see page 198) articles.

The Identification tab

From this tab, you can identify persons in a group photo or persons named in an act by cutting

out their photos or signatures. If you then navigate through your software, you will see that the cut portraits or signatures illustrate persons with whom they are associated.

Using your mouse, enclose the people on the picture in the display area.

Position the mouse cursor over a person, hold down the left mouse button and draw a cut-out frame around the person. When you release the left click, Heredis instantly offers to search the index of persons of your genealogy for the person in question.

If you know this person, type in the given name or surname or both. Immediately Heredis displays the list of persons with this name and forename or variations in your file. Select the person from the list and click **(Windows) Choose; (Mac) OK**. Check the summary of existing persons to make sure you choose the right person.
(**Mac**) The summary appears in the always accessible summary tab.
(**Windows**) The summary appears after selecting an person.

Identification

If you know this person, but he is not present in your genealogy, click the **Create Person** button to create the person directly from this screen.

If you do not recognize this person, click the **Unknown Person** button to indicate that this person is an unknown person.

A frame appears around the person. You can always adjust this frame at any moment.

When you place the mouse pointer on the contours of the frame, it changes its appearance. By holding down your mouse, you can move the frame. By touching the corners of the frame, you can enlarge it or reduce its size to make it fit perfectly.
To the left of the photo, the list of numbered frames appears progressively as you identify the different persons in the photo.

A cogwheel appears when you move your mouse over the media in the list. If you click this button, you have access to the following functions:

- **Remove the Frame**: you have made a mistake, select this menu to simply remove it. Note that all the frames are automatically renumbered.

- **Rename the framed picture** : Heredis automatically assigns a name to the media which you have just created and if the name does not suit you, you can change it.
- **Re-Identify**: if you have identified a person as unknown or you have made a mistake concerning the person, you can always assign to this frame the right person in your genealogy file.
- **Export the framed image**: You can save the newly created image managed by Heredis to your computer.

All images are stored directly in the Media Index. They are also assigned automatically to the media of the identified person.

Click the **Show all picture frames** button at the bottom of this tab to display only the frames numbers in the display area of the image.

You can print the picture as displayed in the image display area by clicking the **Print** button. Specify the print options and click **OK**. The document opens in your usual word processor.

Take this printed document along with you during visits to your family: the people around you will enjoy your work and perhaps identify unknown persons in the group photo.

Info • When you browse and launch the photo tool for a person with whom you have associated a signature for example, Heredis indicates above the display area of the image that the media selected has been cut from another picture. If you click the **Display the Original** link, it will be displayed in the image display area. If you want to hide it, click the **Hide Original** link.

You cannot recut a picture that has already been cut out.

Some editing functions are not available for a group photo if you have already identified persons in this picture.
If you close your genealogy file without saving, all edits, cut-out photos and signatures… will be lost.

Identification can only be performed on files in photo format: . jpg, . jpeg, . png … A PDF is not a photo format. There will therefore be no identification on a PDF media.

PDF Media (Mac)

Arrows on either side of the number of pages

can be used

to change pages.

The PDFs that appear in the summary allow you to scroll through all pages one after the other, zoom in or out.

PDF Media (Windows)

Since Heredis 2023, PDFs now display all pages in all media areas. A specific toolbar appears.

The first button allows you to display the pages one below the other. The + allows you to zoom in, and the – to zoom out.
The following buttons change the layout on the PDF screen.

The buttons allow you to change pages one by one or to go to the very beginning or to the very end.

Sharing media

Export a file containing media

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

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

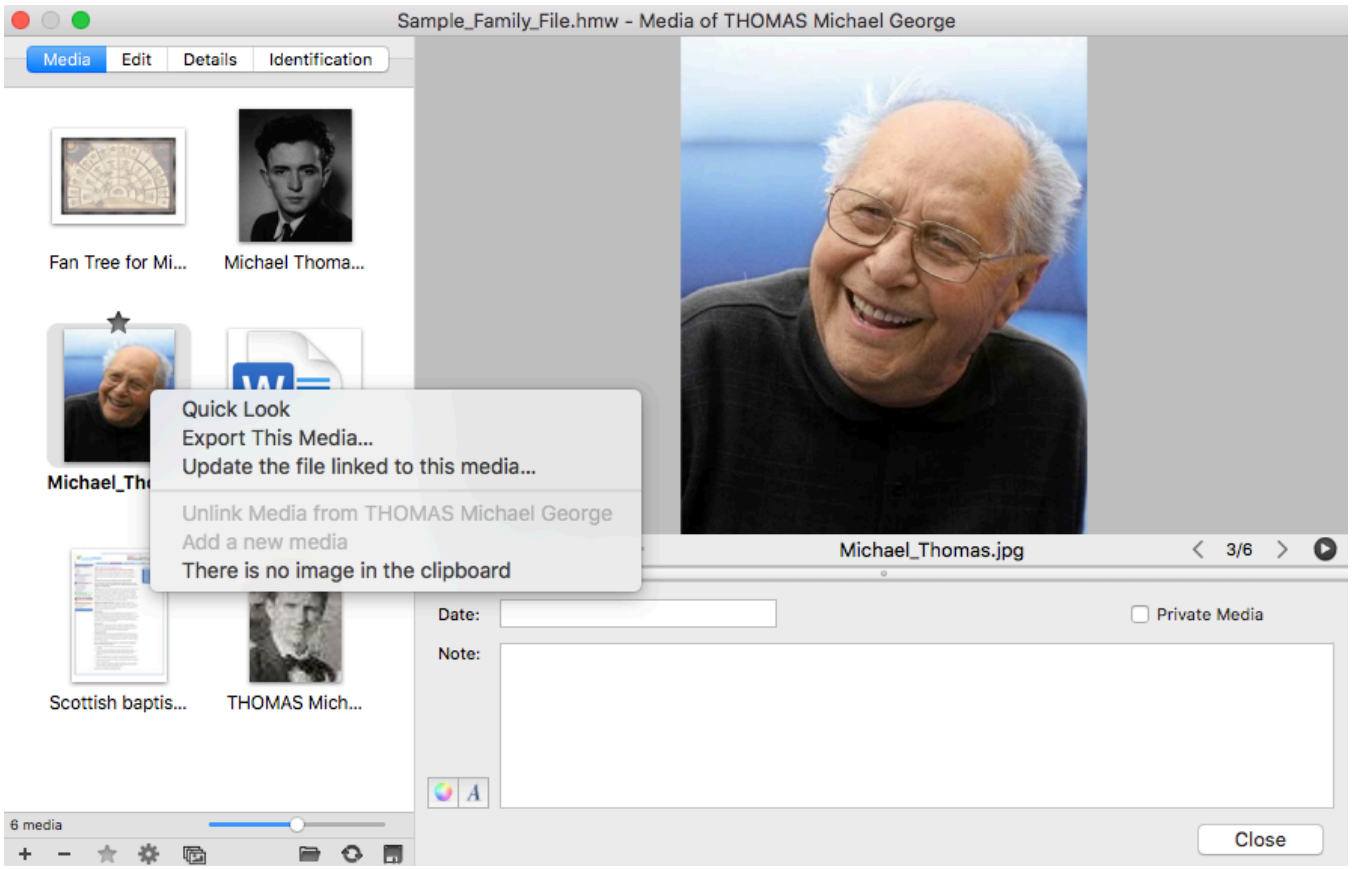
Export media files

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

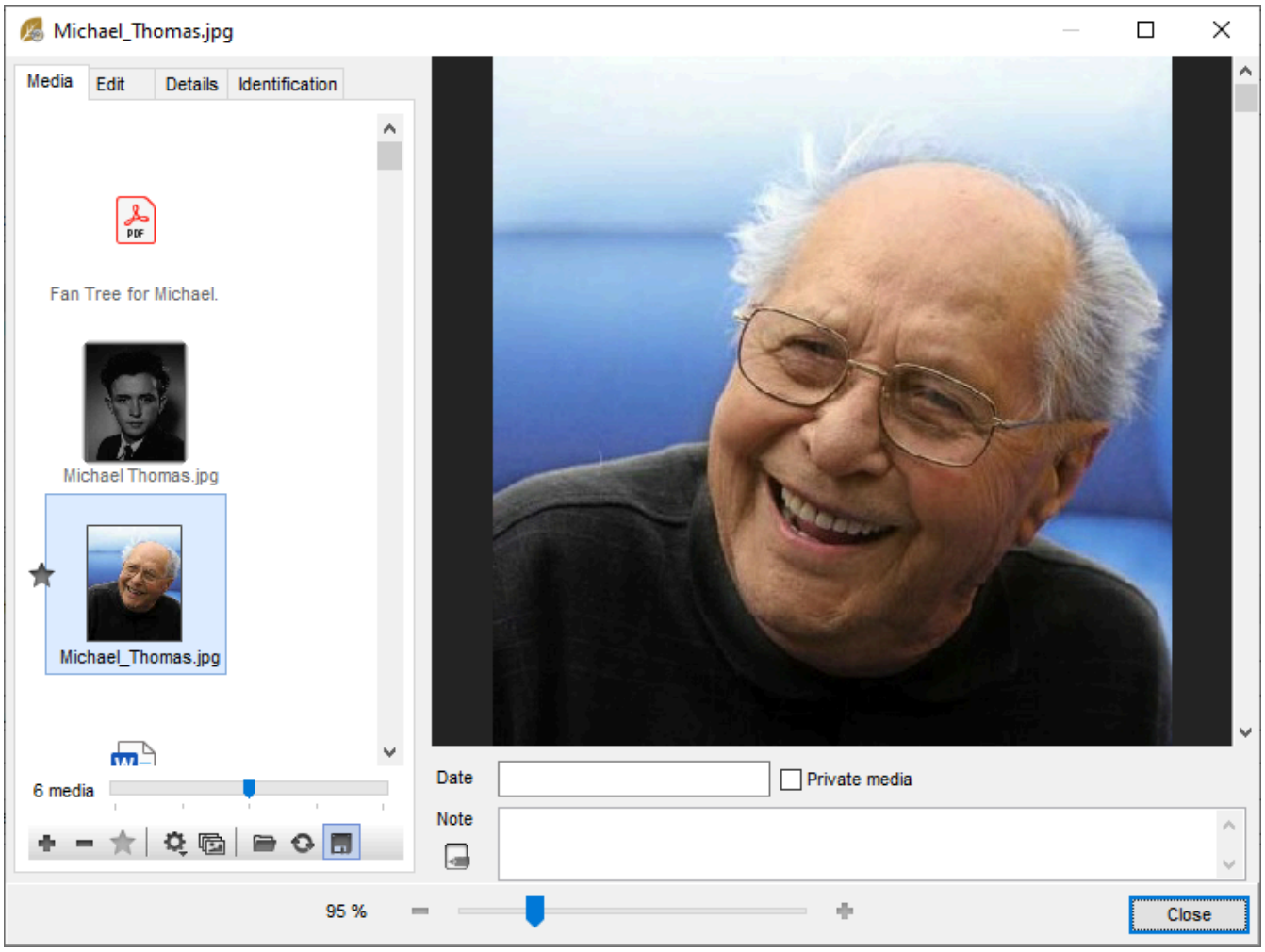
- Double-click on the media to access the edition screen of the media,

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

(Mac) Export selected media



(Windows) Export selected media

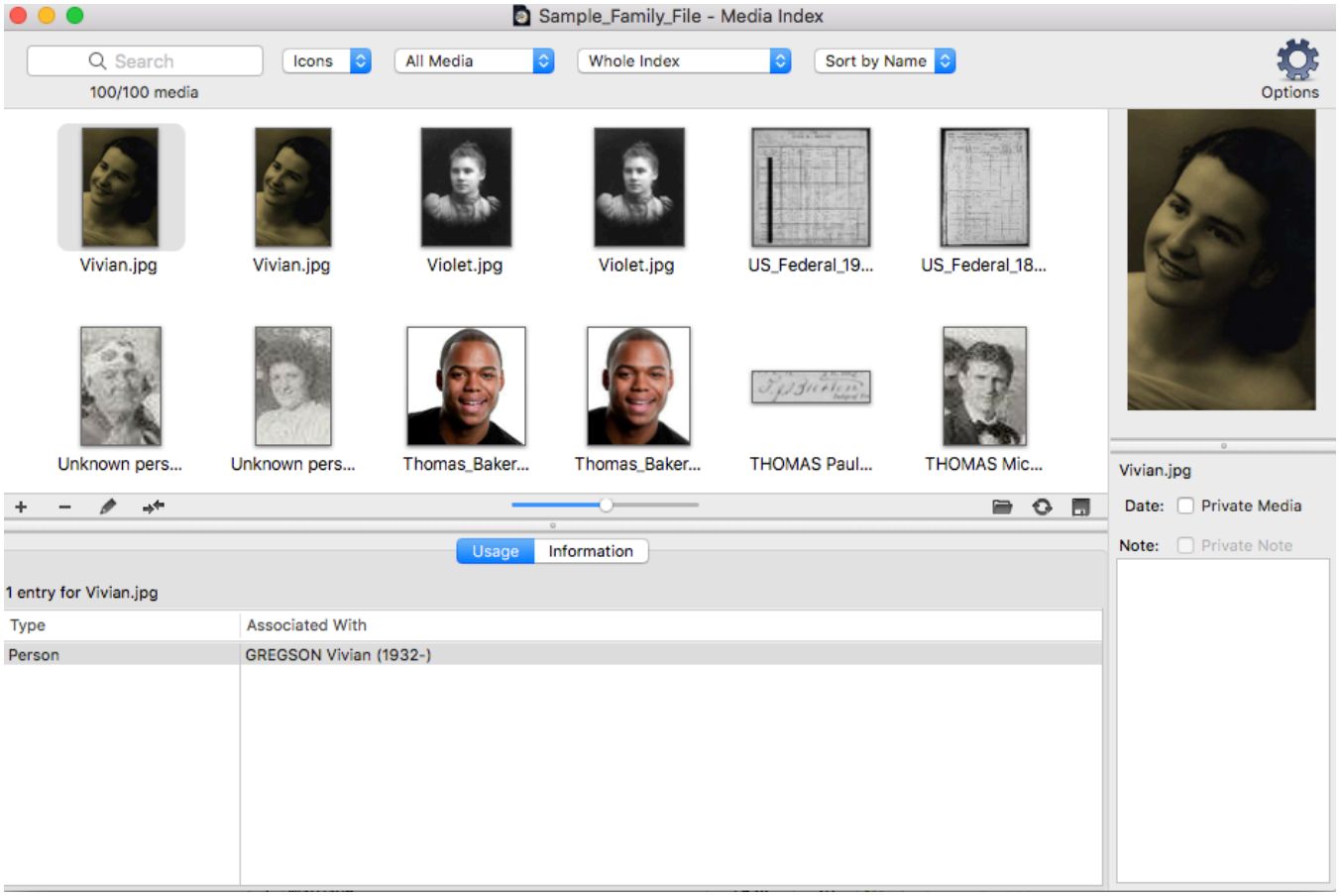


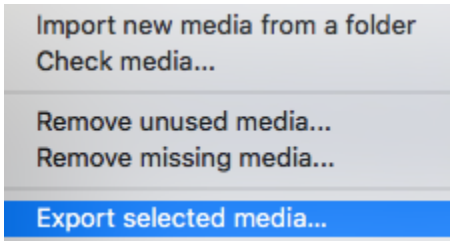
2. Keep the same name or change it and choose the destination location for the exported media.

- In the **Media Index,**

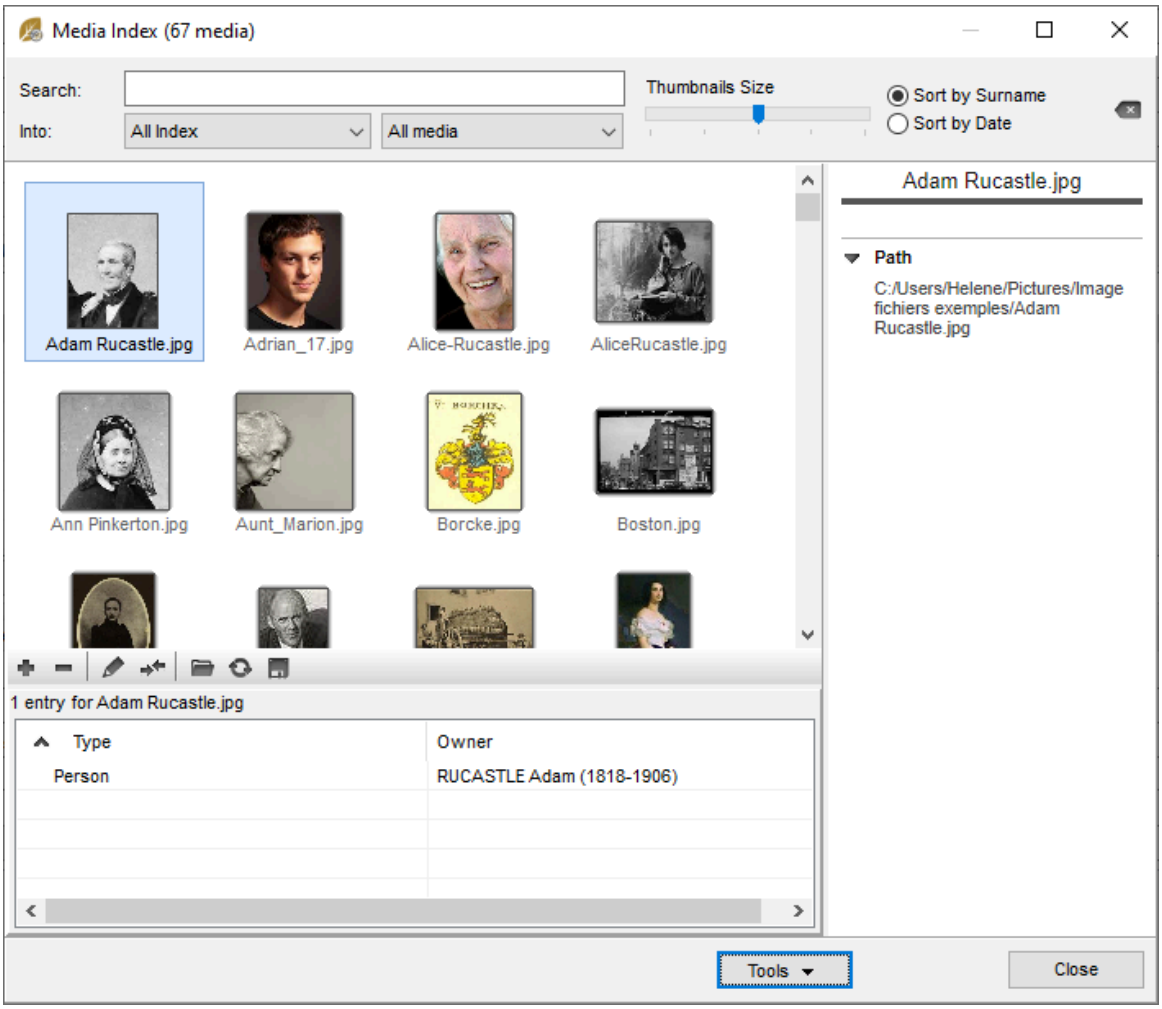
1. Make a selection of media using the display filters for different types of media or uses. Display for example images used for sources in the submenus.
2. Click the (Windows) **Tools** / (Mac) **Options** button on the toolbar of the index and choose **Export Displayed Media….**

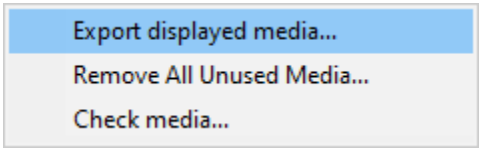
(Mac) Export media from Media index





(Windows) Export media from Media index





3. Select the destination folder for the exported media.

For further details, see Media Index (see page 422).

Slideshow

With Heredis, the slideshow scrolls through the life of your ancestors in images. This tool presents your photos in a family album, composed of different chapters resuming life of the primary person and his/her immediate family.

In this function, Heredis displays the media of the primary person and his family and more specifically the media:

- of the primary person
- of his/her spouses
- of his/her children
- of his/her brothers and sisters
- of his/her parents
- of his/her grandparents

For all, Heredis shows the person's media, union media, individual events, union and shared events, media of names, forst names, occupations, places. If they have already been displayed for the primary person, they won't appear again.

Launch Slideshow

To launch it, place the wanted person as the primary person:

- click the **Slideshow** button under the screen of the primary person from the immediate family tab, or the person's data entry tab.
- click on **Reports** menu **> Slideshow**

Let the pages of the photo album scroll through and enjoy your work.

- Click the **Pause** button on the top right of the screen to stop on a picture and read the comments on the photo, for example.
- Click the **Chapters** menu to display all the chapters of your album. By clicking on one of the chapters, you navigate directly to the selected chapter and you can then restart the slideshow by clicking the **Play** button at the top right.

Slideshow

Change Slideshow Theme

By default, the slideshow appears with the **Retro** theme but you can change it according to your tastes. Click the **Themes** menu and choose another theme from the selection.

Each theme has an associated music. It is not editable.

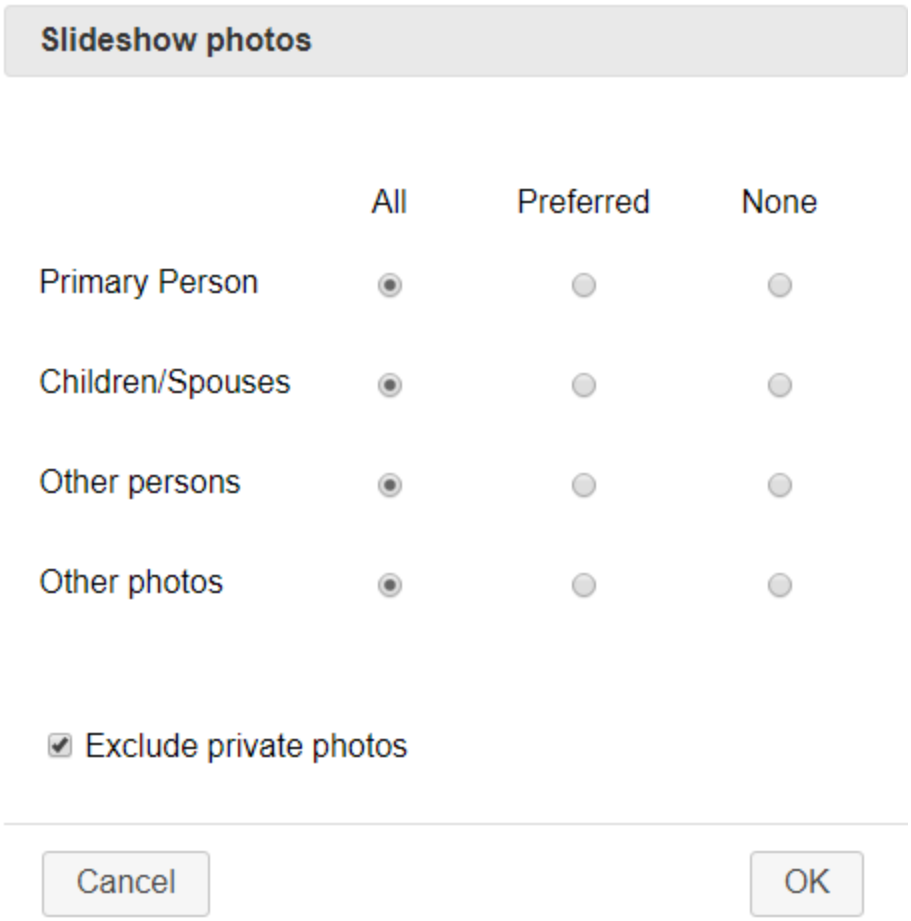
At the bottom of the screen, you have an audio player for playing music. As you watch this family slideshow, the photos parade with the music. Click the **Sound** icon to cut the sound.

Filter the images of the slideshow

By default, all media of the primary person and his/her close family are displayed.

Click on the cogwheel and choose the images you want to see for the primary person, his/her children, his/her spouse and unions, the other persons (brothers, sisters…) etc.

Filter images of Slideshow



Note: other photos are those attached to places, surnames, given names, occupations, sources, and linked to the primary person.

A box to tick allows you to exclude from this slideshow all private images of your genealogy.

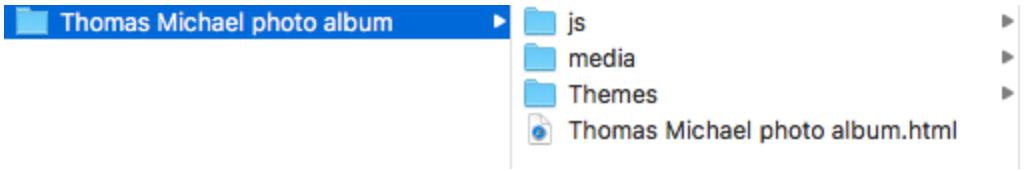
Export the slideshow

Now you wish to share this sideshow, click on the **Export** button. Heredis creates, in the location of your choice, a folder with the photo album of the primary person, the way you set it. Share this folder with your relatives: they can play it by simply clicking the HTML page created in **The photo album of […].html** and even if they do not have the Heredis software.

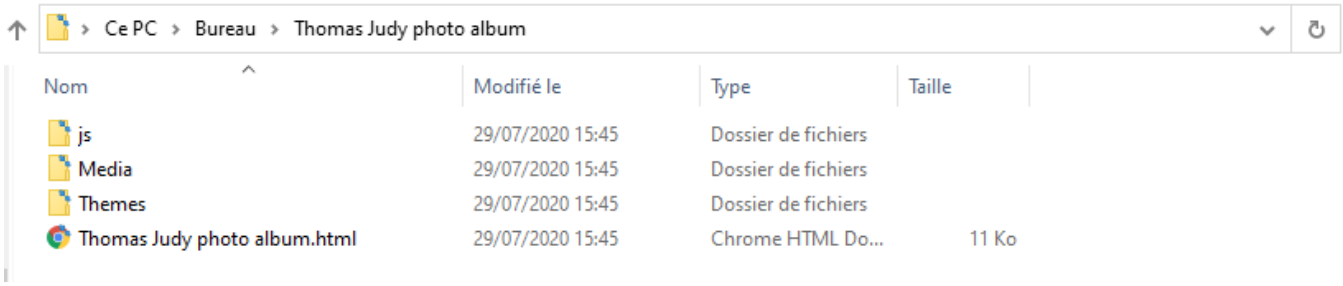
You can also copy the folder to a USB key or an external hard-drive and plug it to your TV, computer or any other USB outlet… to visualize the slideshow with your family.

Important: You need to copy the entire folder if you want the Slideshow to work.

(Mac) Slideshow's folder in Finder



(Windows) Slideshow's folder in Windows Explorer



To exit the slideshow, simply click the **Exit** button at the top right.

Check a genealogy

Sometimes an error message may appear while you are using your Heredis software.

Error messages can originate from various causes:

- your genealogy file is damaged
- the Heredis software itself is not functioning properly
- the system environment of the computer on which Heredis is running is interfering with the proper functioning of Heredis (because of an operating system update, a firewall/ antivirus, the addition of another software, etc.)

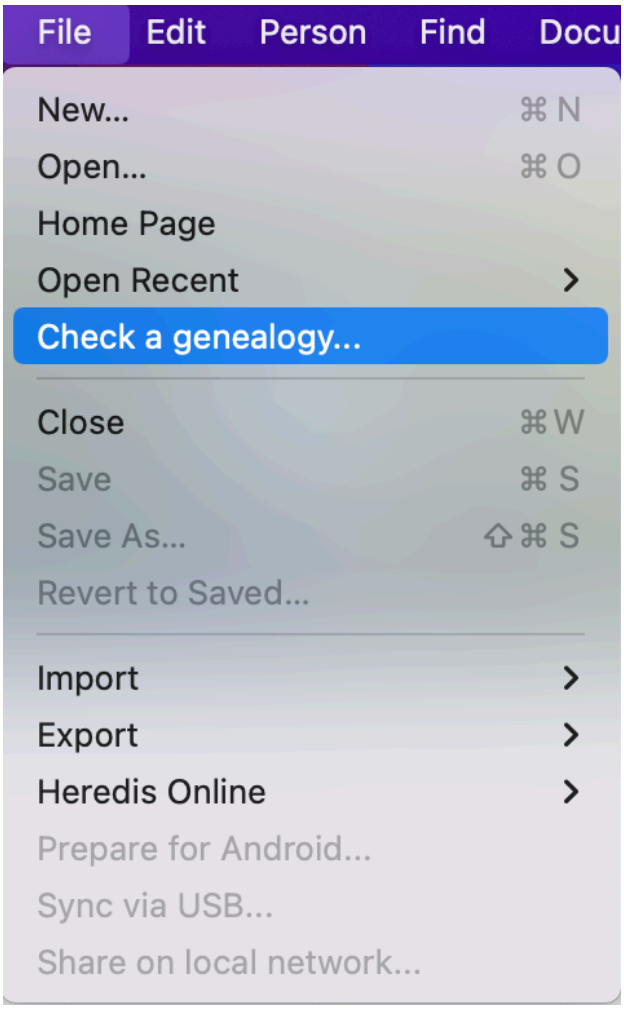
Note: if your antivirus is not the basic one in your system, or if you have recently updated your system, etc., your computer's environment may have been modified. As an example, a person using the latest Windows 10 update without an antivirus (other than the Windows standard one) is not working in the same environment as a person using Windows 10 with the last update dating from several months back and who has installed an antivirus such as Avast, Kaspersky, etc.

We recommend taking error messages into consideration. If they pop up on your screen, there's got to be a good reason for this. Ignoring error messages can lead to permanent damage to your genealogy file.

To help resolve error messages, starting with the 2023 version of Heredis, you will be able to launch a "genealogy check": this new tool will scan your file and repair it if need be.

Open Heredis.

On the Home page, in the pulldown menu, click on **File > Check a genealogy…**



Select the file to be checked according to where you have stored it on your computer.

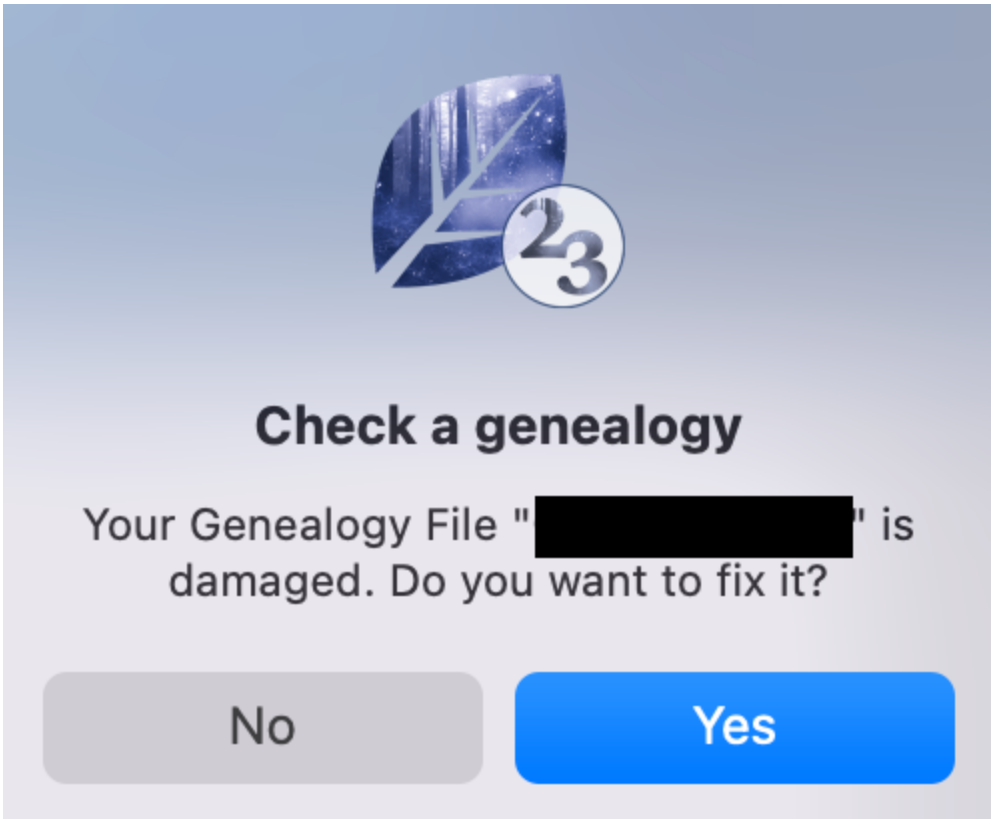
A message will inform you that the verification process may take a while. The more data in the file, the larger the file, and the longer it will take to have it verified. This is just like doing genealogical research, you'll need to be patient!

Note: if you need to use this tool, we advise you do so at the end of the day so you don't slow down your computer should the verification take a long time to process.

Click **Yes** to approve the launch of the genealogy check.

What if Heredis detects a problem in your genealogy file?

If Heredis considers a file is damaged, then a message will pop up, offering to repair the file.



Click **Yes** to start the repair. This process may also take a while.

If you click **No**, do not use this genealogy file as you may damage it even further.

If Heredis was able to repair the file, it will open it, and you will then be able to resume working on it.

If not, take a screenshot and contact our customer service via our contact form. Make sure you mention the message you have seen.

What if Heredis does not detect any damage to your genealogy file?

If Heredis did not detect any damage to your file, the following message will pop up:

If you keep getting the error message, the issue may be unrelated to your genealogy file. There could be other possible causes, so please reach out to our customer service via our contact form.

Note: when contacting our customer service, please use the email address matching your Heredis account; this will facilitate the handling of your case.

Documents

Create and Edit a Book

Your family tree has grown and you wish to share your findings with your family. The Ancestors or Descendants books are perfect for getting the interest of cousins or other relatives, even if they know nothing about genealogy.

You can edit written books to tell your genealogy. From the information you have gathered in your file, Heredis generates a complete book in written form and automatically adapts the vocabulary to the data type. This book includes cover page, dedication, acknowledgments, preface and introduction.

The written books offered in Heredis are elaborated according to the recommendations of the author of the Filiatus software. The presentation and the writing are particularly careful. Written in the style of the genealogy dictionaries of olden times (Father Anselme or Dictionary of the nobility), their presentation is nevertheless friendly and comprehensible by all, even neophytes on the subject.

The ancestors of each character are analyzed in all seams, to detect possible cousinings and to create the branches and sub-branches corresponding to the family structure studied.

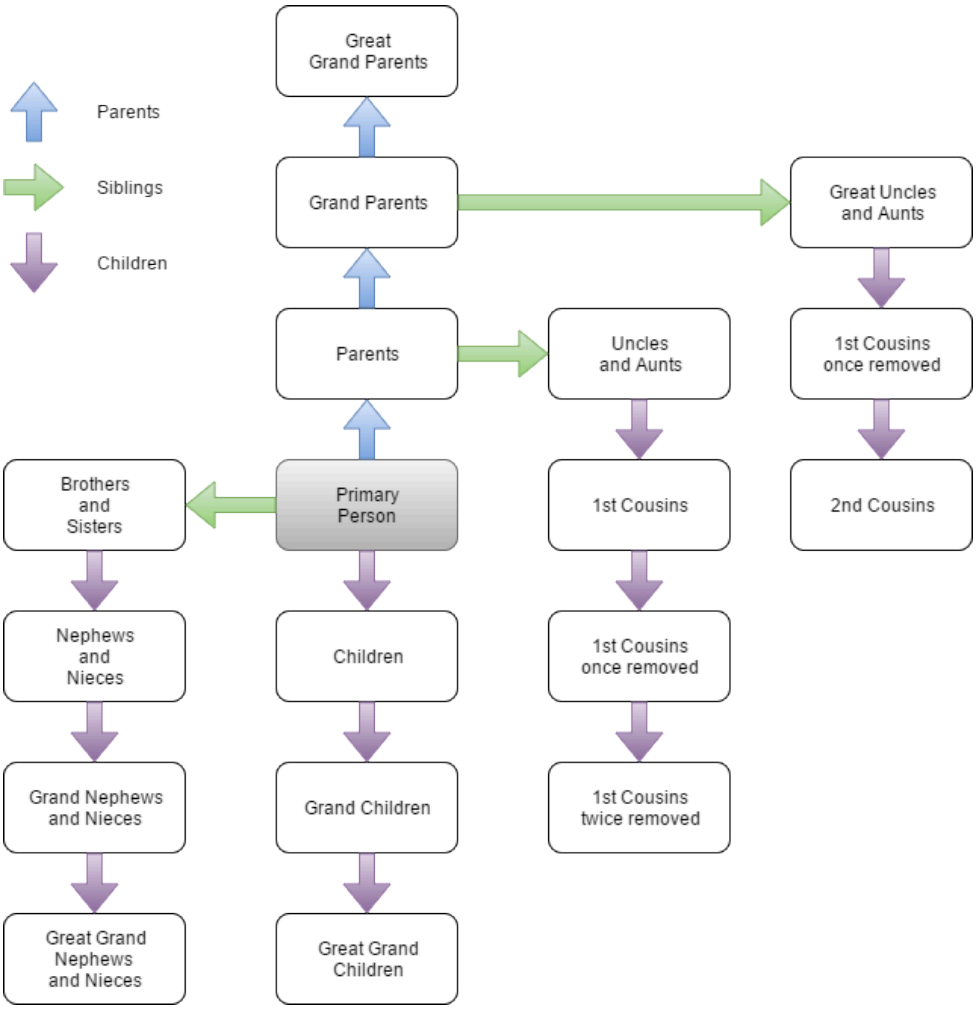
Heredis puts two types of book at your disposal, books written from the primary person and books of the type «dictionary» based on all your genealogy.

With Heredis 2022, the book Families from my village has appeared. See the article Families from my village (see page 576) for more details.

The books written from the primary person

- **Ancestors** by generation
- **Descendants** by branch
- **Clan**: in this document, Heredis builds up the close family around the primary person: spouses, parents, uncles and aunts, grandparents, brothers and sisters, cousins, children, grandchildren …

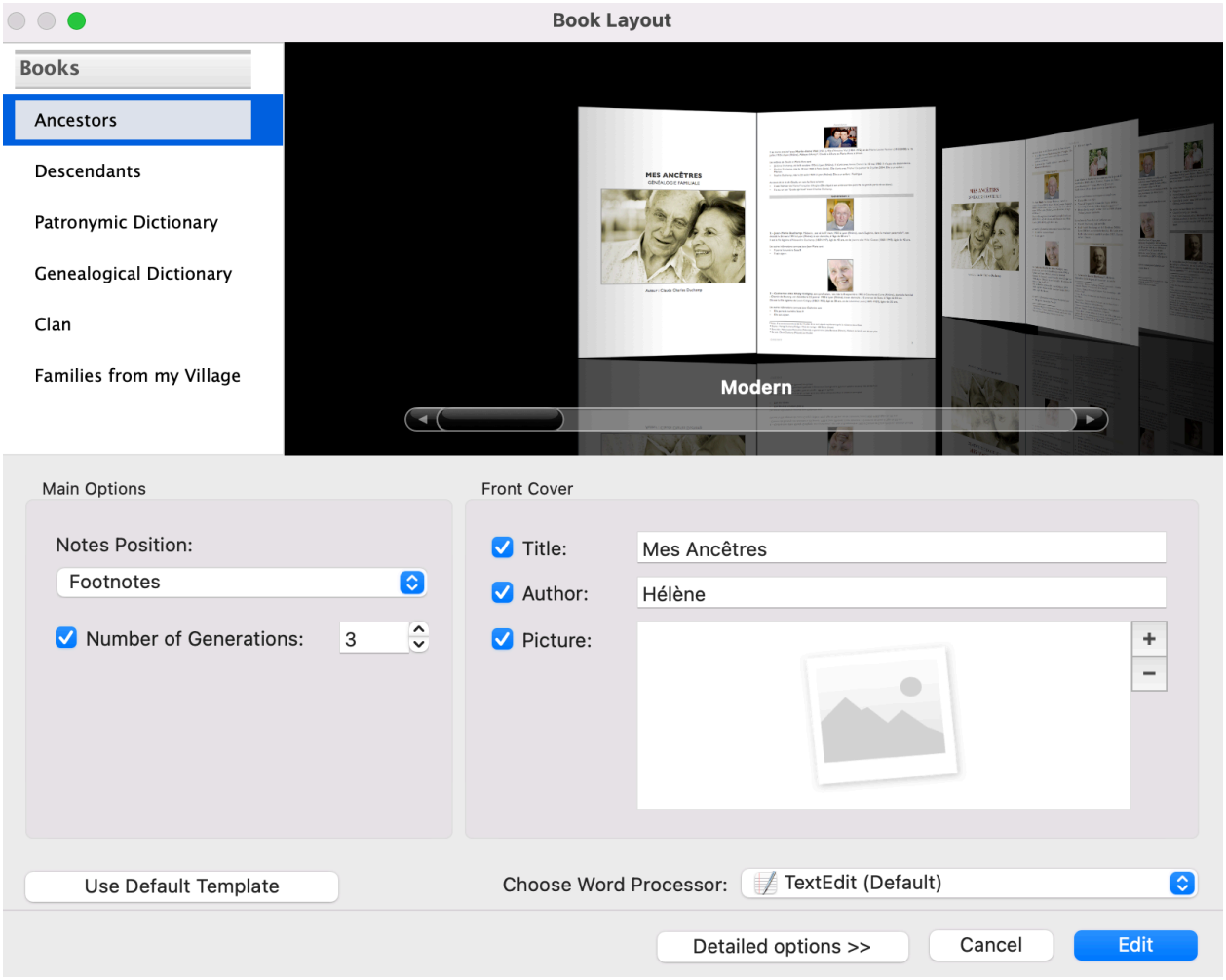
Diagram of the individuals included in the Clan



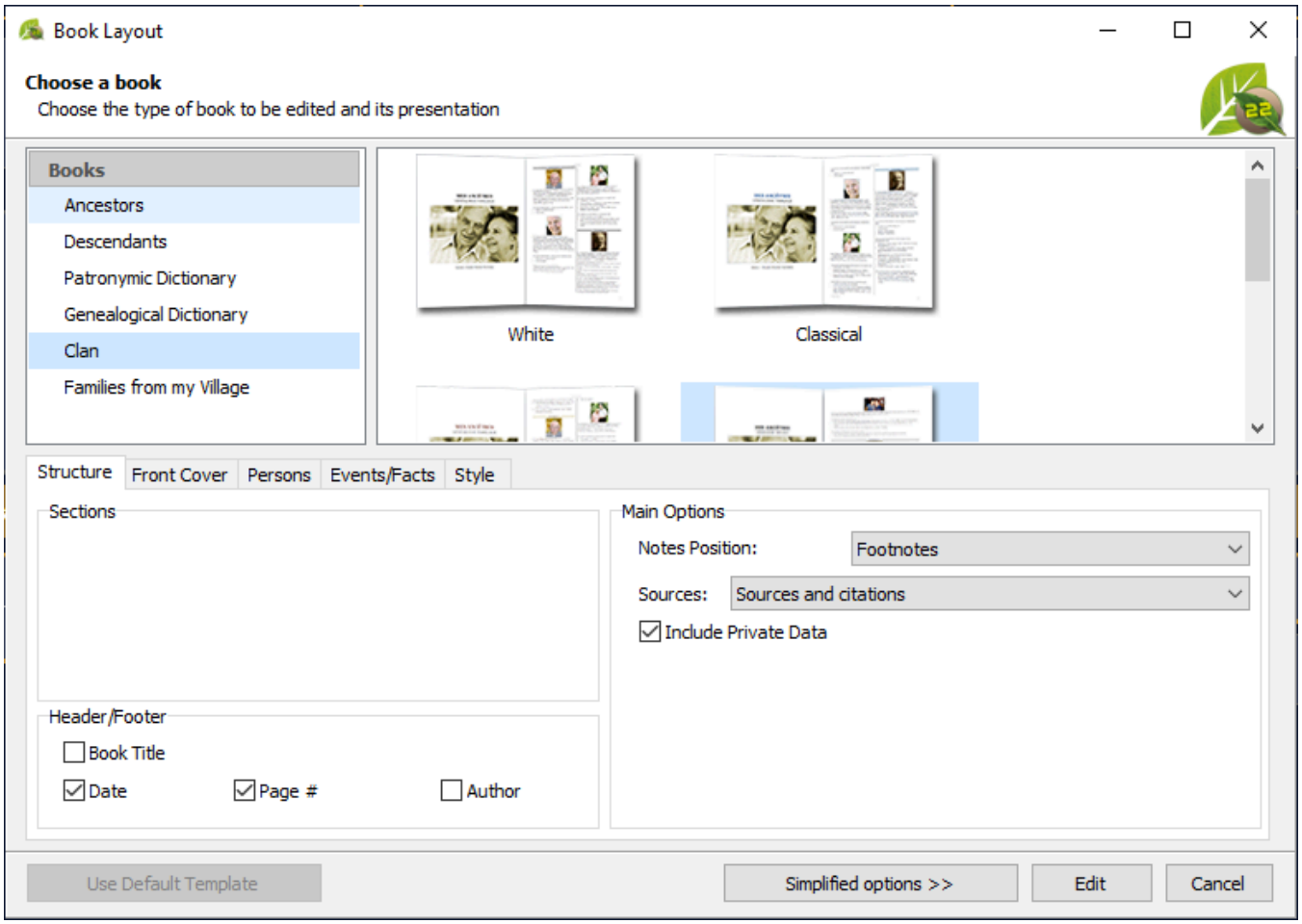
The “dictionary” type books

- **Patronymic dictionary**: Heredis searches all men at the beginning of branches, classifies them by surname and generates their patronymic descent (this dictionary is inspired by René Jetté’s «Genealogical Dictionary of Families»).
- **Genealogical dictionary**: Heredis takes all individuals from your genealogy file, sorted alphabetically.
  You can attach to these books, genealogical tables and a complete index of individuals, professions and places mentioned.

(Mac) Books choices



(Windows) Books choices



Creating a Book

1. Choose (Windows) **Reports** menu > **Books**; (Mac) **Documents** menu > **Books**; or click the **Books** button in the toolbar.
2. Select the document type from the list on the left.
3. Select the appropriate graphic theme in the viewer.
4. Click on **Detailed options** button and view the different tabs to choose the appropriate construction parameters for your document.

The tabs and options are the same on Mac and Windows. The only difference is the color of the selections because the Mac system highlights in blue color what Windows puts in gray.

Detailed options

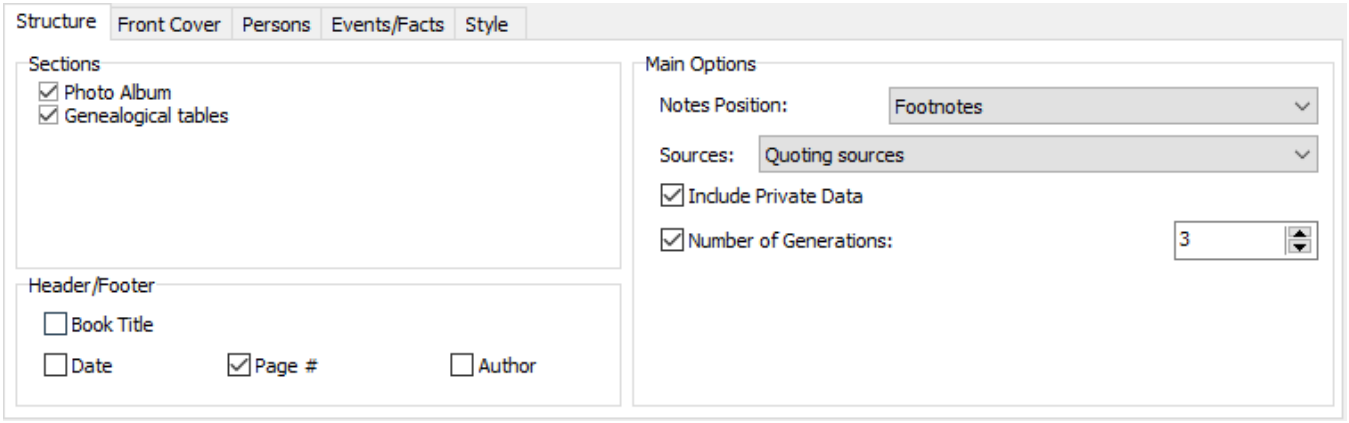
The presentation and content options can be selected from the various tabs. Changes made to a theme are memorized for future use of the same theme.
By default, the book construction screen opens in simplified mode. Only the most common options are displayed. To view all available options, click the **Detailed Options** button at the bottom of this screen.

Note: In detailed mode, the label of this button changes to **Simplified Options**, allowing you to

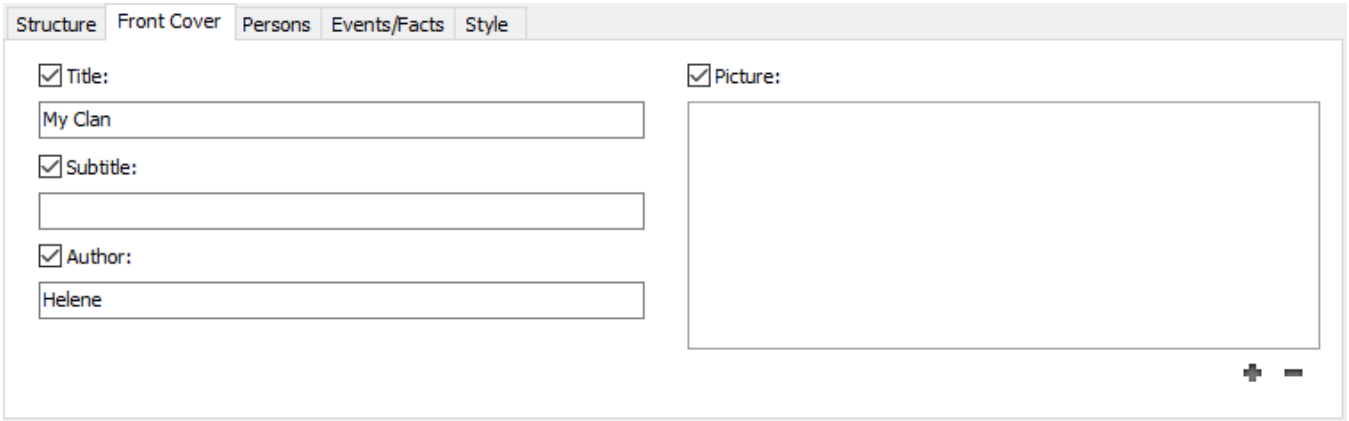
return to simple mode at any time.

- Click the **Structure** tab.
  - Check the information to be included: photo album, header and footer data, private data.
  - Choose where to place notes, at the bottom of the page, at the end of the section or in the text.
  - Limit your document. Indicate the number of generations desired, limit to a surname, place, edit your document in several volumes.
  - Choose how to present sources: Quoting sources, Complete sources, or No Sources

Note: Depending on the type of document selected, some of the options mentioned above do not appear.



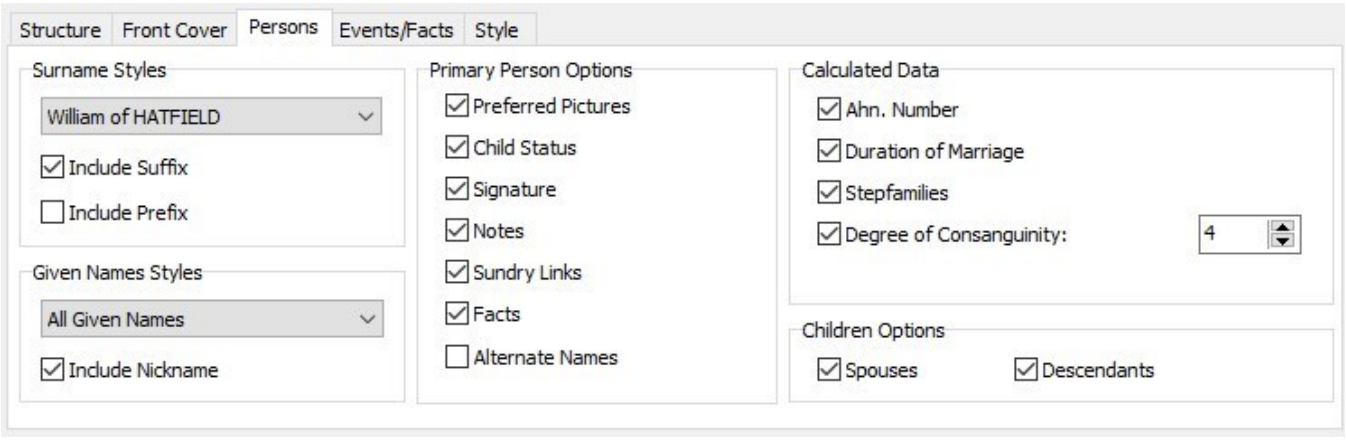
- Click the **Front Cover** tab.
  - Check the boxes for the information to be included on the cover.
  - Modify the title, add a subtitle, indicate who is the author.
  - Insert a picture to customize the cover, click on + button at the bottom right to add a picture.



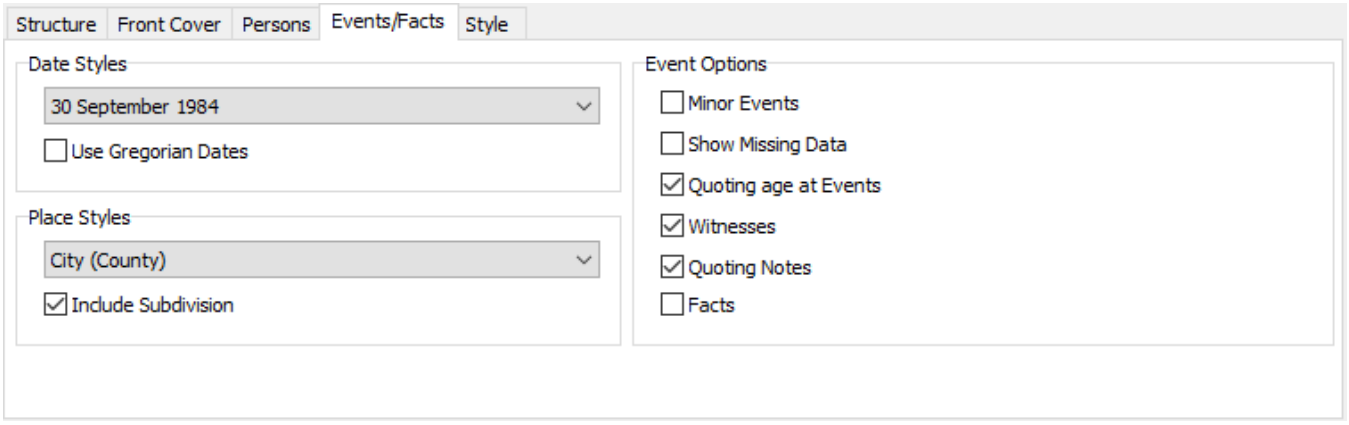
- Click the **Persons** tab.
  - Choose the surname and given name formats.
  - Check the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered these

fields.
- Check the boxes to include the following information: **pictures**, **child status**, **signature**, **notes**, **sundry links**, facts and, starting with Heredis 2025, **Alternate Names**.
- Indicate which calculated data you would like: **ahnentafel number**, **duration of marriage**, **Stepfamilies, Consanguinity degree** precise the maximum wantred degree.
- Tick the corresponding boxes to include in the document the **spouses** of each child and whether or not they have **descendants**.

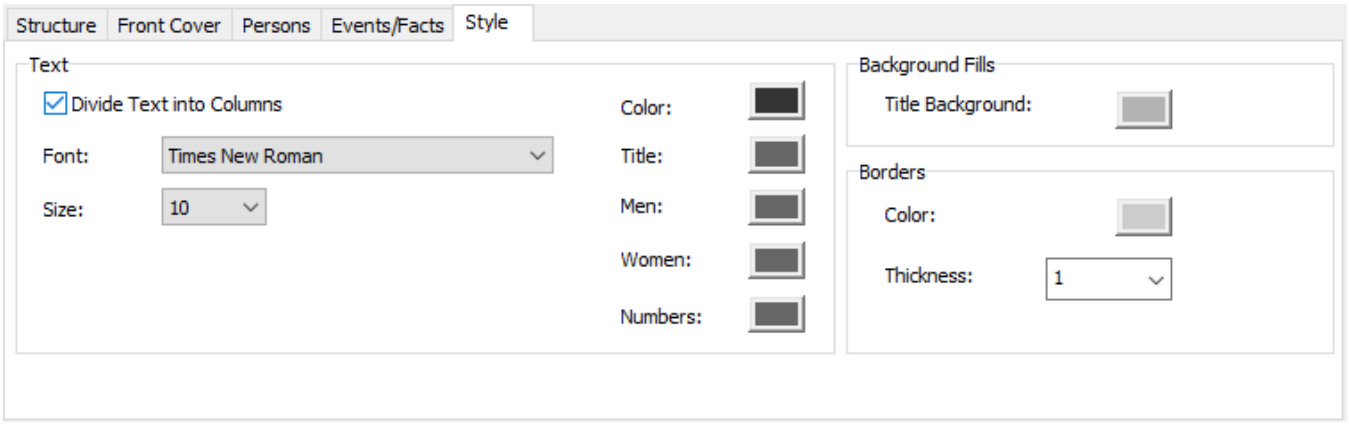
Note: If the person in the record has several sets of parents entered, the main couple appears first. The other couples are listed under Other Parents. See the article Add several sets of parents.



- Click the **Events/Facts** tab
  - Choose the date format. Check the **Use Gregorian Dates** box to display all dates in this calendar, regardless of the calendar in which they were entered.
  - Choose the place style from the drop-down menu. Select which elements of the places you want to display in the document from the ones you have entered. Check the box **Include subdivision** to give more precision to the place.
  - Select which events to include: **minor events** (other than birth, death and marriage event), **facts**.
  - For each event, tick the corresponding boxes to specify witnesses, age at the event and notes.
  - Check the option **Show Missing Data** to have it completed by your family.



- Click the **Style** tab
  - Tick the box to **Divide text into Colums** by page for your book.
  - Choose the formatting of the book: **font**, text **size**
  - Click on the colored button to choose colors for general data (**Color**), **title**, specific colors for **men**, **women** and **numbers**
  - Click on the colored button to choose the color of **title background**, **color** and **thickness** of borders of the document.



(Mac) Select the word processor with which you want to edit the document. Heredis offers you all programs that enable editing and installed on your computer.

(**Windows**) Heredis will launch the software by default for .docx files. Make sure you have a word processor by default overwise the document won't open. It will be saved in Documnets > BSD Concept > Heredis > Heredis Genealogical Reports but won't open. You'll be able to open it once you'll have a word processor.

- Click **Edit** to start the word processor.

Important: Once your book is created it becomes an independant document from Heredis. You can modify it in your word processor. If you encounter {XE} tags in your book, it is not due to Heredis, see {XE "xxxxxxxxxx Names" } tags in your documents, what to do? article.

Info • Indexes are not directly integrated with books because each word processor handles them in a specific way. However, index entries are marked so that you can generate an index

after the document is created and opened in your word processor. Put the cursor where you want and generate the index:

- in Word, menu **Insert** > **Tables and Index** or **References**> **Insert Index**
- in LibreOffice, menu **Insert** > **Indexes and Tables**

Mac Note: The text editor Page doesn't manage index.

See Export persons from a book (see page 574).

Print Books

Once the book is created, you can print it from your word processor.

Click on **Edit** to start book creation. Once generated, the file opens in your default word processor. It becomes independent of Heredis and your genealogy file.

Windows note: if you don't have a default word processor on your system, or if Windows has defaulted you to Microsoft Office Suite even though you don't have a license, the file may not open. It is nevertheless saved by default in Documents > BSD Concept > Heredis > Heredis genealogical reports. Tell your system which software to use to open .docx files. If necessary, consult our technical FAQ article Modifying a default program in Windows.

Generally, to print, then click on the **File** menu **> Print**.

From your word processor, you can save in a format other than . docx, for example in .pdf. Click the **File** menu > **Save As**, change the format (the operation differs from one word processor to another), choose the save location and click **Save** or **OK** depending on the software.

For more details, refer to the user manual of your word processor or printer for printing configuration.

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

Export persons from a book

From Heredis 2025, it is possible to create a new file in GEDCOM or Heredis format with only the persons present in a book.

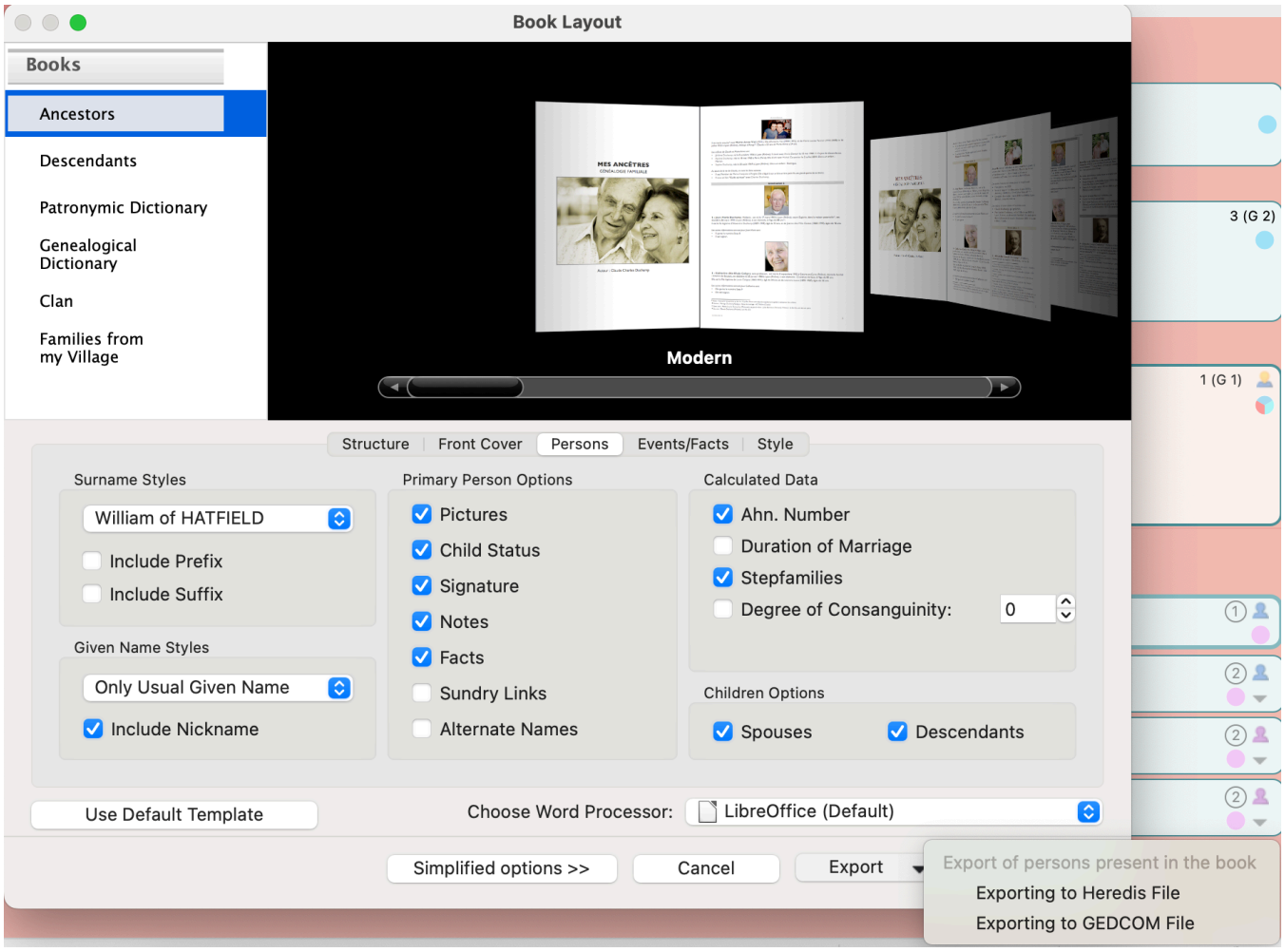
This way, you can easily export the persons from the book to provide the file to a family member, should the need arise.

To do this, create the book as described in Create and edit books (see page 566).

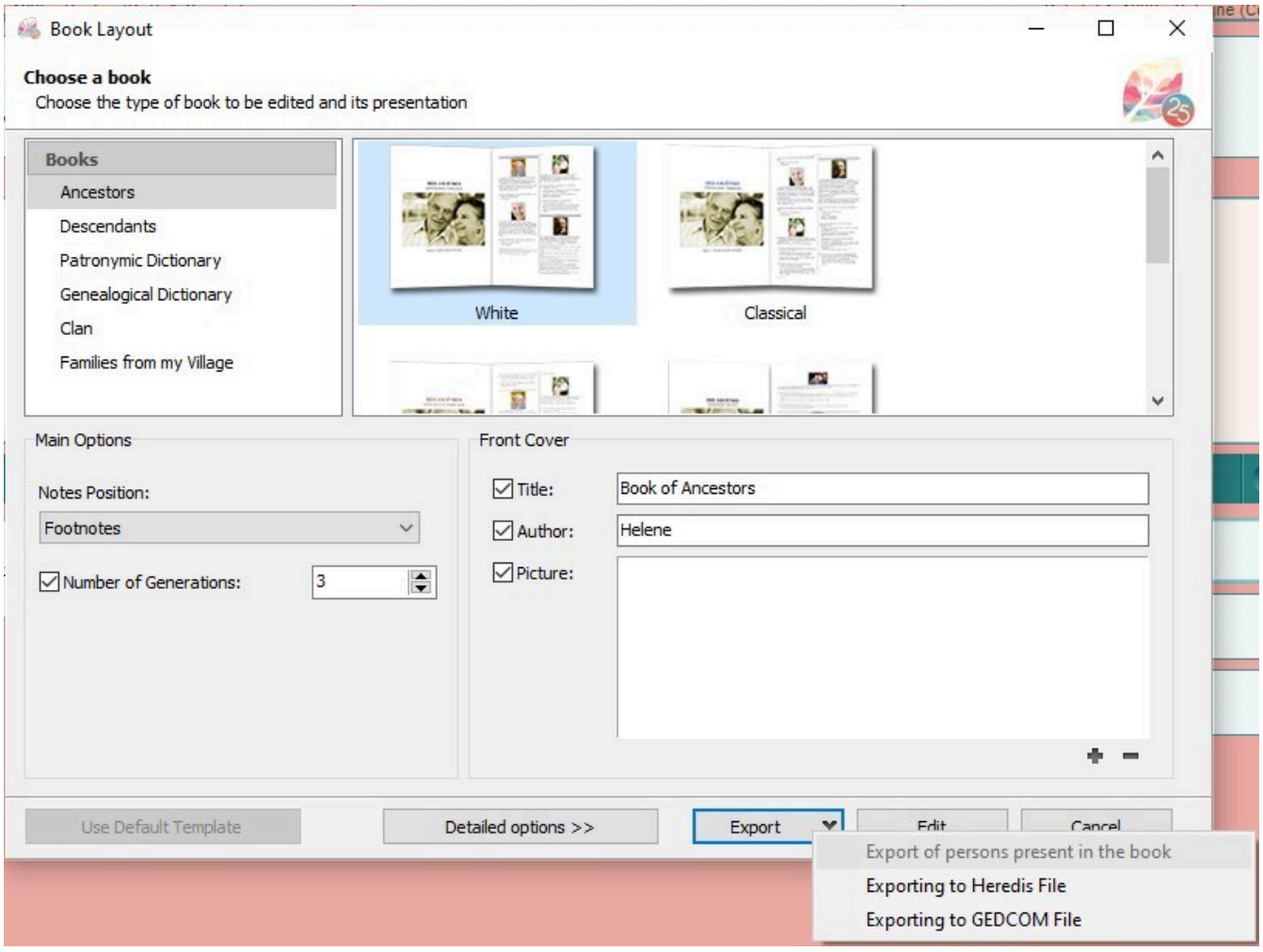
Once you've chosen the construction options, click on the Export button.
Choose the format:

- choose **Exporting to GEDCOM File** if the person to whom you are sending the file uses an older version of Heredis or another program
- choose **Exporting to Heredis File** if the person to whom you wish to send the file uses the same version of Heredis as you, or a higher version.

(Mac) Book – Exporting to a file



(Windows) Book – Exporting to a file



- Choose backup location.

Heredis will analyze the book and show you the progress bar.

Heredis then opens the export settings window.

Please refer to the article corresponding to the type of export you have chosen, to find out more about the settings:

- Export a complete file in GEDCOM format (see page 768)
- Export a complete file in Heredis format (see page 752)

This export will contain all the persons mentioned in the book, so it’s up to you to choose which data you wish to include.

“Families from my Village” Books

Families from my Village is a kind of book you can create with Heredis. In a Families from my Village book, you will find all the persons who had a major life event in the village you selected. This book follows the same logic as one-place studies, such as the Ortsfamilienbuch used by German genealogists.

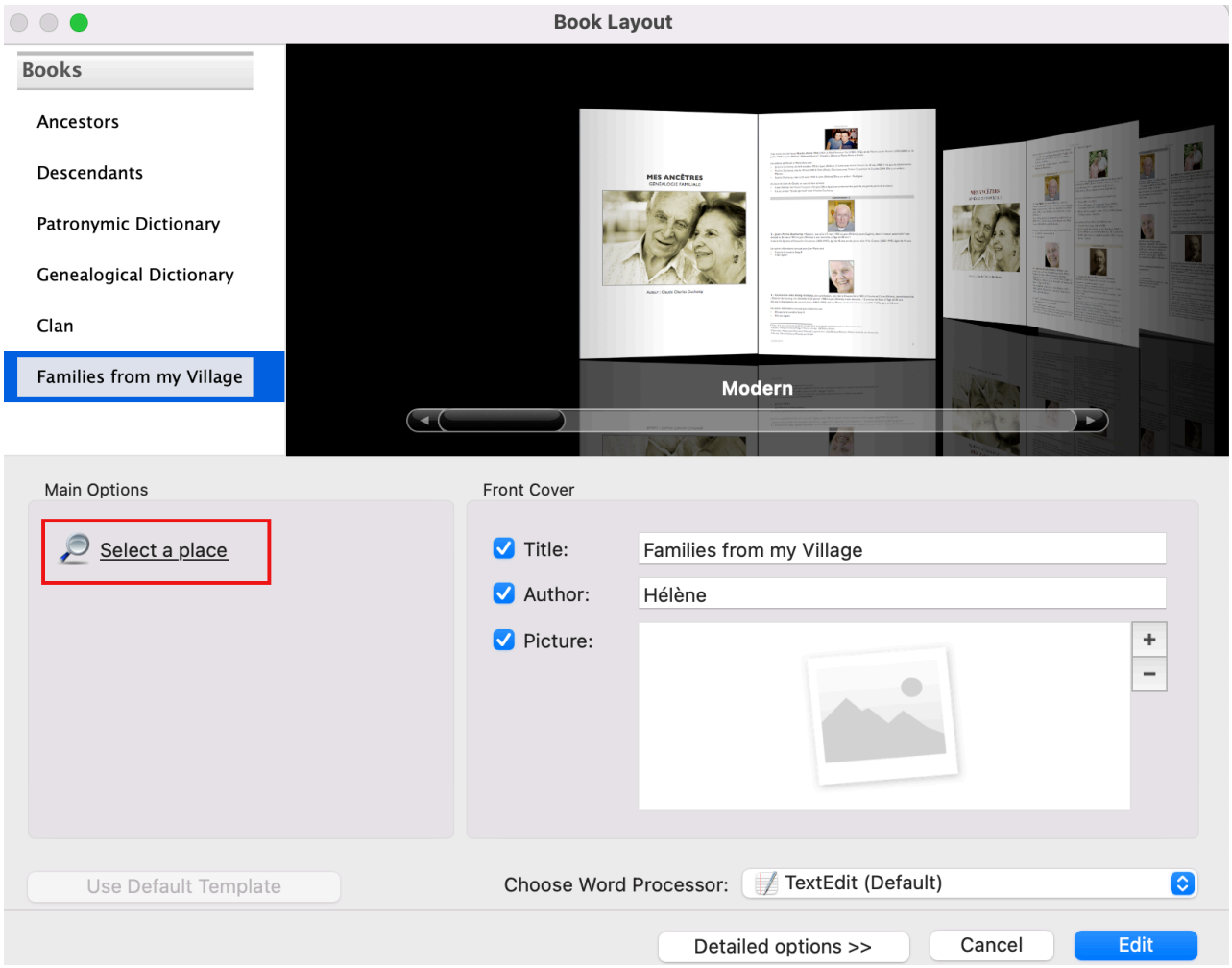
Create a « Families from my Village » book

To start creating a Families from my Village book, click the **Books** button on the toolbar or use the pull-down menu: **Documents > Books**.
Select **Families from my Village**. Choose a theme just as you would do it for any other type of Heredis book.

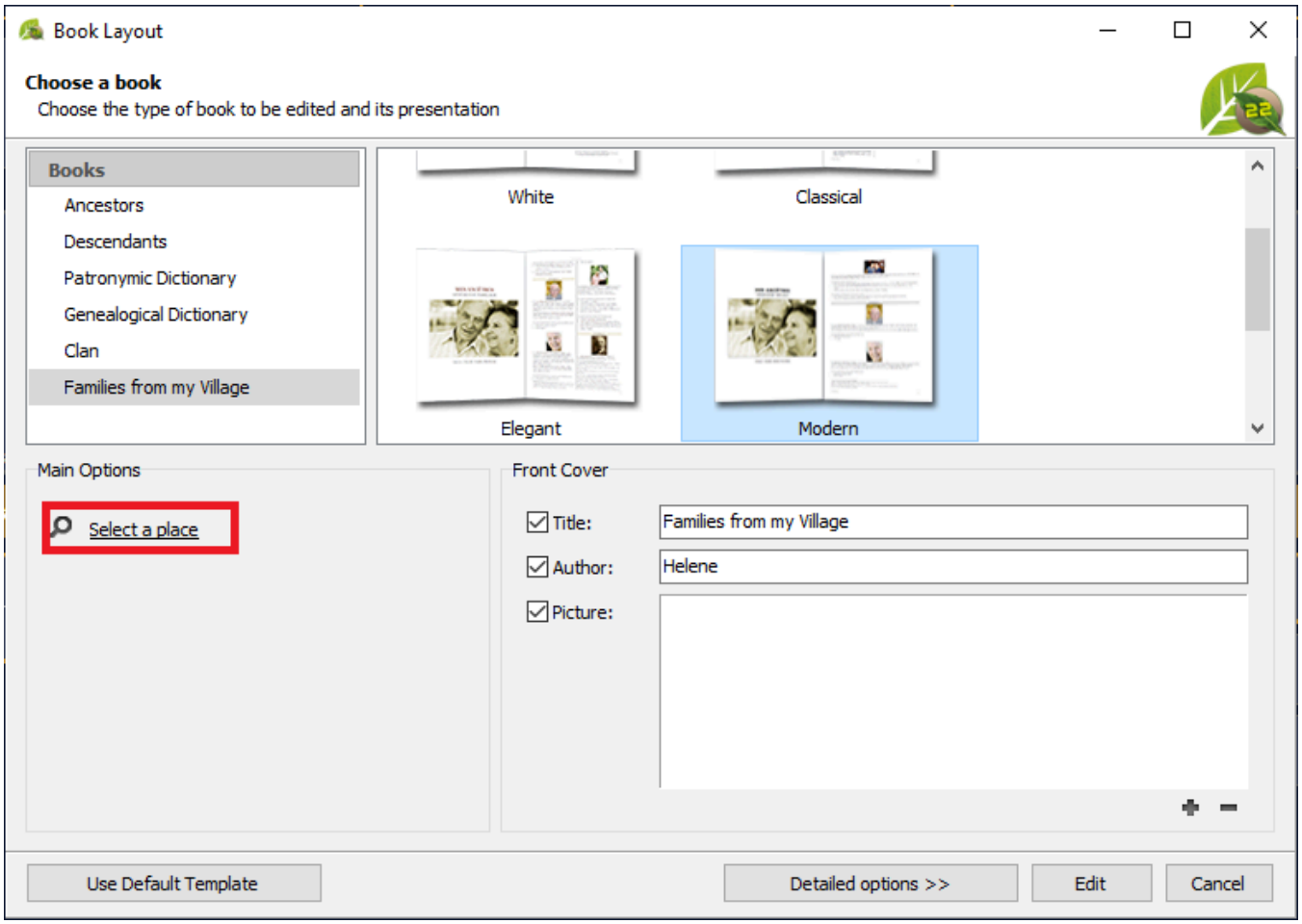
In the lower part of the Book Layout window, choose the desired options. Remember to choose them before creating the book, as it will not be possible to change them after the book is created. You would otherwise need to restart the entire creation process to add data.

Click on **Select a place** to choose among pre-existing places in your genealogy. Indicate a title, an author, and choose a photo as an illustration.

(Mac) Select a book, a theme, and a place



(Windows) Select a book, a theme, and a place



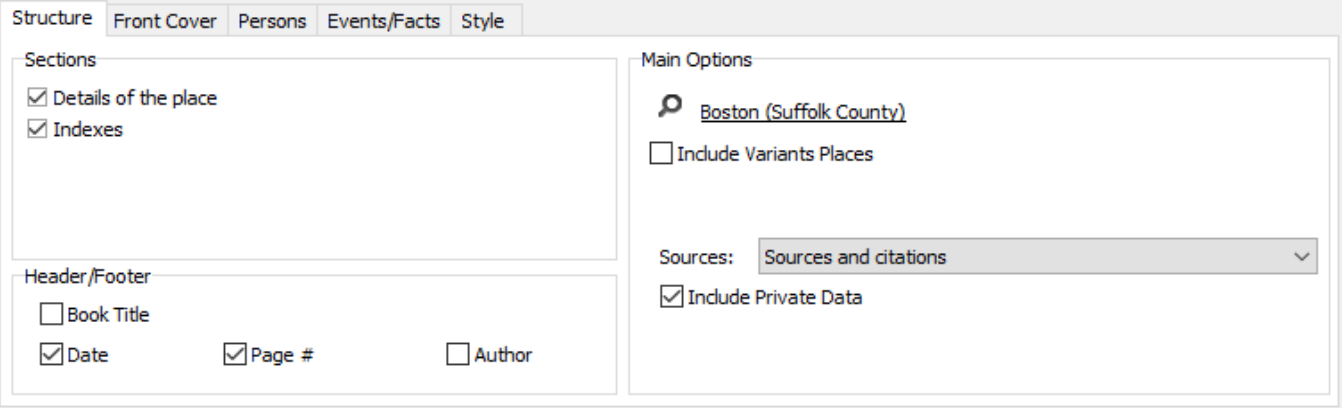
(**Mac**) Choose the type of word processor you wish to use.

For additional options, click on **Detailed options >>**. Various tabs will allow you to further customize your book.

Structure tab

(Mac) Structure tab

(Windows) Structure tab



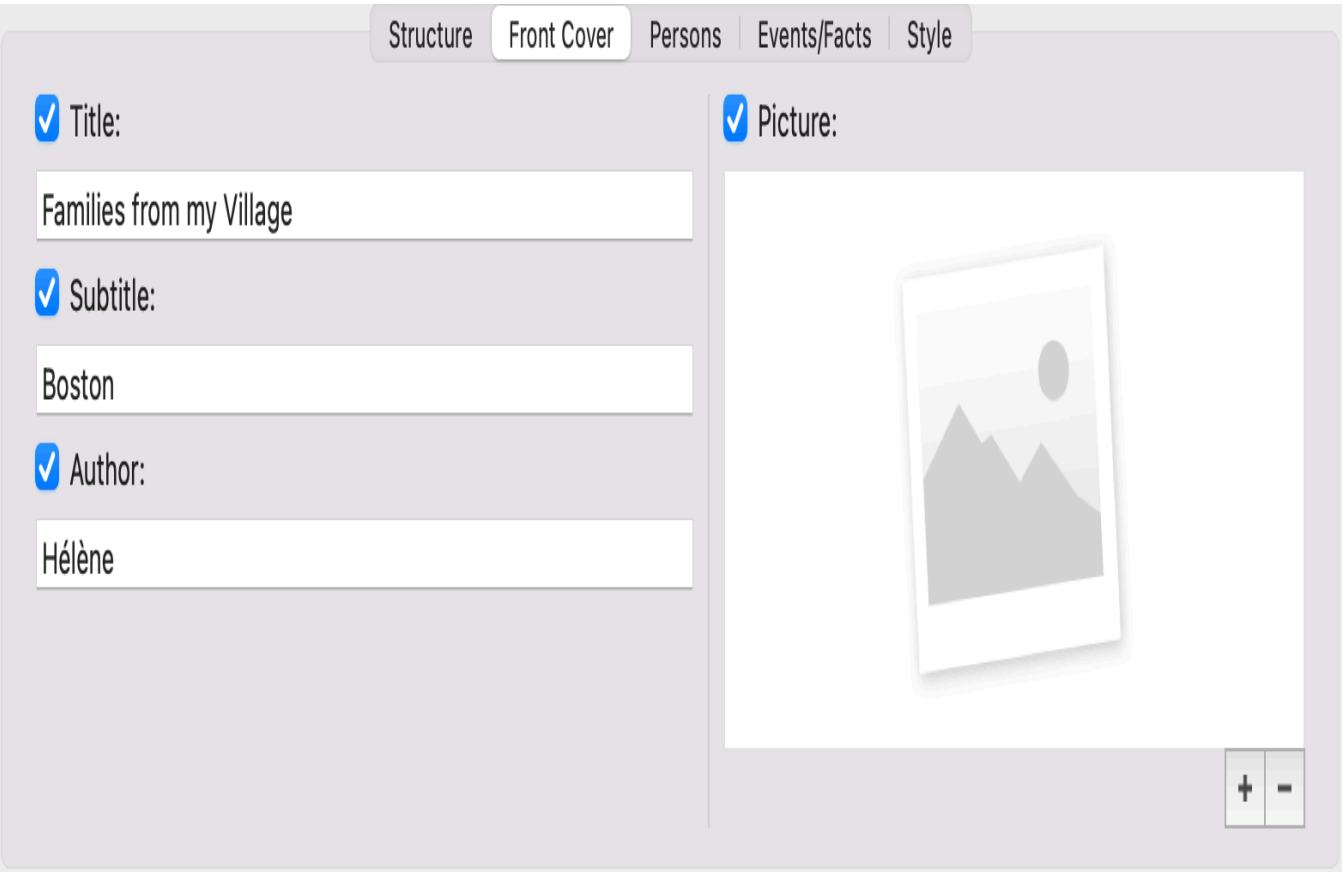
Check each of the boxes you are interested in. You are given the option to:

- Add **Details** of the place. The book will include data from the Places Index: full name, notes, places subdivisions, name variants, and media available for the place.
- Add (= generate) **Indexes** for persons and places.
    - of persons
    - other locations
    - occupations

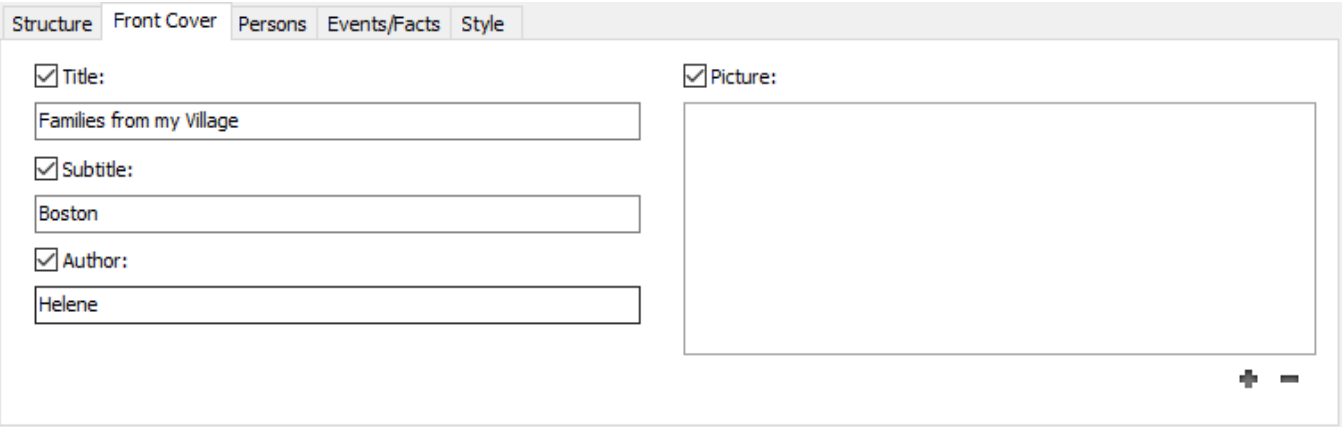
  It will let you locate where in the document (book) the person or place etc. you are looking for is mentioned. The number of elements in the book is indicated at the top of the index.
- Include a **Book Title**, a **Date**, **Page** numbers, and the name of the **Author**.
- **Select a place** and also add every person entered in the place variant(s) if there is any. In which case you can check the box **Include Variants Places**.
- Choose **Quoting sources** – or not.
- **Include Private Data** – or not. Uncheck the box to not include the data.

Front Cover tab

(Mac) Front Cover tab



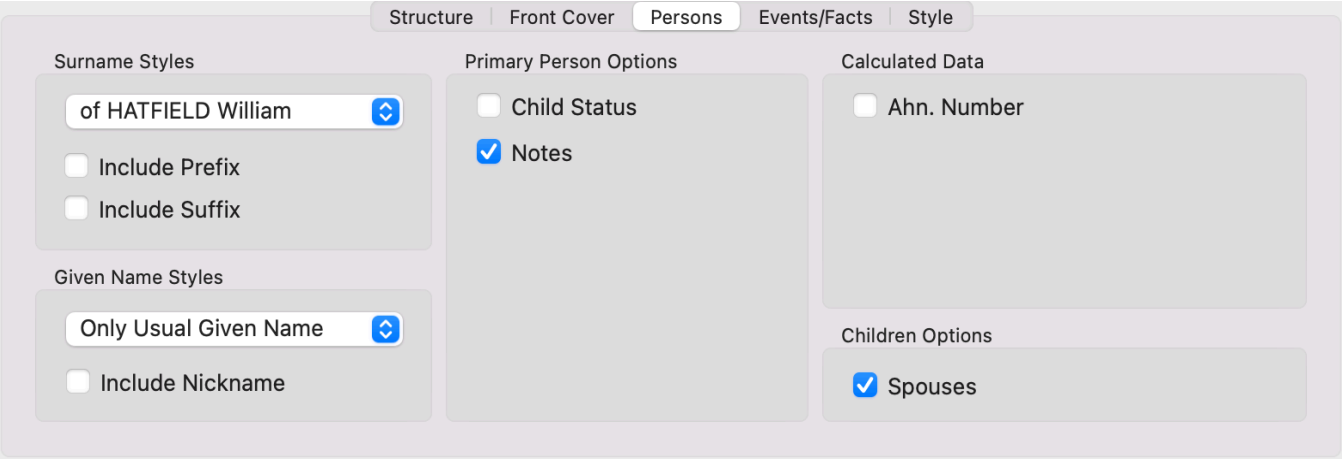
(Windows) Front Cover tab



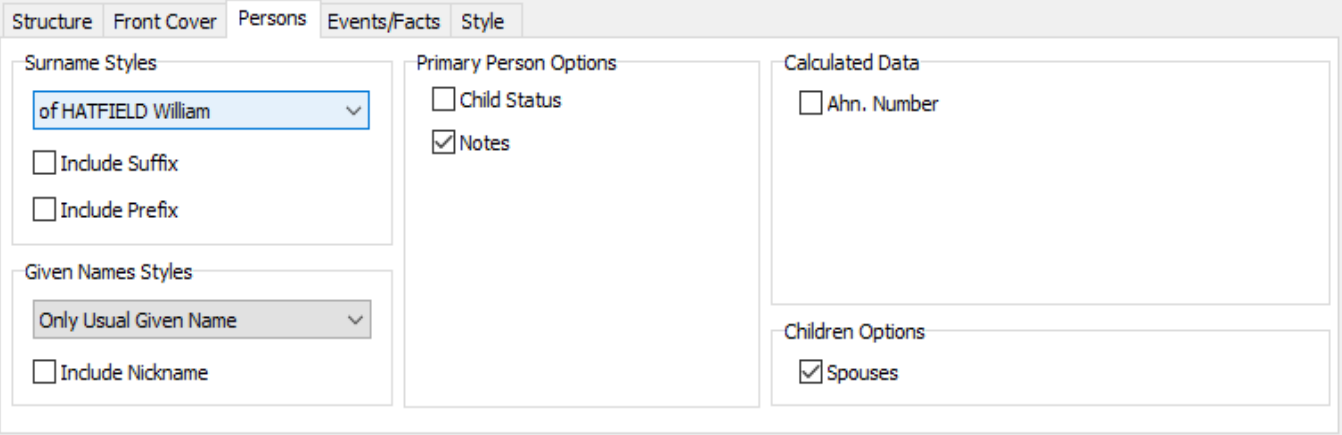
It will let you choose a **Title**, **Subtitle**, **Author** and a cover **Picture**. Uncheck boxes to ignore the fields you do not wish to include on the book cover.
Click on ✚ to add a picture, or on ━ to remove it.

Persons tab

(Mac) Persons tab



(Windows) Persons tab



Surname Styles: you can set up your preferred format for a person’s full name, with the option to include his/her Prefix or Suffix – if you have provided such information in the person’s data.

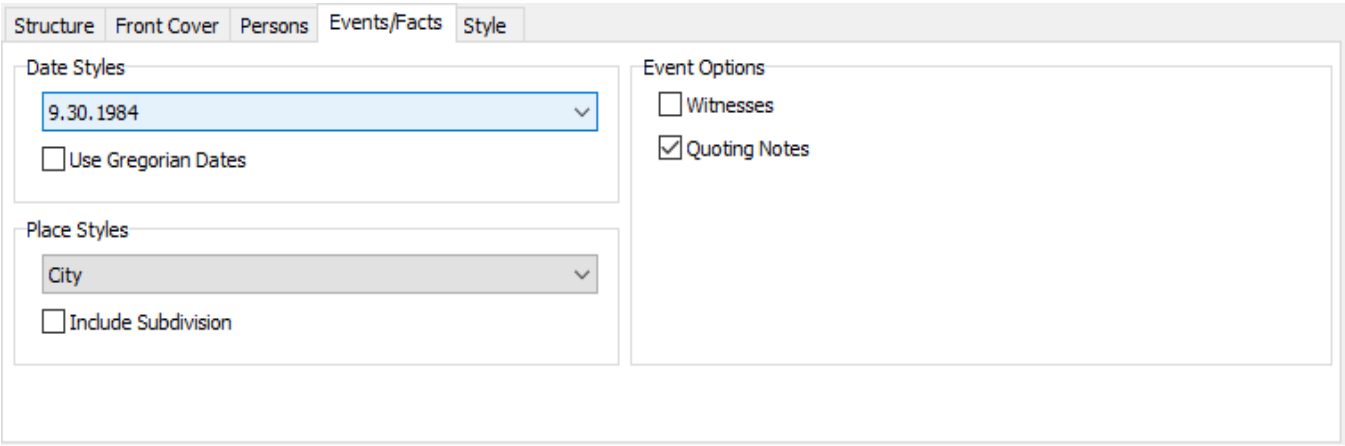
Specify which given names should be mentioned: **All Given Names**, **Only First Given Name**, **Only Usual Given Name**, or even **First Given Name and Initial of Others**. Check the box entitled “**Include Nickname**” to include your ancestors’ nicknames in the book.

Check additional boxes available under this tab to include additional personal data such as **Child Status** – legitimate, adopted, etc. – **Notes**, **Ahnentafel Number** and **children’s Spouses**.

Events/Facts tab

(Mac) Events/Facts tab

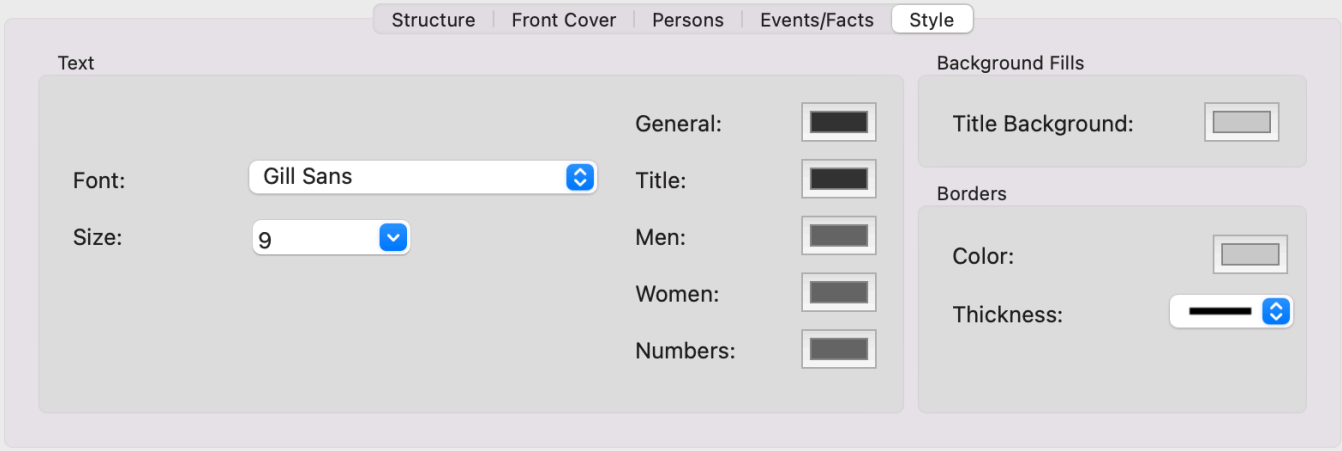
(Windows) Events/Facts tab



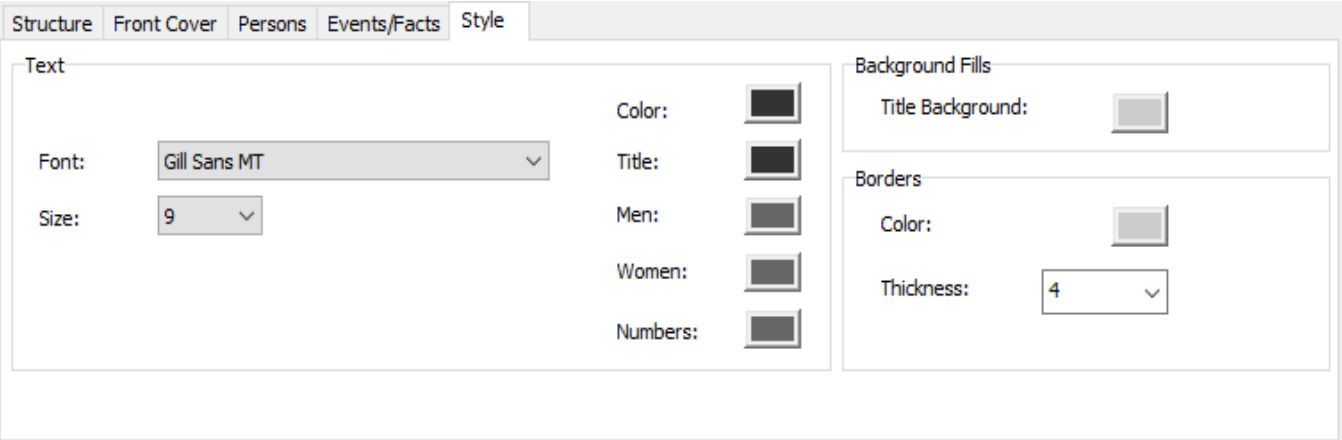
Choose among the **Dates Styles** offered which should be used. If some dates have been entered using specific calendars, e.g. the French Republican Calendar, check the box entitled "**Use Gregorian Dates**" and Heredis will convert the dates for you automatically.
Choose among the Places Styles offered which should be used. Check the box to Include Subdivision – providing you have entered one.
Check the Witnesses and/or Notes boxes if you want them to be mentioned in the book.

Style tab

(Mac) Style tab



(Windows) Style tab



Under this tab, you may choose among various fonts and font sizes and/or set colors according to the types of data available. Click on the color squares to modify the default color for each type of data. Click on the **Font** and **Size** drop-down list to modify them.

Once your book layout is completely set up, click on **Edit** to generate your book in a .docx format. This document will no longer be linked to your Heredis software and will be automatically opened in your default or selected word processor.

Note on Windows: make sure your default word processor can handle .docx files.

Consult the generated book

By default, on **Windows**, Heredis saves the document under Documents > BSD Concept > Heredis > Heredis Genealogy Reports.
On **Mac**, you need to specify where to save the document after clicking on **Edit**.

As soon as it is created, the document will open up on your computer screen. You will be able to enter additional information: acknowledgments, a dedication, an introduction.
Use your word processor’s features as usual. Changes made to the document will not affect your Heredis data since the document is independent from your genealogy software.

Pictures can be resized or even removed if – for instance – they turn out to be low-quality photos. All you need to do is select the picture and hit the backspace or delete button on your keyboard.

This document is defaulted to list family members under the name of the male spouse (usually the head of household), immediately followed by his parents' info. For this reason, female spouses and children – in general – are not listed at the "first level" as primary persons prefixed by a cross-reference number. They are "attached" to their spouse or parents.

Content of the edited book

The main persons presented in this document are:

- All persons who are "heads" of a family who have lived in the place.
- All persons «isolated» with only one major individual event in the place.

These main persons appear at the first level in the book, sorted alphabetically, with a number in front of their name.

Data displayed

Primary Person

Person's number
Ahnentafel number
Surname Given Name
If a person's surname is a variant, the main surname will be displayed and the variant will be between parenthesis. Example : SMITS (SMITH)
Child Status, Religion, Occupation, Title
Date and Place of Birth-Baptism / Date and Place of Death-Burial

Parents' Surname, Given Name
Cross-reference number
Child Status, Religion, Occupation, Title
Parents' date and place of Birth-Baptism / date and place of Death-Burial

Family/Spouse(s)

Spouses are listed chronologically in the document and include the following information:
Spouse's Surname, Given Name
Cross-reference number
Child Status, Religion, Occupation, Title
Spouse's date and place of Birth-Baptism / date and place of Death-Burial
Spouse's Parents' Surname, Given Name
Child Status, Religion, Occupation, Title
Spouse's Parents' date and place of Birth-Baptism / date and place of Death-Burial

Children (from each family/spouse)

A numbered list of the children born from each family
Surname Given Name
Cross-reference number
Child Status, Religion, Occupation, Title
Children’s Date and Place of Birth / Date and Place of Death

For each child’s family

To be displayed in chronological order:
Spouse’s Surname Given Name
Cross-reference number
Child Status, Religion, Occupation, Title
Children’ spouse’s Date and Place of Birth / Date and Place of Death
Marriage Date and Place

Cross-reference numbers

Each main person in the place (village) has a cross-reference number.
If a person is described in a family group then they have a cross-reference number to quickly access all their information.

The cross-reference number is clickable in the document by holding the CTRL key on Windows or Command key ⌘ on Mac.

(cross-reference number) = will send you to the same person
{ cross-reference number } = will send you to the family under which the person is listed (which is usually the case for women and children)

Notes and sources

If you have checked the “**Notes**” box in the Events/Personal Topics tab, all the notes of the persons, unions and events mentioned are grouped under the main person block.

If you chose “Sources and Citation” in the Struture tab, the person and event sources are also displayed under the main person block.

Indexes

Under the persons list, if you checked the option before editing, it is possible to display indexes.

- Names and Variants Index
  SMITH…….. p 8, 15
  SMITS (SMITH)
- Other Places Index
  This index lists other places mentioned, sorted in alphabetical order, with the name of

the person and cross-reference number.

Abbreviations

Bi = Birth
M = Marriage
rM = Religious Marriage
Mc = Marriage Contract
O = Other Type of Marriage
D = Death
B = Burial

F = Father M = Mother

Export persons from the book Families from my Village

See the article Export persons from a book (see page 574).

How to include several cities in the “Families from my Village” book?

The city you are interested in has been known under several different names during various time periods, or perhaps it was merged with a neighboring city at some point in time.

Do you wish to create a “Families from my Village” book that will include persons from the former city and those from the current city?

Open the **Places Index**. Consult the article entitled “Places Index (see page 472)“, more specifically the **Variants** paragraph.

- Specify that the former city is a variant of the current one.
- Click on **Books…** and select **Families from my Village**.
- Select a place.
- Click on **Detailed** options >>.
- Check the box “**Include Variants Places**“.

Your book will then include all the persons who lived in this city under its current name as well as those who lived there when it bore its former name(s).

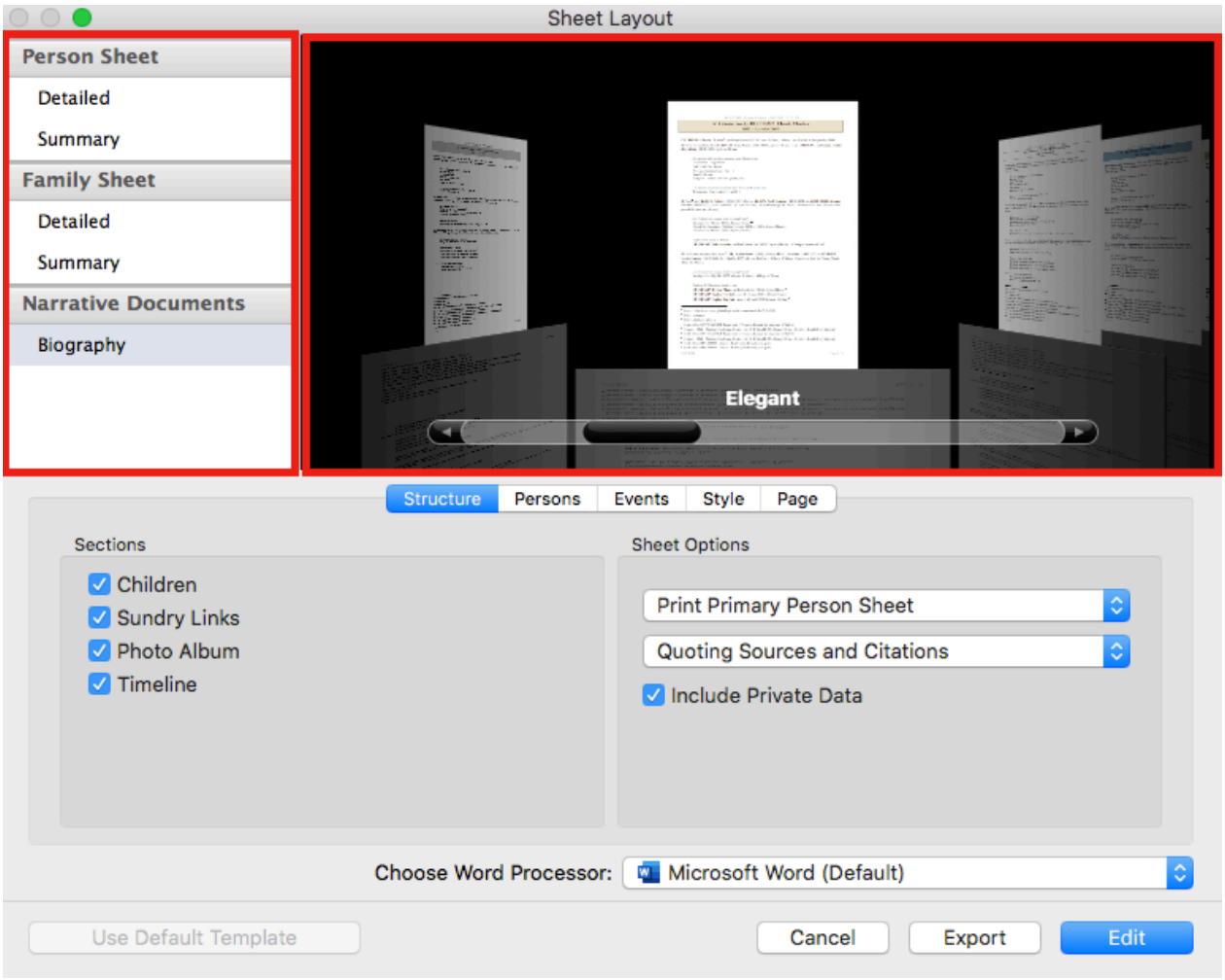
Create and Edit Sheets

You can edit individual or couple sheets.

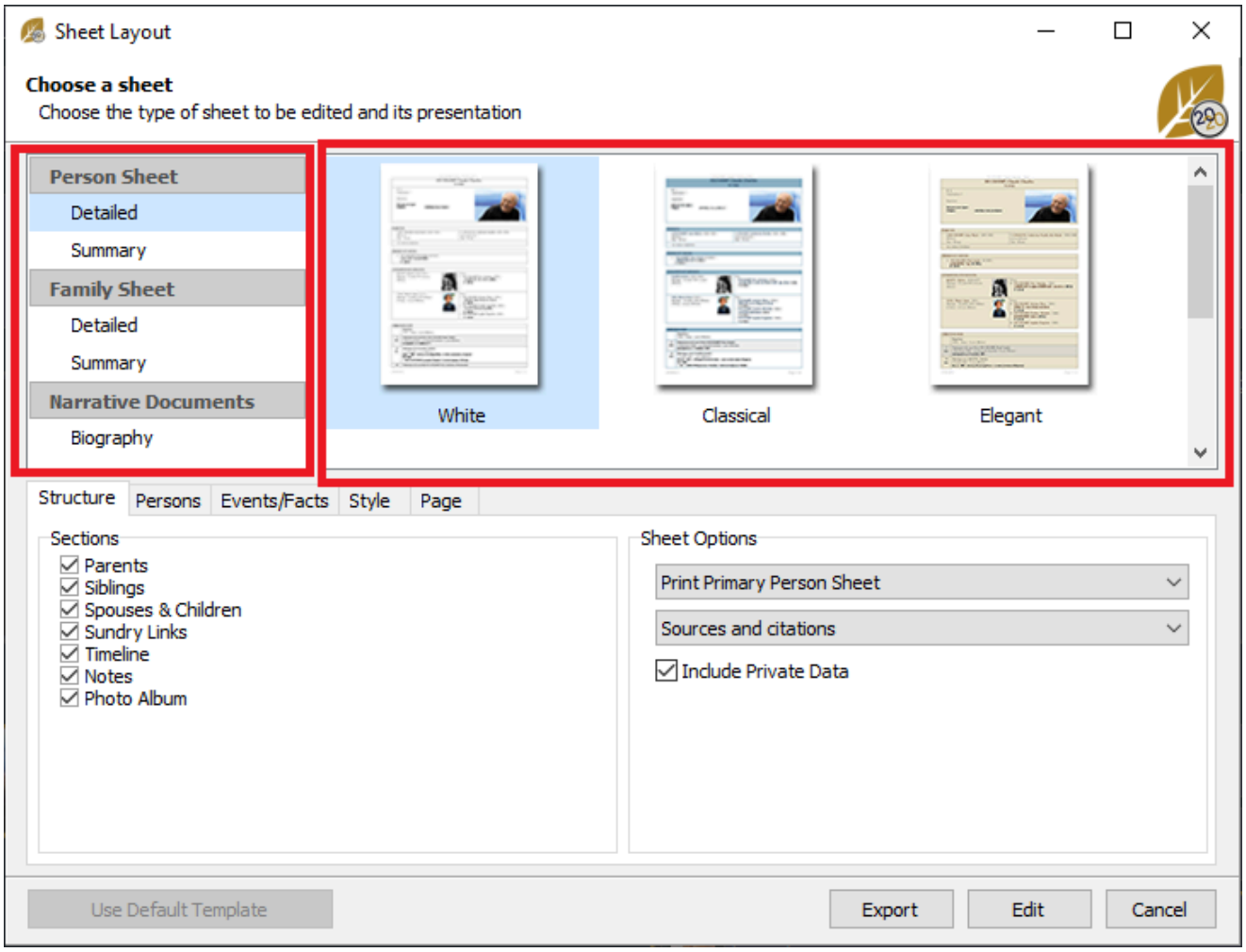
Creating sheets

- Choose **(Windows) Reports / (Mac) Documents > Sheets** or click the **Sheets** button in the toolbar.
- Select the document type from the list on the left.
- Select the appropriate graphic theme in the viewer

(Mac) Choose the type of sheet then the theme



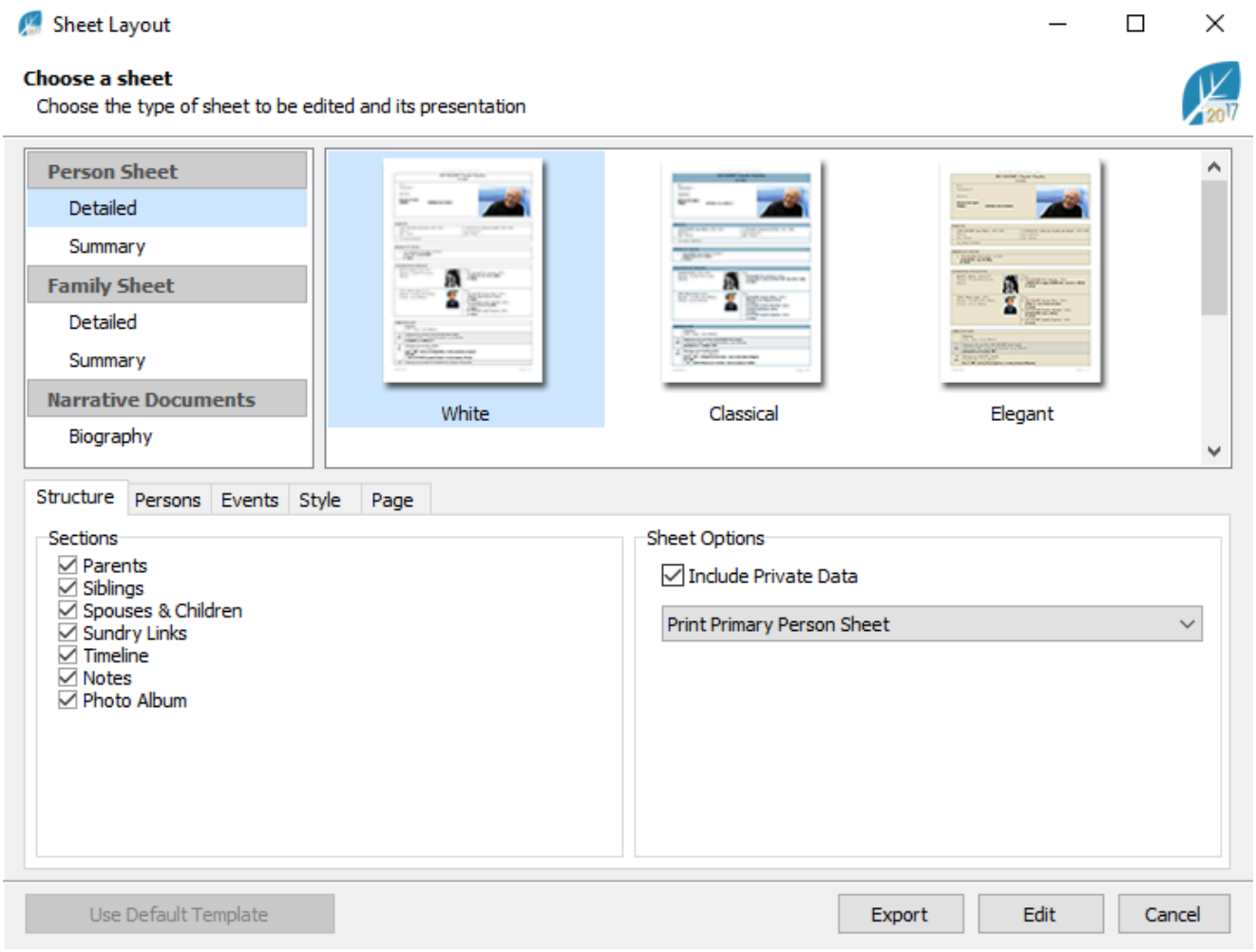
(Windows) Choose the type of sheet then the theme



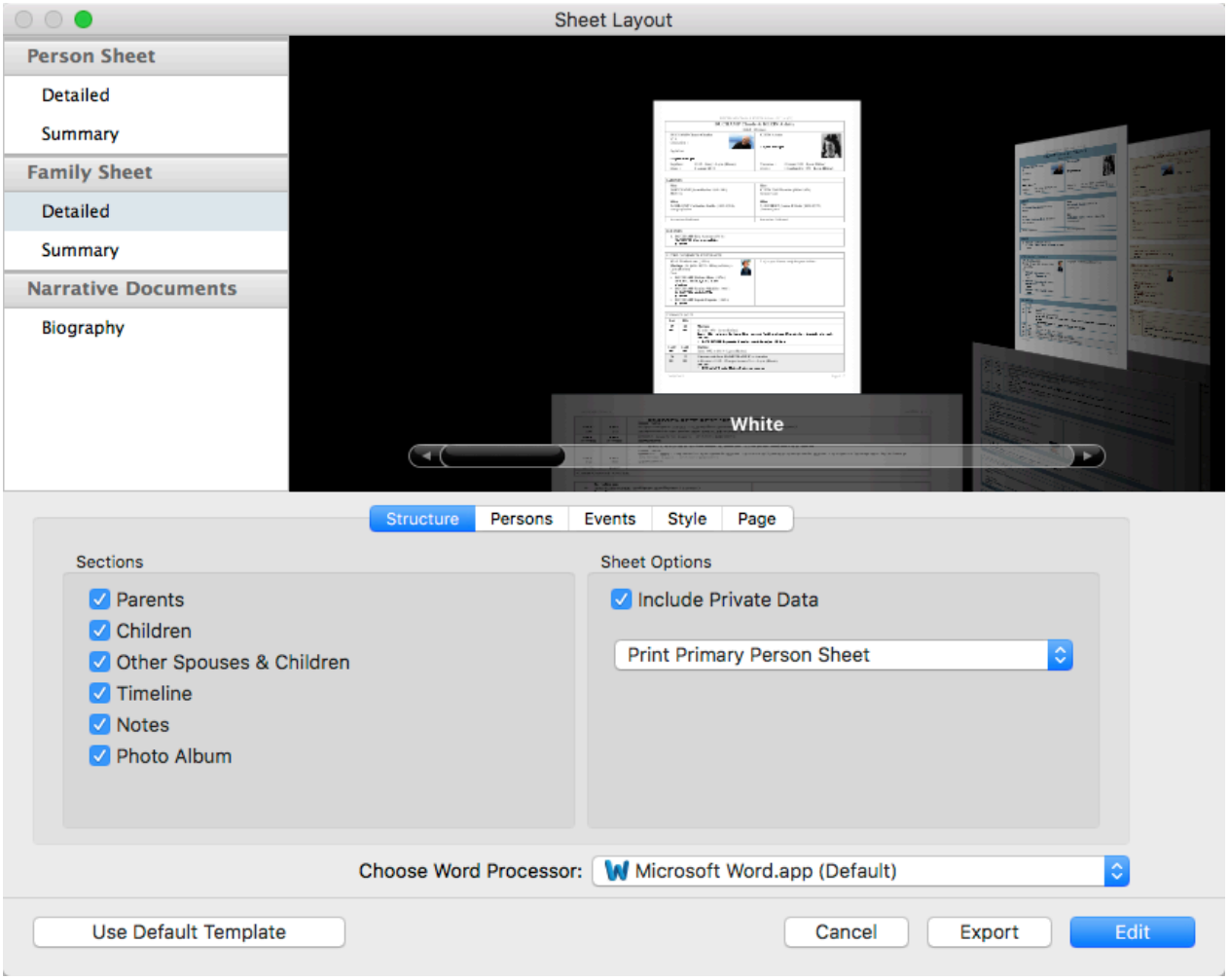
- Click on the different tabs to choose the appropriate construction parameters for your document. See paragraph below.

Composing a sheet

(Windows) Sheet's Layout

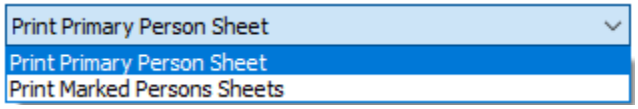


(Mac) Sheet's layout



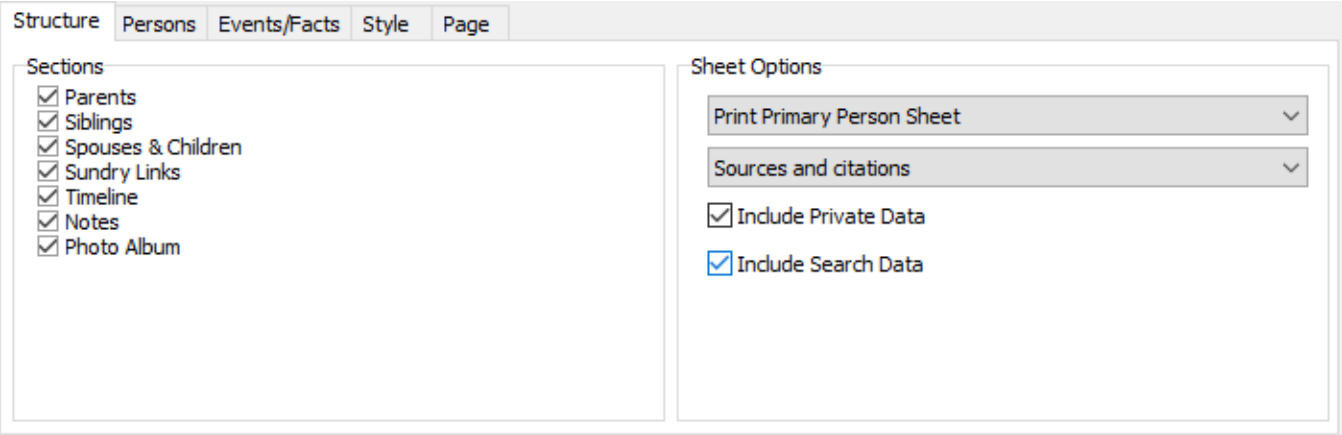
The presentation and content options can be selected from the various tabs. Changes made to a theme are memorized for future use of the same theme.

- Click on the **Structure** tab
  - check the information to be included in the form: different family members, photo album, notes, private data, search data, etc.
  - choose how to manage sources.
  - choose the person(s) to be treated.
  - **Note**: If you want to edit the sheets of several persons in your file at the same time, you must first mark these persons using the flag of **Personal Data** screen. You can mass mark according to one or more search criteria through smart search. For example, you can search for all persons with the Thomas name and then click the **Marked >Declare marked** button in the processing area. See the Smart Search (see page 371) article for more details. Then select **Print Marked Persons Sheets**. You will get all the relevant sheets at the same time.

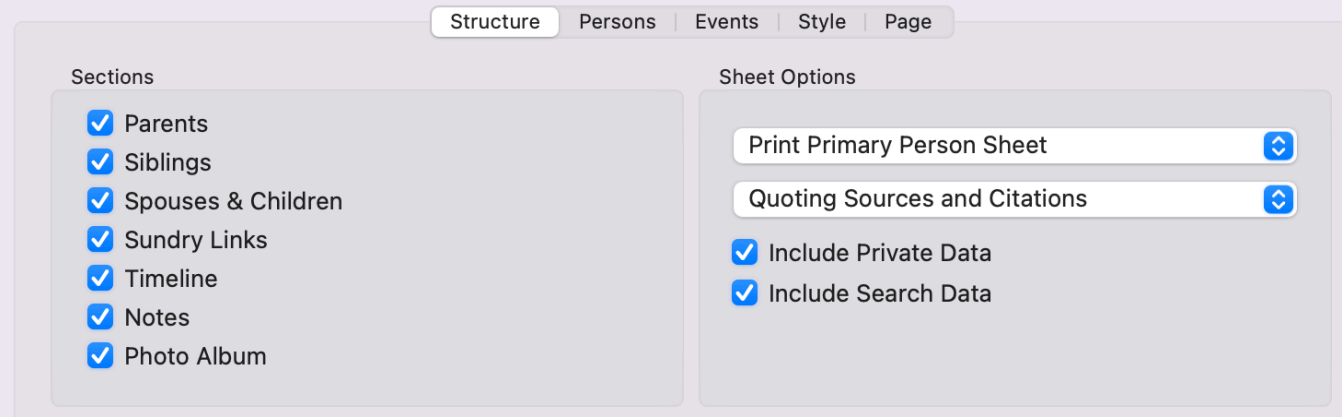


Be careful, the more persons you put, the longer the edition will be. Avoid putting too many people at the same time not to block Heredis for many hours if your file is consequent.

(Windows) Structure tab



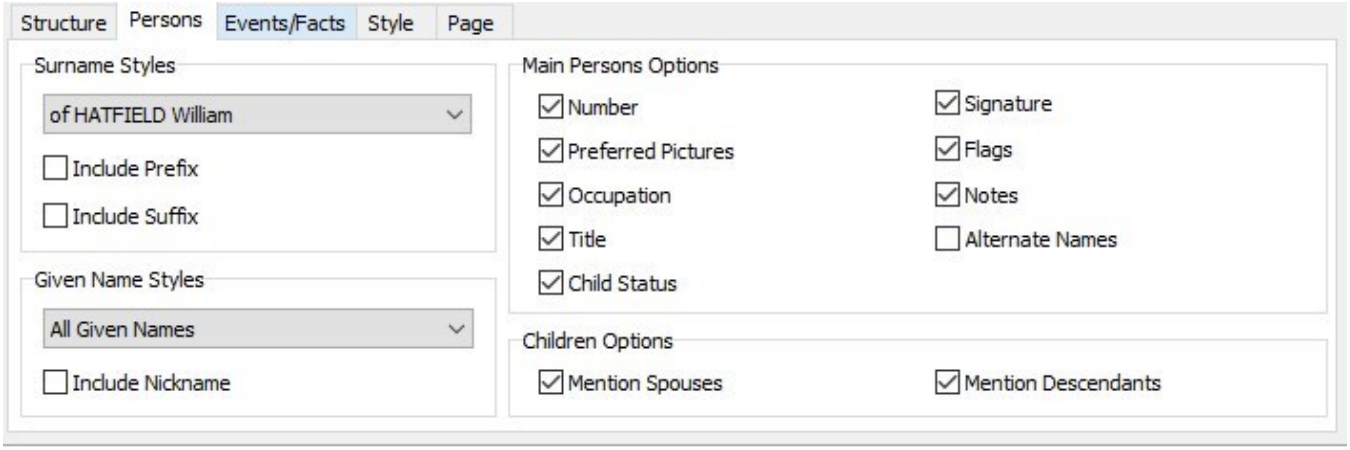
(Mac) Structure tab



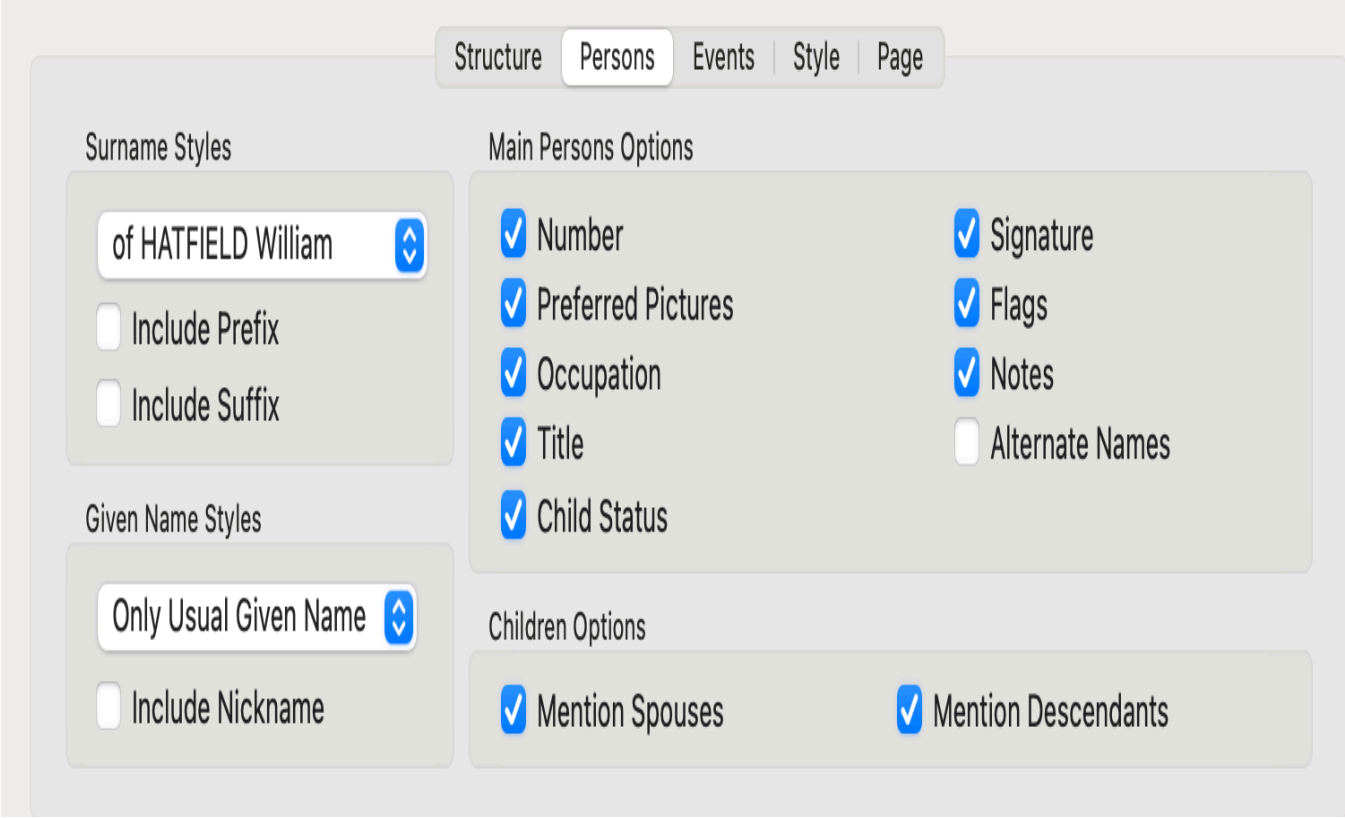
- Click the **Persons** tab.
  - Choose the surname and given name formats.
  - Check the boxes to add **Prefix**, **Suffix** and **Nickname** if you entered these fields.
  - Check the boxes to include the information in the sheet: preferred picture, number, occupation, title, child status, signature, flags (confidential, childless …), notes.
  - Check the corresponding boxes to include in the document the spouses of each child and whether or not they have descendants.
  - Starting with Heredis 2025, personalized flags (in addition to those offered by Heredis), alternate names and union status can be included in the record.

Note: If the person in the record has several sets of parents entered, the main couple appears first. The other couples are listed under Other Parents. See the article Add several sets of parents.

(Windows) Person tab



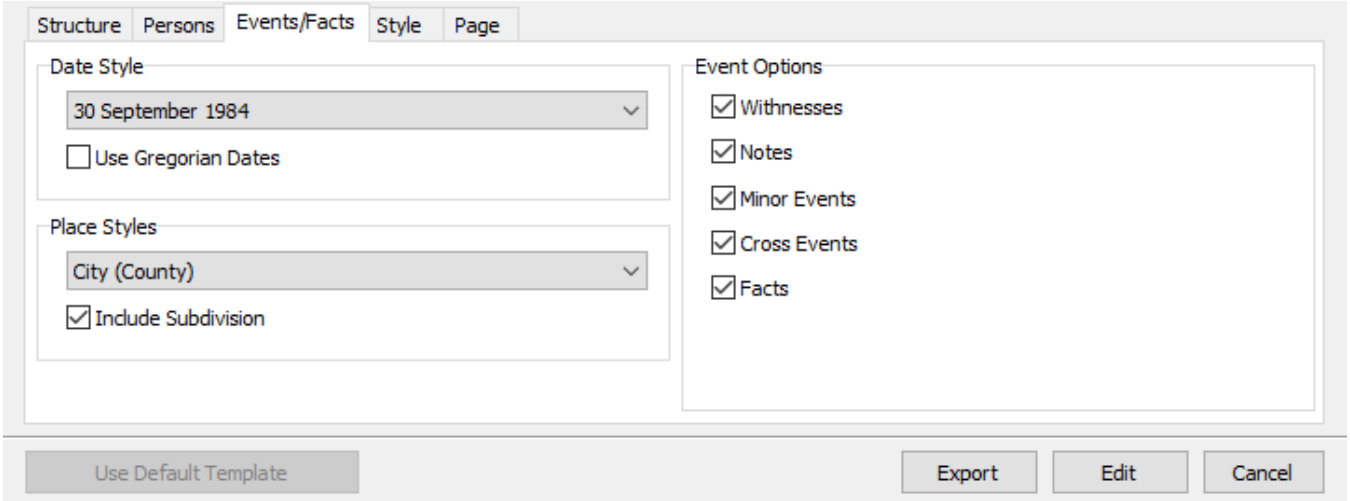
(Mac) Person tab



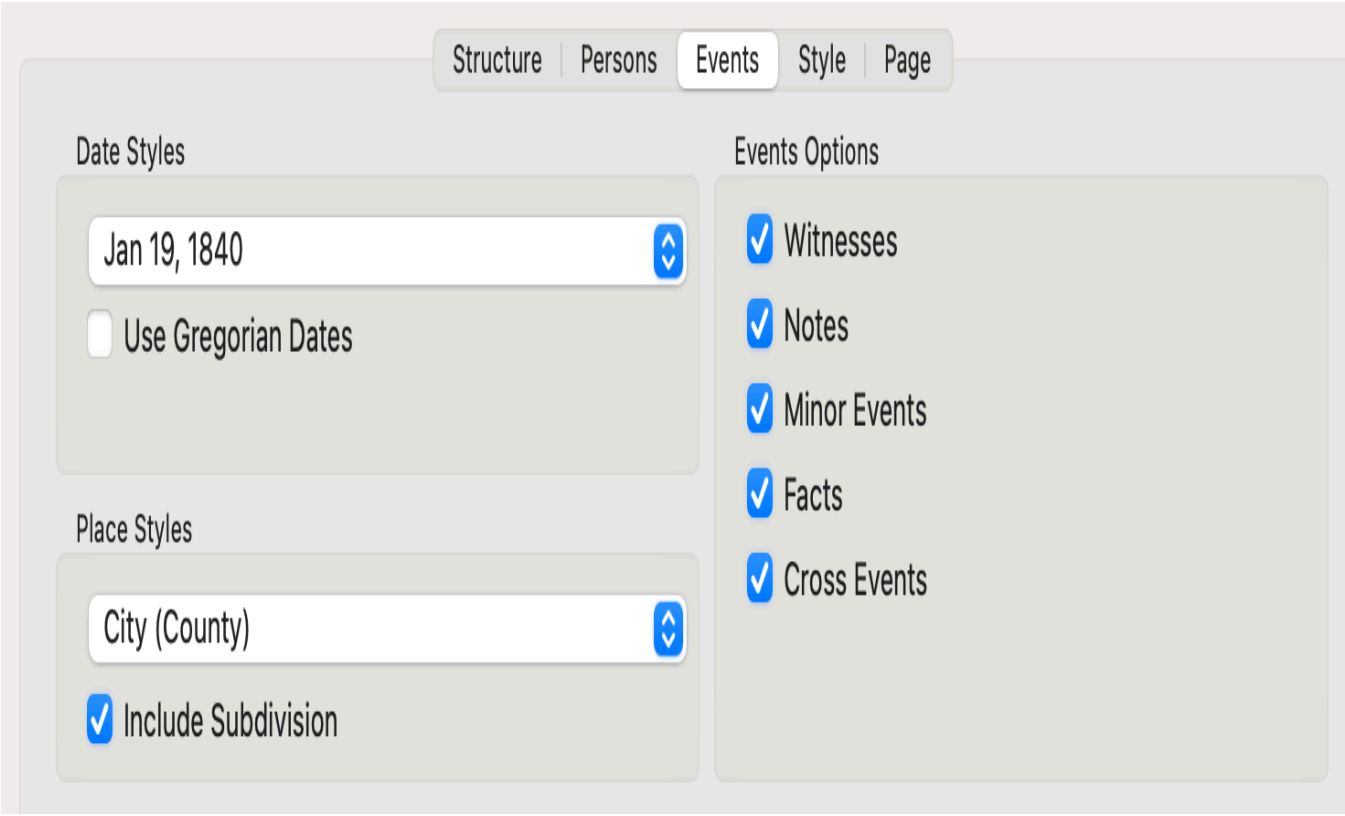
- Click the **Events** tab to select which events to include:
  - **minor event**s (other than birth, death and marriage event), **cross-events** (events in which the person participated as a witness, for example).
  - Choose the format of date of events.
  - Check the **Dates in Gregorian calendar** box to display all dates in this calendar, regardless of the calendar in which they were entered.
  - Choose the place style from the drop-down menu. Select which elements of the places you want to display in the document from the ones you have entered.
  - Check the box **Include subdivision** to give more precision to the place.
  - For each event, specify if you wish to mention witnesses and notes.
  - Choose to add the **Facts** of the person.

- If you selected the **Biography** document, check **Show Missing Data** to have your family complete it.

(Windows) Events/Facts tab



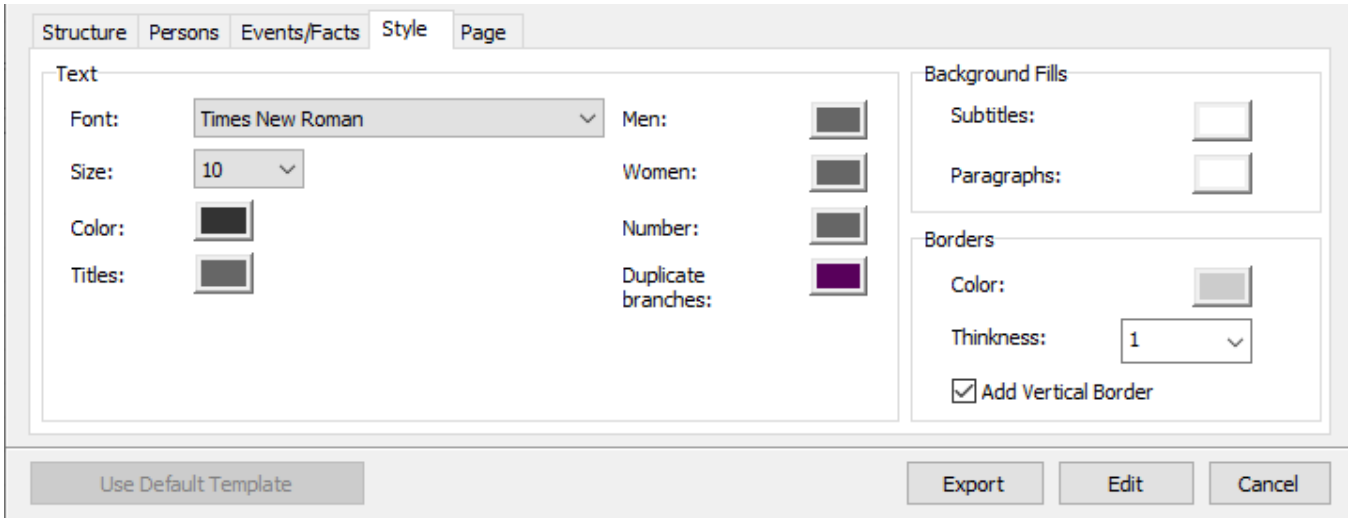
(Mac) *Events tab*



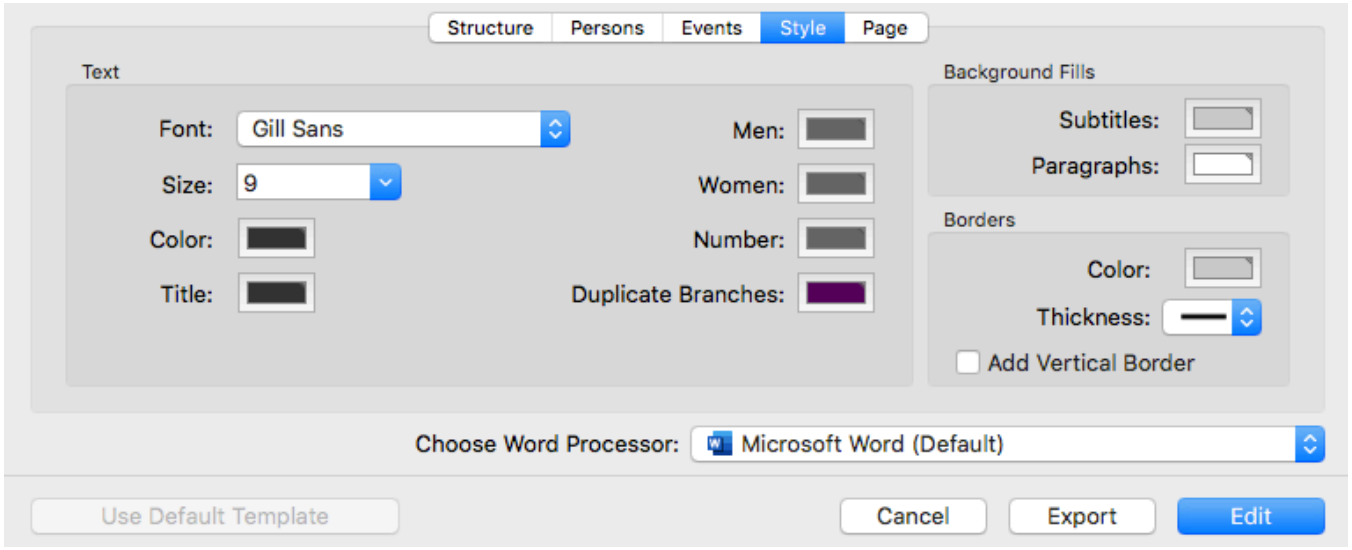
- Click the **Style** tab and choose the formatting of the form:
  - type of font,
  - text size and color,
  - specific colors for men, women and numbers,

- colors of the titles
- colors of background fills
- color and thickness of the borders of the document.

(Windows) Style tab

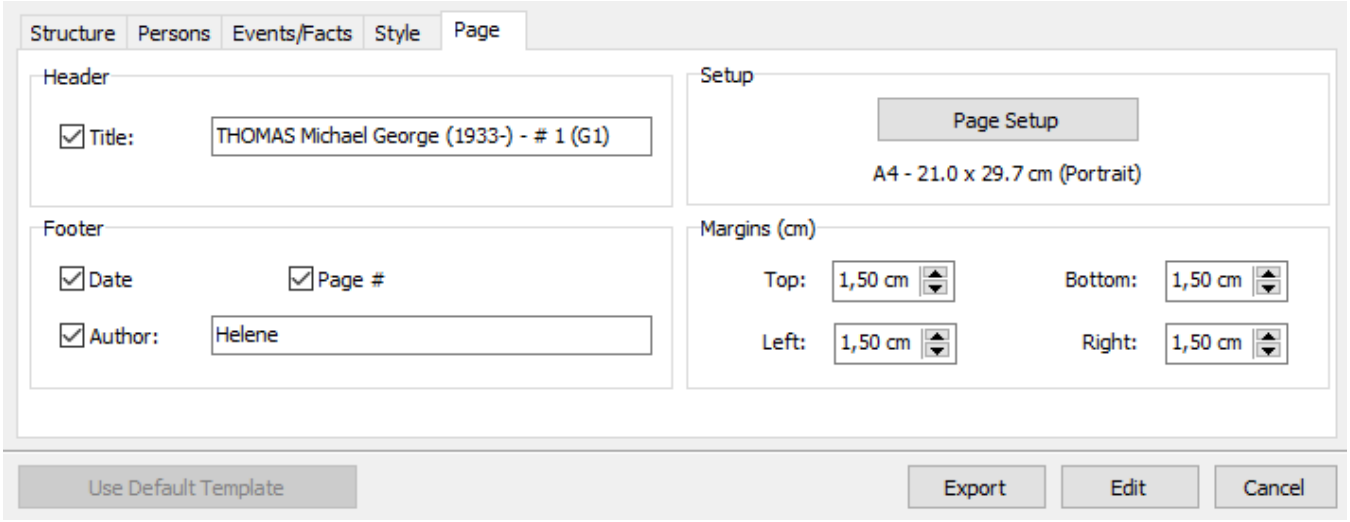


(Mac) Style tab

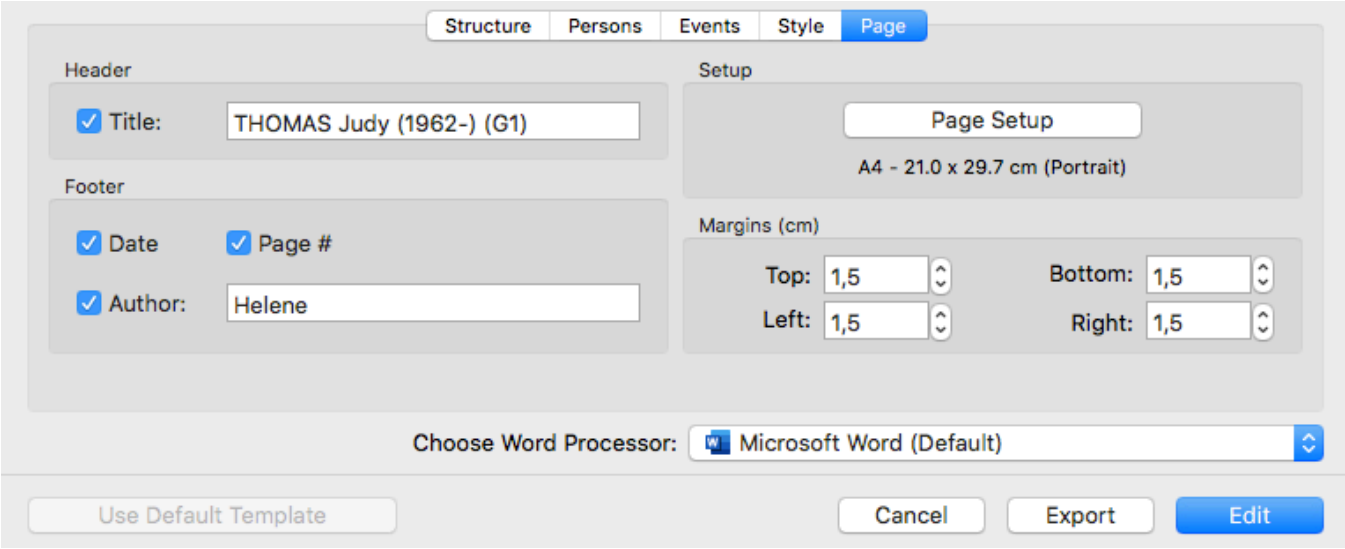


- Click the **Page** tab and set your print options:
  - indicate the text to include in headers and footers,
  - paper size and orientation,
  - setup the document margins.

(Windows) Page tab



(Mac) Page tab



- **(Mac)** Select the word processor with which you want to edit the document. Heredis shows you all programs that enable editing and are installed on your computer.
- (**Windows**) The sheet will open in your default word processor for .docx file formats that is installed on your computer. If you do not have a default word processor for this type of file, Heredis will not be able to open the file. Remember to check in Windows system, if you have a default application for .docx.
- Click **Edit** to start the word processor.
- Click **Export** if you want to use it differently and create a .txt document to be open in raw text format.

Important: Once your sheet is created it becomes an independant document from Heredis. You can modify it in your word processor. If you encounter {XE} tags in your sheet, it is not due to Heredis, see {XE “xxxxxxxxxx Names” } tags in your documents, what to do? article.

Save a Sheet

A sheet edited in your word processor becomes an independent document from the Heredis software. This document can be saved for later reprinting or modifying. To keep the document displayed in your word processor, use the saving feature of your software. It is generally found in the **File** menu.

To change the name proposed by Heredis for the document, or the location of the file, choose **File > Save As**. These commands are generally the same in all word processors.

Print Sheets

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

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

Usually, you can find the Print options in File menu > Print but it depends on your word processor software. Refere to its user guide to know exactly how.

Custom Reports

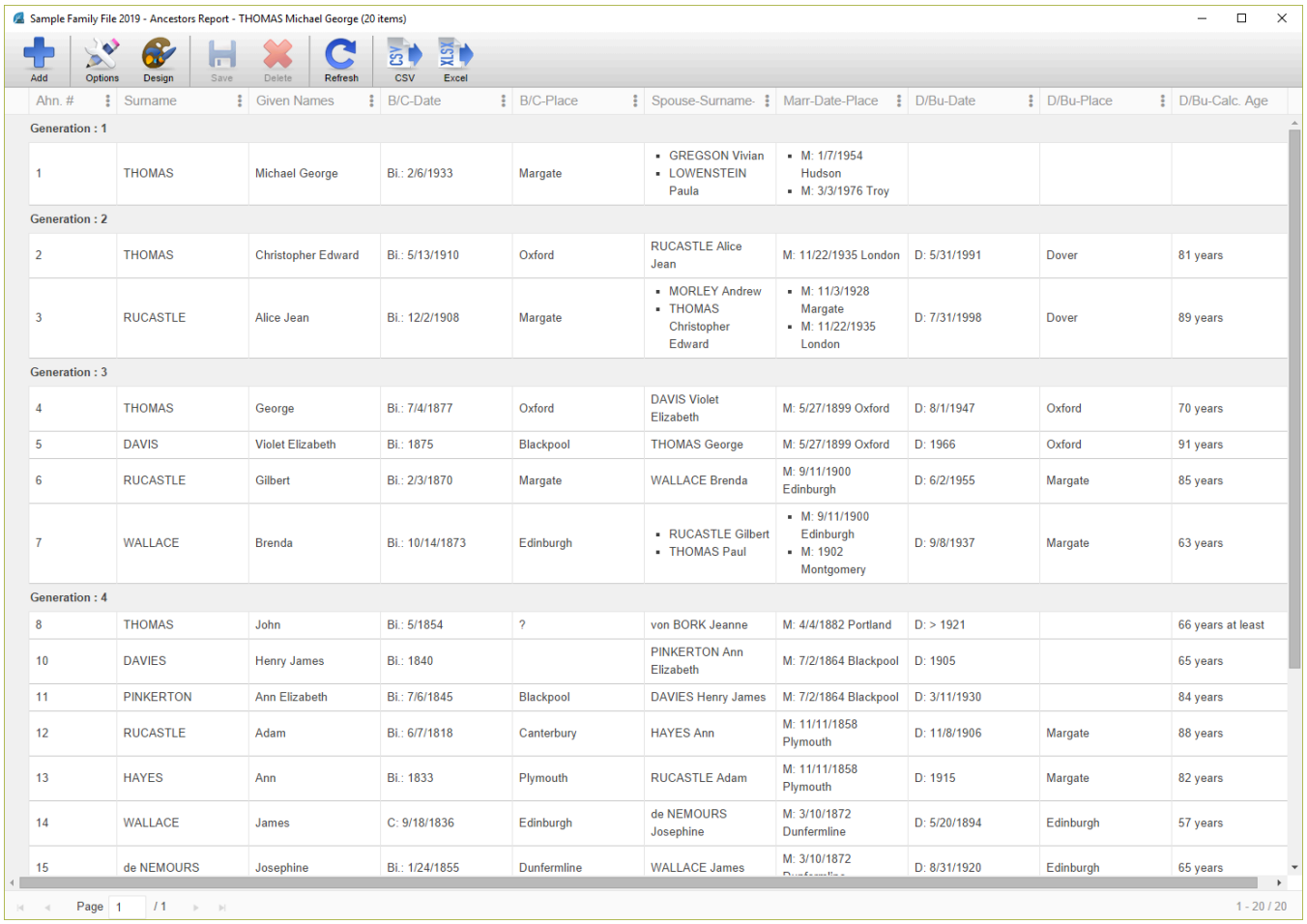
This feature offers various reports models that can be fully customized according to your needs.

Click on the menu **(Windows) Reports > Custom Reports; (Mac) Documents > Custom Reports** and select the type of report you are interested in among the default models included in the application: Ancestors, Descendants, Persons, Events, Places, Sources. You can also use the shortcut in the toolbar.

The selected report opens up in a new Heredis window, which allows you to consult the data in your file while continuing to work on your genealogy.

Note: you can also open several custom reports at the same time if you wish to.

Ancestors Custom Report



Ahn. #	Surname	Given Names	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	▪ GREGSON Vivian ▪ LOWENSTEIN Paula	▪ 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	▪ MORLEY Andrew ▪ THOMAS Christopher Edward	▪ 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	▪ RUCASTLE Gilbert ▪ THOMAS Paul	▪ 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	D: 8/31/1920	Edinburgh	65 years

The data thus displayed depends on the type of default report selected:

- **Persons Reports** allow you to display all the persons in your genealogy

- **Ancestors Reports** display the primary person and his/her ancestors, grouped by generation
- **Descendants Reports** display the primary person and his/her descendants, grouped by generation
- **Events Reports** allow you to display all the events saved in your genealogy
- **Facts Reports**, from Heredis 2025, allow you to display all facts saved in your genealogy
- **Places Reports** display all the places saved in your genealogy
- **Sources Reports** allow you to view each and every source in your genealogy.

Each report includes the following elements:

- a toolbar
- a data table
- a status bar

In each report, you can click on a person's name and navigate onto this person in Heredis.

The Toolbar

Add Button

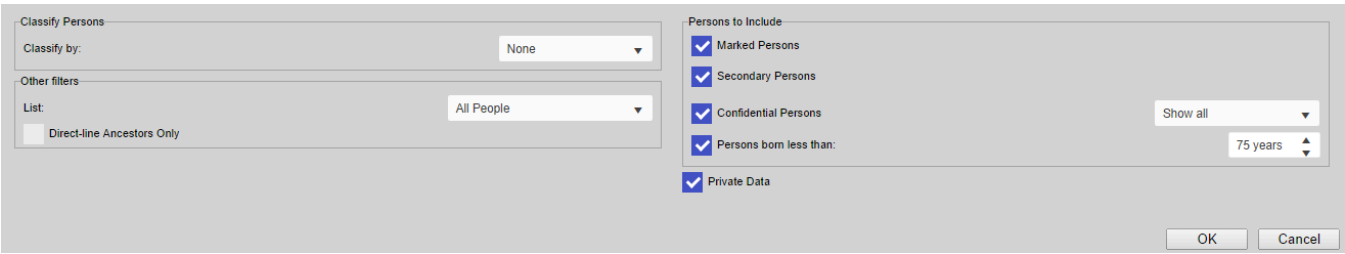
Select the information you want to add to your report by clicking on the different sections available (Personal Data, Media, …)
You can select one or more fields among those suggested. If you click the **OK** button, additional columns are automatically added to your report to let you view the data you deem relevant and important.

Note: You can also group multiple fields into a single column. Select the desired fields and check the "**Group in a single column**" box. Validate your selection and do the same thing again for each column in which you want to group several fields. For instance, "Birth Date" and "Place of Birth".

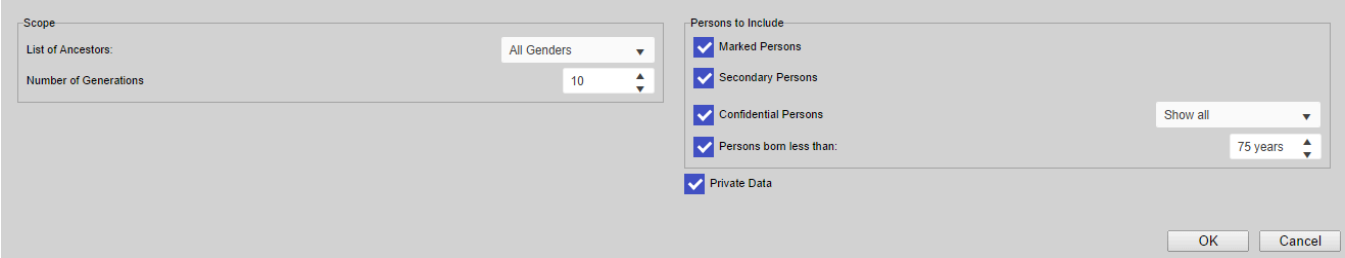
Options Button

Based on the type of report, you are given several options, grouping, and filters to refine the displayed report.

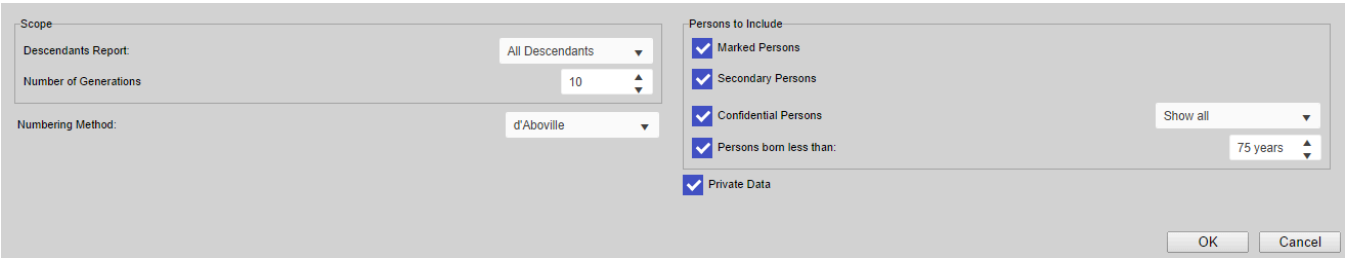
– *Persons Report:*
This report is built based on all the persons saved in your genealogy. If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.
Heredis is defaulted not to apply any grouping of persons in this report but you can set up your own display of data: classify by Name or Birth.
You can also choose to display Males or Women Only, and to list Direct-line Ancestors only.



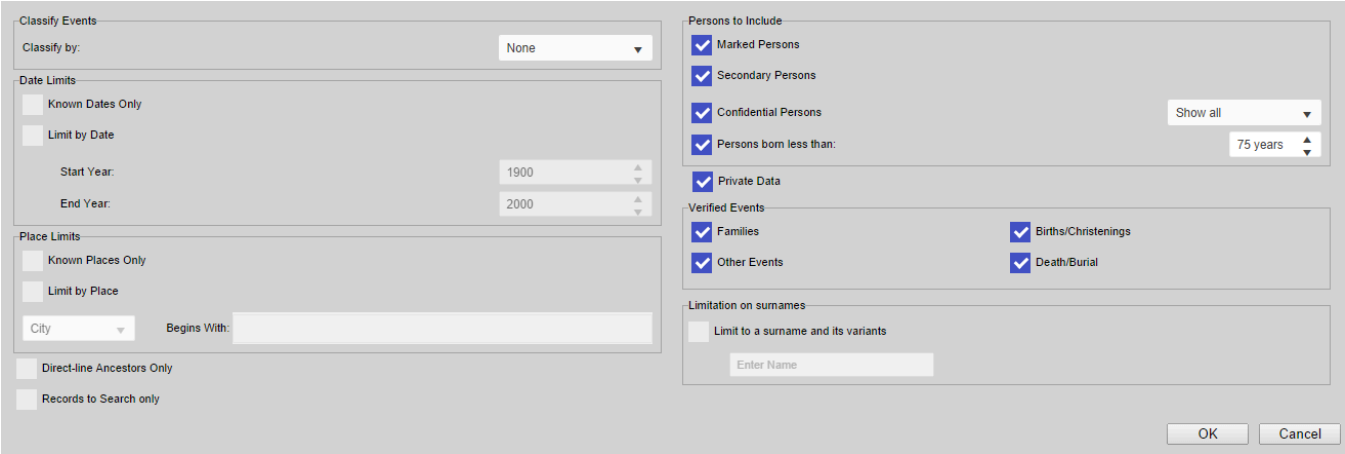
– *Ancestors Report:*
This report is built based on the primary person displayed on the navigation screen.
If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.
Heredis is defaulted to supply a complete list of 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.



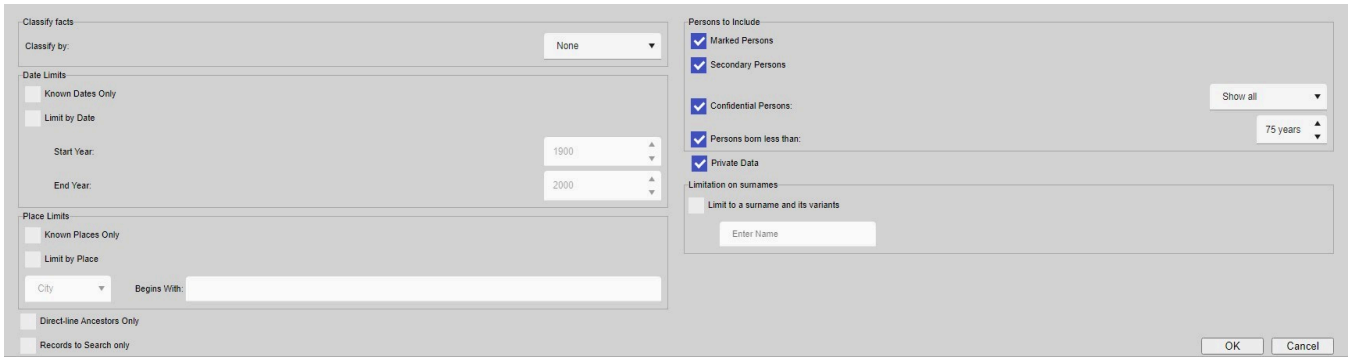
– *Descendants Report:*
This report is built based on the primary person displayed on the navigation screen.
If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.
Heredis is defaulted to supply a complete list of 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).



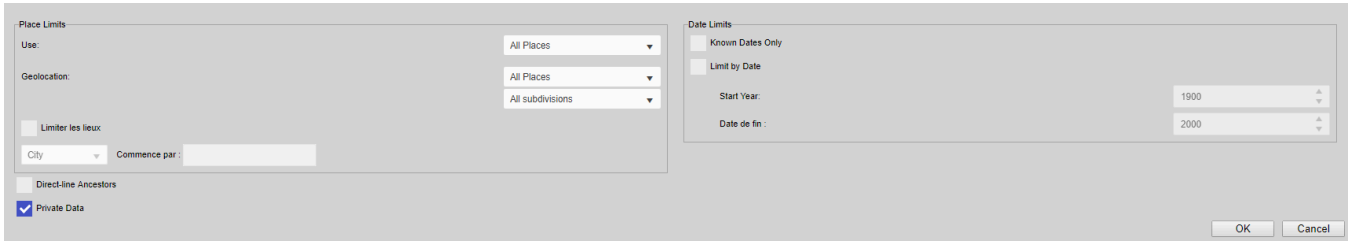
– *Events Report:*
This report is built based on all the events saved in your genealogy.
If you wish to display or hide marked, secondary, confidential, contemporary persons or private data, check or uncheck the corresponding boxes.
Heredis is defaulted not to apply any grouping of events in this report but you can create your own way of displaying data: classify by Dates, Persons, Type of events, or Places.



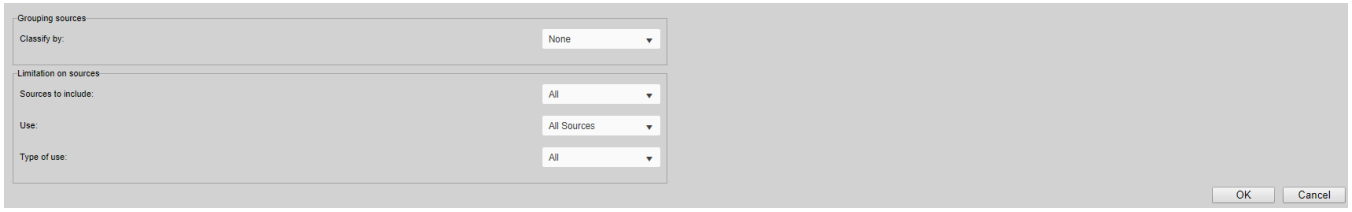
– *Facts reports (from Heredis 2025):*
This list takes into account all existing facts in the file or, if you're using smart search, smart search results.



– *Places Report:*
This report is built based on all the places saved in your genealogy.
You can choose to limit to a city, a state…



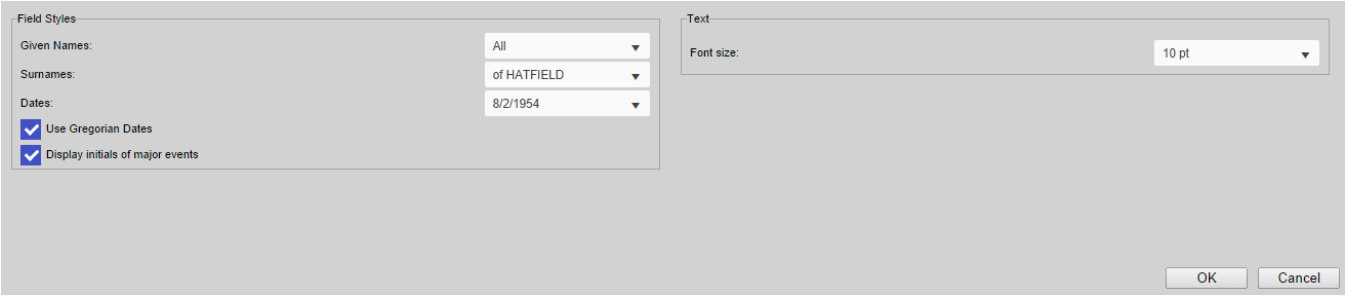
– *Sources Report:*
This report is built based on all the sources saved in your genealogy.
You can change options to display private sources only, used only…



Design Button

You are given layout options for the following:

- Surnames, Given Names, Dates
- Font size displayed in the report
- Colors for males, females, direct-line ancestors, and implexes – since Heredis 2020. Since Heredis 2022, colors are exported to .xlsx and .csv formats.
- Major events



Save Button

Click the **Save** button and name your report so it is saved with your custom options and preferences.

Find it again later in the menu **(Windows) Reports > Custom Reports; (Mac) Documents > Custom Reports**, right underneath the default model supplied by Heredis.

You can manage your custom reports models. Please refer to the paragraph below (see page 605) for more details.

Delete Button

From the menu: **(Windows) Reports > Custom Reports; (Mac) Documents > Custom Reports**, open the model you do not wish to keep, click the **Delete** button, and confirm you want to delete the model. You can also delete from the model management tool. Please refer to the paragraph below (see page 605) for more details.

Refresh Button

Custom reports open in an independent Heredis window so you can continue working on your file while leaving a custom report open. If you make modifications or additions to your genealogy, all you need to do is click the Refresh button to update the content of the report displayed.

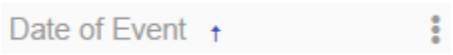
CSV / XLSX Buttons

You can export the data from your report to a **CSV** or **Excel** format so you can use them later outside of the Heredis environment. The file will become independent from Heredis and you will be able to work on the data from your usual spreadsheet software.

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

Data Table

The various reports provide data presented in a multiple-column table ; content varies according to the type of model you choose.
You can sort data by clicking on a column header. An arrow displayed next to the header title indicates the type of sorting that has been applied: ascending, descending, or no sorting if no arrow is displayed.

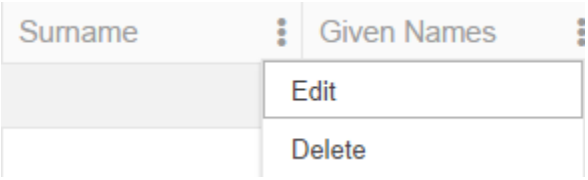


Note: some columns cannot be sorted; this is the case, for instance, of columns in which several types of data have been aggregated. A message in red will inform you that the column cannot be sorted.

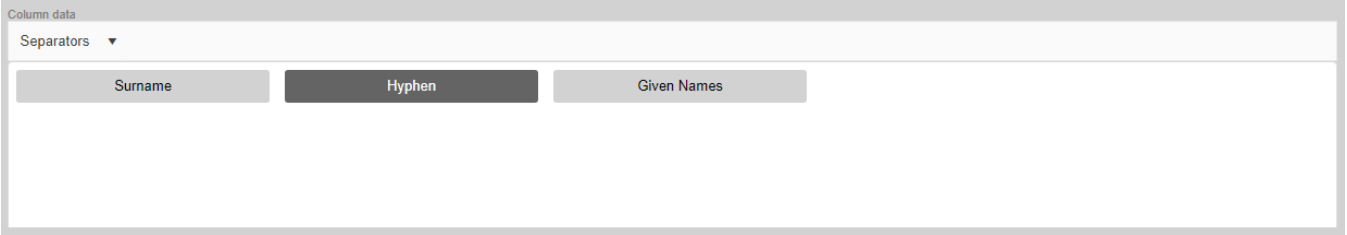
You can also

- Reorganize the way data is displayed by moving columns, for example: click the header of a column and hold the click down while moving the column to the desired location, then release the mouse click.
- Delete a column: click on the 3 dots displayed on the column header and select the **Delete** option.
- Modify the content of a column: click on the 3 dots displayed on the column header and select the **Edit** option. An Edit Column window opens up, it allows you to:
  – modify the column title
  – add/modify/delete fields in this column
  – add and customize column data separators to display between 2 column fields

Edit or Delete a Column



Organize data



Status Bar

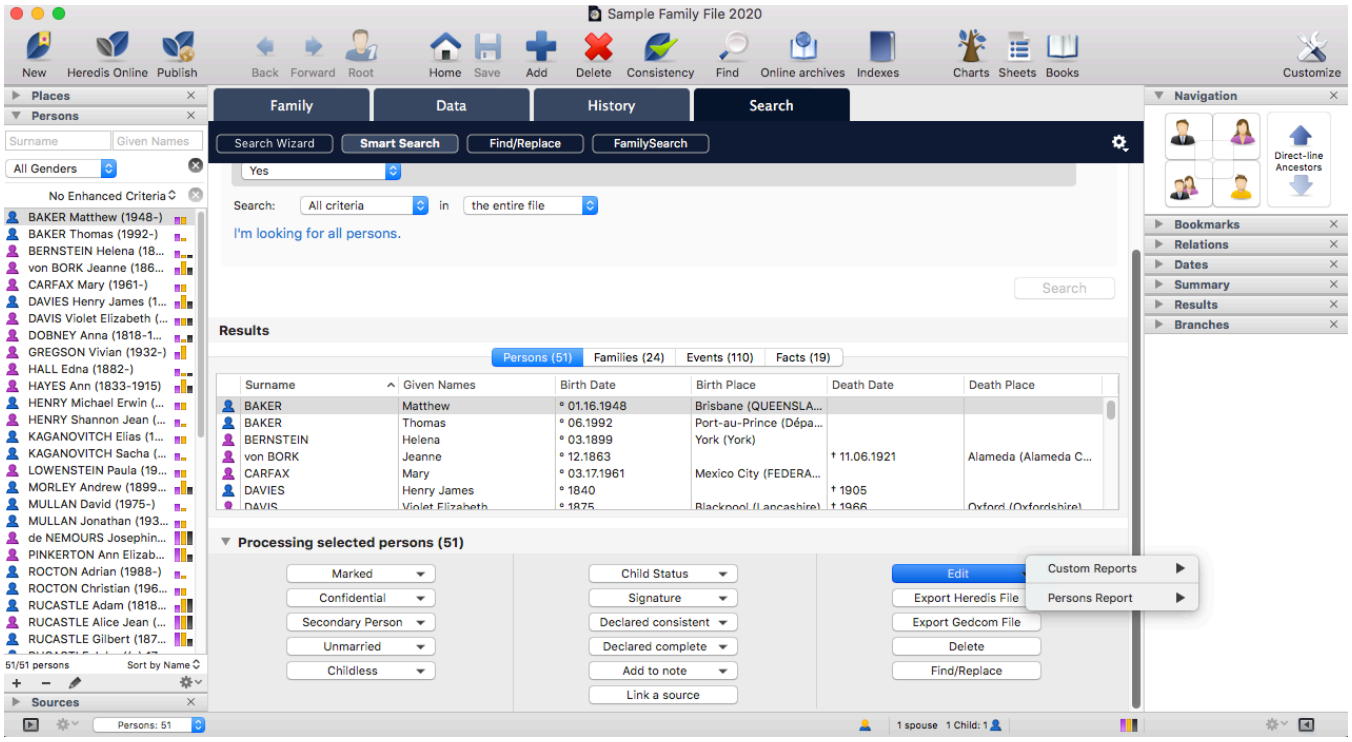
In the status bar, Heredis shows the total number of pages for the report being displayed, as well as the range in which the current page is located (the indicator is displayed in the bottom right). Easily navigate through the different pages of a report by clicking on the **First** / **Last Page**, **Previous Page** / **Next Page** arrows. You can also move directly to a given page by entering its number.

Custom Reports and Smart Search

Custom reports are also accessible directly from **Smart Search**.

- From the **Search** tab **> Smart Search**, launch a search.
- In the **Results** area, select the **Persons** or **Events** tab you are interested in.
- In the **Processing** area, click the **Edit** button **> (Mac) Custom Report / (Windows) Customizable Reports** and select the report model you want to use to display the results from your search.

Smart Search and Custom Report



Manage your models

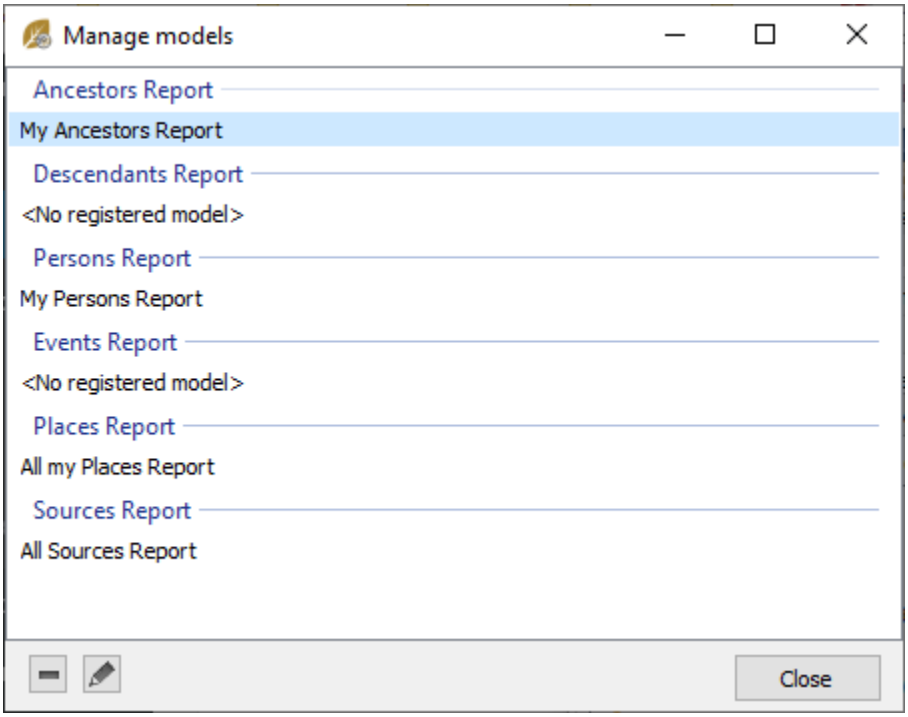
You can manage your custom reports models.

(Windows) Click on the **Reports** menu **> Custom Reports > Manage my models…** to open

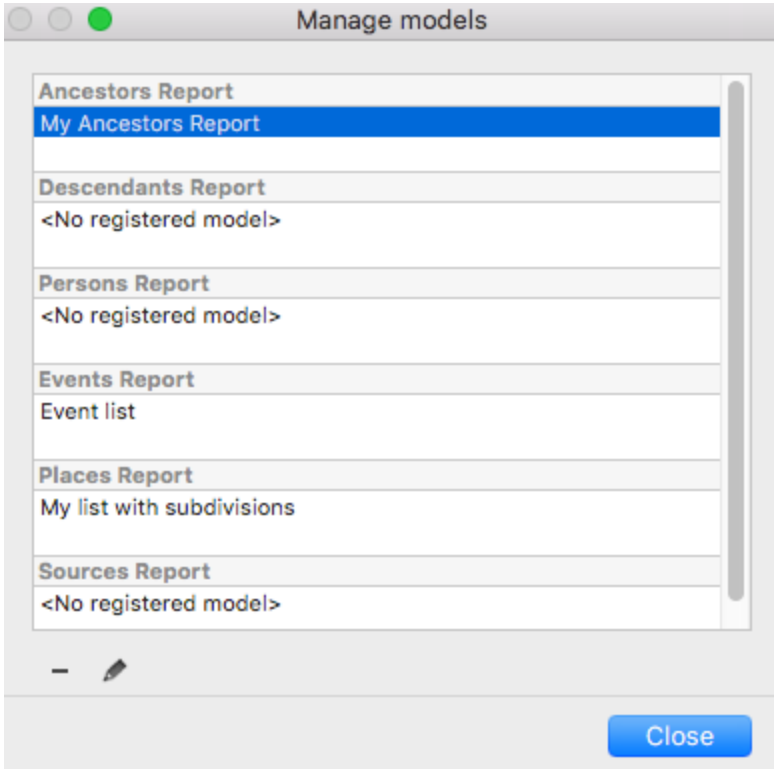
the model manager.

(Mac) Click on the **Documents** menu **> Custom Reports > Manage my models…** to open the model manager.

(Windows) Manage custom reports models



(Mac) Manage custom reports models



Select the report model you wish to modify and click the button to rename this report model or the button to delete the model.

You can print a Research journal with Custom report. See Research Journal (see page 608) for all details.

Research Journal

After taking a break from your research, it is not uncommon to wonder where you had left things at and what is left to do.

The research journal is there to help you in this matter. It allows you to track your research progress. No more spending half an hour trying to figure out what you intended to look for on the internet, or, even worse, during a visit to the Archives' reading room. There is nothing more annoying than wasting that kind of time when you have just made a special trip for the occasion.

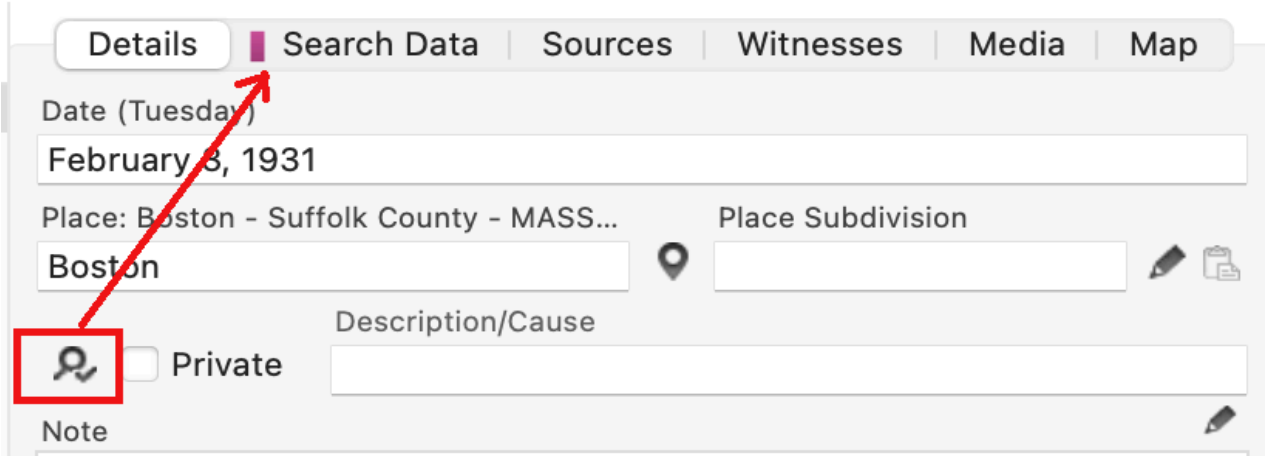
For each event, enter the project to which you wish to attach the search, the status of your research, and other useful information about the status of the event so you know where you are standing.

Once this information has been entered, generate a Custom Report, selecting the Research Journal, and export it to CSV or Excel format.

From now on, no more scrambling when researching!

Specify the search status and various other useful elements

With every event you create, you can enter as usual the date, place, etc. Starting with Heredis 2023, a magnifying glass is at your disposal. Click on it and open the **Search Data** tab for the event.



Under the **Search Data** tab for the event, specify:

Search Status: Search record, No search record, Search in progress, or Untraceable record.

Note: you can change the default status in the Heredis preferences. On Windows, Tools menu > Preferences > Heredis Preferences > Format tab.
On Mac, menu Heredis > Preferences > Format tab.

If you choose to set “Search record” as the default Search Status, each new event created will be considered as a record to search for. Which means you will then only need to modify the events that shouldn’t be searched for as “No search record” once you have found them, or to qualify them as a “Search in progress” if the search has started but is not finished.

Project: to let you manage several projects, for instance the “Smith branch”, to access the searches related to this branch, or, as another example, “Killed in action” to manage searches related to persons who died on the battle field.

Document: to specify the type of document you need to consult, e.g., “vital records” or “notarial instruments”, etc.

Place: to indicate where to look. For example, the online Los Angeles County Registrar/ Recorder, the NY Public Library, the Archives of Ontario, or even “at Grandma’s”, etc.

Date: what is the approximate date of the event, or also the date when you plan to do the research…

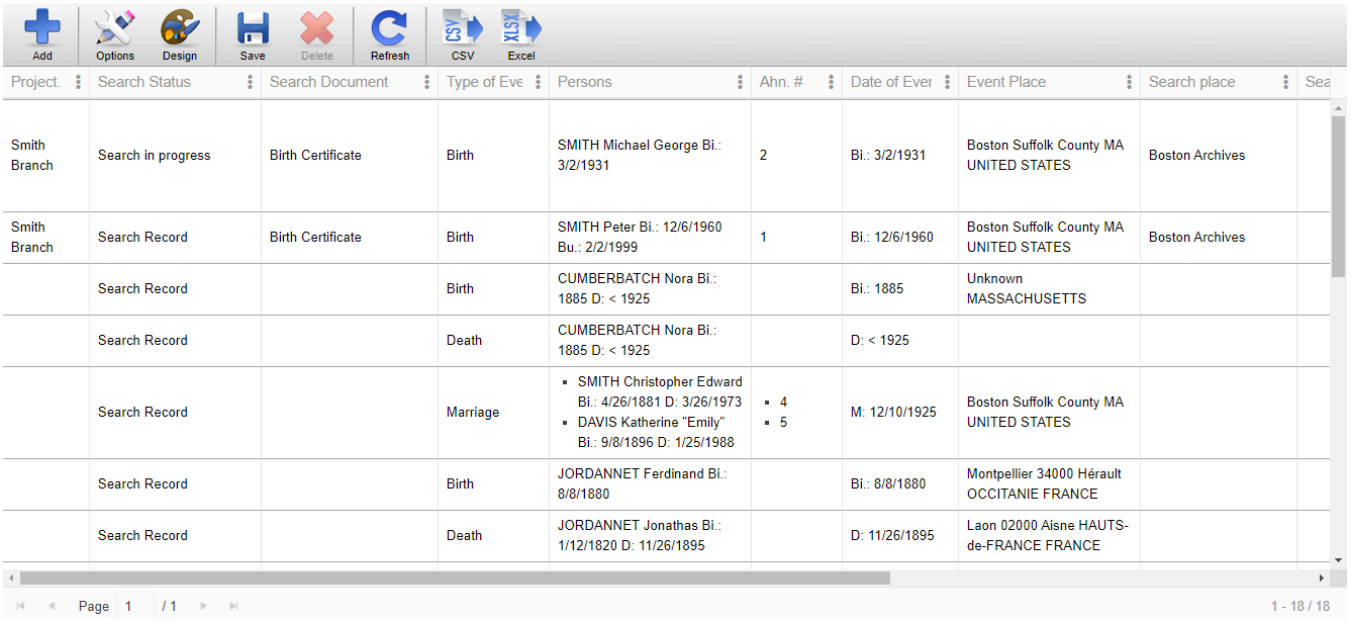
Call #: if you already know the exact reference of the document you want to consult. You could have found, for instance, thanks to the online inventory of your City Archives, that the call number for your document is 147 Q 50.

URL: a website address if the search is to be done online.

Note: this empty space allows you to type in a note to complete your search data if necessary.

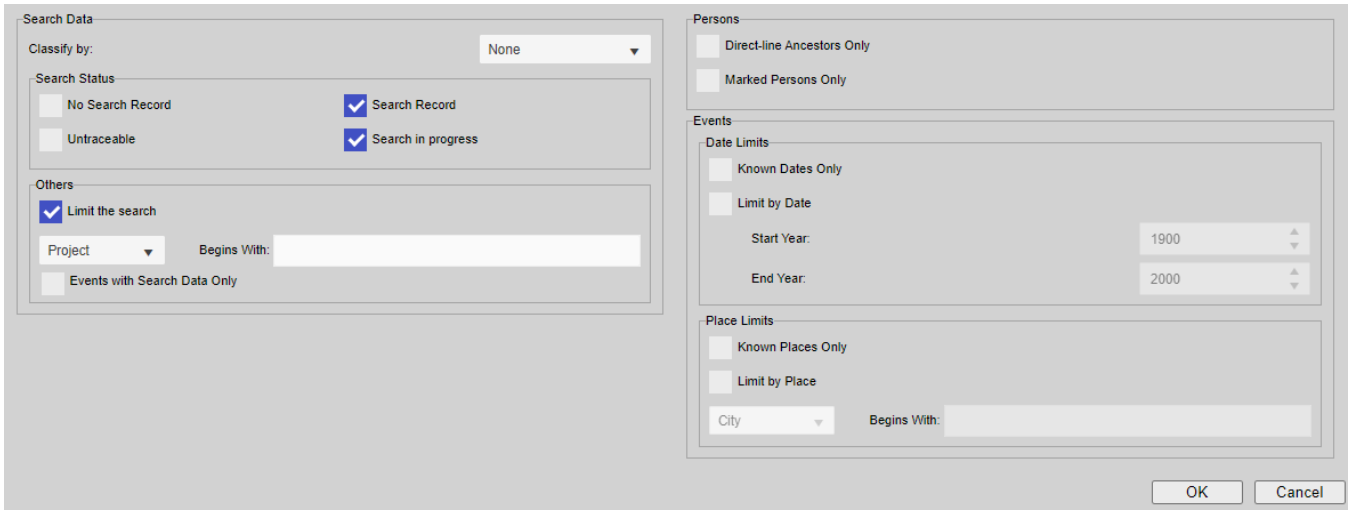
Get a Research Journal

Once you have filled in this information, generate your journal by clicking on the menu **Documents > Custom Reports > Research Journal.**

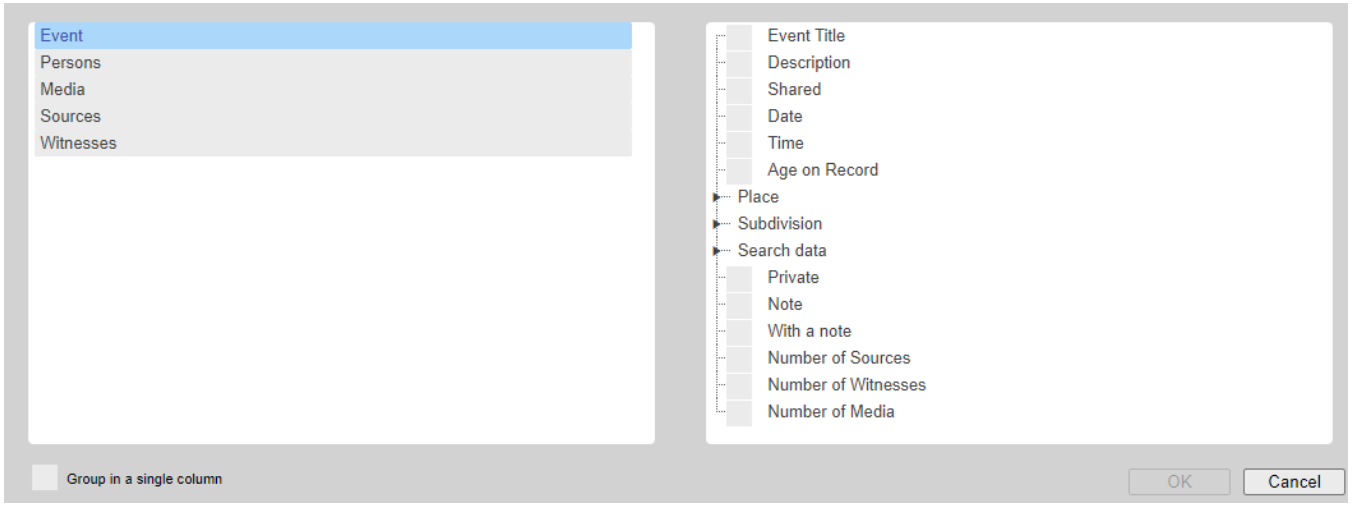


Click on the **Options** button to:

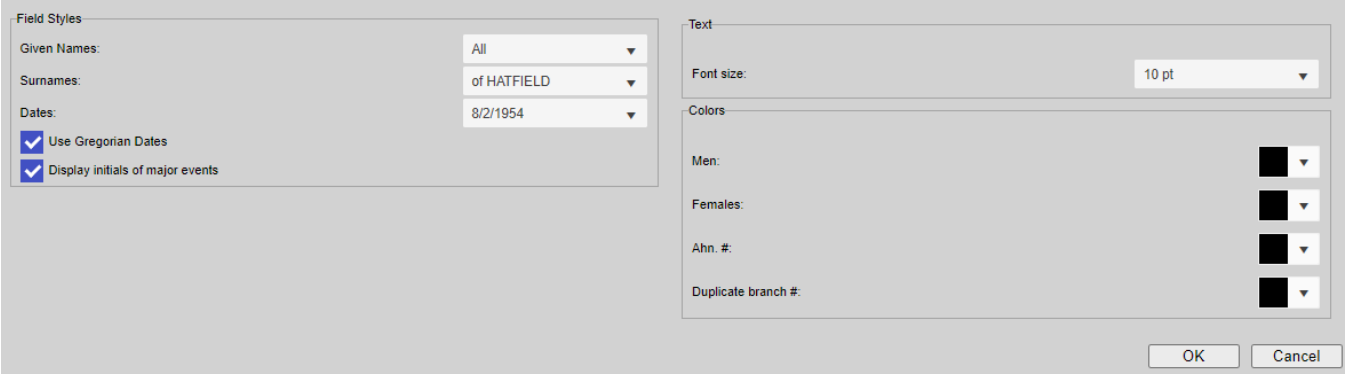
- Group by Project, Search status, Document or Place.
- Modify the search status or add other ones. By default, only events with the “Search record” status and “Search in progress” status are displayed.
- Limit the search to a project, a document, a place, a call number or a URL.
- Limit the search to Direct-line Ancestors Only or to Marked Persons Only.
- Limit the search to Known Dates Only or to a specific time range.
- Limit the search to Known Places Only or to a specific place.



Click on **Add** button to insert additional columns that could be of interest to you: Event, Persons, Media, Sources, or Witnesses.



Just like in any other custom report, you can click on **Design** button to select a format for Given Names, for Surnames with a nobiliary particle, for Dates, for the Font size and Colors.



The **Save** button allows you to save your research journal “model” so you don’t have to go over every setting again each time you generate a research journal.

To delete a model (or template), once you have opened it, simply click on the **Delete** button.

Modify data in Heredis while keeping the research journal open. You can update your research data by clicking on **Refresh**.

The **CSV** and **Excel** buttons allow you to export your data to a CSV or Excel format so you can then open the journal in a spreadsheet with software programs such as Microsoft Excel or LibreOffice Calc.

Note: the exported version of your journal will become independent from Heredis and what you will modify in the spreadsheet will not be updated in Heredis.

See also the articles: Custom reports, (see page 598) Input events (see page 598) and Search Data tab of an event (see page 214).

Access the Research Journal of an event directly from Search Tracking

Heredis offers a search tracking tool for the major life events of a person and his/her ancestors. (See the article on Search Tracking (see page 365))

To modify a major life event, you can access the event search tab from the following icons: or or or .

- the event status is “No search record”,
- the event status is “Search in progress”,
- the event status is “Search record”,
- the event status is “Untraceable”.

(Windows) Pre-established reports

All documents you view and print with Heredis will open in your word processing. This way of operating puts you in a familiar environment, facilitates the manipulations you want to perform, allows you to completely reshape the presentation of the data and to record, if you wish, the documents displayed as independent files.
If no word processing is up and running on your computer, you can download free word processing, such as LibreOffice. Make sure your system has an application by default for .rtf, .xlsx, and .docx files.

Use the **Reports** menu to access the various editions offered by Heredis, with the exception of indexes entries that can only be accessed in indexes.

For more details on old Ascentors, Descendants and Persons Custom report, see (Windows) Customize your reports (see page 621). For Custom Reports included since Heredis 2019, see Custom Reports (see page 598).

The different types of pre-established reports

Ancestors reports

They are built from the primary person displayed on the navigation screen.

- The Default Ancestors report
- The By Men Ancestors report (agnatic line)
- The By Women Ancestors report (cognatic line)

Descendants reports

They are built from the primary person displayed on the navigation screen.

- The Default Descendants report
- The By Name Descendants report

Persons reports

It displays and prints all persons registered in the file regardless of their kinship or role, ranked in order of surname and then given name.

Families report

It displays and prints all the unions recorded in the file regardless of the type (marriage, civil or religious, cohabitation, extramarital relationship…).

Tiny Tafel report

This report is a review of genealogical researches. It lists all the surnames recorded in the file based on where the surnames were found and the period during which they appeared.
For each surname and place, it counts the type of acts found: Birth – Baptism – Marriage – Death.
The Tiny Tafel report is the preferred mode of exchange within genealogical societies.
It allows you to immediately see if bearers of the surnames you are interested in have already been identified by other genealogists, where and when they have been spotted.

Events report

It displays and prints all events, individual or family, recorded in the file, ranked chronologically, with the date and location of the event.

Facts report

It displays and prints all the facts recorded in the file, arranged in alphabetical order. For each fact, its description, the person to which it is attached and the place when this information is provided are displayed.

Research Status report

It review of your researches and prints all the persons for whom you are looking for an original certificate in order to confirm your data. The list can be edited for the entire file or place by place, or for an entire County or State.

To get this report, you need to activate the landmark button (Research Status) in the **Data > Personal Data** screen, or in the event entry area of the **Add a Person** window or in the **Search Wizard,** by clicking on the magnifying glass. To activate it, change the display mode with the cogwheel of the **Personal Data**.

Anniversaries Report

It displays and prints events, individual or family, based on a “historical” selection: events that took place on a particular day of the month, or in the following week or month.

Indexes lists

They allow the full content of each of the indexes generated by Heredis to be published.
The **Surname List,**the **Given Name List**,the **Occupations List** and the **Places List** show the list with the variants and the number of uses.
The **Source List displays** and prints all the sources cited in the events, specifying the persons related to them and the events involved.
These lists can be obtained directly from the corresponding indexes. In the index, click on the

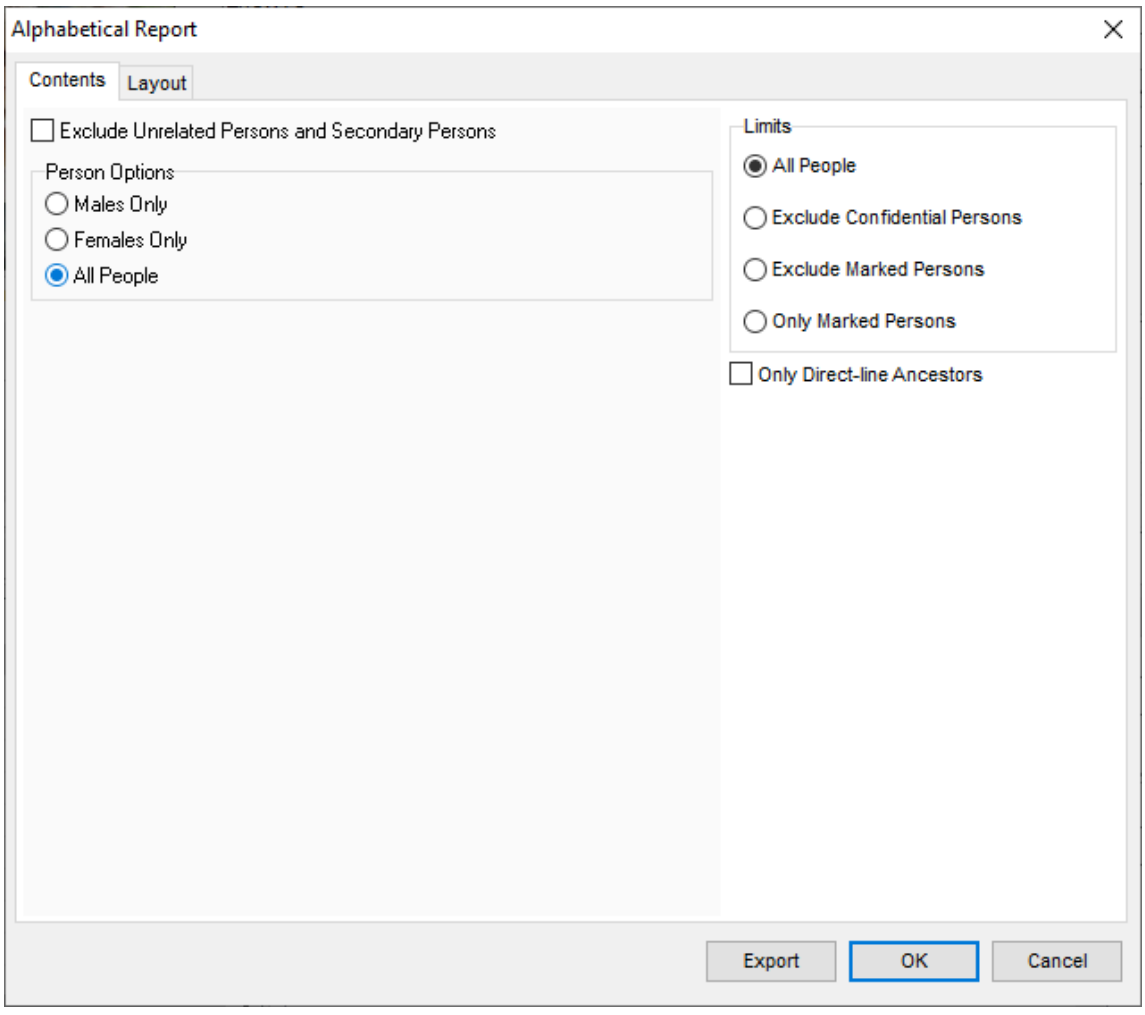
Print button.

The choice of data to display

- Click on the **Contents** tab. According to the chosen report, you may not have always the same options.
- Check the options for selecting the persons to be displayed in the report (men, women, witnesses, etc.) based on their genealogical role.
- Specify the limits to be made to the list (confidential, Direct-line Ancestors, Period, Places…).

Options vary depending on the type of report requested.

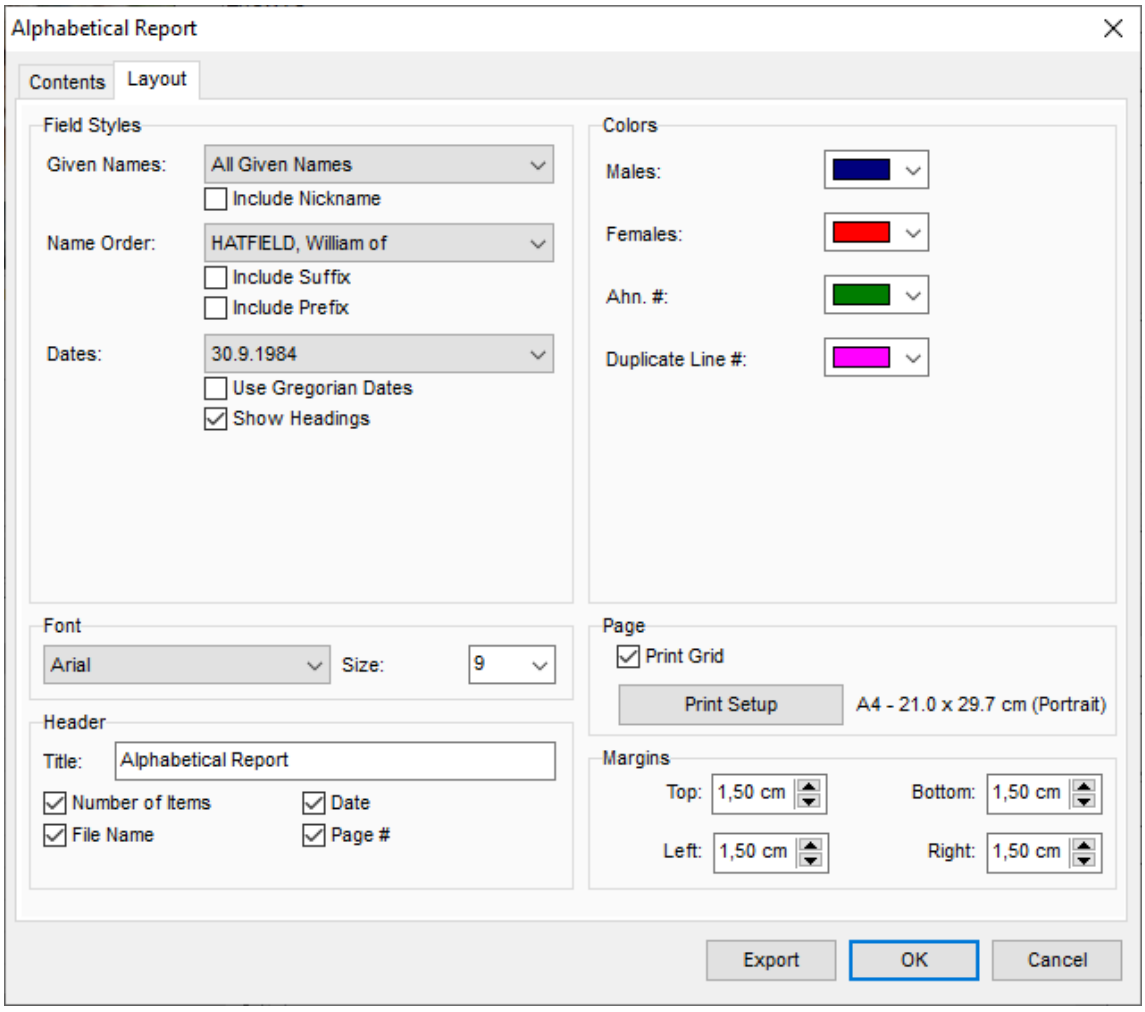
Persons Report (By Name or Alphabetical) – Contents



The layout of the reports

- Click on the **Layout** tab.
- Determine the layout of each report using the different settings proposed for the header, font, format, field styles, and colors.

Persons Report (By name or Alphabetical) – Layout



Font

For each edited state, select a font and character size.

Header

Each page of each state reproduces a header where you post:

- A personal text entered in the header area
- The total number of items on the report
- The date of the report edition
- The name of the genealogical file
- The number on the page.

Margins and Page

You can change several elements of the page format:

- The margins of the document.
- The printing of the grid. Check **Print grid** to frame the areas assigned to the different types of information in the cards or separate each of the persons listed.
- The layout. Click the **Print Setup** button to select a printer, choose the orientation of the paper (portrait or landscape), choose the size of the paper. The paper sizes suggested depend on the type of printer you have selected.

Field Styles

You can choose for each person displayed in the requested document, different layout options. Click on the drop-down menus and find out all the statement possibilities that are available to you for:

Given names

- All Given names
- Only the first given name
- Only the usual given name (in the absence of a common declared given name, Heredis will take the first given name)
- The first given name followed by the initials of others.

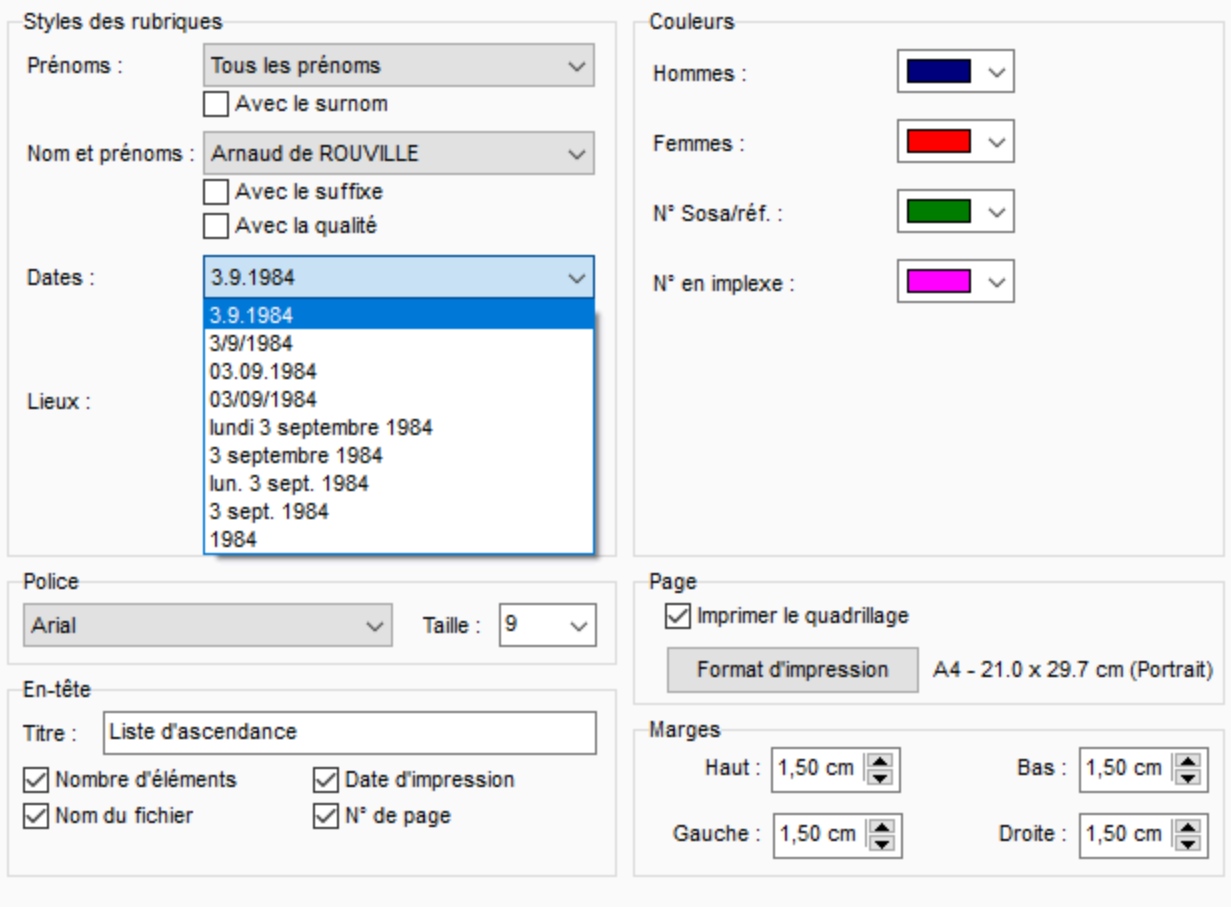
Check the option **include nickname** if necessary.

The name order

Different possibilities are proposed to place the surname, particle and given names. Check the option **include suffix** and **include prefix** if necessary.

Dates

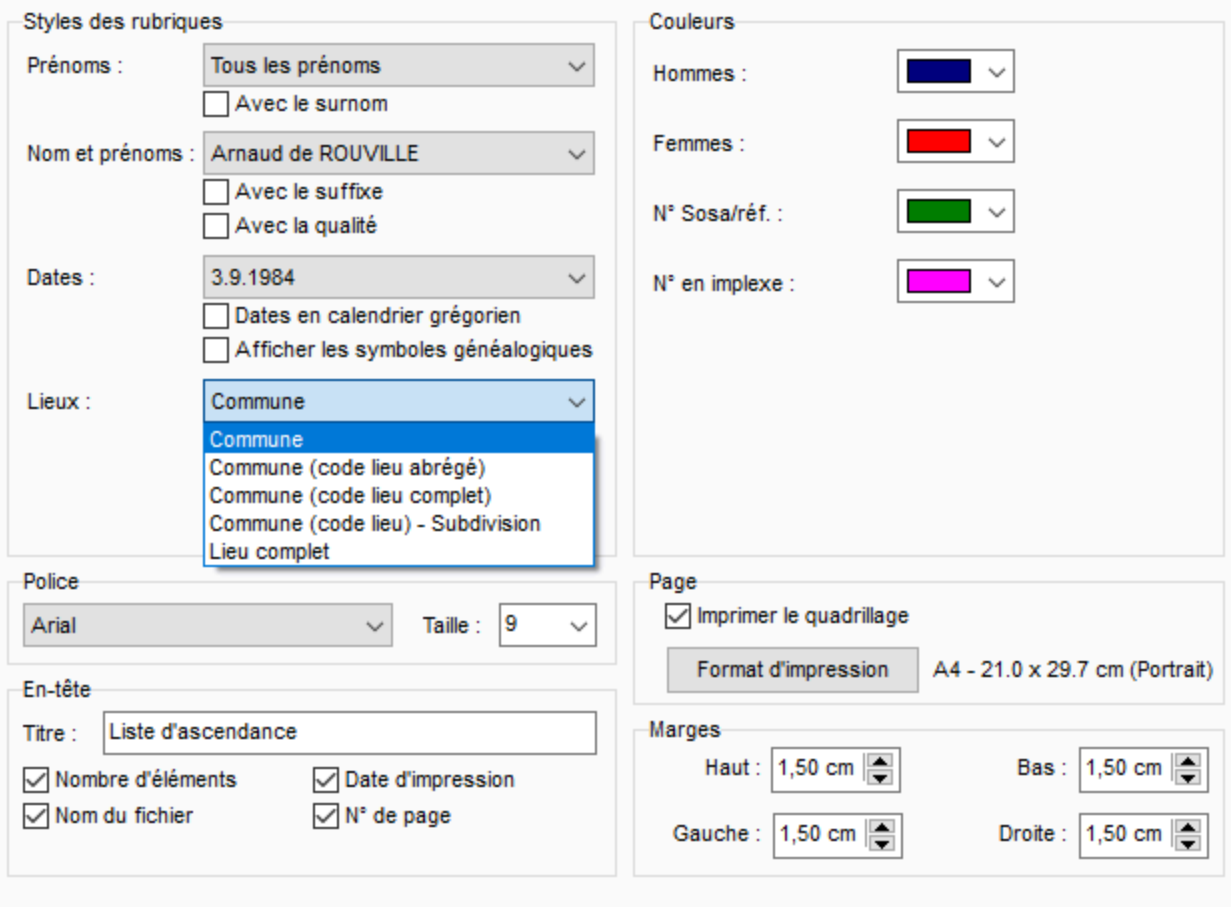
- Digit separated by a point (with or without the display of 0)
- Digit separated by a slash (with or without the display of 0)
- Month in letters (in full or abbreviated)
- Month in letters and the day of the week (whole or abbreviated)
- Only the year.



In each of these cases you can check the Dates option **in the Gregorian calendar** to view and print the dates in Gregorian format regardless of the calendar in which they were entered.
The **Show Headings** option precedes each date by the symbol corresponding to the type of event: ° for Birth, b for Baptism, x for Marriage, xR for Religious Marriage, xP for Other Union, mc for Marriage Contract, † for Death, (†) for Burial.

The places

- Name of the city only
- Name of the city and postal code
- Name of the city, postal code and subdivision of the place if there is one
- Full place name.



Sources (for some documents such as Biography)

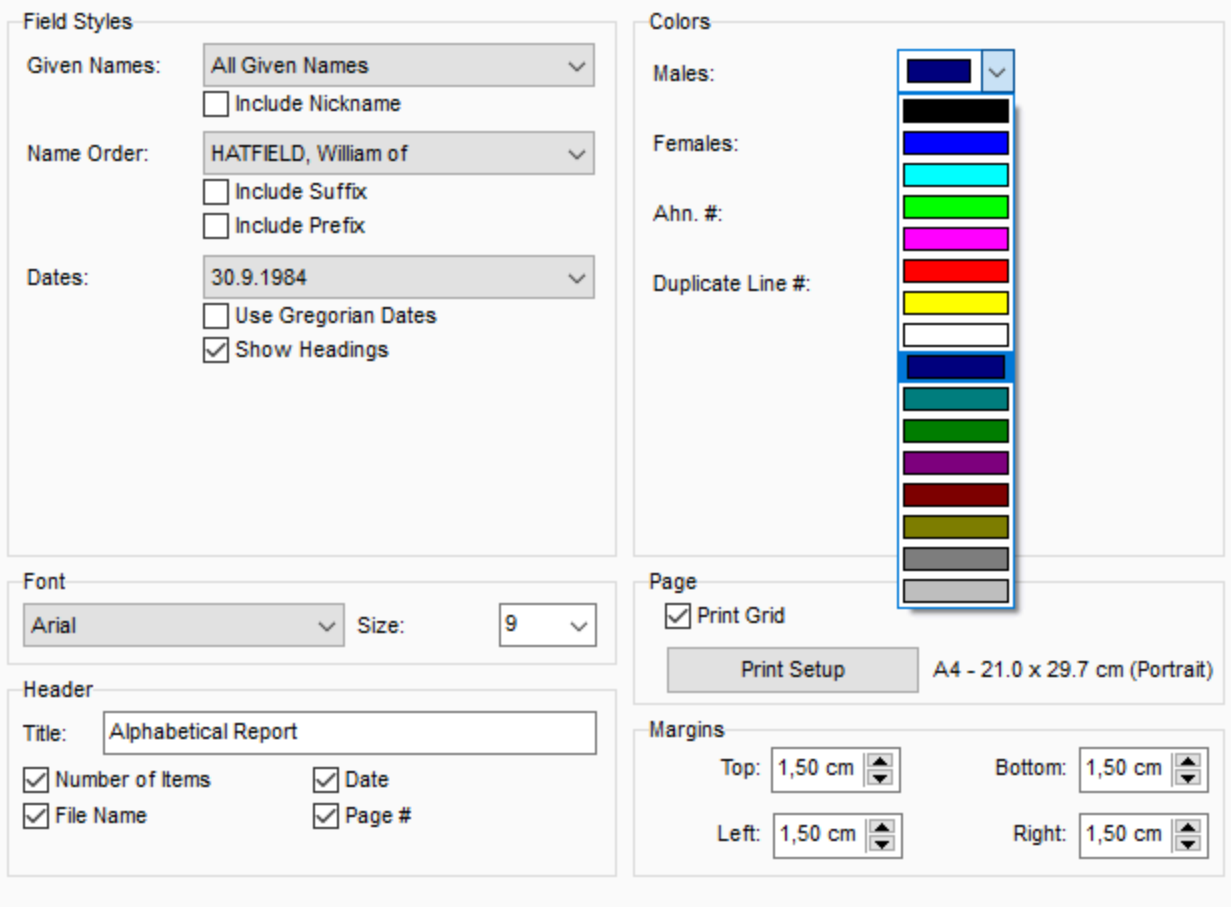
- either they are ignored,
- or Heredis indicates the names of each of the associated sources,
- or Heredis details the description of each of the associated sources,
- or Heredis takes up the entirety of each of the associated sources, including the text of the deeds.

Private data

If you exclude private data, notes, events, sources, media for which the **Private** box was checked at the time of entry will not be printed in the requested document.

Colors

Differentiate each of the important elements of the edited state by assigning it a color. Select it from the drop-down menu. Items differ depending on the type of report requested.



Click **OK** to validate the creation of the document in .rtf format.

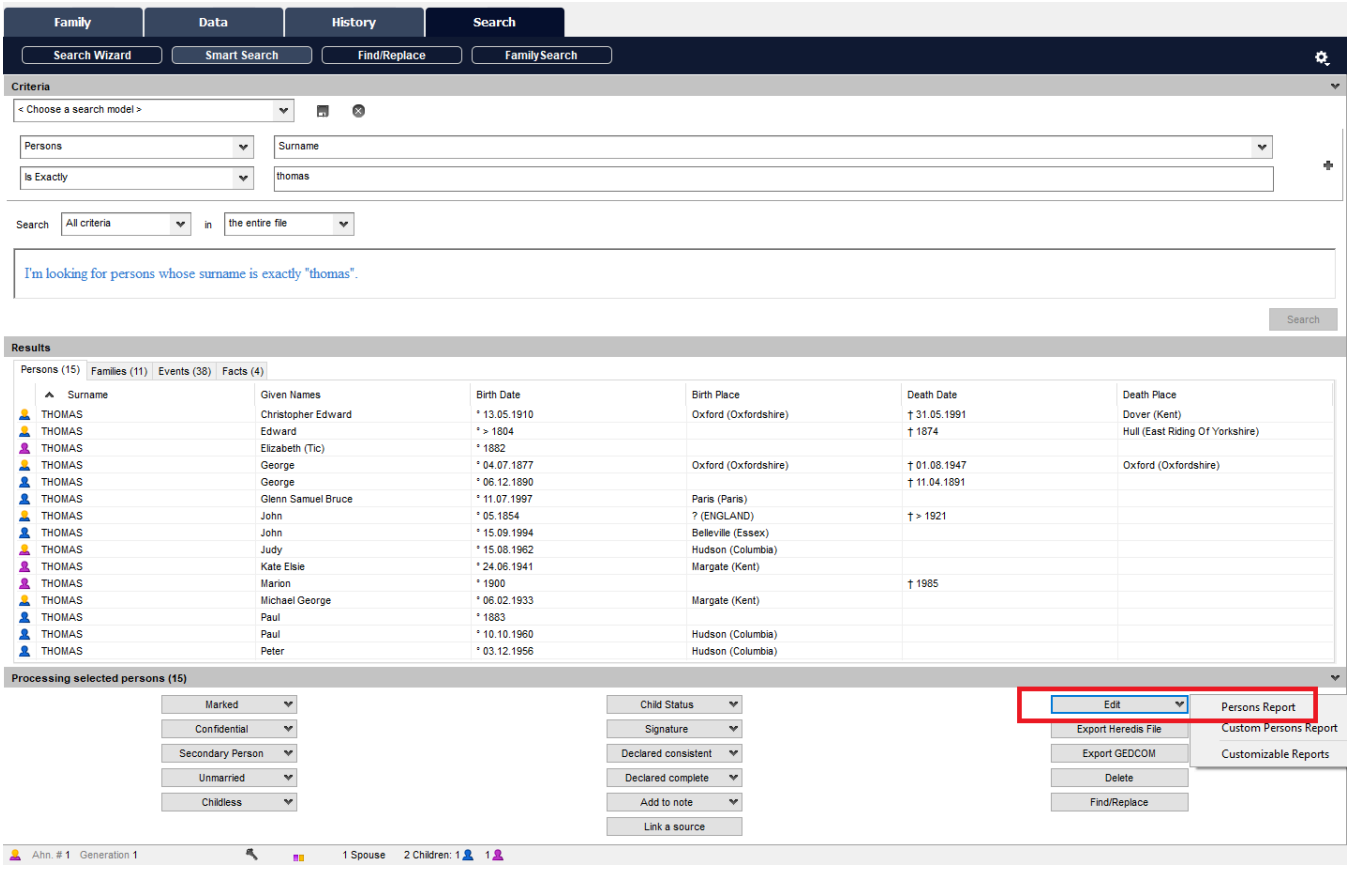
Note: This format opens with any word-processing software. Make sure you have a default software for files with the .rtf extension. Check out the Windows user manual or online tutorials to learn more.

Create a report of persons or events from Smart Search.

It is also possible to edit the result of a selection obtained with **Smart Search** as a report.

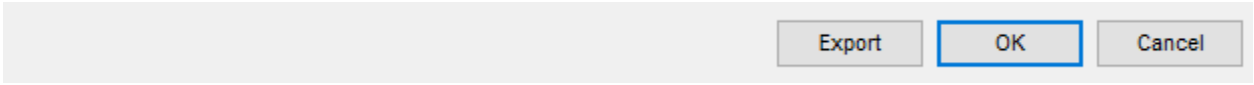
Search for one or more criteria from the **Search** > **Smart Search** Tab. Check out Smart Search (see page 371) article for more details.

- Click the **Edit** button in the processing selected persons area.
- Select the type of report of **Persons** or **Events** based on the tab selected in the search results.



Exporting documents

The various documents, reports or sheets, are exportable in text format (.txt).
Click the **Export** button to create a .txt document or click on OK to create a .rtf document. Give the new document a name and specify its location before registering it.
Then open this document in adapted software: word processing, spreadsheet…



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

(Windows) Customize your Reports

This function existed prior to Custom Reports included since Heredis 2019. See also the new custom reports (see page 598) article.

All documents you view and print with Heredis are open in your word processing. This way of operating puts you in a familiar environment, facilitates the manipulations you want to perform, allows you to completely reshape the presentation of the data and to record, if you wish, the documents displayed as independent files.
If no word processing is up and running on your computer, you can download free word processing, such as LibreOffice.

Create a custom report

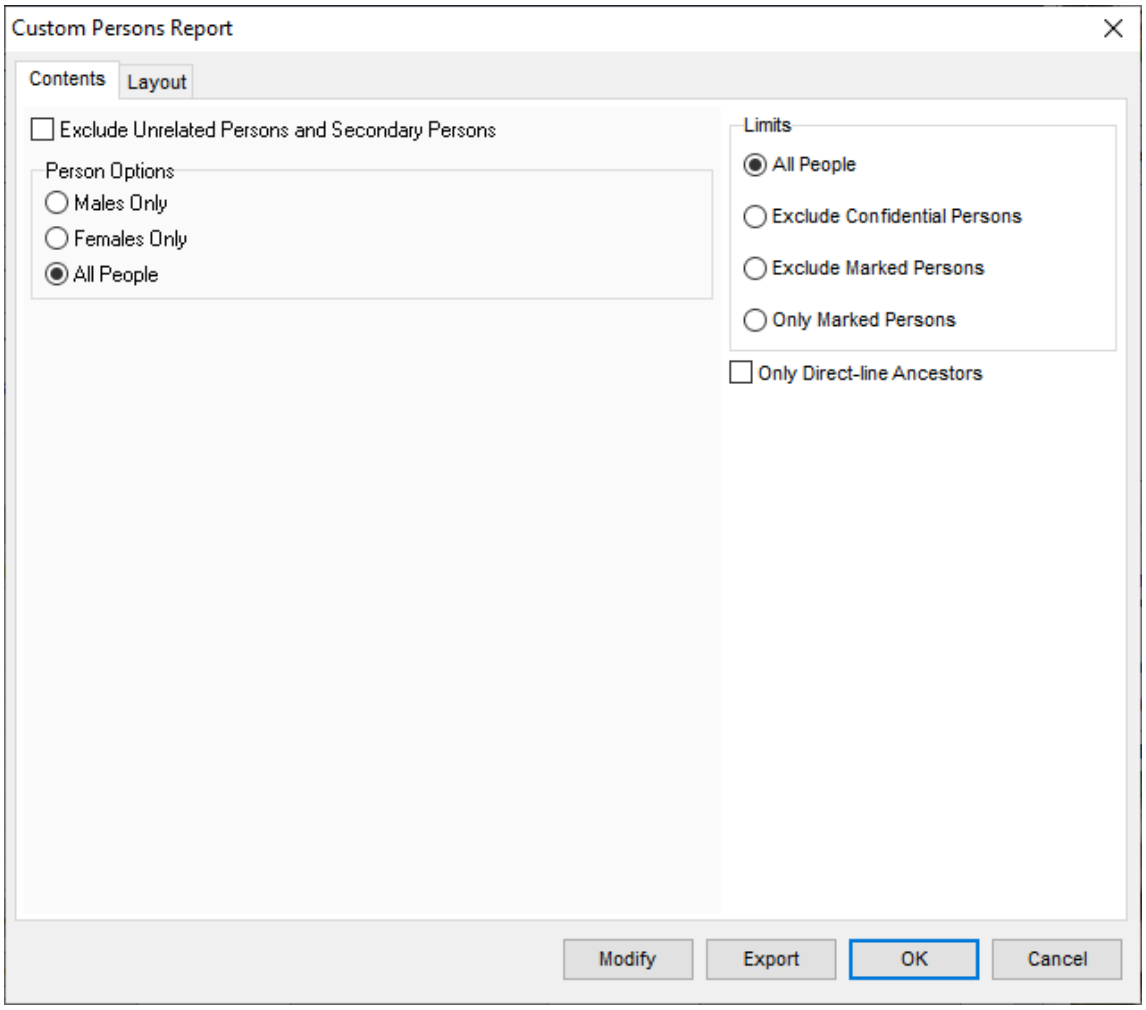
You can compose several types of custom reports: **Persons**, **Ancestors** or **Descendants**.

Click on the **Reports** menu to access the various editions offered by Heredis. Choose the type of list **(Ancestors, Descendants, Persons)** and then click **Custom Report…**
All selected settings will be memorized and offered by default when you'll next open the same type of report.

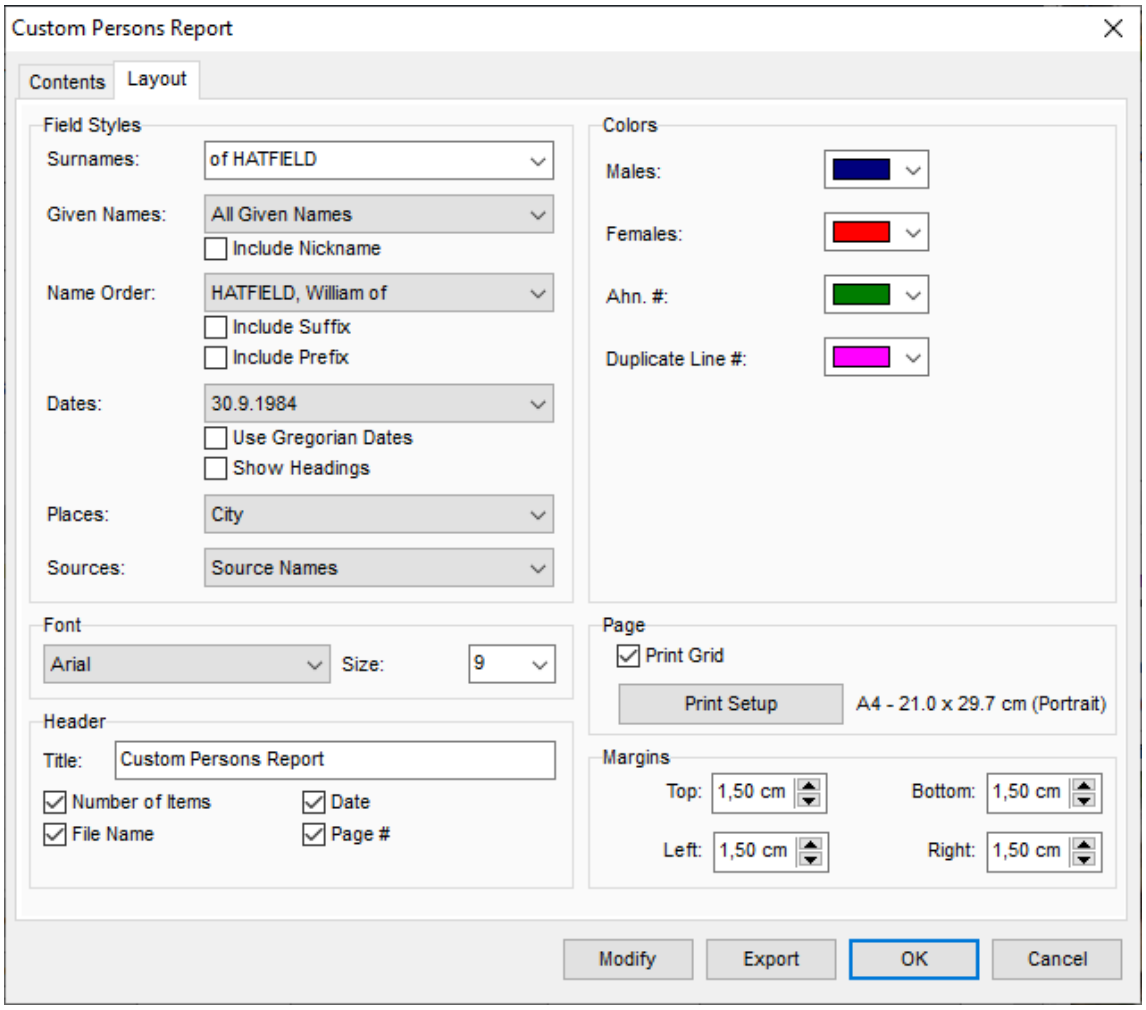
All **Ancestors** or **Descendants** custom reports will be built from the primary person displayed.

- Choose list settings for **Contents** and **Layout** in tabs of the same name.

Contents tab


Custom Persons Report
Contents
Layout
Exclude Unrelated Persons and Secondary Persons
Person Options
Males Only
Females Only
All People
Limits
All People
Exclude Confidential Persons
Exclude Marked Persons
Only Marked Persons
Only Direct-line Ancestors
Modify
Export
OK
Cancel

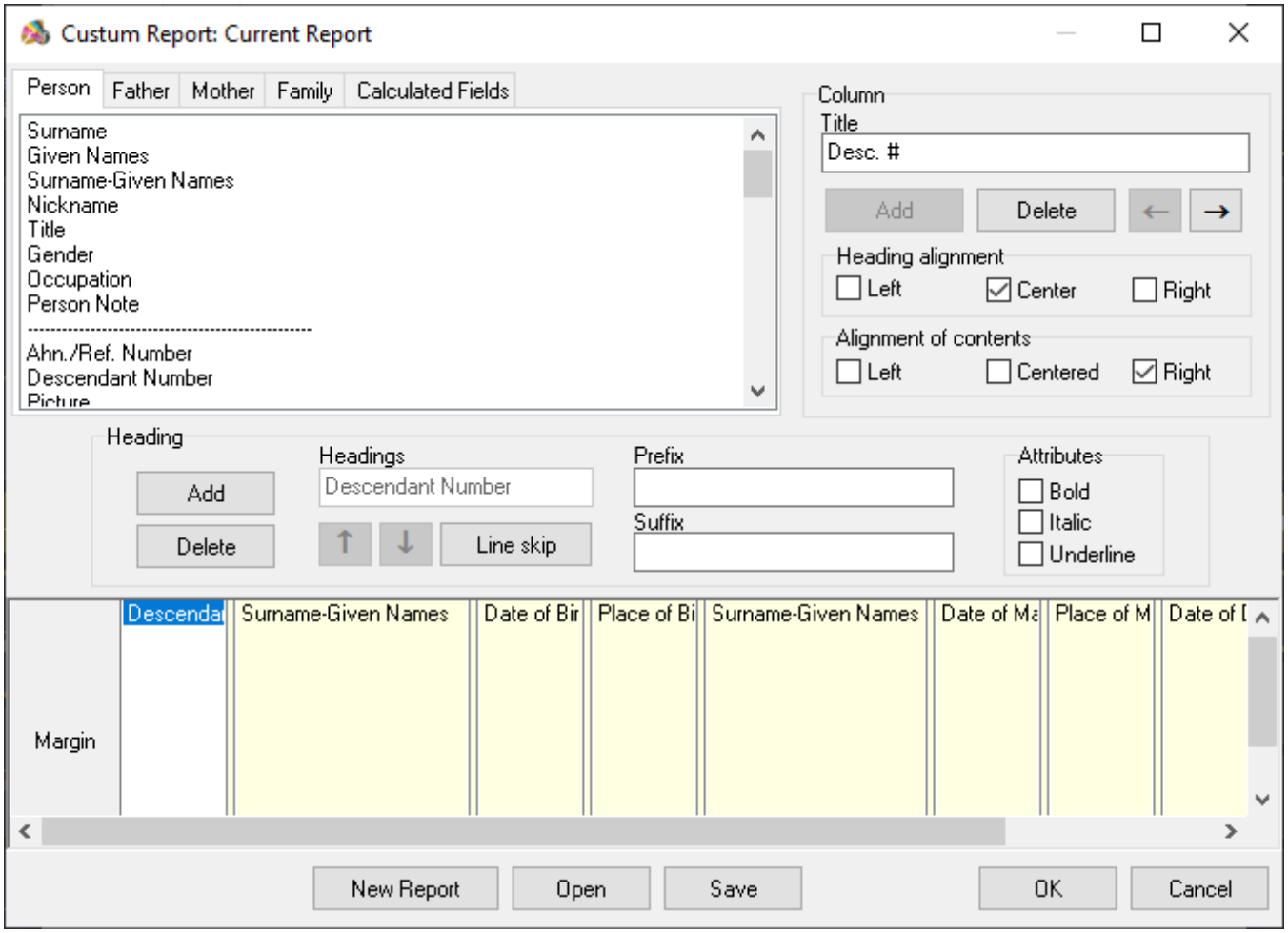
Layout tab



- Click the **Modify** button to change the default report or create your own report.

To build a custom report, you have the following:

- **Columns:** You can build your report with as many columns as you like, assign them a width, a title, and include the fields you want in each column. It is possible to insert or remove columns.
- **Fields:** Most of the fields in the **Data> Personal Data** screen are usable, as well as certain calculated fields (age at death, number of children, etc.).
- **The layout of the columns:** Each of the fields you put on the report can be shaped (attributes, alignment, etc.).
  You can also assign a **suffix** and a **prefix** to each selected field.



When you first open a custom report, Heredis displays a default report that you can use as is or change.

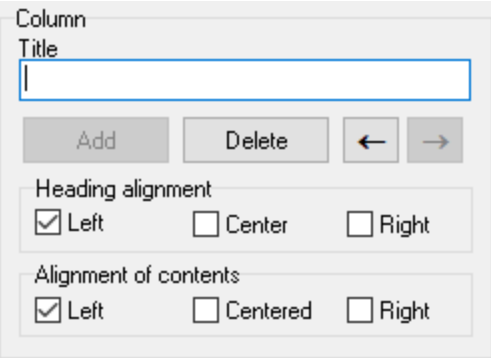
Custom reports as you have drawn them can be saved and recalled for future use. For example, you can create several themes for each type of reports (persons, ancestors, descendants).
The custom report offered by clicking on the **New Report** button is fully composed by you.

Columns

Add columns

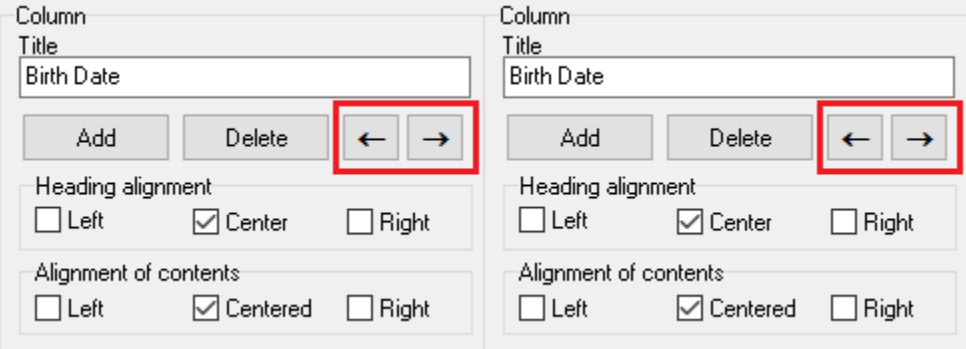
The lower area of the window allows the columns to be displayed. It represents the useful width of the page. The columns are divided between the two margins in the same proportions as on the screen regardless of the print format chosen (portrait or landscape).
You can create up to 32 columns within the space available for printing.

- Click the **Add** button in the **Column** area to create the number of columns you need for the report to build.



Swap columns

- Click in the column to move.
- Click the **Left arrow** or **Right arrow** button until the column has reached the desired location.



Delete a column

- Click in the column to select it.
- Click the **Delete** button in the **Column** area.

Give a column a title

- Click in the column to select it.
- Type in the title chosen for the selected column in the **Title** input area.
- Include the alignment chosen for the column title by checking the **Left, Centered** or **Right** boxes.
- Also indicate the alignment chosen for the contents that will be contained in this column.

Change the width of the columns

Position the mouse on the right edge of the column you want to enlarge or reduce.

- The cursor then turns into a double arrow.
- Hold the left button on the mouse.

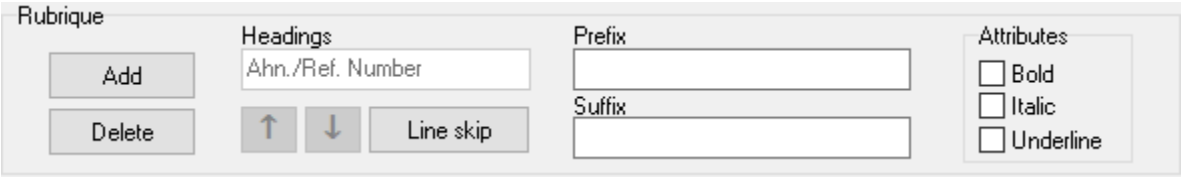
- Move the right edge of the column to reach the desired width.

Fields

Position the fields in the columns

Depending on the type of information to be placed in the column, click on one of the tabs containing the data for the person, his/her father, his/her mother, his/her unions, or the calculated data.

- Choose on the list of fields on the one you want to set up and click on it.
- Click the **Add** button in the **Field** area to fit into the selected column.
  or Double-click on the name of the field in the list to fit into the selected column.
- Include for the added field any formatting attributes to apply to it by checking the **Bold, Italic** or **Underline** boxes.



The fields will be presented side by side in the edited document unless you have inserted a line break.
To spread the fields across different lines in the same column:

- Select the field.
- Click the **Line Skip** button.

The total number of fields and line breaks is limited to 32 per column. For delete and move options, line breaks should be treated as fields.
To switch the order of fields on the same line or within a column:

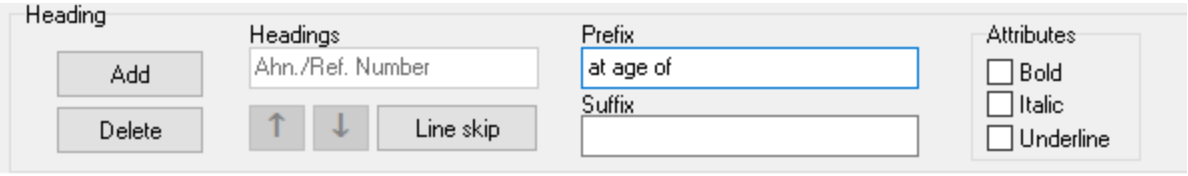
- Select the field to move.
- Click the **Up** or **Down** Arrow button until the field has reached its new location.

Delete a field in a column

- Select the field to remove.
- Click the **Delete** button in the **Field** area.

Add a suffix or prefix to a field

- Select the field to edit in the column.
- Click in the **Prefix** area and then type in the prefix to be applied to this field.
- Position yourself in the **Suffix** area and then type the suffix to apply to this field.



For example, to indicate the age at death of a person:

- Select **Ageat Death** in the column.
- Click in the **Prefix**box, type “at the age of”.
- Click in the **Suffix** box, type the word “years.”

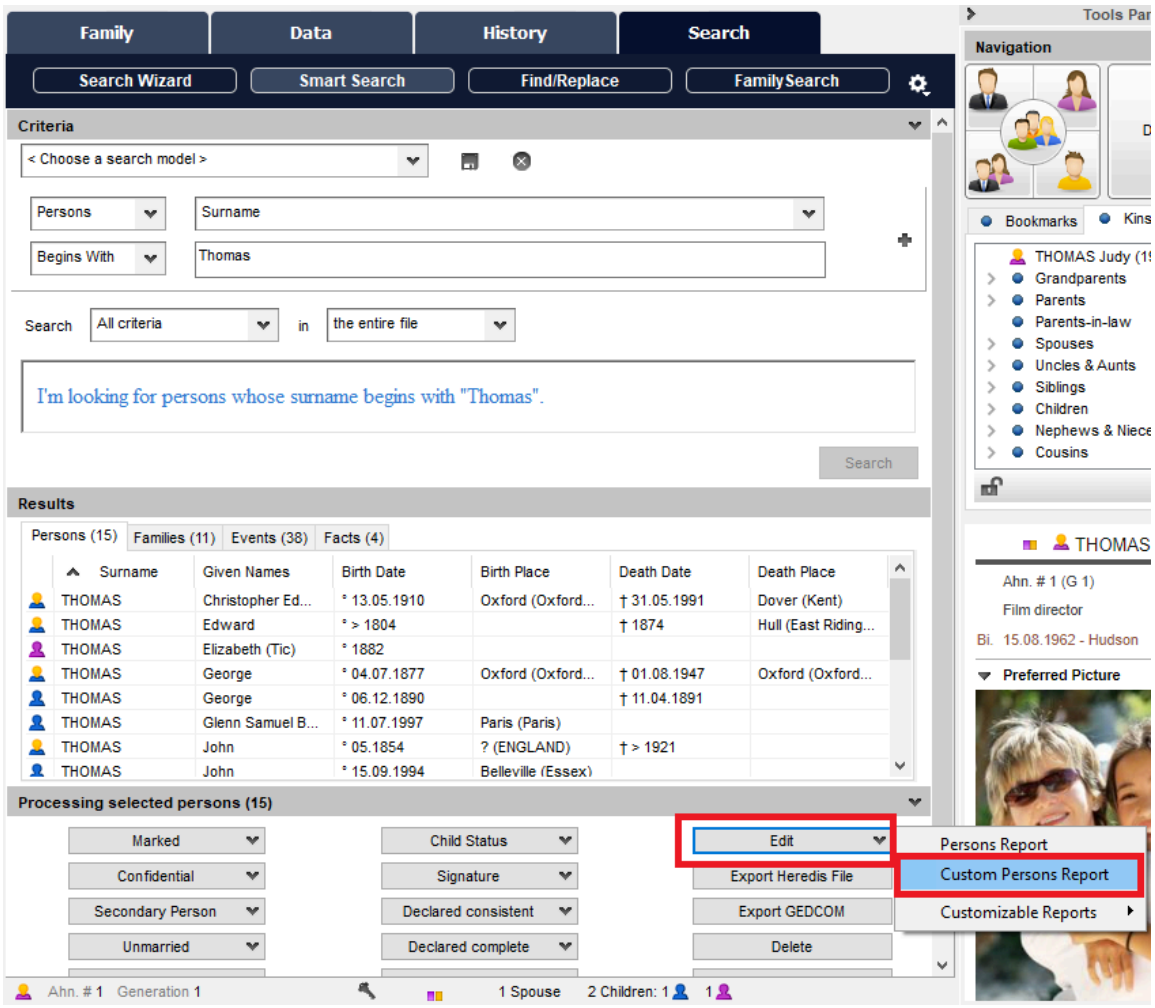
You will thus get the mention: at the age of < age at the death > years.

Create a Custom Persons Report from Smart Search.

It is also possible to edit the result of a selection obtained with **Smart Search** as a personalized list.

Search for one or more criteria from the **Search** > **Smart Search** Tab. Check out Smart Search article for more details.

- Click the **Edit** button in the results processing area.
- Select **Custom Persons Report.**



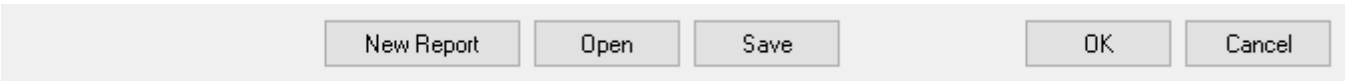
Save a Custom Report layout

Change an existing report

Each time the same custom report (persons, ancestors or descendants) changes to the construction of the reports, it is memorized.
To create a custom report theme with the layout you've set:

- Click the **Save** button.
- Name the custom list theme you're creating. He'll wear a .hp18 extension.
- Heredis records this theme in the *Documents* folder – *BSD Concept – Heredis – Heredis Custom Reports.*

This theme can then be called and used in any type of custom report.



Create a new custom report

To create a new blank list theme:

- Click the **New Report** button to access a new blank list, to be completed with the desired fields and columns. The number of columns proposed by default is 4.

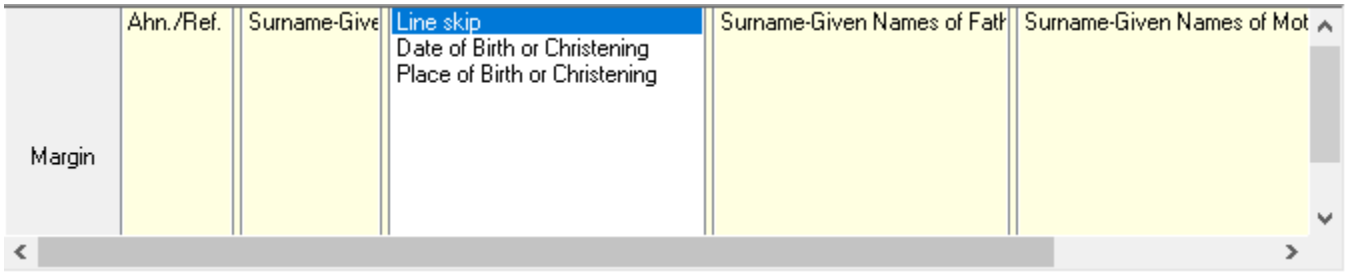
Open a custom report theme already registered

To recall all the custom report themes you've created:

- Click the **Open** button.
- Select the existing theme to reuse. Custom report themes have a .hp18 extension.

This theme will appear on the screen for use or modification and will be the list theme that will open by default when the next request of the same type of list is set.

Launch the edition of the custom report



- Click the **OK** button to validate the layout of the built list.
- Click the **Cancel** button to return to the setting screen without changing the custom report theme used.
- Click the **OK** button on the setting screen to launch the text processor that will display the custom report.

Alphabetical Report - 15 items - 04/08/2020 - File Sample_Family_File - page 1

Ahn. #	Birth Date	Name	Father	Mother
4	THOMAS, Christopher Edward	13.5.1910 Oxford	THOMAS, George	DAVIS, Violet Elizabeth
32	THOMAS, Edward	> 1804		
	THOMAS, Elizabeth (Tic)	1882	THOMAS, John	BORK, Jeanne von
8	THOMAS, George	4.7.1877 Oxford	THOMAS, John	
	THOMAS, George	6.12.1890	THOMAS, John	BORK, Jeanne von
	THOMAS, Glenn Samuel Bruce	11.7.1997 Paris	THOMAS, Paul	CARFAX, Mary
16	THOMAS, John	5.1854 ?	THOMAS, Edward	DOBNEY, Anna
	THOMAS, John	15.9.1994 Belleville	THOMAS, Peter	WATSON, Kristen
1	THOMAS, Judy	15.8.1962 Hudson	THOMAS, Michael George	GREGSON, Vivian
	THOMAS, Kate Elsie	24.6.1941 Margate	THOMAS, Christopher Edward	RUCASTLE, Alice Jean
	THOMAS, Marion	1900	THOMAS, George	DAVIS, Violet Elizabeth
2	THOMAS, Michael George	6.2.1933 Margate	THOMAS, Christopher Edward	RUCASTLE, Alice Jean
	THOMAS, Paul	1883	THOMAS, John	BORK, Jeanne von
	THOMAS, Paul	10.10.1960 Hudson	THOMAS, Michael George	GREGSON, Vivian
	THOMAS, Peter	3.12.1956 Hudson	THOMAS, Michael George	GREGSON, Vivian

Export the contents of a custom report

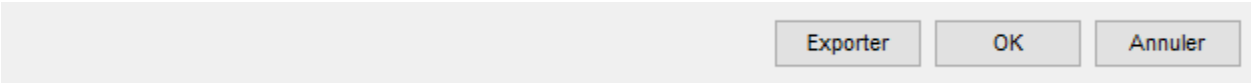
- Click the **Export** button in the setting screen to export the data in the custom report to Plain Text Files (.txt).

This data can then be used in a database, spreadsheet or word processor.

Exporting documents

The various documents, lists or sheets, are exportable in text format (.txt).
Click the **Export** button to create a .txt document or click on **OK** to create a .rtf document. Give the new document a name and specify its location before registering it.

Then open this document in any type of adapted software: word processing, spreadsheet…



Then once open with your word processing software or text reader software you can save, modify … the document becomes independant of Heredis.

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

Personal Timeline

Since Heredis 2026, the **History** tab has been enhanced with a personal timeline.

Click on the **History tab > Personal Timeline** to display the lifeline of the primary person.

Zoom

As with the wheels in the **Graphs** tab, you can zoom in and out.

Click on the + to zoom in.
Click on the – to zoom out.
The target button resets the setting to the default zoom.

Vertical and horizontal scrollbars appear according to zoom level.

The display

Heredis displays the image, given and surname of the primary person and, if he or she is a direct descendant, his or her Ahnentafel number and generation.

A lifeline appears. It’s blue for men, pink for women, and green for people of indeterminate gender.

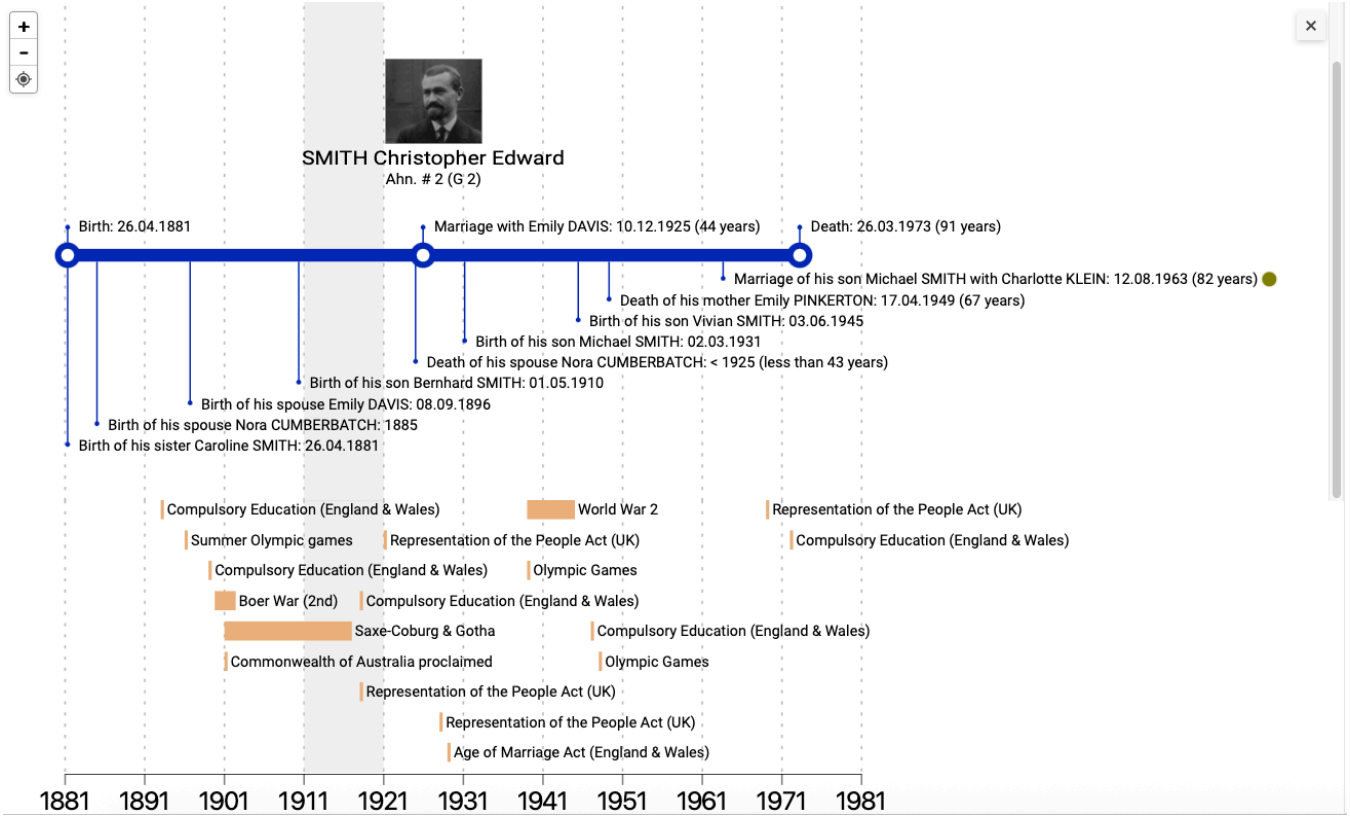
On this line, you can see the events in his life above the line. They are marked by a circle on the line.
Crossed events, i.e. those of close relatives, are displayed below the line.

Note: Obviously, if the events or personal facts you have entered are not dated, they cannot be placed on the timeline.

By default, the lower part of the window shows the historical events that took place during his lifetime.

Later in this article, you’ll see how to set the display parameters.

Everything appears in relation to a time scale.



Options

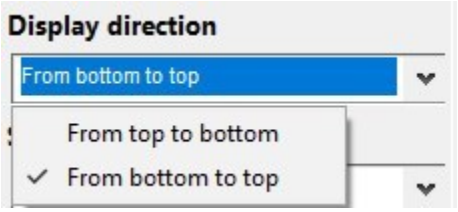
The options panel can be displayed or hidden.

Click on the cross ✖ to fold up.

Click on the burger button ☰ to unfold.

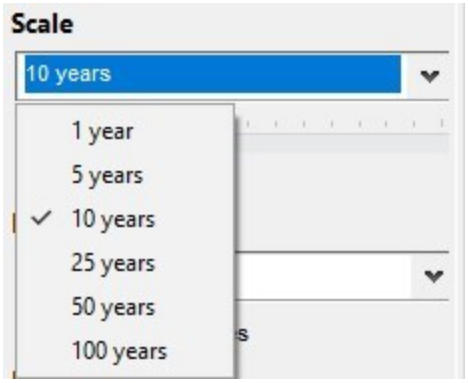
Display direction

By default, the time scale is located below the lifeline, after the historical facts if you are displaying them.
You can reverse the direction to display from top to bottom.
Click on the drop-down menu and choose the direction best suited to your use.

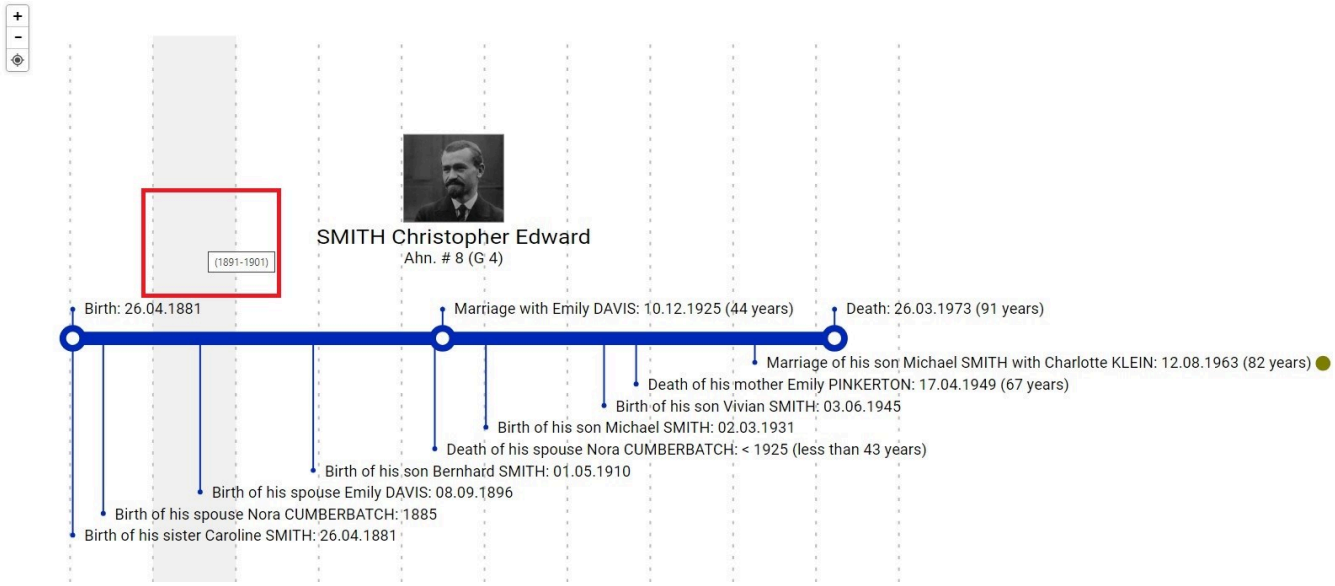


The scale

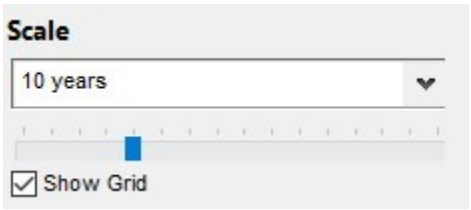
Modify the scale to obtain a time range more suited to your needs. You can choose between 1 year and 100 years.



According to your choice, the period grid, symbolized by dotted lines, adapts. Move your mouse between two dotted lines on the timeline to see the period in question in a tooltip.



Stretch the time scale to improve legibility. Use the slider under the scale drop-down menu.

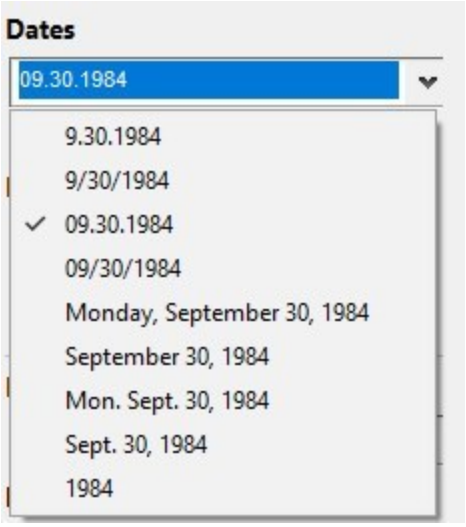


Tip: Remember to fold the work and search panels to the side if you have a small screen.

Finally, uncheck the **Show grid** box to stop seeing the dotted lines.

Date format

Click on the drop-down menu to choose your preferred date format.



Check the **Date in Gregorian** box to have Heredis automatically convert the dates entered into another calendar. This makes it easier to understand for people to whom you may be sending the timeline and who may not be familiar with the intricacies of the calendar.

The chosen format is applied to the dates of individual and crossed events, as well as to the dates of historical facts if you decide to display them (see below).

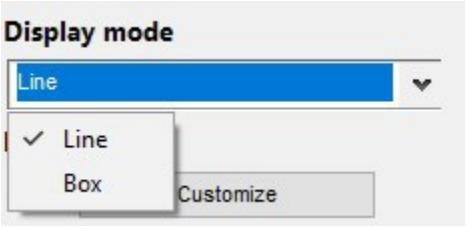
Data to be displayed

Choose whether or not to display (by unchecking the box):

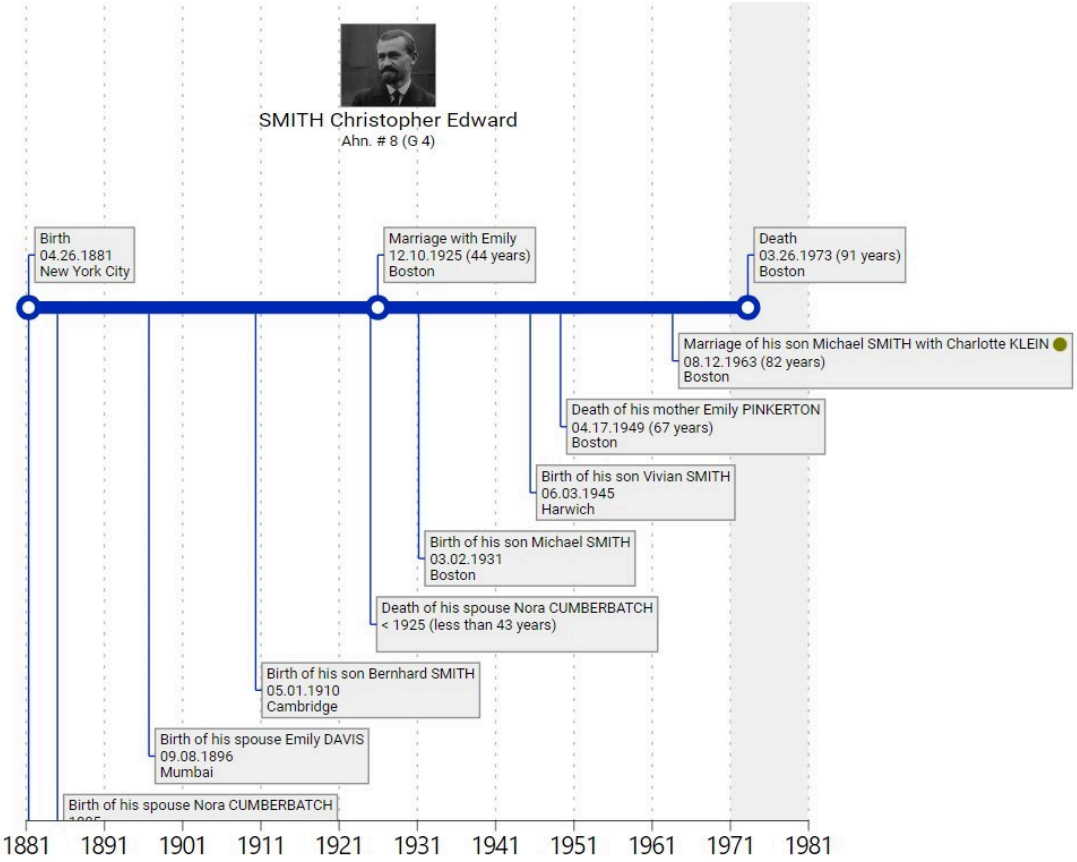
- the **numbers** (Ahnentafel and/or personal) of the primary person
- **ages** at the event
- main **images** of the person and events in Box mode.

Display mode

Click on the drop-down menu to choose whether to display events in **Line** or **Box** mode.



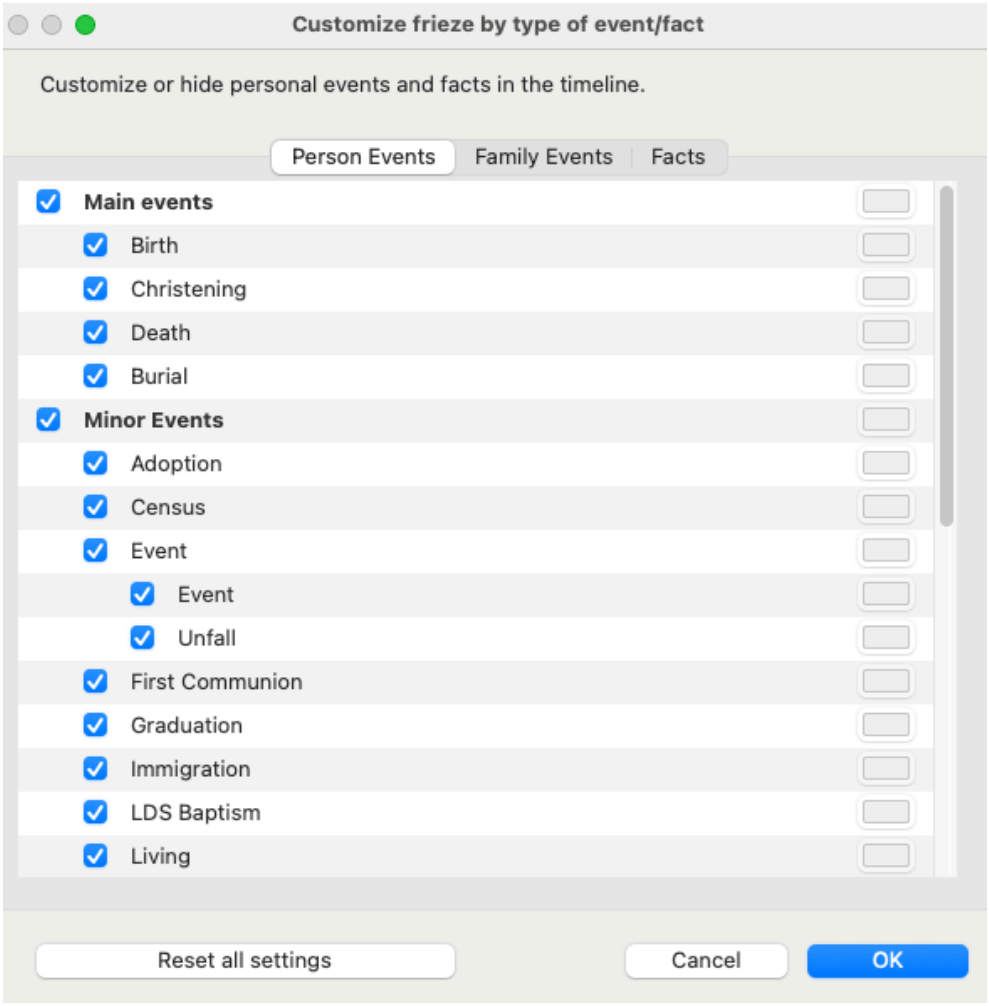
The box display is larger, but allows you to view the main event image if you've set one up.



The events

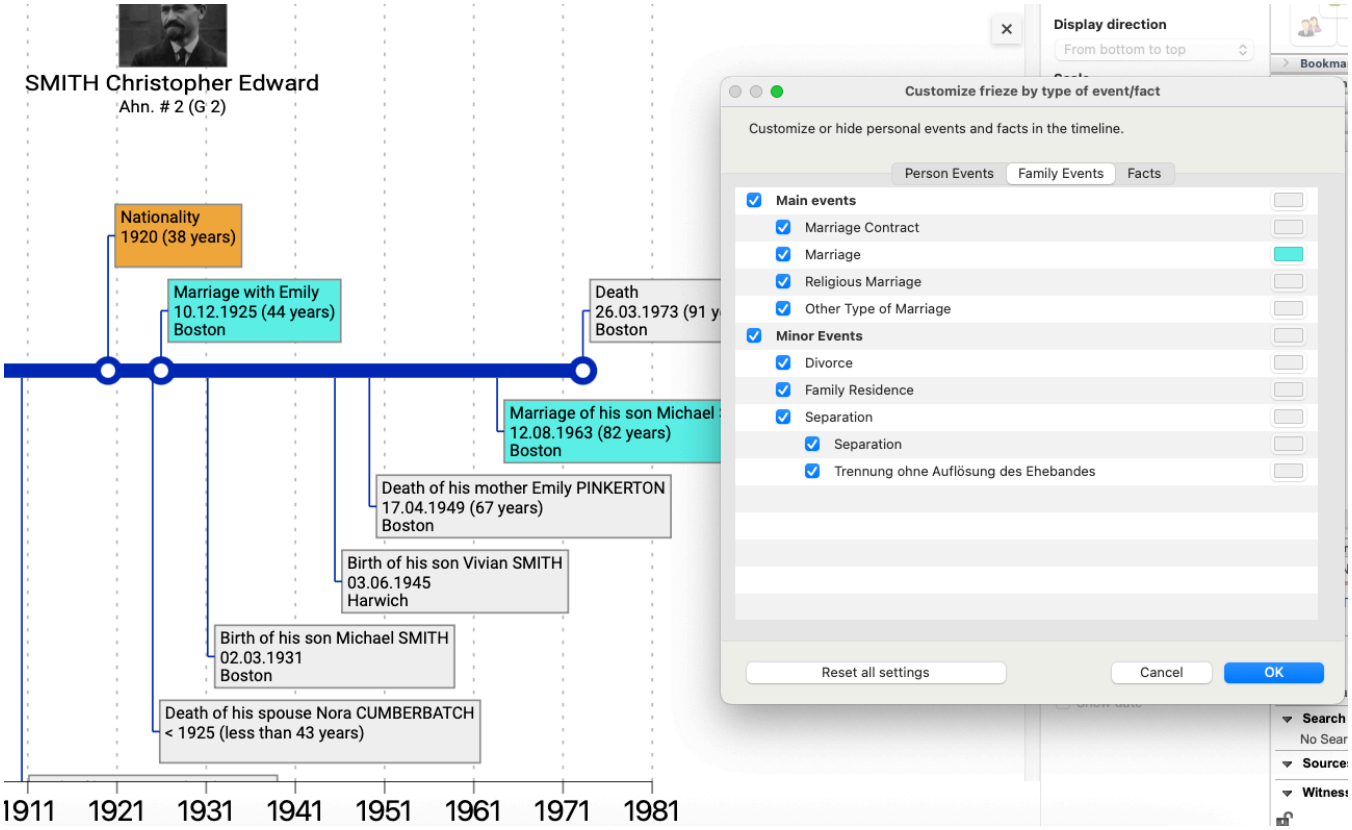
The **Cross Events** box, if checked, displays the events of the primary person's relatives. Uncheck the box to stop them appearing.

The **Customize** button lets you choose which events you want to display and which you don't. In **Box** mode, you can also assign a color to each event type.
Click on **Customize** to open the settings window.



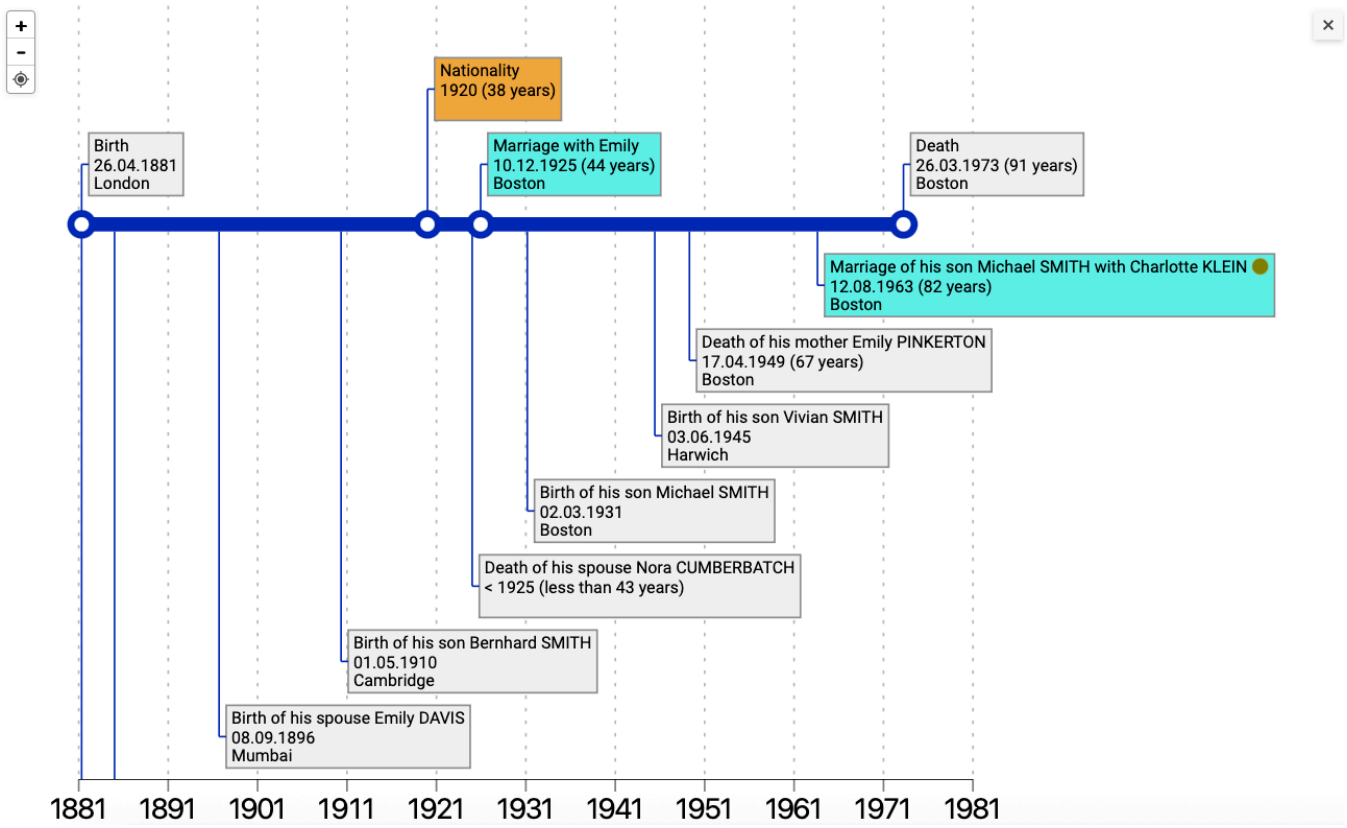
3 tabs are available to display or not the :

- **Person Events**. This tab lets you manage personal events by event type
- **Family Events**. This tab lets you manage the primary person's union events by event type
- **Facts**. This tab lets you manage dated personal facts.



Note: On Windows, validate the window for changes to take effect.

Uncheck the events you do not wish to see on the timeline.
Click on the grey rectangle to assign a color to this personal event or item.



These choices apply if the event exists for the primary person or someone close to him/her (cross-event).

To refine the display of events, you can use event flags.

Event flags

Since Heredis 2025, you can assign personalized flags to events. See the Personalized flags (see page 188) article for more information.

The personal timeline allows you to choose whether or not to display events to which you have attached personalized flags.
Click on the drop-down menu to view only events with flags, only events with a flag, or events without flags.

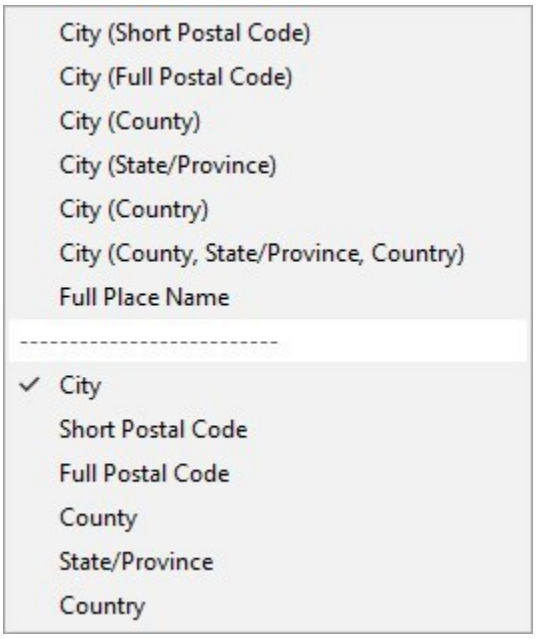
Uncheck the **Show flags** box if you don’t want to see the icons in the box.

The places

In **Box** mode, event places appear. You can choose the format of the places from the drop-

down menu.

Click on the drop-down menu. Select the desired format from the list.



Historical facts

Place your ancestors in the historical context in which they lived.

Check the **Show historical facts** box.
Choose the category of historical facts you wish to display by clicking on the drop-down menu.

If you have customized categories, they will appear.
See the Historical facts index article for all you need to know about adding categories and historical facts.

Click on the button on Windows and on macOS to open the index of historical facts.

Check the **Show date** box to display the date of historical facts on the timeline. The format applied is that chosen for events, to ensure a uniform timeline.

Print an personal timeline

You can also print a personal timeline. It works in the same way as the family timeline.

See Exporting a personal or family timeline or wheel for printing.

Family Timeline: Interface overview

Since Heredis 2026, Family Chronology becomes Family Timeline.

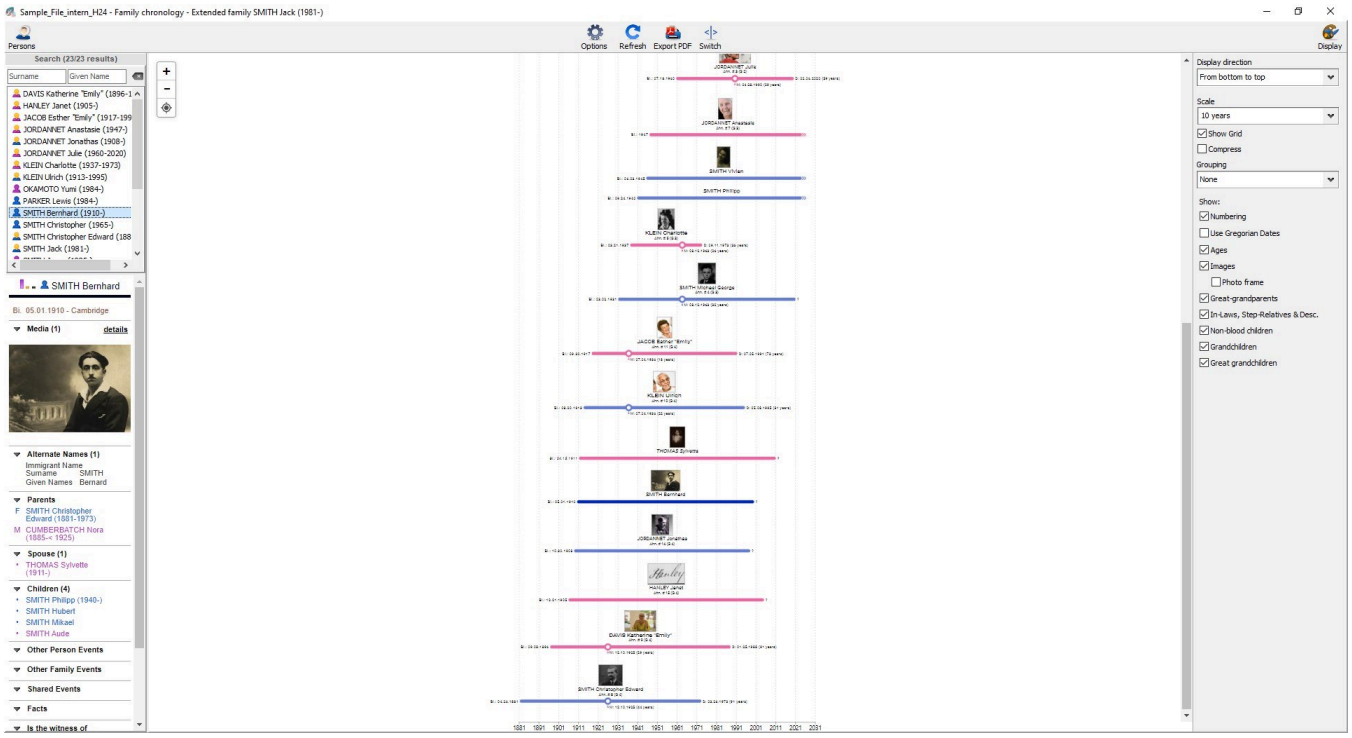
Be it for direct-line ancestors only, or for your extended family, or, as another example, for the primary person's ancestors and descendants, you can:

- chronologically track ancestors
- trace back surnames used across time
- locate ancestors' birthplaces throughout ages

(Windows) To access the Family Timeline feature, click on the **Charts > Family Timeline** menu.

(Mac) To access the Family Timeline feature, click on the **Documents > Family Timeline** menu.

A window will pop open showing various persons on a timeline.



Buttons

Zoom in / Zoom out

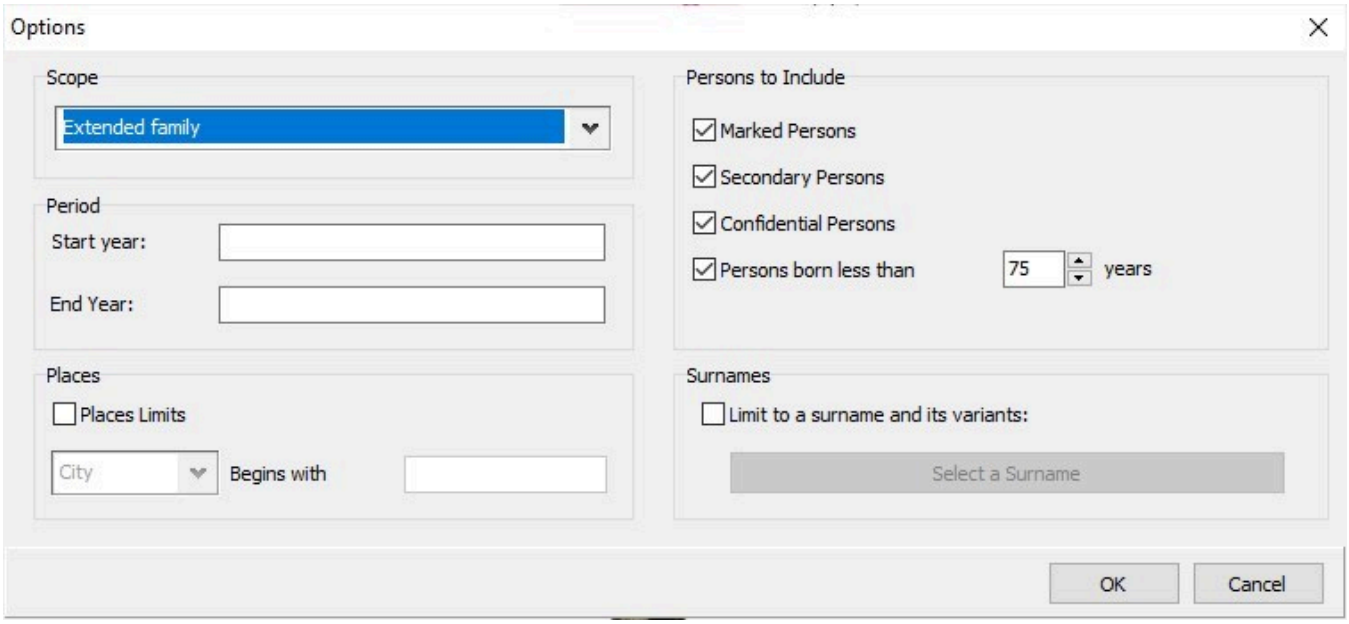
Click on **+** or on **–** to zoom in and out, or use the mouse wheel while holding down the CTRL key. The target button centers the timeline back as it was when first opened.

Refresh

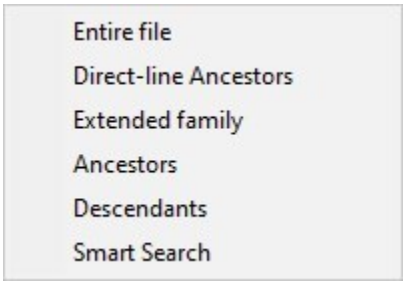
You can leave the window open and continue working on your genealogy. Click the **Refresh** button to update the timeline with new data you have just entered.

Options

The **Options** button allows you to modify the timeline scope.

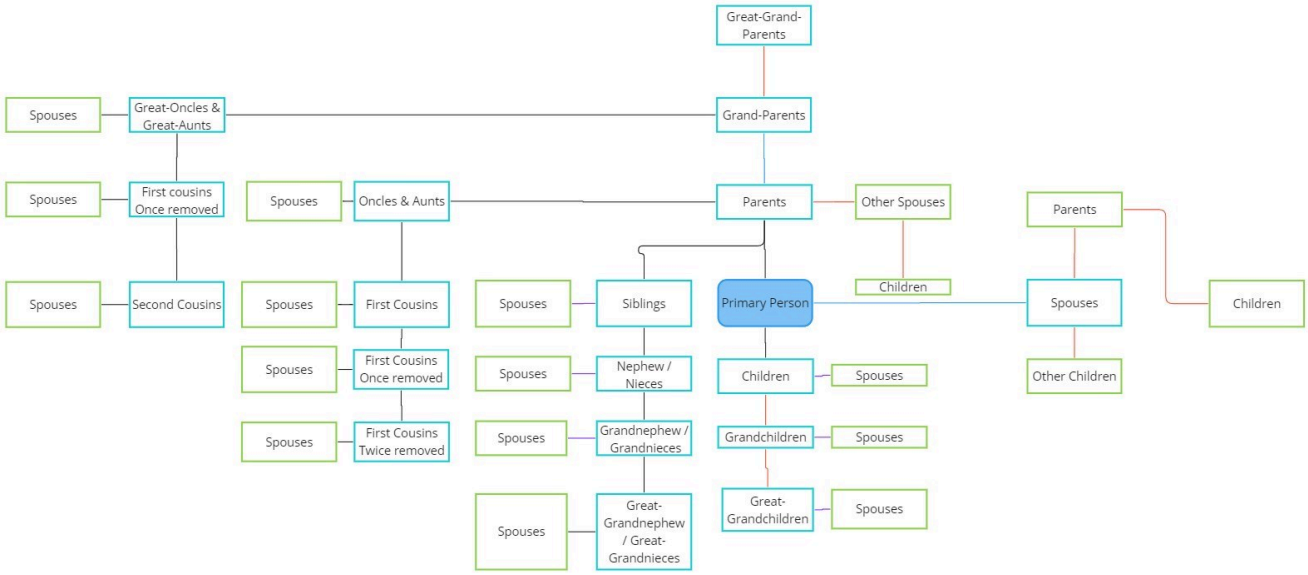


Select to display:



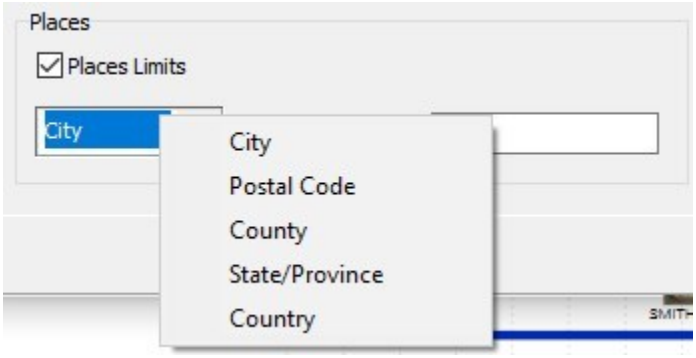
- **Entire file**. If your file includes over 2,000 persons, only the first 2,000 will be displayed for optimal performance.
- **Direct-line Ancestors** will display the root person's ancestors.
- **Extended family** (of the primary person) includes his/her usual family members such as aunts and uncles, cousins, etc. over 3 generations upward and 3 generations downward, as well as in-laws/stepparents and their descendants.
- **Ancestors** or **Descendants** of the primary person.
- Persons found through a **Smart Search** (look up the Family Timeline : Smart Search article for more details).

Extended family diagram

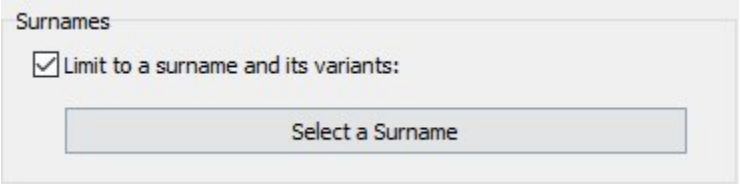


Enter a Start Year and End Year for the **Period** about to be displayed on the timeline.

Limit places according to your selection of administrative division: City, Postal Code, County, State/Province, Country.



Limit to a surname, by clicking on **Select a Surname** then choose desired surname.



Choose to **Include** (or not) Marked, Secondary, Confidential **Persons** and/or “Persons Born Less Than X Years Ago”.

Click **OK** to confirm your choices. The Family Timeline is recalculated to implement your options.

Panel Buttons

There are two side panels to **Search** and **Display** your family timeline.
The **Switch** button lets you swap sides for the Search and Display panels.

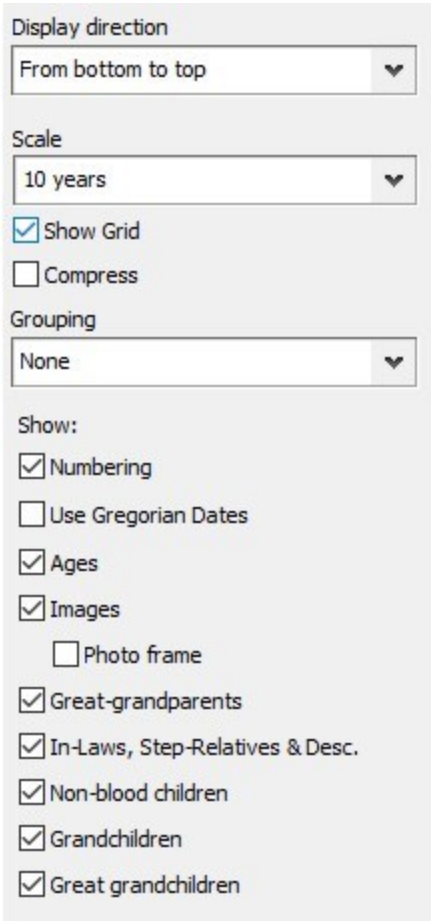
If you need more screen space, you can hide the panels by clicking on the **Display** and **Persons** buttons. Click again to display the panel(s) again.

Export PDF Button

The Export PDF button launches the Export for printing settings window. See Export a personal or family timeline or wheel for printing article.

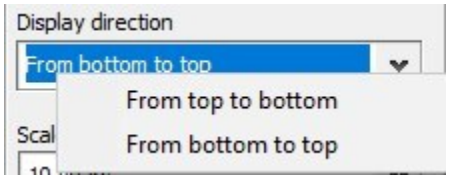
Panels

Display Panel



The **Display** panel allows you to:

- Switch **Display direction: From bottom to top** or **From top to bottom**. You'll display ancestors from the oldest to the youngest or vice-versa.

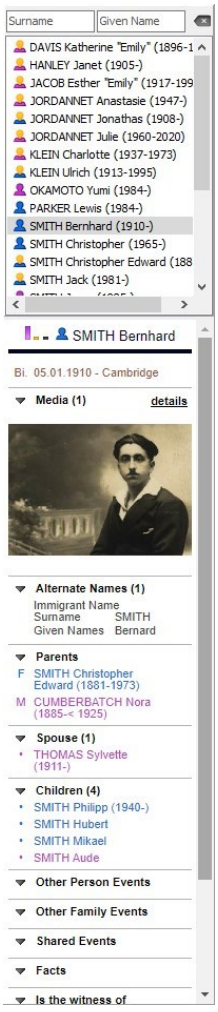


- Modify the time **Scale** from 1 to 100 years. The timeline is recalculated to take into account the scale you selected.

- Check or uncheck **Show Grid** (which helps identify the time period).
  If the grid is displayed, position your mouse between two markers to see the tooltip indicating the time period.
- Check the **Compress** box to save some screen space.
- Create groups, see paragraph on **Grouping**. See Family Timeline: Grouping article.
- Choose the date format to display.
- Display **Ahnentafel** or **User** Numbering according to your Preferences (see Heredis' Preferences (see page 107) article), and **Generation**.
- Display (Use) Gregorian Dates.
- Display Ages at the time of events.
- Display Images (or not) with (or without) a Photo frame.

If you selected the **Extended Family** scope, you are welcome to uncheck the following boxes to choose not to display specific persons related to the primary person: Great-grandparents, In-Laws, Step-Relatives, & Descendants, Non-blood children, Grandchildren, Great-grandchildren.

Person Panel



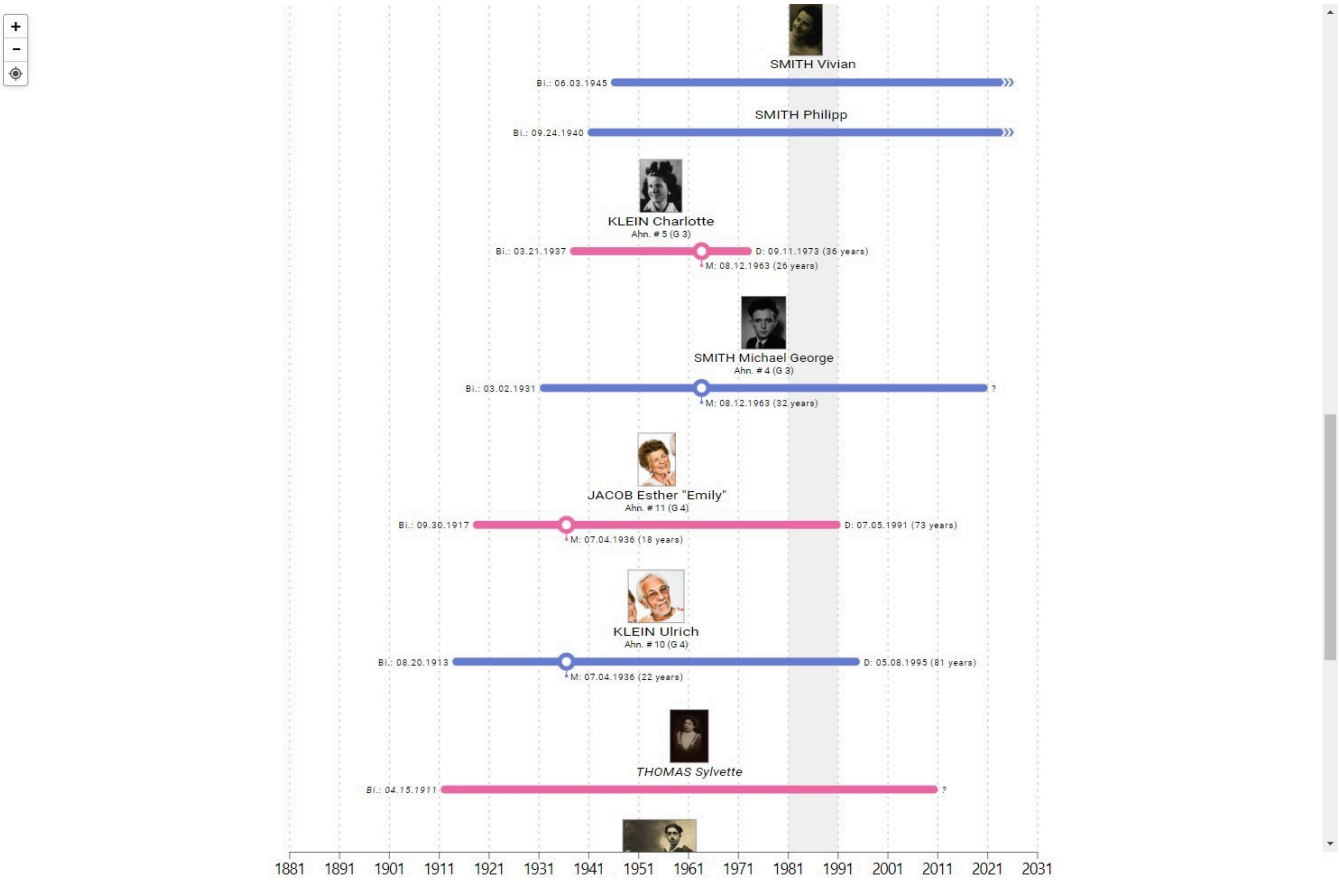
This panel consists of two areas, one for searching through the list of persons included in the timeline, and one for viewing the summary of a selected person.

The **Persons** area allows you to search for a person in the Family Timeline.
Search using surnames and given names. As you enter the first letters of, e.g., the surname, the list will be narrowed down. You may enter the names in full or partially.

Click the **Remove Criteria** or button to go back to the full list of persons.

If you click the name of a person from the list of persons included in the timeline, it will be displayed in a brighter color in the center screen. Likewise, if you click on a person shown in the timeline itself, he or she will be highlighted in the list of persons.
The summary of the selected person – located immediately underneath the list of persons – includes all the data you've entered about him/her.

Center Screen



Major events (birth/baptism, death/burial) are displayed with the corresponding dates at each end of the colored line representing the person's life.
Note: If a person in your file has neither a date of birth nor a date of death, he or she will not appear in the family timeline.

If no death date has been entered and that the person is considered as deceased (i.e. because he/she would be older than the default maximum age indicated in the Heredis' Preferences (see page 107)), then a ? will be displayed.

If the person is considered as alive (i.e. because no death date has been entered and he/she

hasn't reached the default maximum age indicated in the Heredis' Preferences (see page 107)), then a double-chevron icon will be displayed to symbolize the continuation of his/her life.

Families (weddings) are represented by one or more circles on the colored line representing the person's life.

Remember to uncheck the **Ages** box in the Display panel to increase screen space and to better see the dates, if necessary.

See also the articles Family Timeline: Grouping, Family Timeline: Smart search, Export a personal or family timeline or wheel for printing.

Family Timeline: Grouping

Since Heredis 2026, Family Chronology becomes Family Timeline.

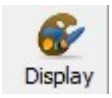
Be it for direct-line ancestors only, or for your extended family, or, as another example, for the primary person's ancestors and descendants, you can:

- chronologically track ancestors
- trace back surnames used across time
- locate ancestors' birthplaces throughout ages

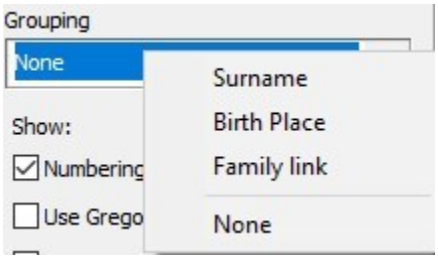
(Windows) To access the Family Timeline feature, click on the **Charts > Family Timeline** menu.
(Mac) To access the Family Timeline feature, click on the **Documents > Family Timeline** menu.

A window will pop open showing various persons on a timeline. To learn more about how the interface works in general, see Family Timeline: Interface overview.

Family Timeline allows you to create groups of persons. This enables you to see how your ancestors' surnames were modified over time as well as where they were located.

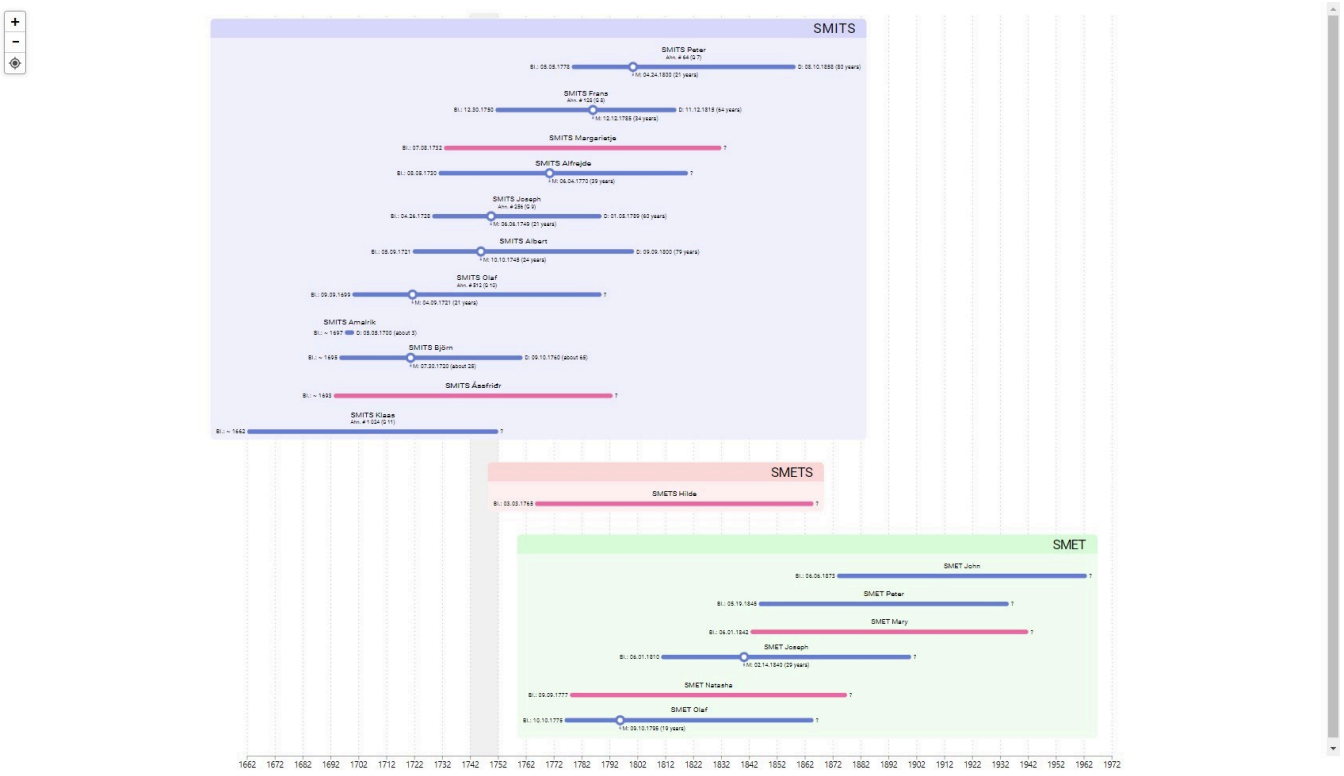
Select the desired grouping in the **Display** 

panel.

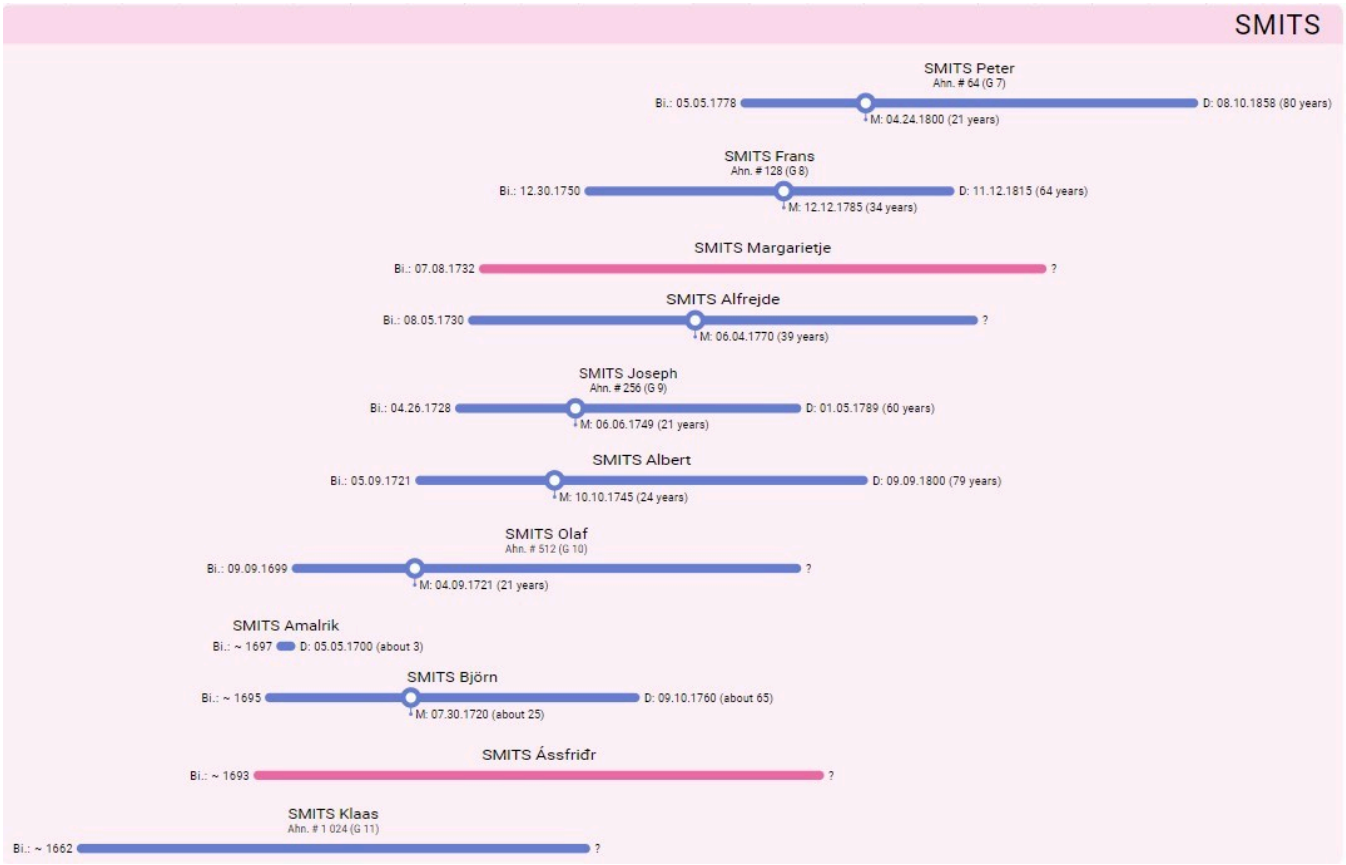


Grouping by Surname

Grouping by **Surname** creates groups of persons bearing the same surname.

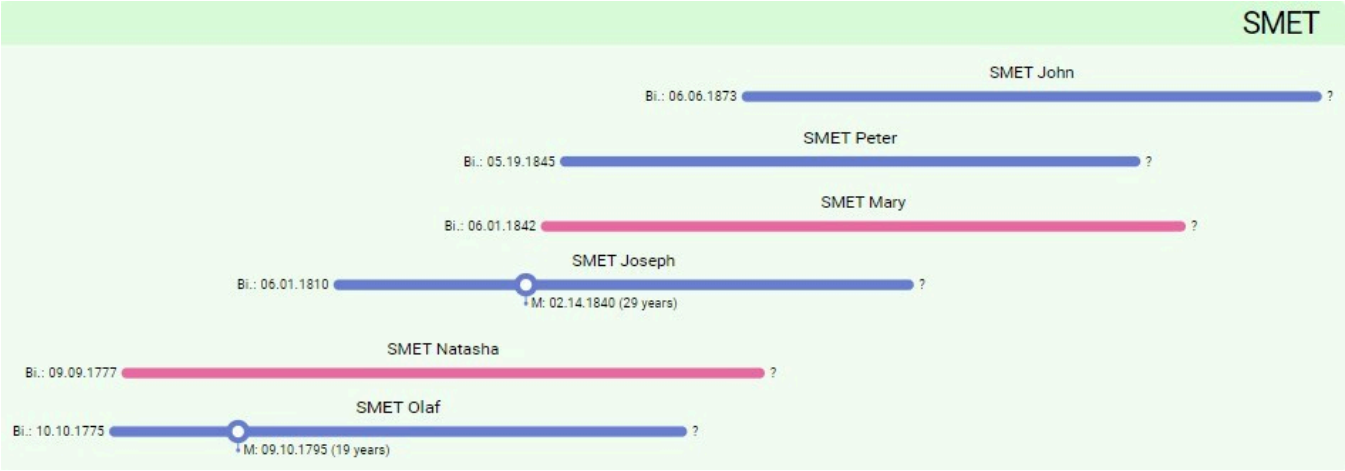


Here we can see that the SMITS surname was used in this family from 1662 to 1858.

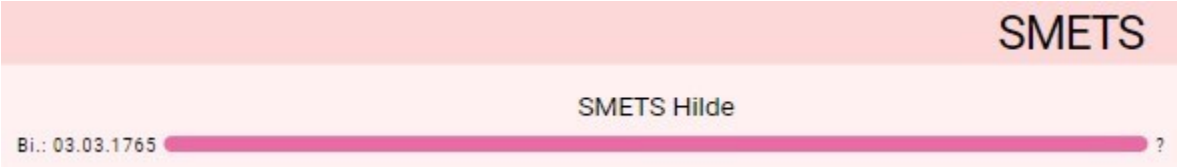


Visualize also the various spellings over time. See here how SMETS was used since 1765 and

SMET since 1775.



We can also see that in the same time period, SMETS with an S at the end was used since 1765.

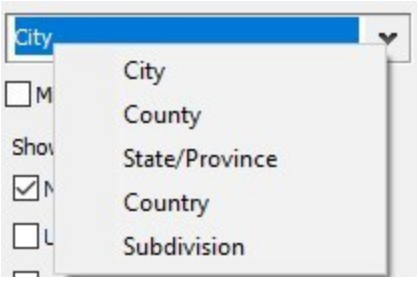


Grouping by Surname thus enables you to visualize the evolution of a surname over time, as well as its use in your genealogy.

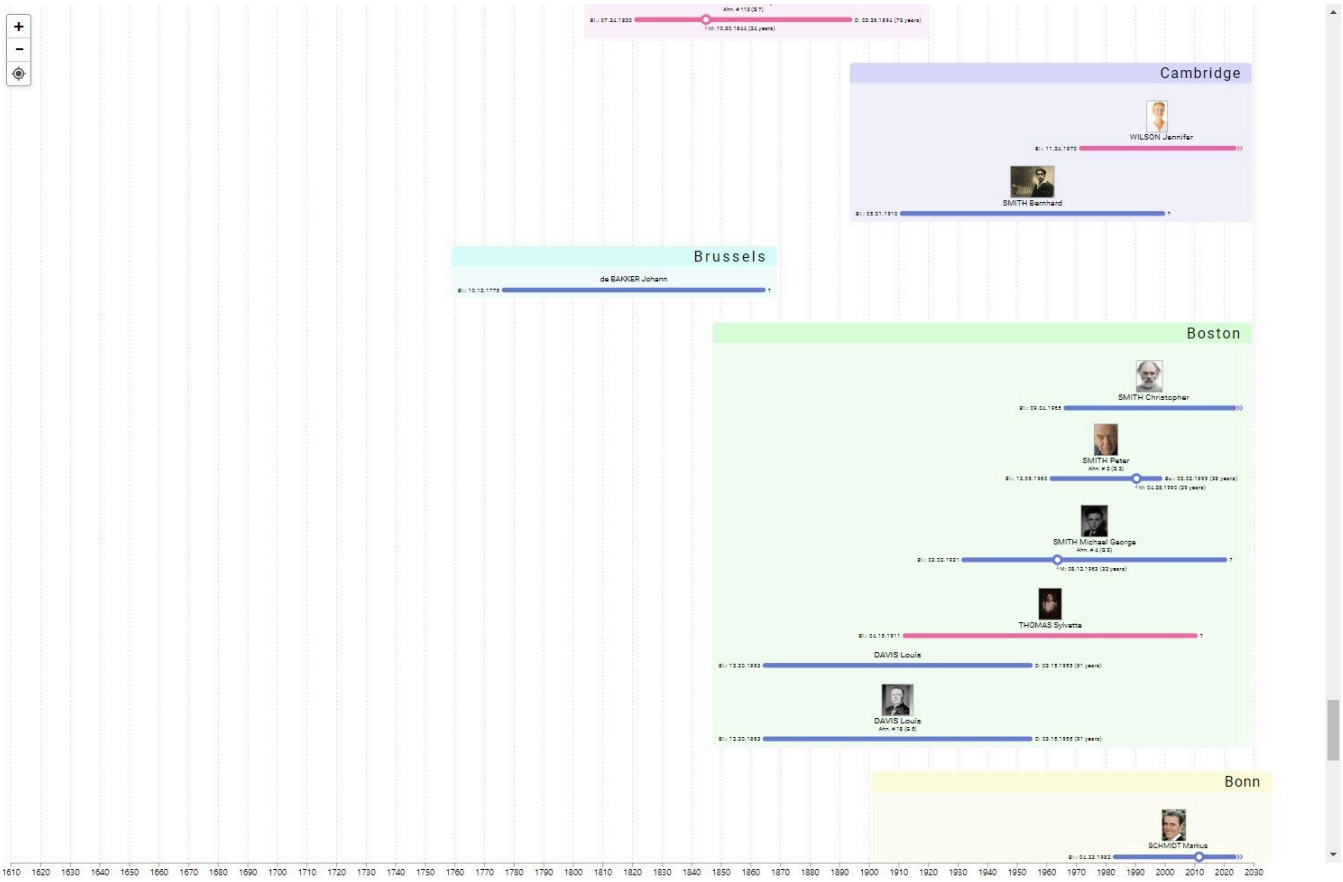
Grouping by Birth Place

Grouping by **Birth Place** creates groups of persons who were born in the same location. Select a filter according to your needs:

- by **city**,
- by **county**,
- by **state/province**,
- by **country**
- or even by **subdivision** if there is any.



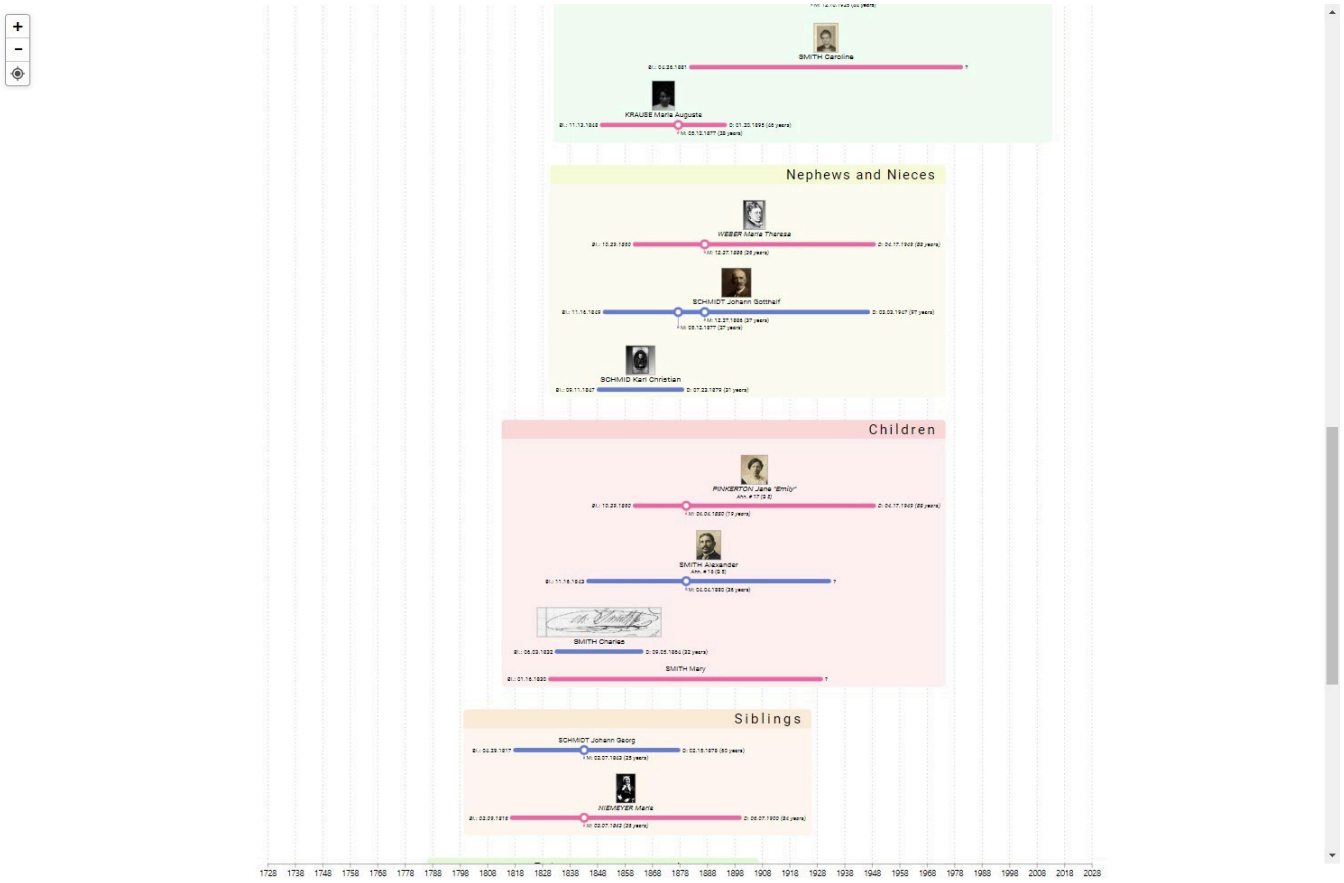
This lets you see where your ancestors lived across time.



Grouping by Family link

Family Timeline is defaulted to open up using the **Extended Family** scope.

If you had changed the scope using the **Options** button, you can change it again. When the **Extended Family** scope is selected, you can select **Grouping** by **Family link**.

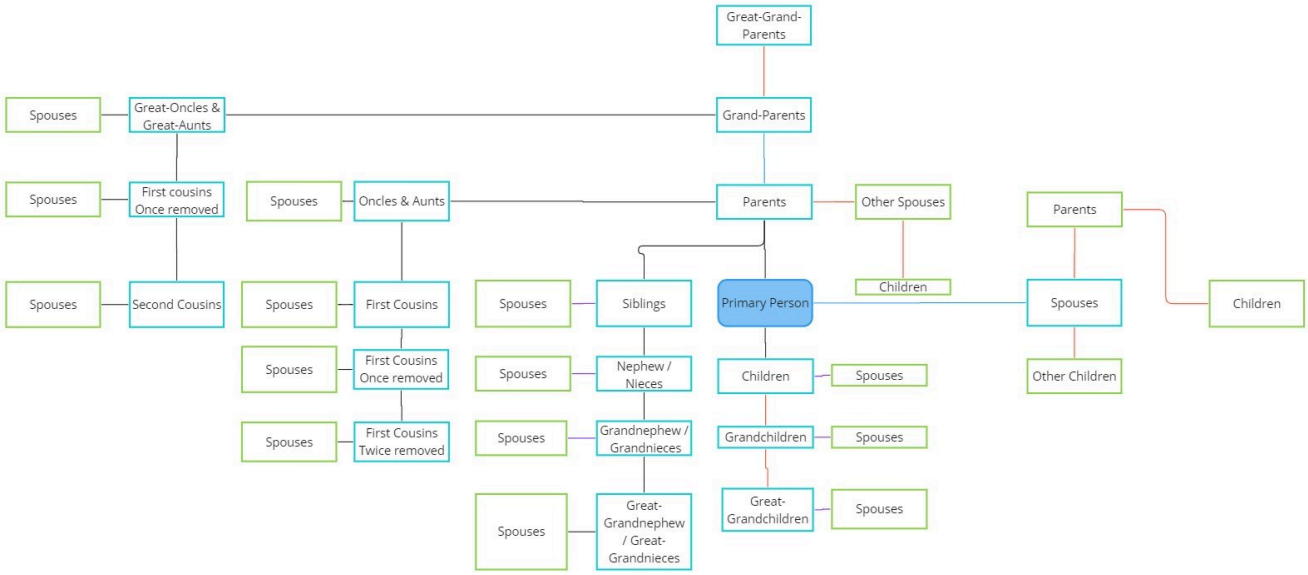


Family Timeline will then display the primary person and his/her:

- spouse(s)
- parents,
- grandparents,
- great-grandparents,
- siblings,
- children,
- grandchildren,
- great-grandchildren,

as well as (if any) his/her:

- uncles and aunts,
- great-uncles and great-aunts,
- nephews and nieces,
- great-grand-nephews,
- first cousins,
- great cousins,
- first cousins once/twice removed,
- second cousins,
- third cousins,
- etc.



In italics, you'll see non-blood relatives such as the spouse's children from a previous marriage, or the second husband of the primary person's mother.

Uncheck the boxes for generations you don't want to display. For example, uncheck Non-blood children to get a better visual of your timeline.

This Grouping feature is really helpful to see the links between the primary person and his/he relatives on a time scale.

See also the articles Family Timeline: Interface overview, Family Timeline: Smart search, Export a personal or family timeline or wheel for printing.

Family Timeline: Smart Search

Since Heredis 2026, Family Chronology becomes Family Timeline.

Be it for direct-line ancestors only, or for your extended family, or, as another example, for the primary person's ancestors and descendants, you can:

- chronologically track ancestors
- trace back surnames used across time
- locate ancestors' birthplaces throughout ages

(Windows) To access the Family Timeline feature, click on the **Charts > Family Timeline** menu.
(Mac) To access the Family Timeline feature, click on the **Documents > Family Timeline** menu.

A window will pop open showing various persons on a timeline. To learn more about how the interface works in general, see Family Timeline: Interface overview.

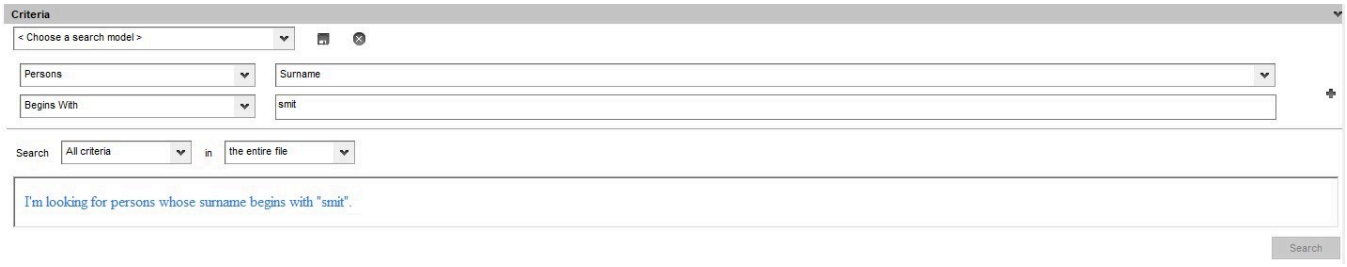
Smart Search enables you to scan your genealogy for persons sharing common criteria, and to manage them as a whole.
Take, for example, all the persons born in the same city, or bearing the same surname.

Run the Smart Search and process the results. See also the Smart Search (see page 371) article.

As the Smart Search is an extremely thorough tool, we'll use just one example here, but many other criteria can be selected.

First example: let's look in the entire file for all the persons bearing the SMIT surname, so as to include only those with this surname in the Family Timeline.

We'll select **Persons > Surname > Begins With** [to make sure we also include the SMITS with an S at the end] > Smit.

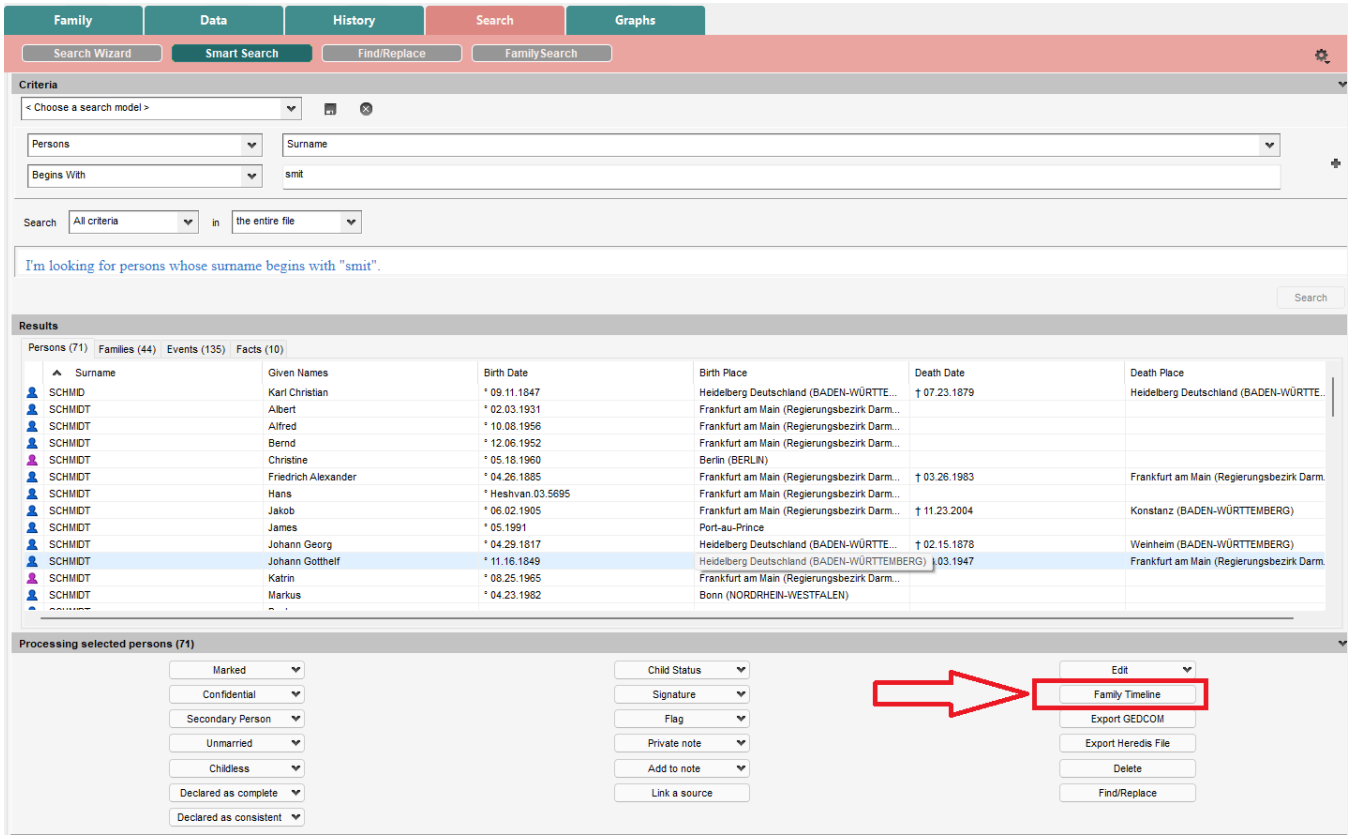


Search **All criteria** in **the entire file**.

The sentence in blue, right below, rephrases your search: "I'm looking for persons whose surname begins with "SMIT". This is indeed what I am looking for.

Click the **Search** button to launch the Smart Search.

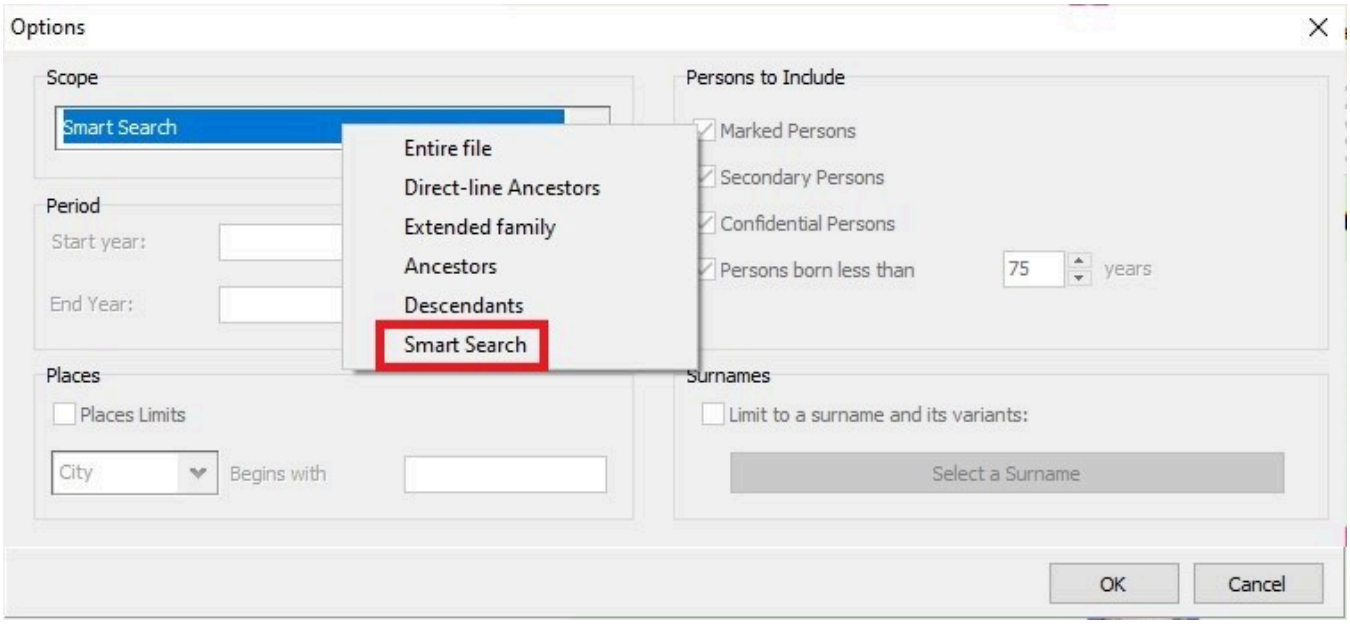
Consult the results, then click on the **Family Chronology** button in the **Processing selected** persons area in order to generate their distribution on the timeline.



A window opens up with the Smart Search results only displayed in the Family Timeline. You can then customize your timeline as described above in **Grouping** and **Interface Overview** articles.

The Family Timeline can also be launched from the **Charts** (Windows) or **Documents** (Mac) menu, as described before.

To generate the Family Timeline with the results of a Smart Search for which results are still available, click on the **Options** button and choose **Smart Search**. Heredis will then display the list of persons resulting from the Smart Search still current under the **Search** tab.



Customize your timeline according to your needs.
You can use any type of Smart Search to generate a Family Timeline.

See also the articles Family Timeline: Interface overview, Family Timeline: Grouping, Export a personal or family timeline or wheel for printing.

Family Timeline: Historical facts

Since Heredis 2026, the family chronology has had a name change. It is now called Family Timeline.

In fact, since Heredis 2026, it has been possible to display historical facts to situate your ancestors in the historical context, making it a real timeline.

Open the family timeline from the **Documents menu > Family timeline** on macOS or the **Trees menu > Family timeline** on Windows.

Basic operation has not changed. See the articles Family Timeline: Interface overview (see page 642), Family Timeline: Groupings, Family Timeline: Smart search and Export a personal or family timeline or wheel for printing.

Place your ancestors in the historical context in which they lived.

Check the **Show historical facts** box.
Choose the category of historical facts you wish to display by clicking on the drop-down menu.

If you have customized categories, they will appear.
See the Historical facts index article for all you need to know about adding categories and historical facts.

Click on the button on Windows and on macOS to open the index of historical facts.

Check the **Show date** box to display the date of historical facts on the timeline. The format applied is that chosen for events, to ensure a uniform timeline.

Export a personal or family timeline or wheel for printing

You can create personal timeline, family timeline and wheels.

See the articles Personal timeline, Family timeline: interface overview, Dynamic ancestrors wheel, Descendants wheel, Mixed wheels, Location wheels (see page 702).

Since Heredis 2026, export options have been enhanced. Export for printing works in the same way for all these functions.

Export for printing

In the **History tab > Personal Timeline**, click on the cogwheel and choose **Export for printing**.

In the **Graphs tab > Wheel** (whichever wheel you choose), click on the cogwheel and select **Export for printing**.

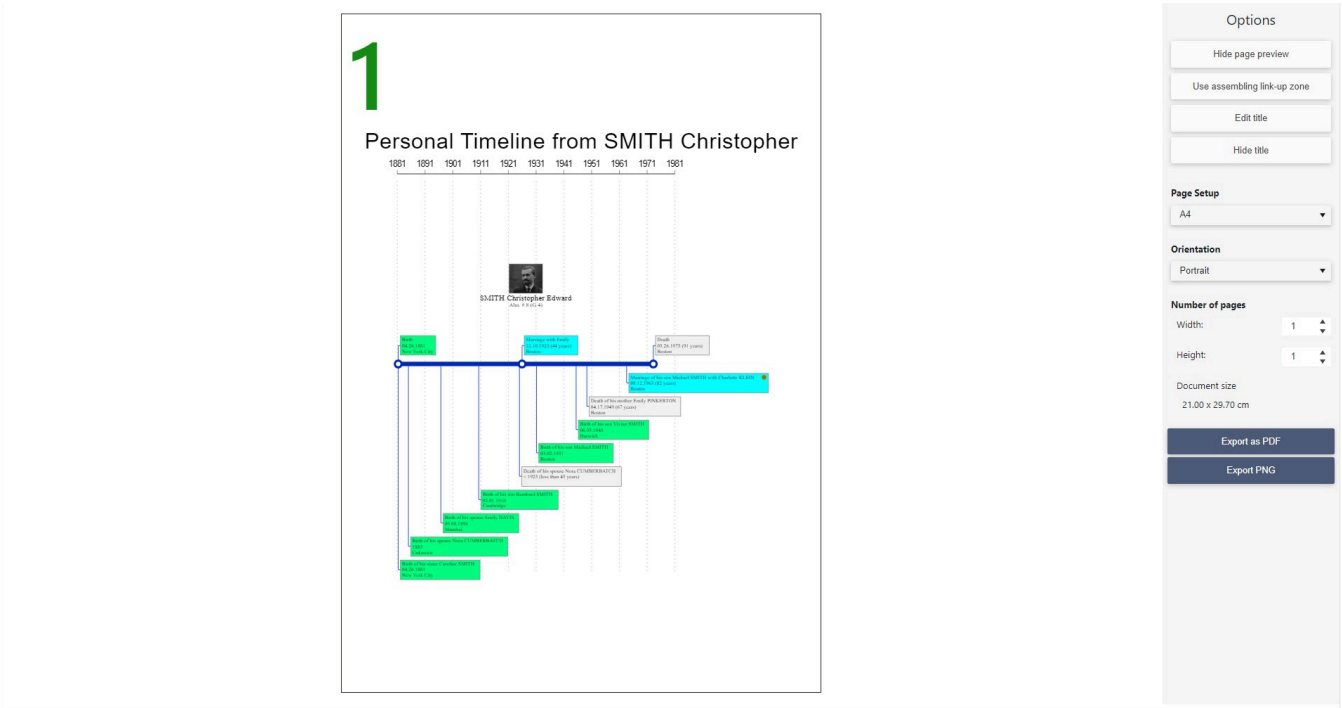
In the **Family timeline**, click on the **Export** button.

The window that opens is the same for all 3 types of representation.

Set export for printing

In the options panel, click on the button

- **Hide pages preview** to avoid displaying the number of pages.
- **Use** or **Delete assembling link-up zone** to have or not have a white band for mounting after printing on several pages.
- **Edit title** to change the default title.
- **Hide title** to hide title.



Choose the print format from the suggested format, or customize if you're having the print job done by a printer with a large roll.

Note: If you're going to print, export as a PDF. The PDF format can go up to 5 meters, so if your tree is larger and your printer has rolls larger than 5 meters, remember to remove the assembling link-up zone.

Select portrait or landscape orientation. Depending on the type of representation, you may want to experiment.

Change the number of pages in height and width. Be careful, this affects the print factor. If you reduce a lot and choose a small format, the result may be illegible.

Tip: before sending this export to a printer or family member, open the file and check that the result is readable at 100% zoom.

Export

Select export format.
Click on the **Export PDF** button to obtain a PDF (non-editable document) and provide it to a printer or send it to a person of your choice. This is the preferred format for printing.

Click on the **Export PNG** button to obtain an image of the performance. You can then add it to a book, for example. Remember to adjust the print format for best quality and legibility.
Note: PNG is an image format, so your export will always be on a single page. Make sure you choose the right format (Quad Demy) and set the number of pages to 1 x 1 for both height and width.

Tree Charts

XXL Family

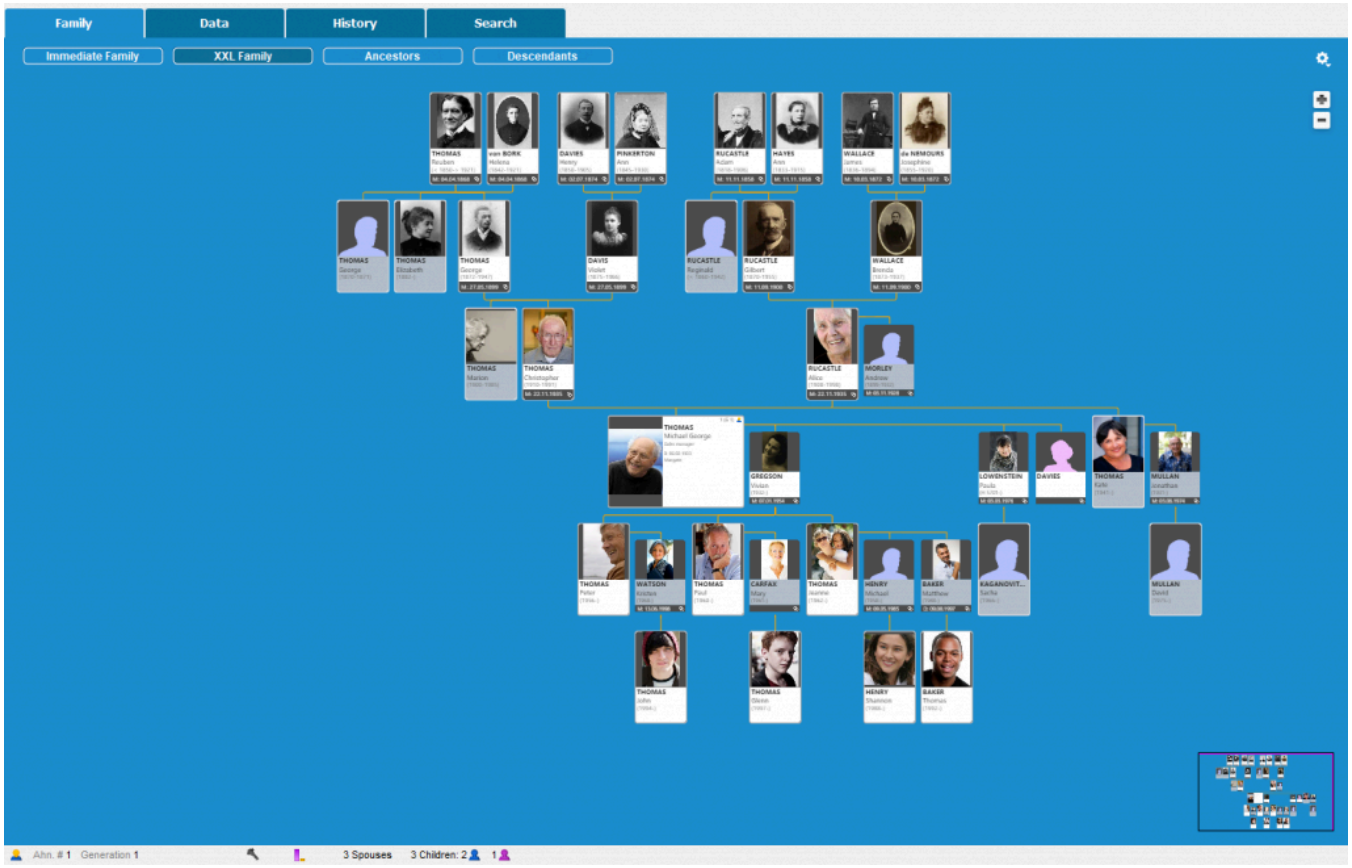
Not only can you visualize the primary person's family – parents, grandparents, great-grandparents, spouses, children – but also all the relatives that might have been around him/her: you'll get to display a true XXL view!

Persons displayed

Access the XXL Family by clicking on **Family** tab then **XXL Family**.

All persons are always displayed clearly distinguishing their affiliation or not to the main line. The primary person has a bigger box, centered on your screen. Background colors of the boxes change according to the affiliation or not of the person to the main line of the primary person. The other ones are usually grayed. The color adapts to the theme chosen for Heredis. Read the article Change Heredis colored theme (see page 106).

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).

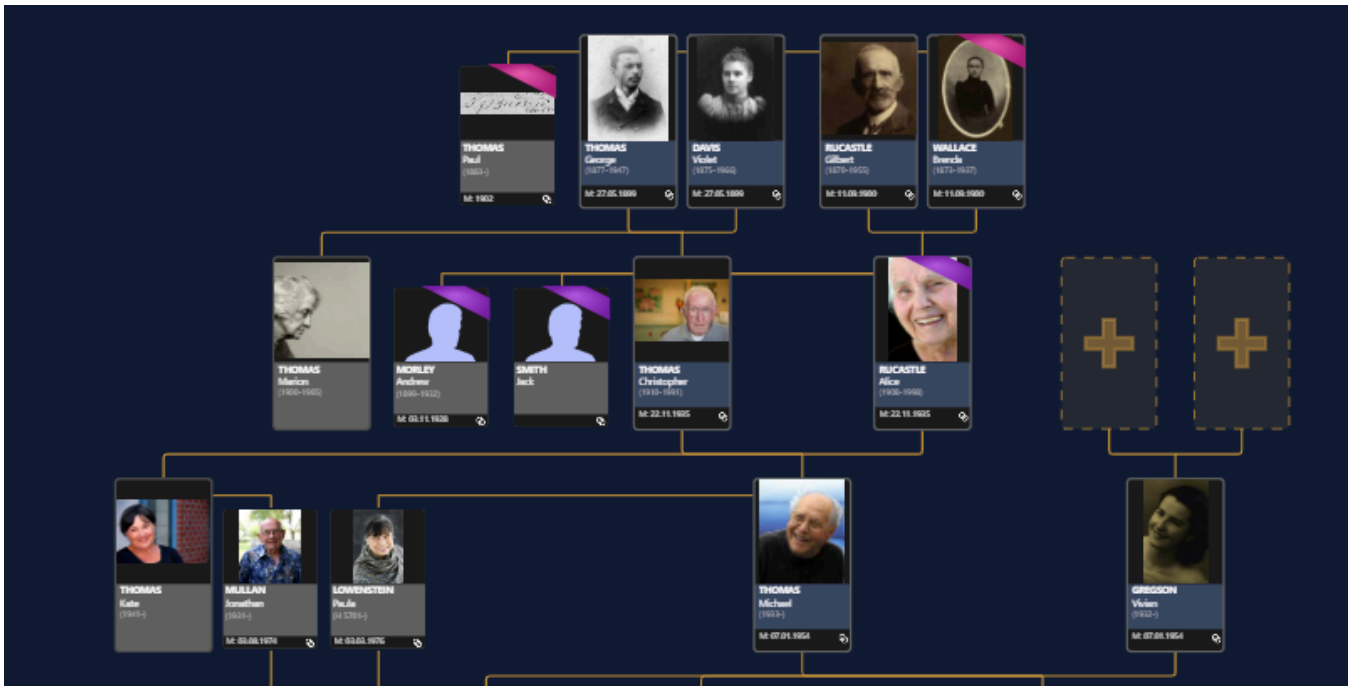
Note: sometimes the siblings will not be displayed chronologically, unlike in other parts of the tree, because a parent's sibling(s) cannot be inserted between the two parents – otherwise the tree chart would not be legible.

- 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
  - His/her great grand children.

Note: You can also display the descendants of other spouses, grandparents and great-grandparents.

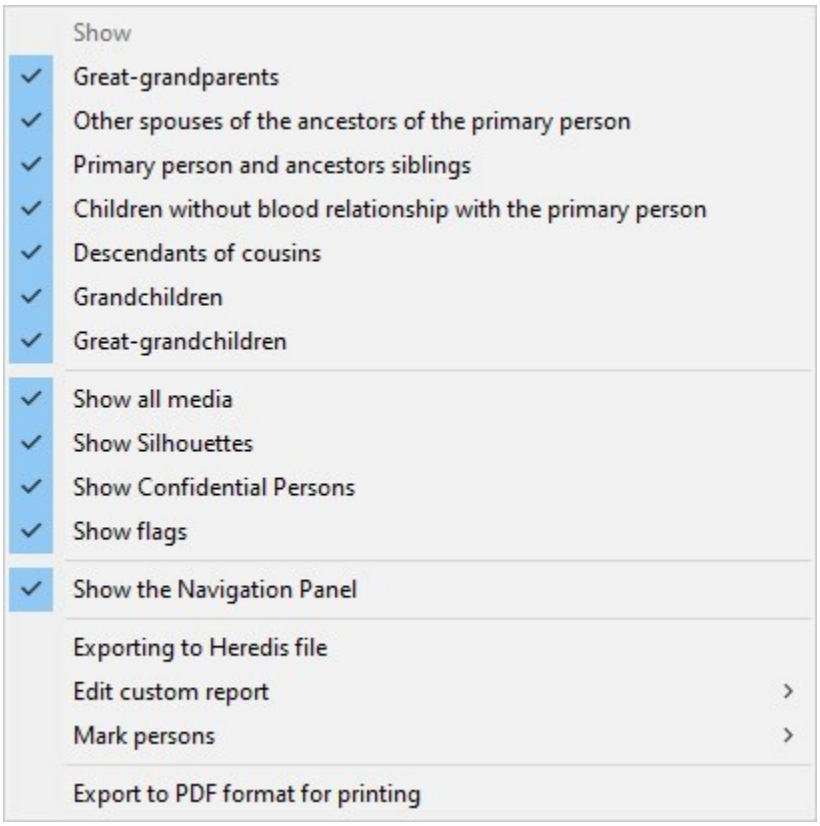
- Concerning generation of the primary person:
  – His/her spouses, brothers and sisters, half-brothers and half-sisters, stepbrothers and stepsisters, and cousins,

You can fold the left or right panels to gain more space and reveal the XXL Family.
If one of the ancestors of the primary person (from the generation of grand-parents) has had several spouses his/her box and that of his/her spouses are marked by a colored band, except the one in direct-line of the primary person. For a question of clarity of the tree, the other spouses are staggered. So you quickly see the direct ancestors of the primary person.



The revealed tree includes persons you do not want to display? Click on the cogwheel

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 (see page 44) 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.

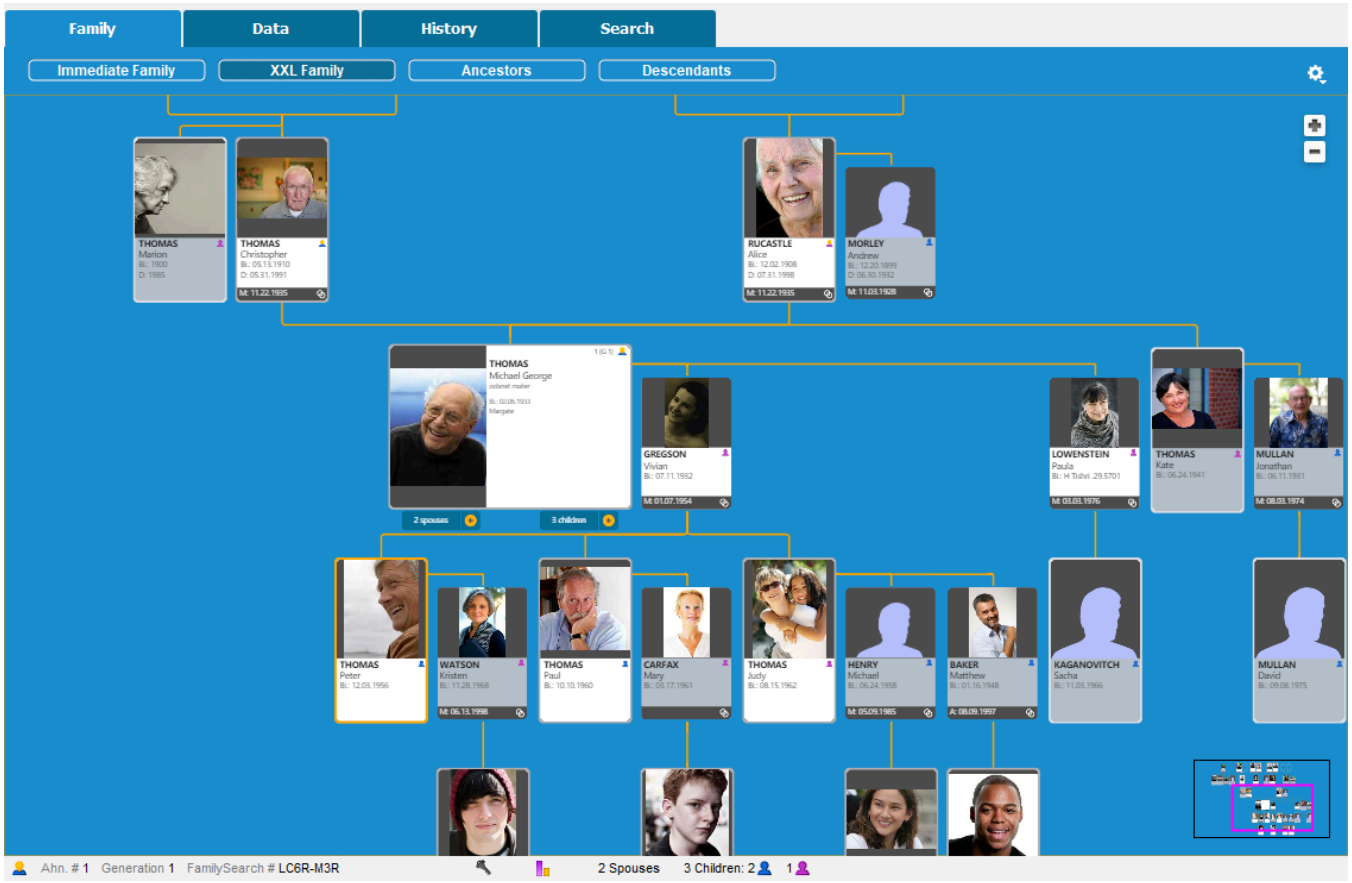
As everywhere in the software, you can also navigate from a person to another thanks to the **Navigation** panel or from the **Person's** index by double-clicking on one of them.

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.

Adding spouses and children to the primary person

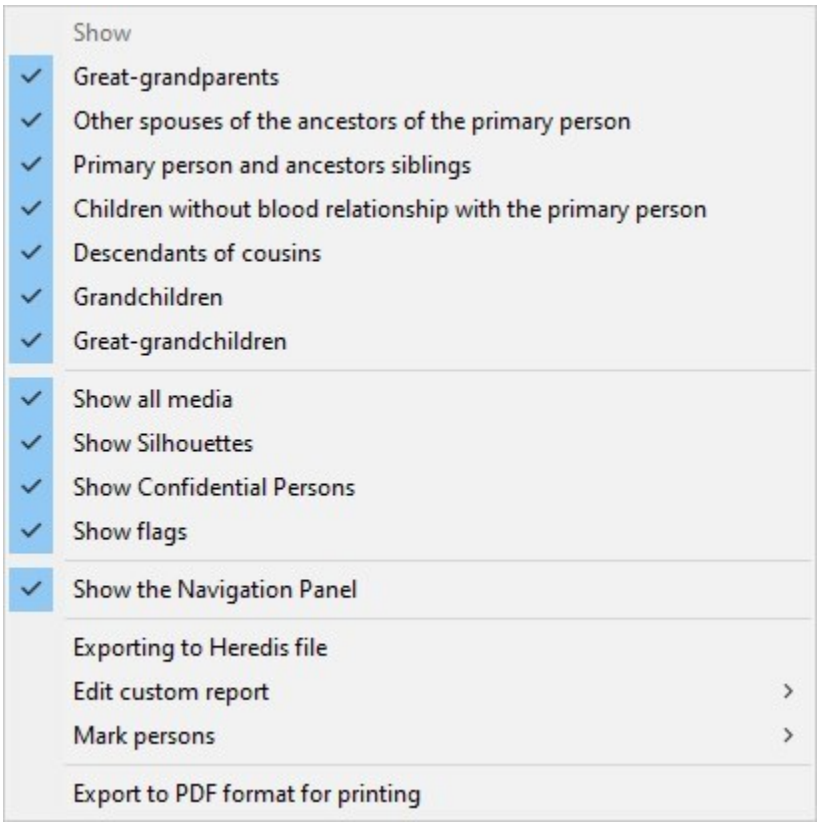
Heredis allows you to add spouses and children to the primary person directly from the XXL Family view. To do so, click on the + sign located below the primary person's box.



If a tick appears, you have chosen to display them; if there is no tick, they will be hidden.

Display options

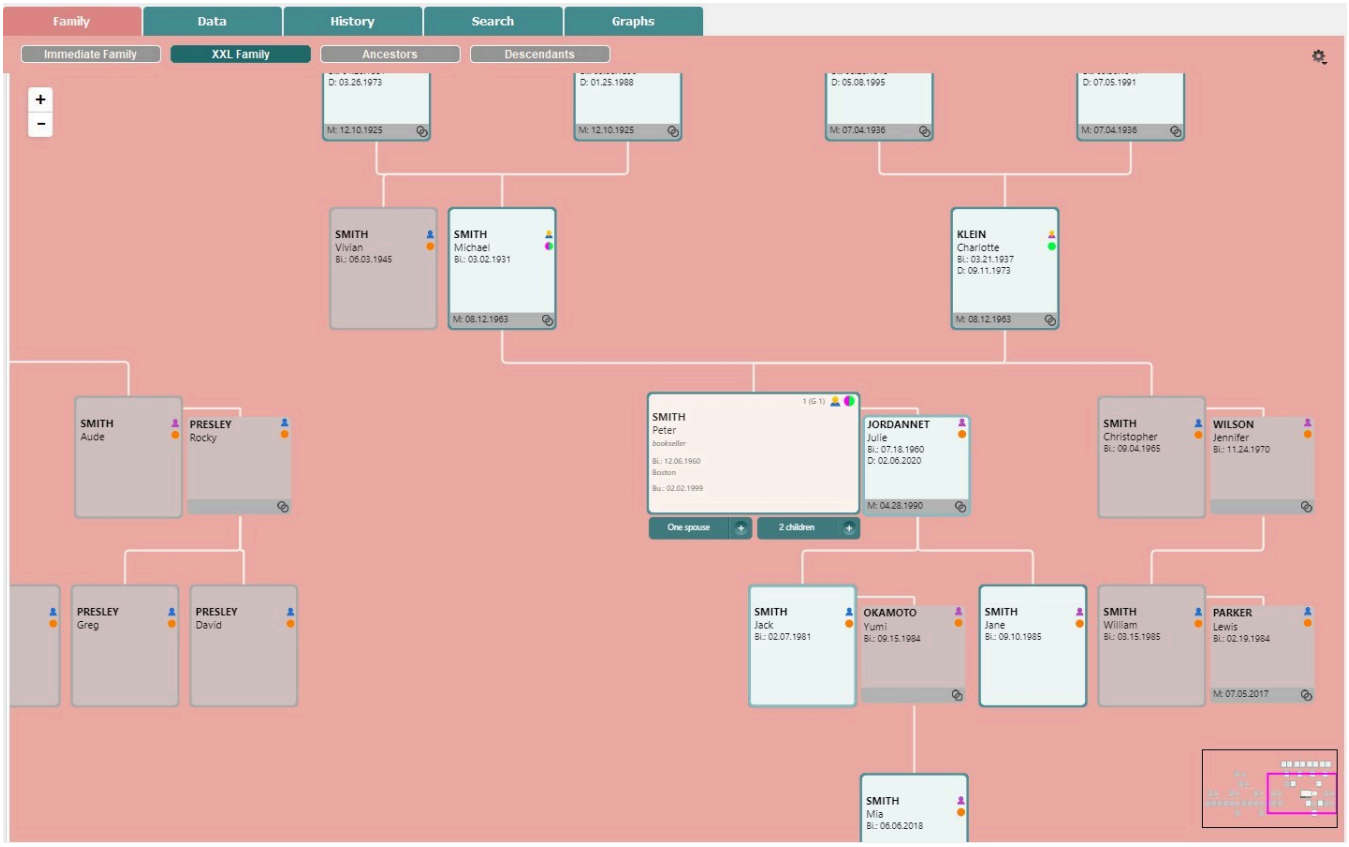
Click on the cogwheel to access the options.



Hide or show 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 cogwheel button , then **Show 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 cogwheel by clicking on **Show Silhouettes**.

If a tick appears, you have chosen to display them; if there is no tick, they will be hidden.

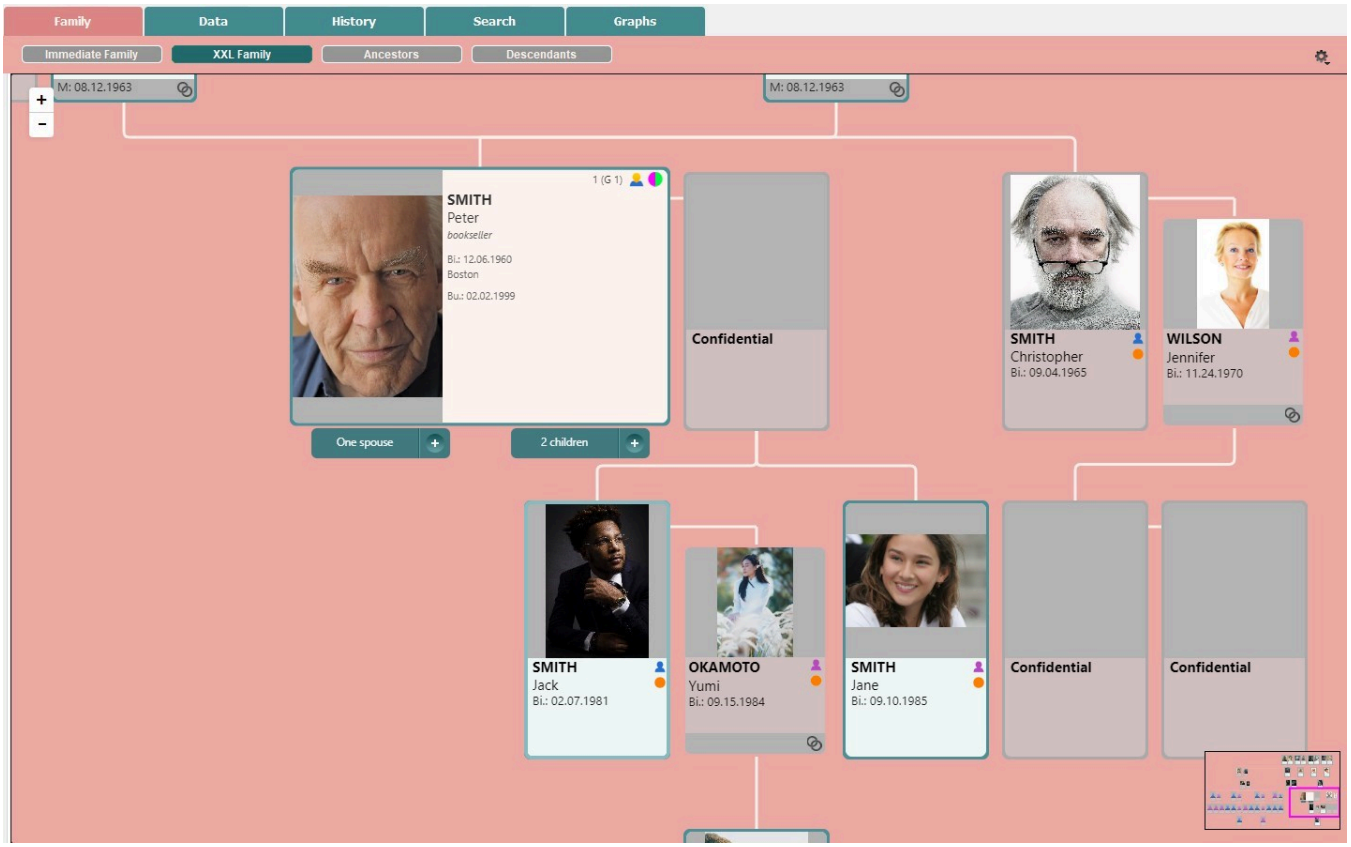


Show or hide confidential persons

You can indicate in Heredis that persons are confidential using the label proposed by Heredis in the person's entry form.
Starting with Heredis 2025, you can display or hide confidential persons in the XXL family.

Click on the cogwheel .
Click on the **Show confidential persons**.

If a tick appears, you have chosen to display them; if there is no tick, they will be hidden.

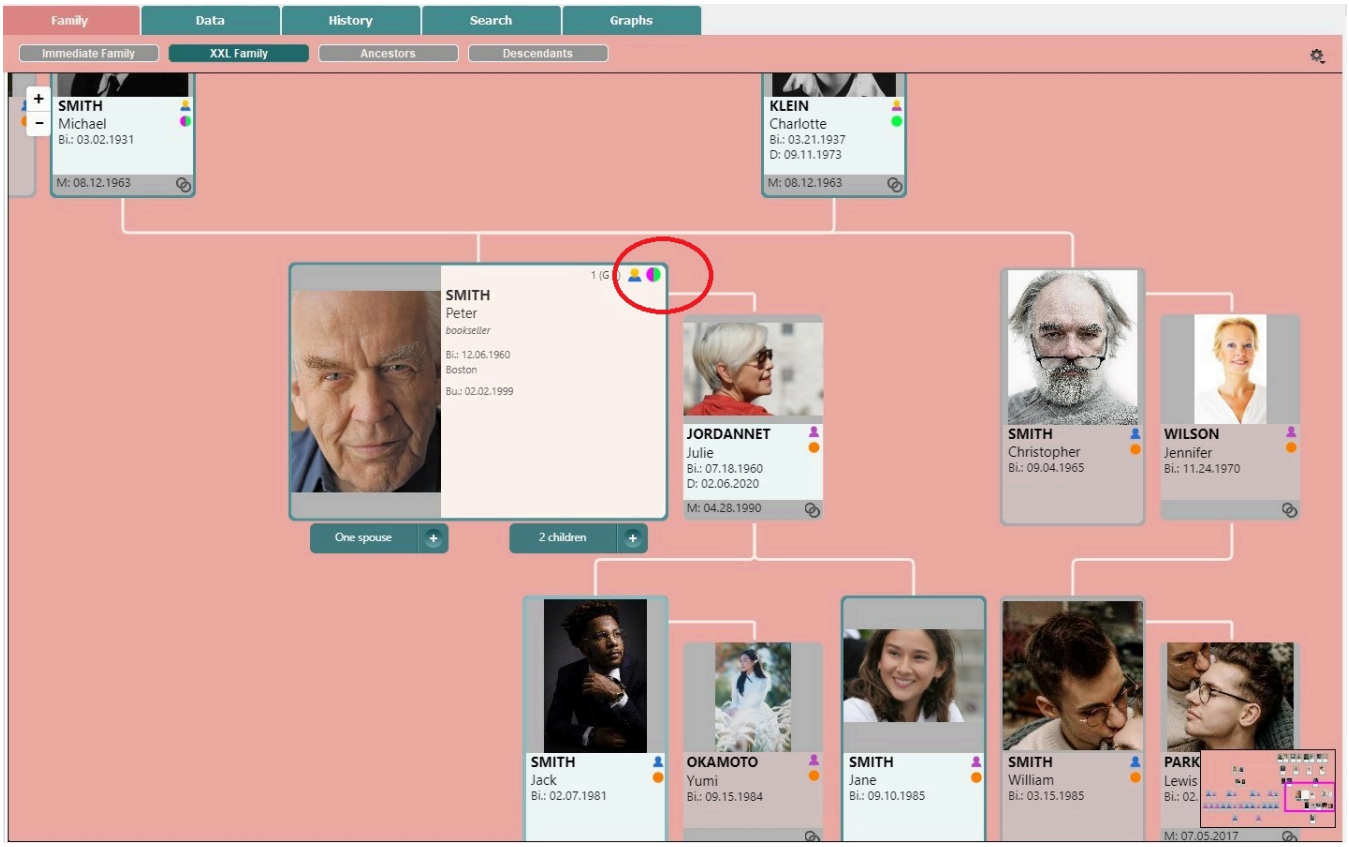


Show or hide personnalized flags

Starting with Heredis 2025, you can add personalized flags to persons. See the article Personalized flags (see page 188).
The XXL family allows you to show or hide personalized flags for persons in the tree.

Click on the cogwheel .
Click on the **Show flags**.

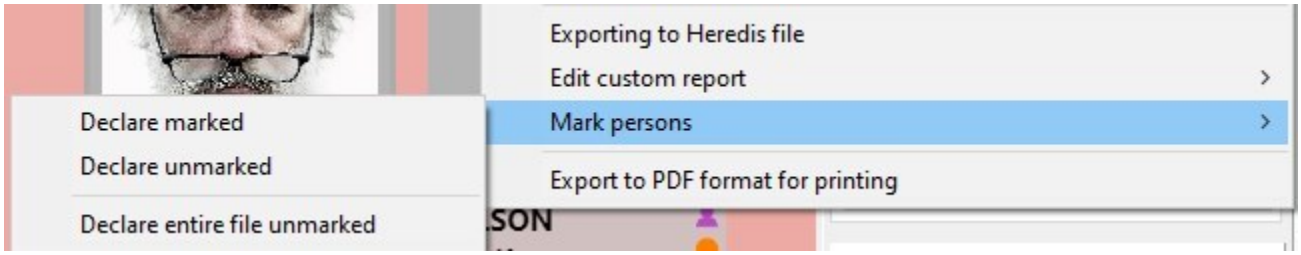
If a tick appears, you have chosen to display them; if there is no tick, they will be hidden.



Mark persons

You can mark persons in the XXL family, for example to exclude them from a GEDCOM export.

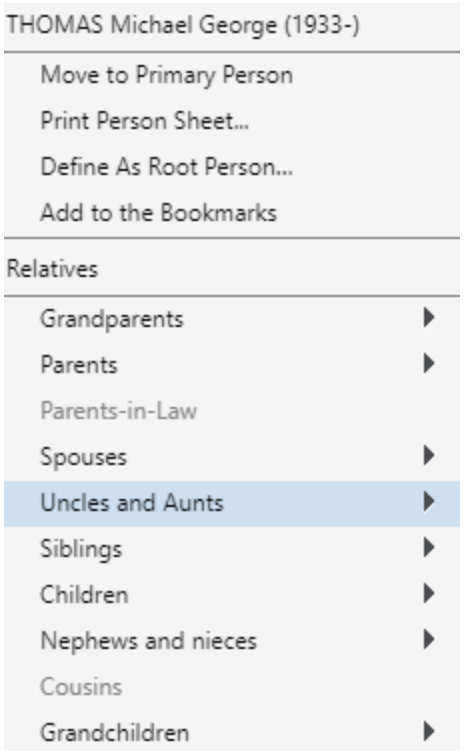
Click on the cogwheel .
Click on the **Mark persons > Declare marked.**



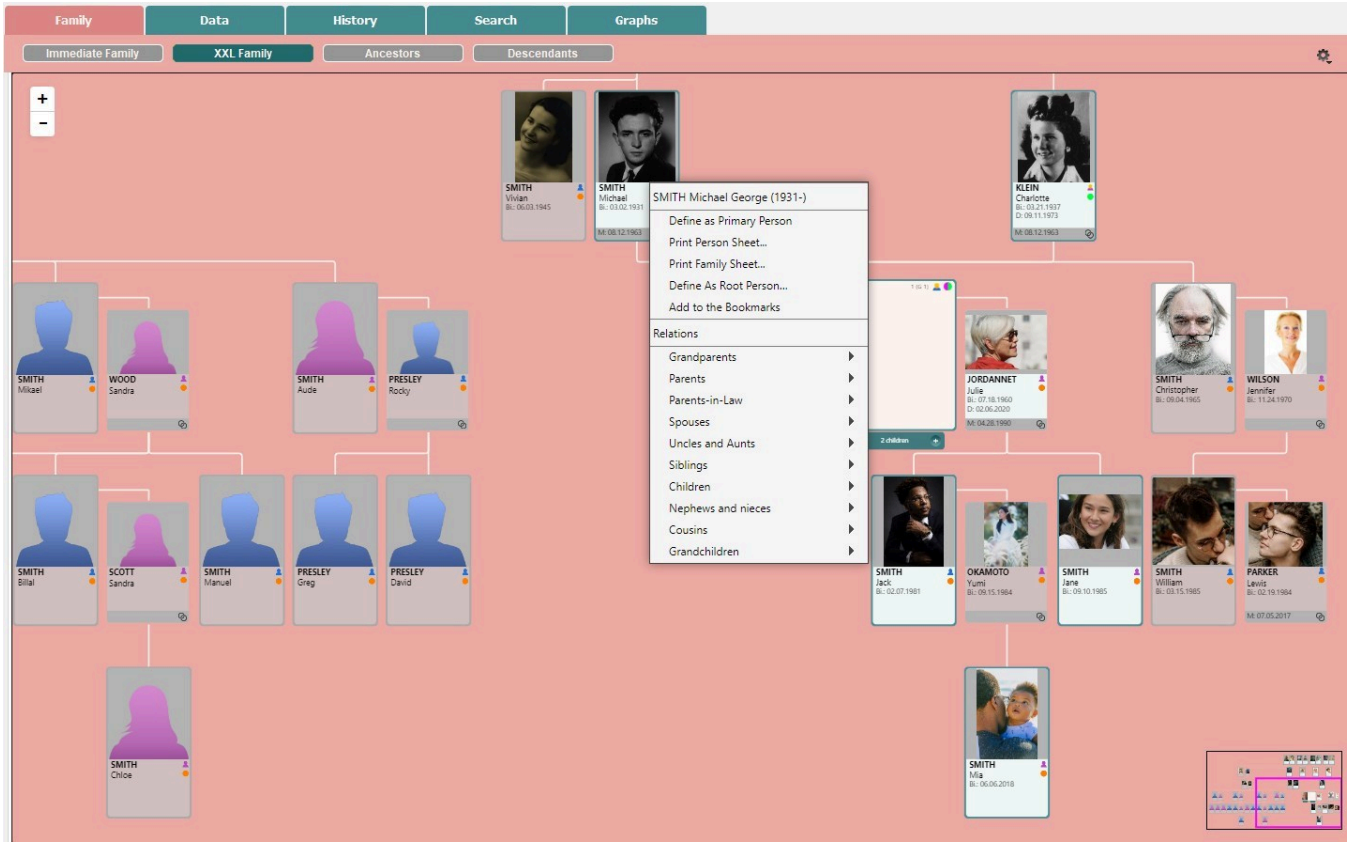
In the same way, you can unmark them.

The other actions in the contextual menu

When you click the right button on a person, you can also:



- move to primary person
- print his/her individual sheet.
- define him/her as the Root person.
- add him/her as a favorite in the bookmarks.
- see his/her relatives



To add membership at this family, click on the add button from the toolbar or directly in the tree, or click on the ✚ button displayed in this view, to complete the direct ascendance.

Starting with Heredis 2025, the XXL family has made it possible to export persons from the tree to a new Heredis file, to create a custom reports of these persons or to mark them.
It can also be printed. See the article Export and print the XXL Family. (see page 674)

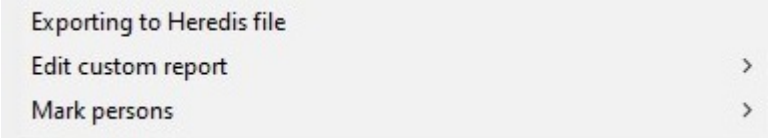
Export and print XXL Family

From Heredis 2025, you have new export options for the XXL family.

Export persons

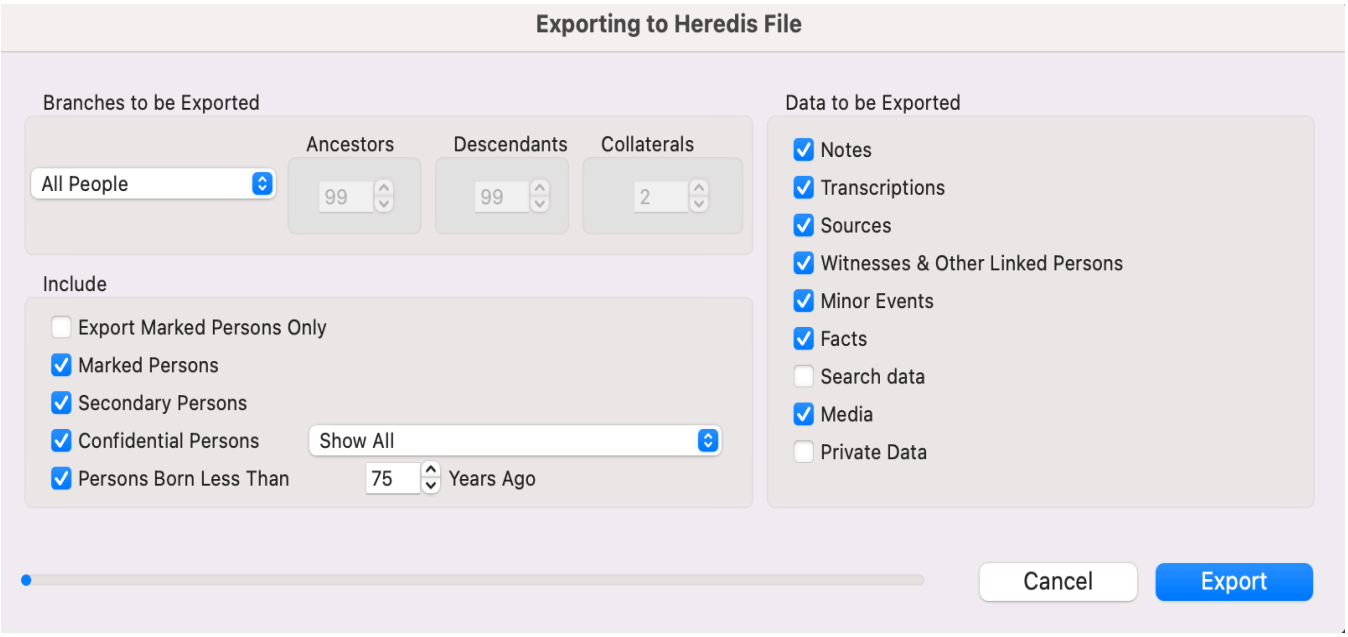
Would you like to create a Heredis file containing only the persons in the XXL family?

- Click on the cogwheel .
- Click on the **Exporting to Heredis** file option.

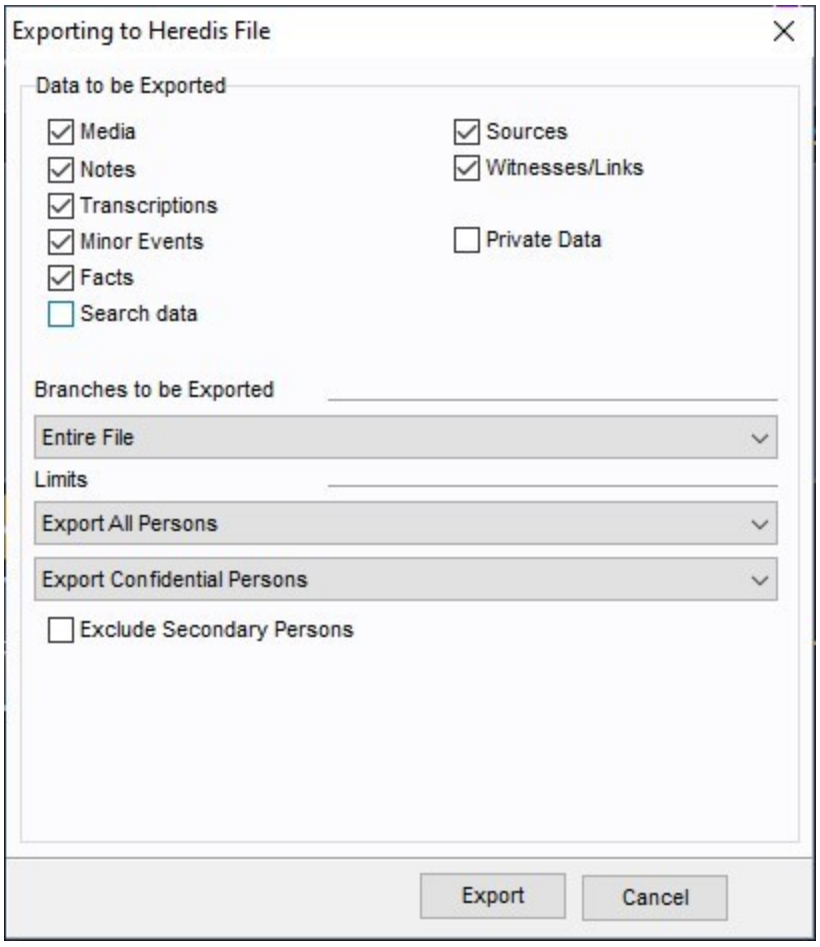


- Set the export parameters as you would for any Heredis export. By exporting all persons, you will export all persons in the XXL family. See Export a complete file in Heredis format (see page 752).

(Mac) Export Heredis file screen

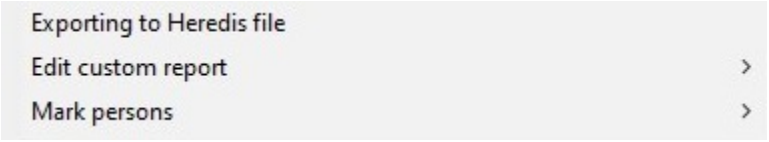


(Windows) Export Heredis file screen



You can then share this file with your family, for example.

Edit custom report



If you wish to edit the custom report of persons present in the XXL family, nothing could be simpler.

- Click on the cogwheel .
- Click on the **Edit custom report > Person report** option, or choose your list template if you have one. See the article Custom Reports (see page 598).

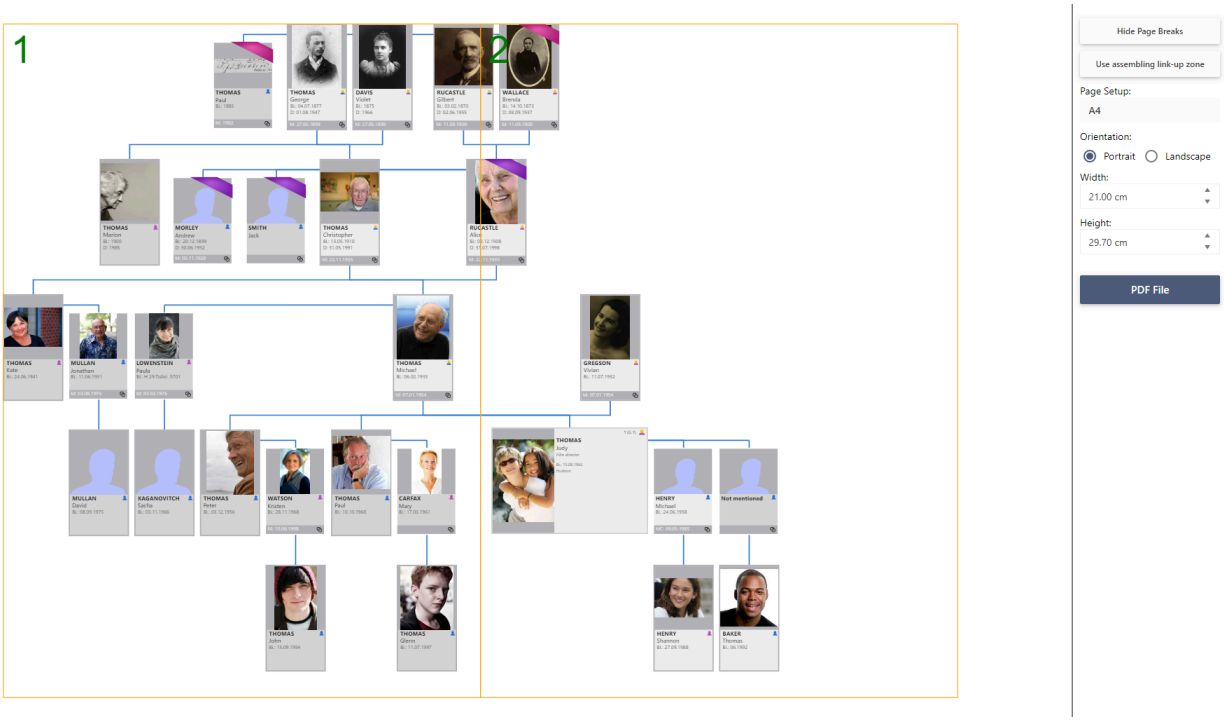
Export as PDF for printing

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 cogwheel
- Choose to **Hide the Navigation Panel**
- Click **Export to PDF format for printing**

A new window opens to preview your tree. You can access to the regular printing settings such as the pages' display or the recovery, the choosing printing format, orientation of pages or the possibility to change the height and width of the pages.

- Choose the page setup and orientation of the paper
- Activate or not the assembling link-up zone. The assembling link-up zone allows you to make the assembly by leaving a white area on the beginning and end of the page.



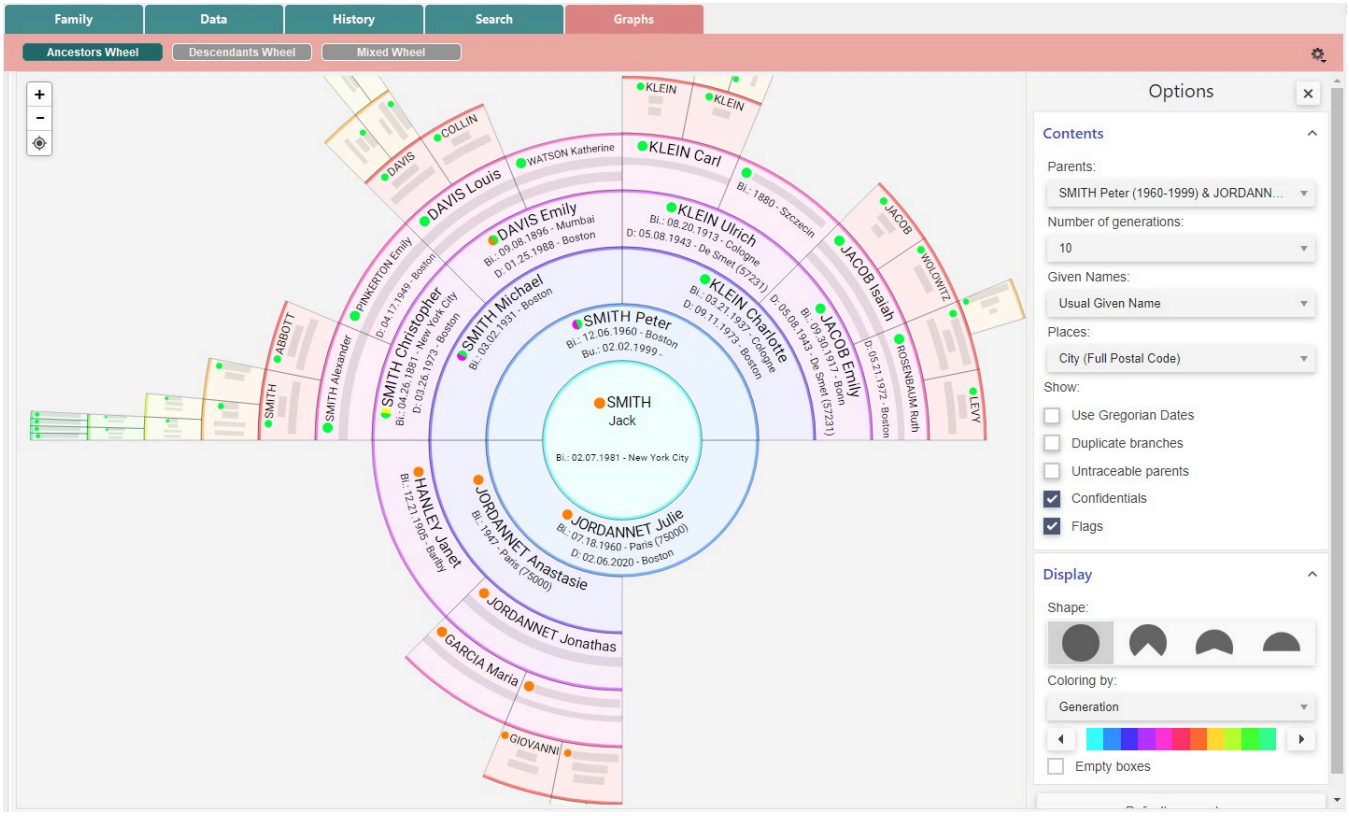
Finally, click on the **PDF file** button, and you can save the file at PDF format to print it from home or with a professional's.

Important: Note that you can generate customized size, but be carefull, PDF format allows only 200″ x 200″. If your XXL Family is bigger and your printer can print on a paper roll, then click on the assembling button to delete assembling link-up zone. (it is desable when you see Use assembling link-up zone)

The Dynamic Ancestors Wheel

Dynamic wheels are available in the Graphs tab. They can be represented as a wheel or a fan, and can be colored according to various filters.

Click on the **Graphs > Ancestors Wheel** tab or, if you have already added it to your toolbar, click on the icon . The wheel is built around the primary person currently displayed on your other Heredis screens (**Immediate Family**, **XXL Family**, **Personal Data**…)



Depending on the generation, the information displayed as well as its format will vary so it can fit in the box.

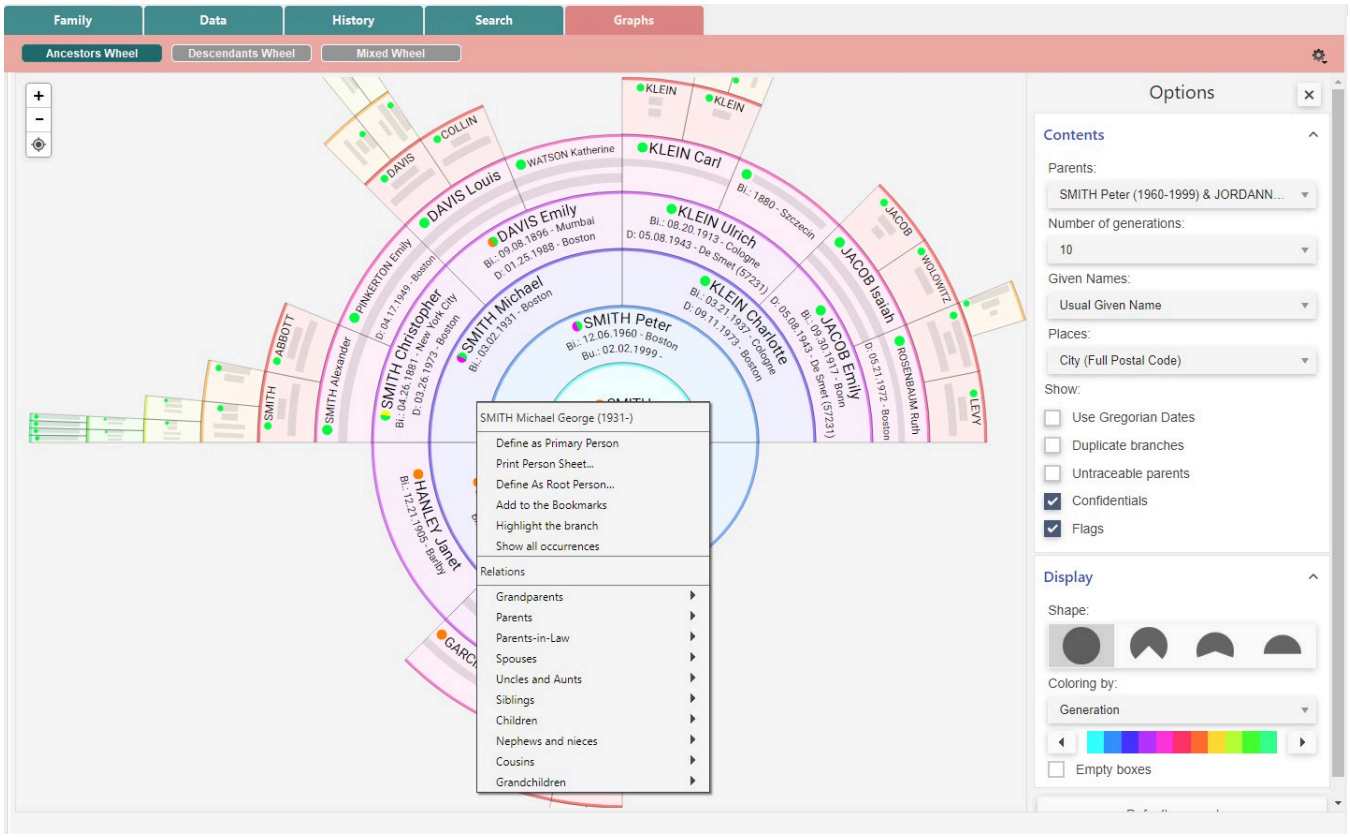
Navigate

You can navigate the wheel by changing the primary person. Right click on the person you want to place in the center of the wheel and choose **Move to Primary Person**. The wheel automatically recalculates the ancestors of the new primary person, who will also be displayed under the other tabs (**Family**, **Data**, **Search**).

Double-click on a person's box to go directly to this person's **Personal Data** screen.

Left click and hold your mouse button to move the wheel around on your screen. Click on the button to re-center the wheel on your screen.

Right-clicking also allows you to view a person's relatives. Clicking on one of the relatives' name modifies the wheel by placing this relative as the primary person.



To zoom in or out, you can use :

- the scroll-wheel on your mouse,
- the + and – buttons in the top left-hand corner of the wheel screen.

Options

Note: Since Heredis 2026, the options panel has been optimized. Click on the **Contents** or **Display** title to reduce the number of options displayed.

A foldable **Options** panel is at your disposal in the top right-hand corner to set up the wheel's parameters. To give yourself more space when viewing the wheel, click on the cross ✖ in the **Options** panel.

To re-open the **Options** panel, click on the hamburger ☰ button.

Contents options

Number of generations

You may choose from 4 to 12 generations. The more generations you have selected, the longer it will take for Heredis to display the wheel.

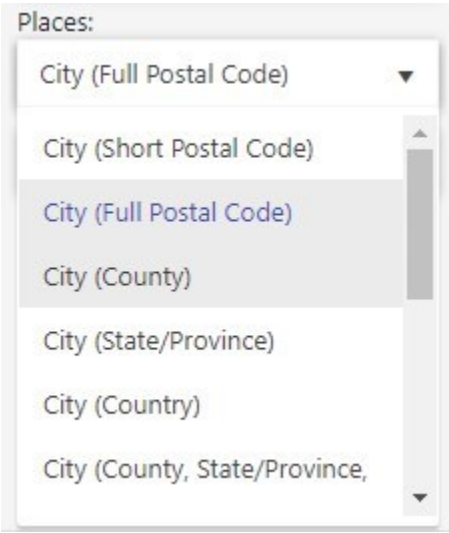
Tip: The speed at which the wheel is displayed also depends on the power of your computer and the current use of your computer's memory. Avoid using other programs simultaneously if you want the wheel to be displayed at a faster rate.

Given names

Choose the format of first names by clicking on the drop-down menu.

Places

Choose the format of the places shown in the boxes.

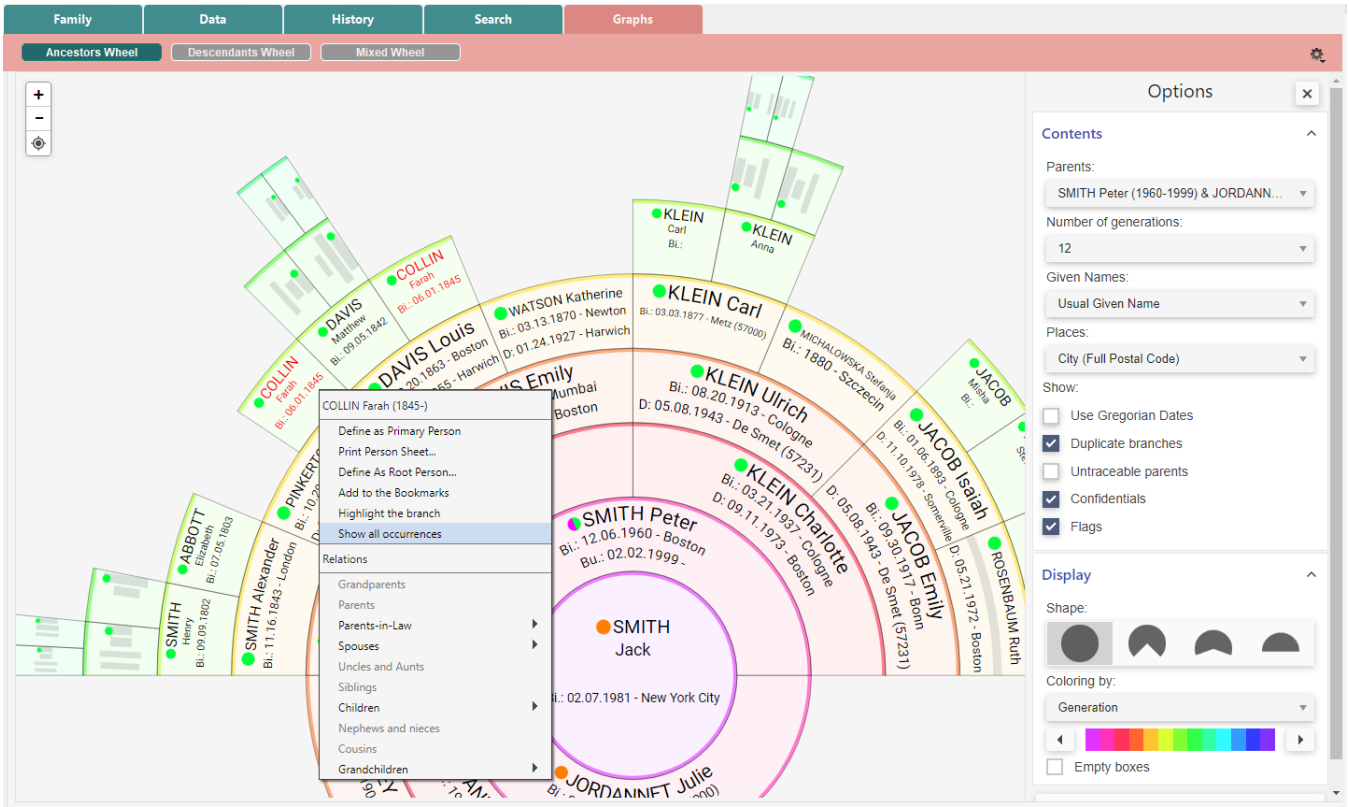


Other content options to display

You can choose whether or not to display

- **Gregorian Dates**. This option makes it possible to transform the dates entered into an unusual calendar into a Gregorian date for a better understanding, for your family members, for example.
- **duplicate branches**. In genealogy, consanguineous marriages are common. These marriages lead to the repetition of branches, known as implexes. You can view

implexes by checking the **duplicate branches** box. The text in the boxes of persons present several times in the wheel is then written in red. You can then right-click on one of the implexed boxes and choose **Show all occurrences** to see where the boxes for that person are located. Heredis highlights them for ease of use.



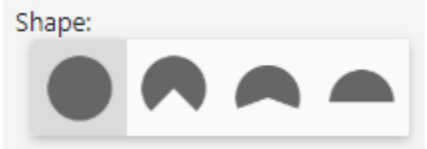
To stop highlighting occurrences, right-click again on one of the boxes and select **Do not show all occurrences**.

- **Untraceable Parents** allows you to display the boxes of missing parents of an individual.
- **Confidentials** display or not the persons declared confidential in the genealogy. If “Confidential” is unchecked, persons will appear with the word Confidential in their box.
- **Flags**. If you have set tags for the persons in your genealogy and you tick the box, the persons present will be marked with the flag(s) icon(s).

Display options

The shape

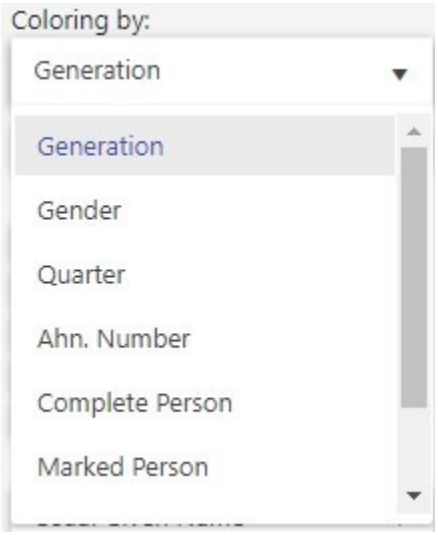
You may prefer to view the wheel at a different angle than the default one of 360 degrees. Click on the graph icon that suits you best.



The coloring

You may choose to color the wheel by:

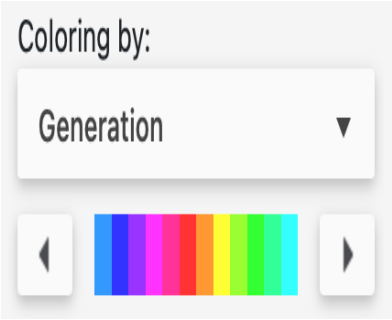
- **Generation**. Each generation will have its own color.
- **Gender**. Men and women will be highlighted in two different colors.
- **Quarter**. Quarters start from the grandparents' generation. The paternal grandfather's and grandmother's, the maternal grandfather's and grandmother's quarters can each be highlighted in a different color.
- **Ahn. Number.** Display clearly which persons of the wheel belong to the Ahnentafel line.
- **Person declared as Complete**. This coloring option gives you an opportunity to visualize the persons whose conditions of completeness for major life events are met. See Heredis' Preferences > Completeness of data (see page 107).
- **Marked Person**. If you have marked persons based on one or more criteria, they can be assigned a different color than those unmarked. E.g., if you want to identify all persons born in the same city. See Flags suggested by Heredis (see page 186) and Smart Search for information on how to tag or "mark" persons.
- **Place**: see Location wheels article.
- **None**. No wheel coloring at all.



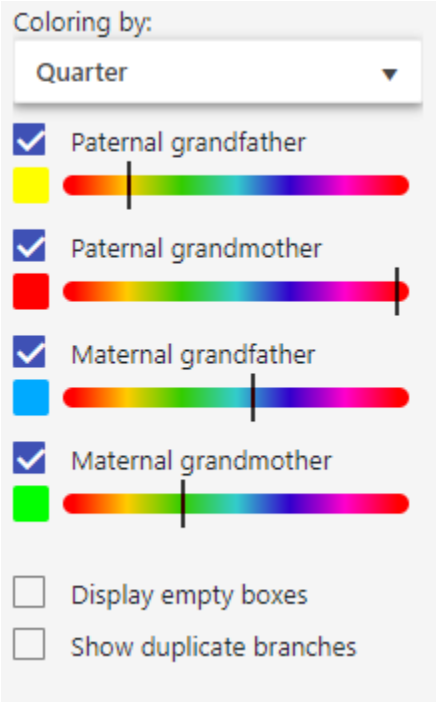
Depending on the selected color format, one or more sliders will appear so you can choose the color to be applied. Left-click on the black slider and move it over the color bar to apply the desired color.

Once you have chosen which color to apply, release the left click. The color will then be applied to the wheel.

Coloring by Generation filter with arrows



Coloring by quarter, color selection by grandparent



The empty boxes

To obtain a perfect wheel, or simply to view the remaining work, check the Show empty boxes box to view them.

Return to default settings

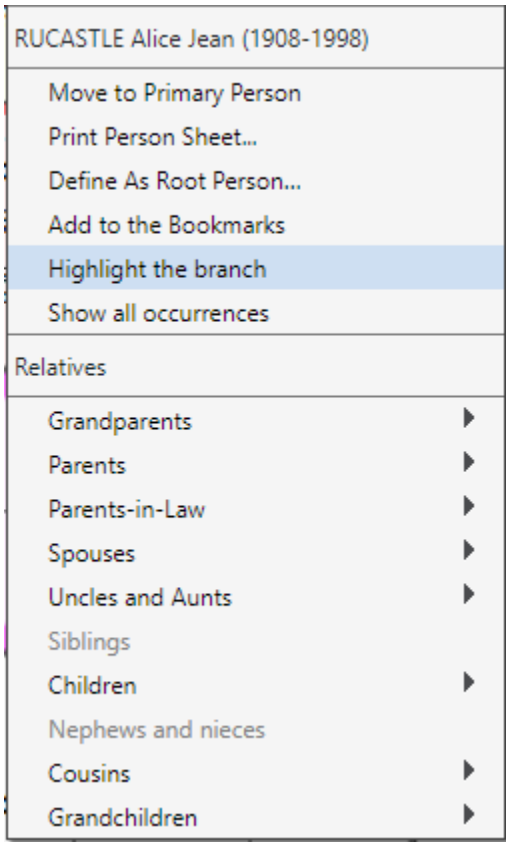
To return to the default settings (6 Generations, coloring by generation, 360° wheel shape, without empty boxes and implexes, without parents not found with confidentials and with date calendar entered), click on the **Default Settings** button.

Highlight a branch

Do you wish to highlight a branch so you can show your maternal family the section of the wheel that will be of interest to them?

Right-click on the box of the person at the base of the branch you wish to view. Select

Highlight the branch.



Colors will be brighter and the branch will be shaded, thus highlighting it on the screen.

Export for printing

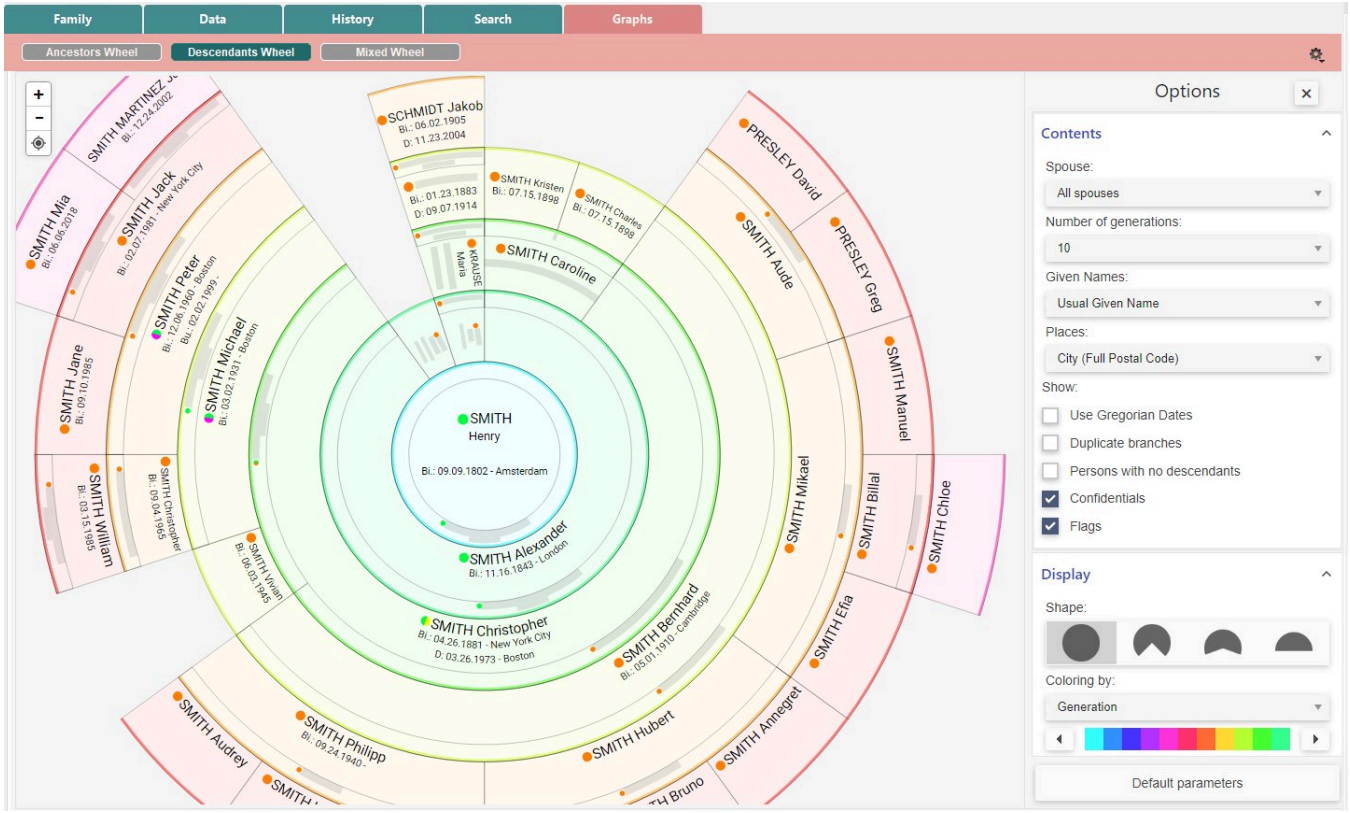
See the article Export a personal or family timeline or wheel for printing, which explains the details.

Descendants Wheel

The **Graphs** tab allows you to display the Ancestors Wheel as well as the **Descendants Wheel** and mixed wheel. Its process is similar to the Ancestors Wheel.

Any change made in a person's data entry form will automatically be reflected in the wheel.

Access the wheel by clicking on the **Graphs** tab **> Descendants Wheel** or from the button you can add to the toolbar.



Navigate the Wheel

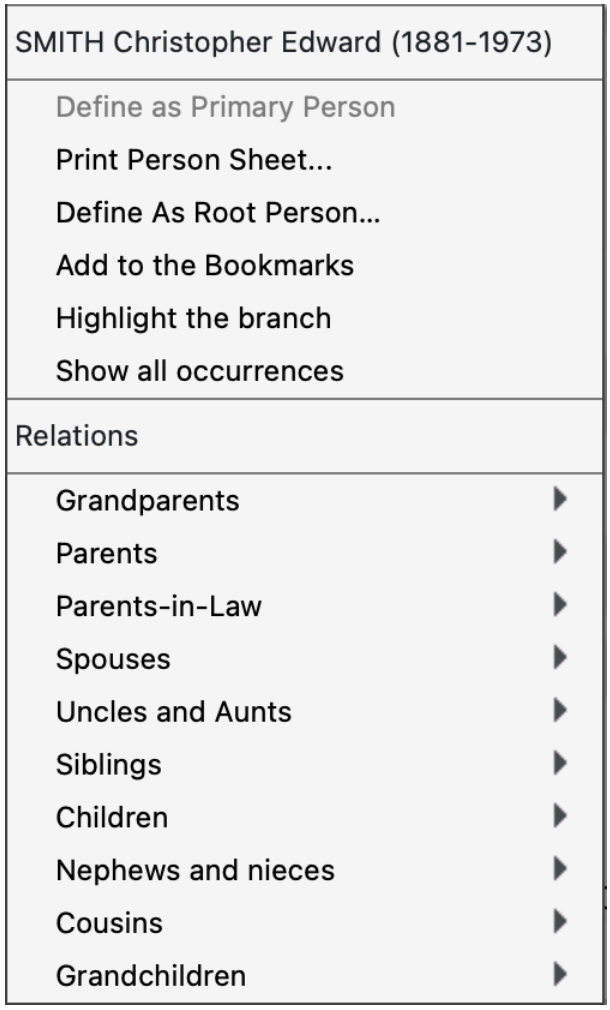
The same way you do it in the XXL Family window, you can zoom in and out by scrolling with your mouse wheel or using the ✚ and ━ buttons in the upper left corner. Hold down the left click of your mouse to move the wheel around in the window.

Click on the target ⌖ button to re-center the wheel on the screen.

Right-clicking with your mouse on a person's box allows you to:

- View the person's Relations
- Define him/her as the Primary Person

- Print the Person Sheet
- Define him/her as the Root Person
- Add the person to the Bookmarks
- Highlight the branch from this person
- Show all occurrences in case of an implex (“duplicate branches”).

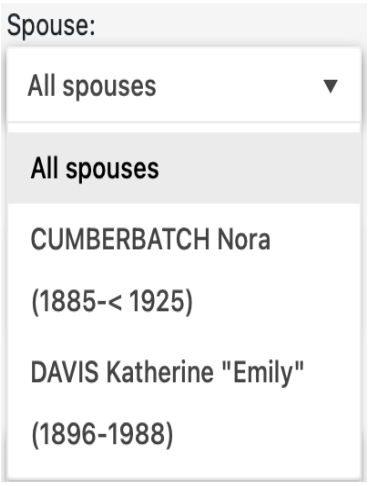


To free up your screen, fold the Options palette by clicking the ✖ button; unfold it using the burger ☰ button.

Options

Content options

Spouses



If the primary person had several spouses, select one of the spouses to display only the descendants from that spouse.
If you select **All spouses**, then all descendants from the main person will be visible.
If the person has children from none of his/her spouses, a question mark will show the descendants born from an unknown parent.

Number of Generations

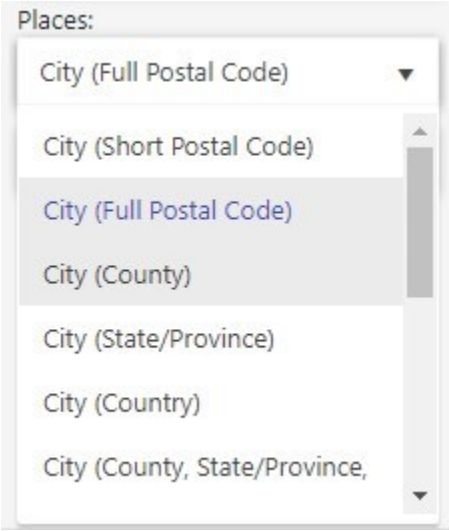
Click on scroll-down menu to specify the number of generations to generate. Between 4 and 12 generations from the Primary Person.

Given Names

Choose the Given Names format you like best by clicking on the drop-down menu.

- All Given Names,
- First Given Name,
- Usual Given Name
- First Given Name and Initials.

Places



Choose the format of the places shown in the boxes.

Dates in Gregorian format

We currently use the Gregorian calendar. Yet you may have already entered dates in another calendar format, such as the Republican calendar.
Check the **Use Gregorian Dates** box to convert Republican dates to Gregorian format so your family gets a better understanding of the graph.

Duplicate branches (aka "Implexes")

It was not uncommon for cousins to marry each other. The wheel helps you identify duplicate branches created by such marriages.

Check the **Duplicate branches** box.
Words inside these boxes are then displayed in red.

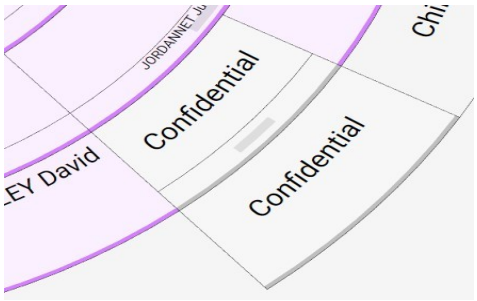
Right-click on a person in the duplicate branch and choose to display all occurrences in order to locate them among the various branches in the wheel. You will see the boxes for this person stand out and thus better locate its multiple appearances in the wheel.

Persons with no descendants

If you have ticked the "**Persons with no descendants**" box (see Flags suggested by Heredis (see page 186)) in personal data tab, you can display the end of the branch by ticking the box. Childless will then be written in a box to indicate the end of the branch.

Confidential

Confidentials box allows you to choose whether or not to display persons declared confidential in the genealogy. If “Confidentials” is unchecked, confidential persons will appear with the word “Confidential” in their box (see Flags suggested by Heredis (see page 186)).

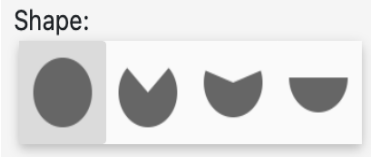


Flags

If you have set tags for the persons in your genealogy and you tick the box, the persons present will be marked with the flag(s) icon(s).

Display Options

Shape



You can choose from a variety of shapes for your wheel. A full wheel or a fan wheel with various angles. Click on the shape that suits you best.

Filters

Depending on the filter selected, the wheel will display different colors.

The various filters offer coloring by:

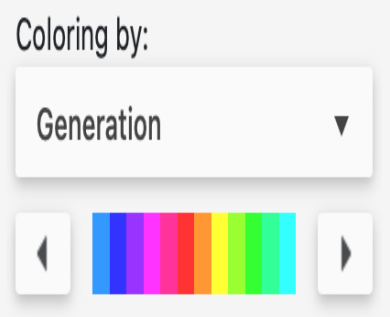
- **Generation**. Each generation will have its own color.
- **Gender**. Men and women will be highlighted in two different colors.

- **Branch**. Each child of the primary person and his descendants has a different color.
- **Family**. If primary person has more than one spouse. You can change the character's spouse in the spouse list filter.
- **Ahn. Number**. Display clearly which persons of the wheel belong to the Ahnentafel line.
- **Person declared as Complete**. This coloring option gives you an opportunity to visualize the persons whose conditions of completeness for major life events are met. See Heredis' Preferences > Completeness of data (see page 107).
- **Marked Person**. If you have marked persons based on one or more criteria, they can be assigned a different color than those unmarked. E.g., if you want to identify all persons born in the same city. See Flags suggested by Heredis (see page 186) and Smart Search for information on how to tag or "mark" persons.
- **Place**: see Location wheels article.
- **None**. No wheel coloring at all.

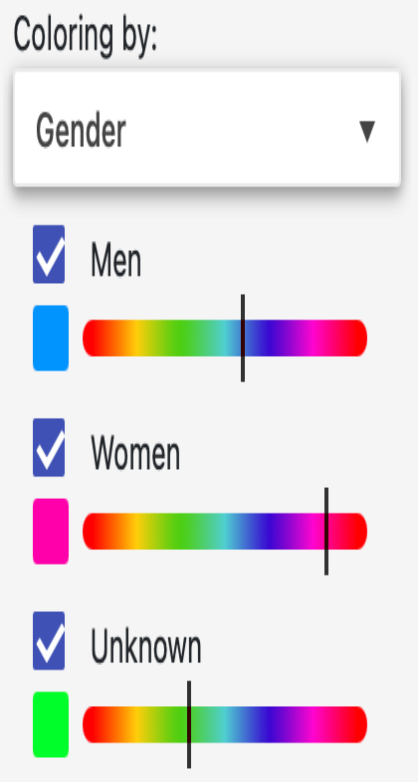
You can change the color gradient by clicking on the arrows and holding the left mouse click on the color strip and dragging it; or by holding the slider with the left mouse click and dragging it. Depending on the filter you choose, you will be offered several color sliders.

Once you have reached the chosen color, you can release the mouse click. The wheel will change colors, applying your selection.

Coloring by Generation filter with arrows



Coloring by Gender filter with arrows



Return to default settings

To return to the default settings (6 Generations, coloring by generation, 360° wheel shape, without empty boxes and implexes, without parents not found with confidentials and with date calendar entered), click on the **Default Settings** button.

Export before printing

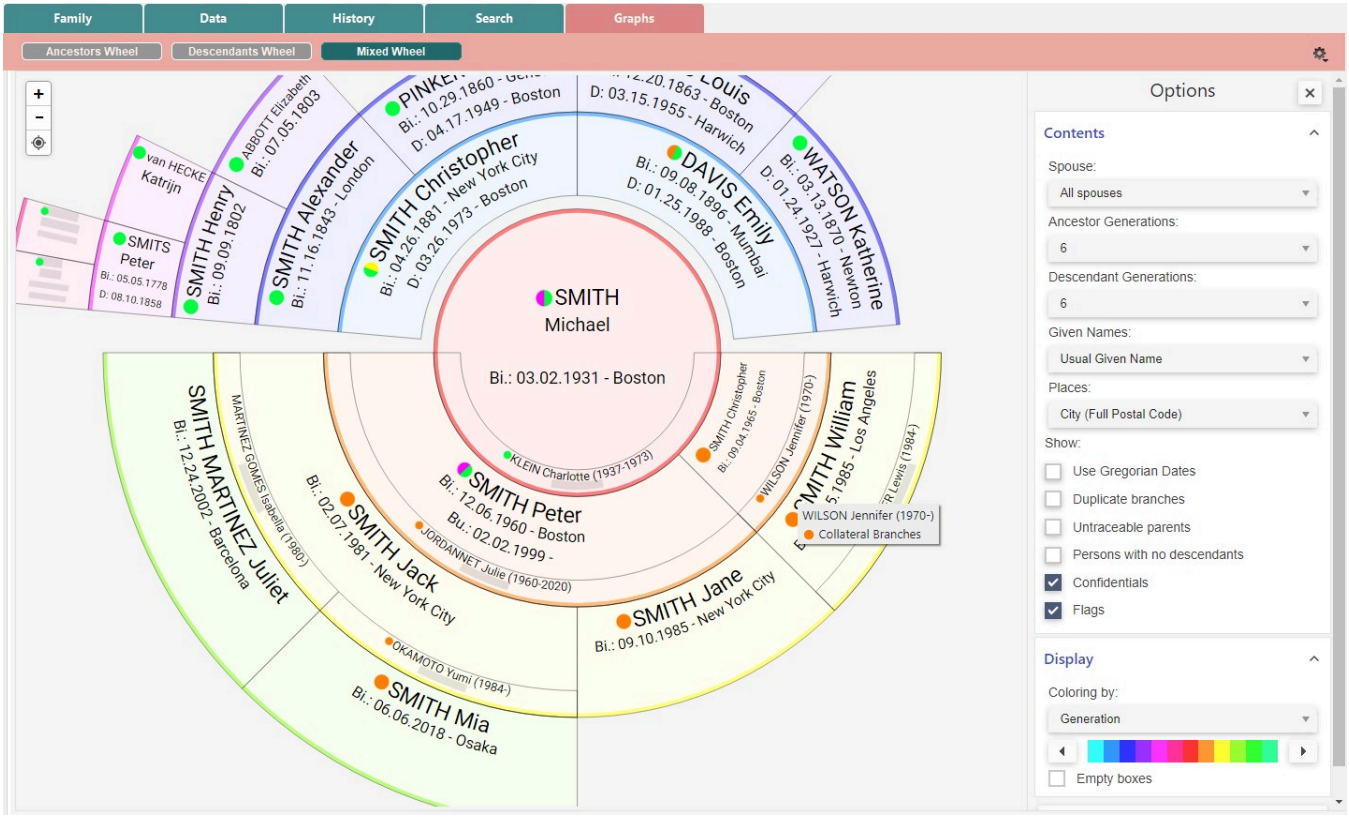
See the article Export a personal or family timeline or wheel for printing.

Mixed wheels

The **Graphs** tab features the Ancestors and Descendants wheels.

The Mixed wheels have been added as well.

To access them, click on the **Graphs** tab from the main screen, then on **Mixed Wheel**.



The mixed wheel lets you display both the ancestors and descendants of the primary person.

Navigate

Use the + and – buttons to zoom in and out. You can also hold down the CTRL key (Windows) or Cmd key (Mac) on your keyboard and zoom in/out using the mouse wheel.

Hold down the left-click on the wheel to drag it. Use the target button to reposition the wheel in the center.

Right-clicking on one of the wheel's boxes will open the same contextual menu as in the Ancestors and Descendants wheels.
The menu provides the following information about the selected person:

- his/her relatives,
- the option of placing him/her as the primary person; the wheel is then recalculated,

- the option of printing the Person Sheet for the person you selected,
- the option of defining him/her as the root person,
- the option to add him/her to the Bookmarks,
- the option to highlight/unhighlight the Ancestors or Descendants branch, depending on whether the selected person is part of the primary person's ancestors or descendants,
- the option to show all occurrences and better visualize the various boxes in case of duplicate branches.

Display/Hide options

Just as with the other wheels, you are offered a panel of options that can be removed using the cross ✖. Click on the burger ☰ button to reopen it.

Note: Since Heredis 2026, the options panel has been optimized. Click on the **Contents** or **Display** title to reduce the number of options displayed.

Contents options

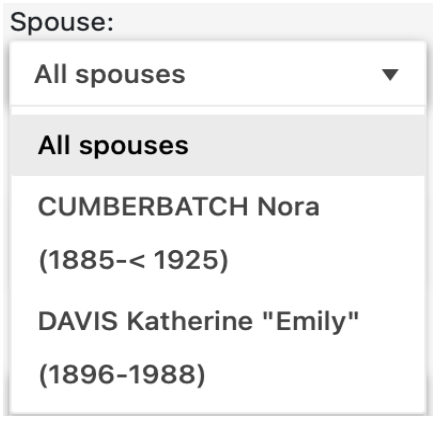
Sets of parents

Since Heredis 2026, it has been possible to add several sets of parents. For example, adoptive parents and biological parents. It is not possible to represent them all on a wheel.

So, if your primary person has several sets of parents, you will be able to choose the parents for which you want to see the ancestry.

If a person has several sets of parents in their ancestry, Heredis shows the main set of parents. See the article Add several sets of parents.

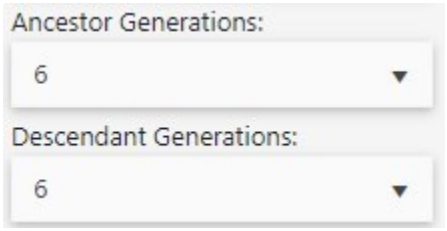
Spouses



If the primary person had multiple spouses, select one of the spouses to display only their descendants from that marriage. To do this, click on the drop-down menu.
If you choose all spouses, you will see all the descendants of the primary person.
If the primary person has children who do not belong to any of the spouses, a question mark will appear to show their descendants from an unknown parent.

Number of generations

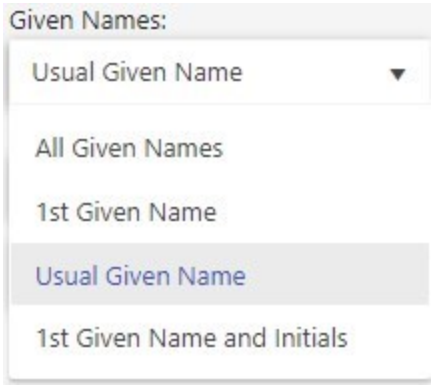
Click on the drop-down menu to select the number of **Ancestor Generations** to be processed (between 4 and 12 generations). Do the same to select the number of **Descendant Generations**.



Note: the more generations you select, the greater the load on your computer's processor. If your computer is overloaded or has a weak processor, it will have difficulty displaying lots of generations. Keep this in mind, and above all avoid having other software or your web browser open simultaneously, as these will also put a strain on your processor.

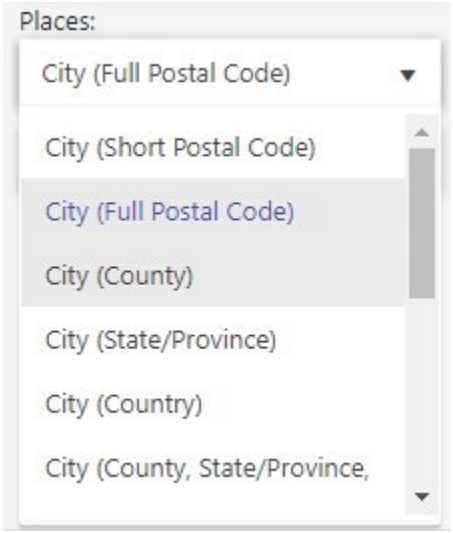
Given names

Click on the drop-down menu and choose the format for first names that suits you by clicking on the drop-down menu.



Places

Click on the drop-down menu and choose the format of the locations mentioned in the boxes.



Use Gregorian dates

We currently use the Gregorian calendar. You may have entered dates in another calendar, such as the Republican calendarif you have French ancestors.
Tick the box **Use Gregorian dates** to convert Republican dates to the Gregorian calendar for your family's understanding.

Duplicate branches

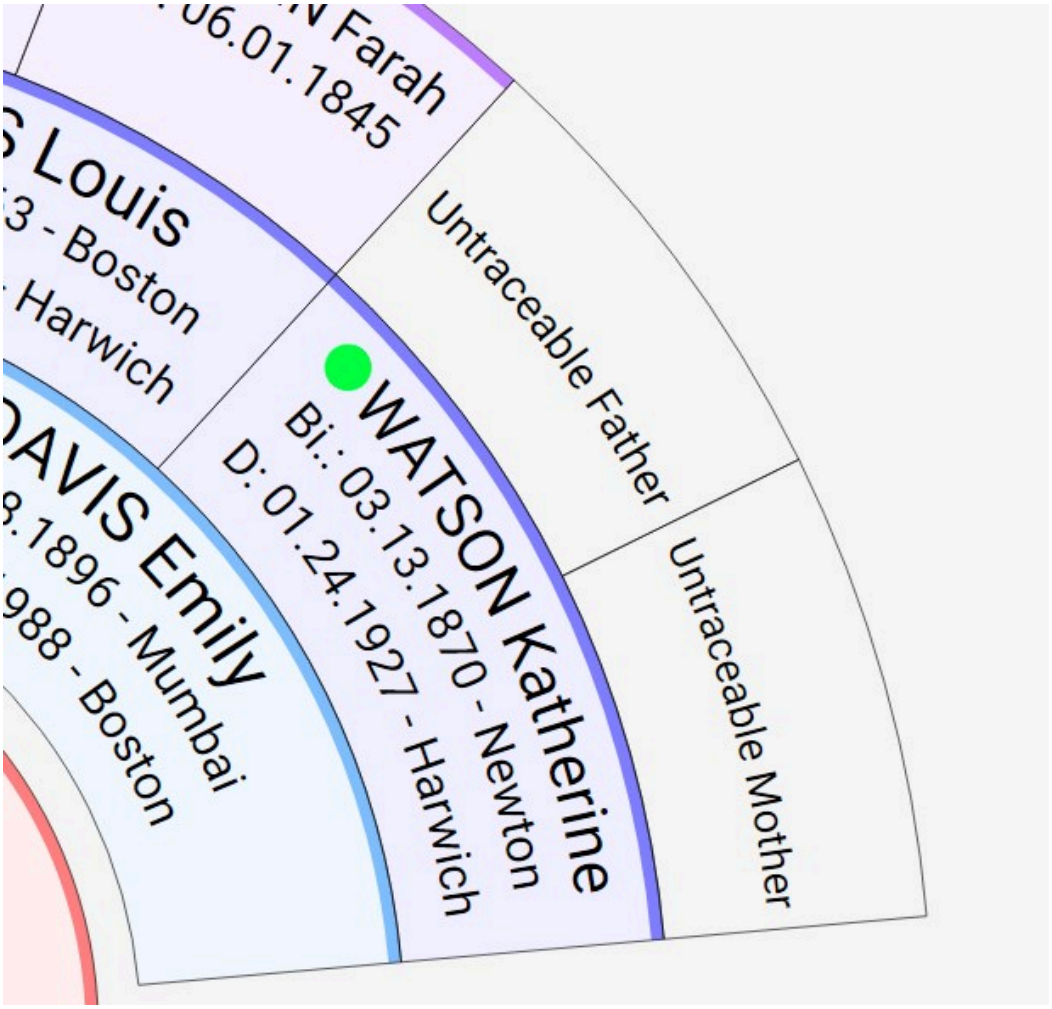
Marriages between cousins were common. The wheel allows you to identify duplicate branches aka implexes.
Tick the **Duplicate branches** box.
The text in the relevant boxes will then turn red.

Right-click on the person in the duplicate branch and choose to display all occurrences in order to locate them among the multiple branches in the implex. You will see the boxes for the person in question highlighted, making it easier to locate their multiple appearances in the

wheel.

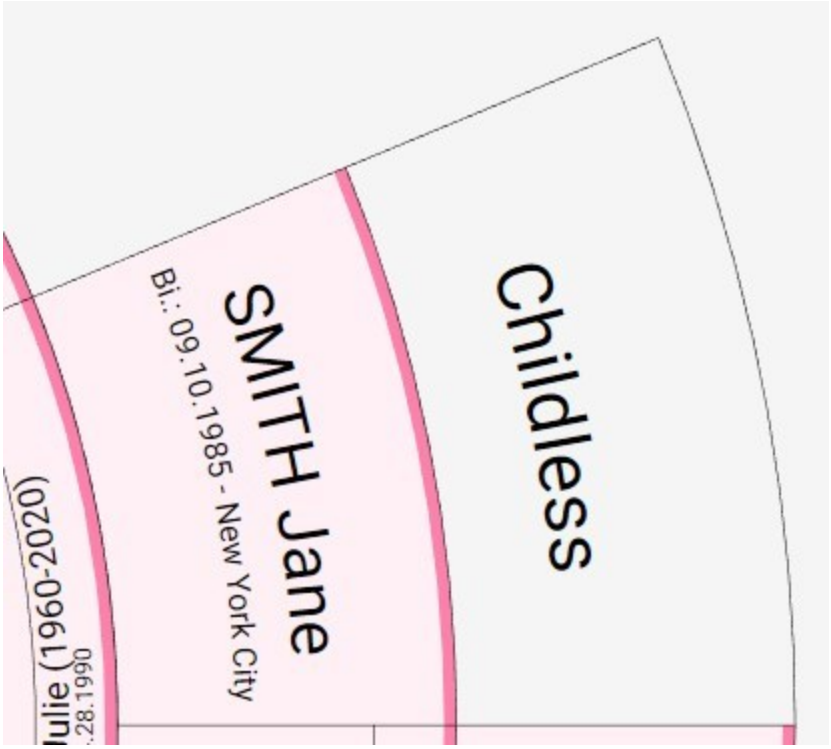
Untraceable parents

To identify branch ends that do not require further research. See the article Untraceable Parents (see page 161).



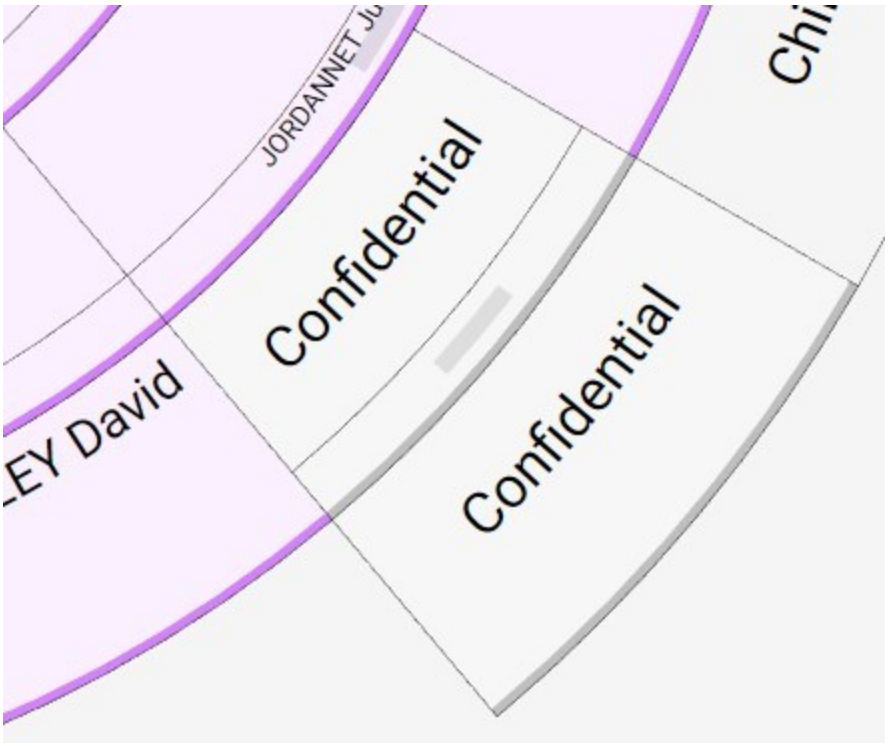
Persons with no descendants

If you have checked the label '**Childless**' (see the article Flags suggested by Heredis (see page 186)) in the personal data tab, you can display the end of the branch by checking the box '**Persons with no descendants**'. A box will then clearly indicate the end of the branch.



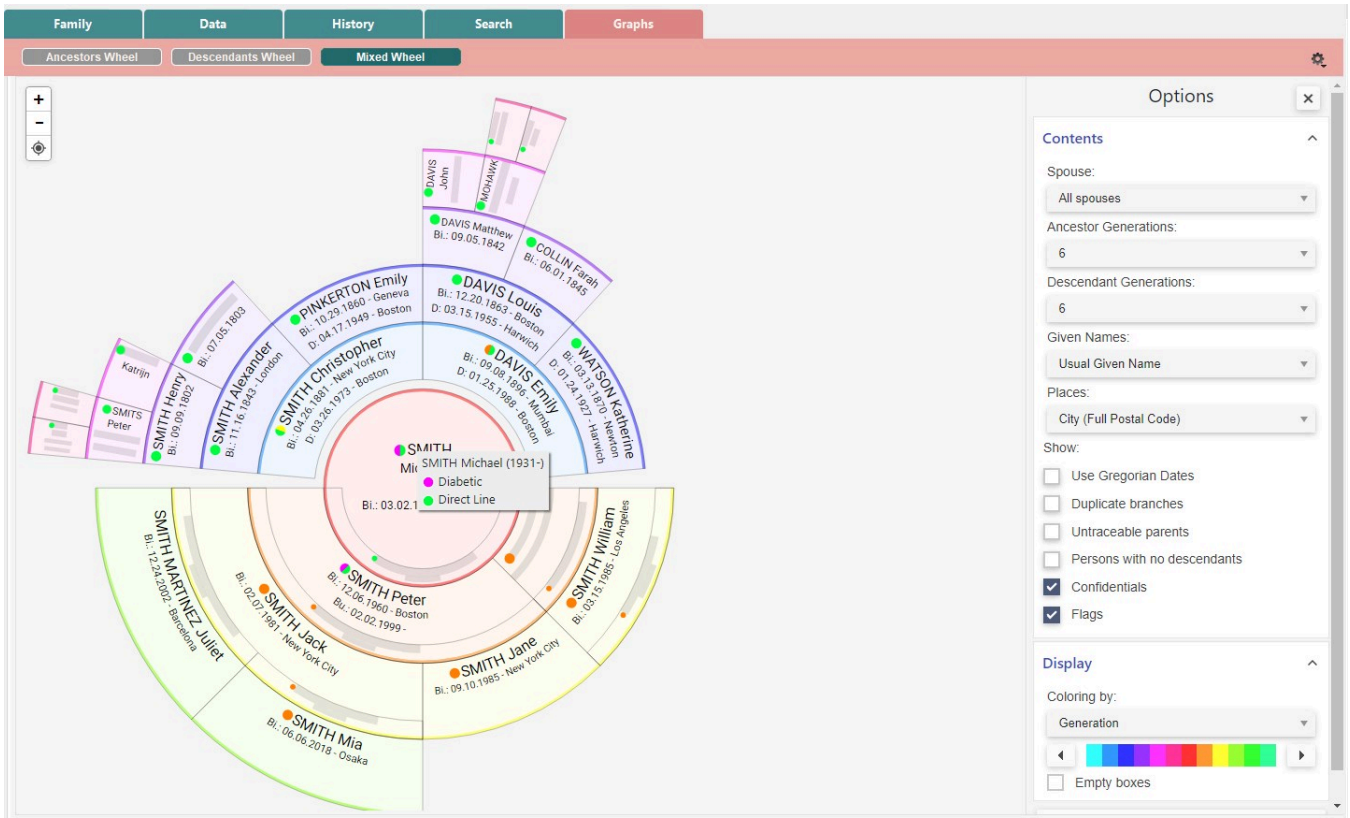
Confidentials

Confidential allows you to choose whether or not to display persons marked as confidential in the family tree. If '**Confidential**' is unchecked, persons will appear with the label Confidential in their box. (See the article Flags suggested by Heredis (see page 186)).



Flags

If you have flagged persons in your family tree and you tick the box, the persons present will display the icon for the flag(s). See the article Personalized flags (see page 188).

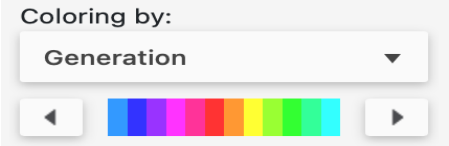


Diplay options

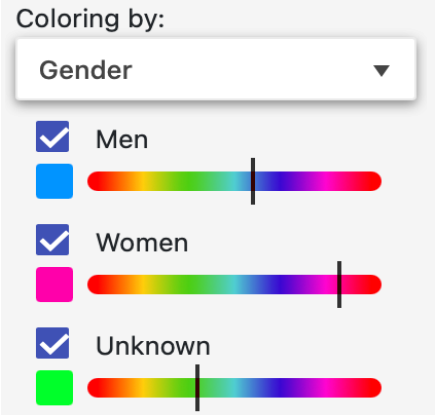
Filters

Apply colors based on the following filters:

- by **generation**. The wheel displays a different color for each Ancestor and Descendant generation. Use the slider to select the desired starting color.



- by **gender**. To show the male/female breakdown. Move the cursor to select the color for men, for women and for persons of unknown gender (i.e. stillborn babies). By unchecking a category, you can choose not to select a color, in which case gray will be applied.



- by **Ahn. Number**. Move the cursor to select the color. Please note that Ahnentafel numbering is applied in relation to the root person and only in the ascending line. There will therefore be no coloring option for descendants.
  If the primary person is not one of the ancestors of the root person, not all of his/her ancestors will be colored.
  You can, however, check the **Not Ahn. Numbe**r box to apply a particular coloring to individuals who are not in direct line with the root person.

- by **Complete Person**. Move the cursor to select the color. This option allows you to visualize how much work is left to do. “Completeness” varies according to your Heredis preferences. For more details, see the Heredis’ Preferences (see page 107) article, “Completeness of data” paragraph, Event Icons.
  You can also choose to color Incomplete person by checking the related box.

- by **Marked/Unmarked Person**. Marking allows you to easily identify persons according to a specific criterion, i.e. all those who died in the city of London. See the article Flags suggested by Heredis. (see page 186)

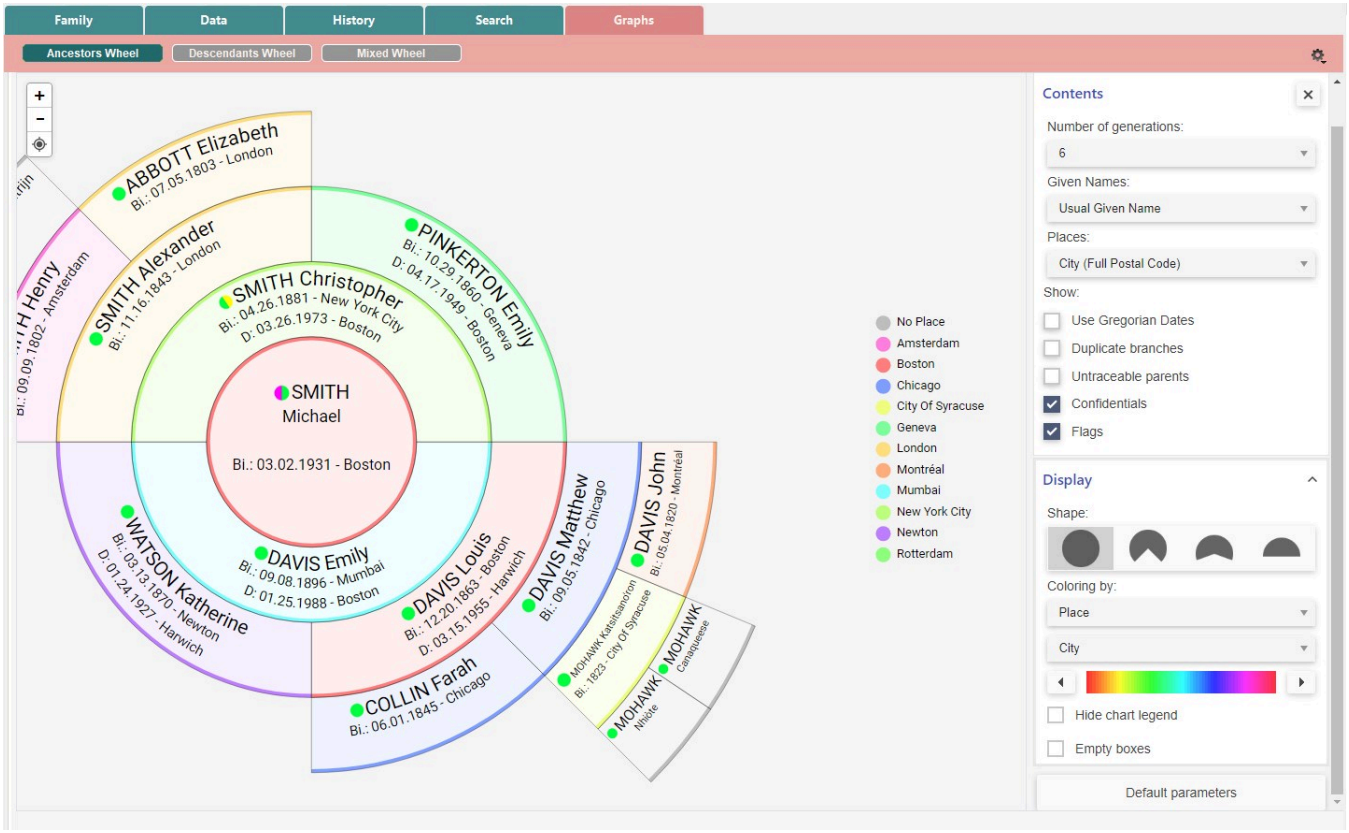
- by birth **Place**. See the Location Wheels article for details on how to use it.

Export for printing

See article Export a personal or family timeline or wheel for printing for details.

Location Wheels

The Ancestors and Descendants wheels can be found under the **Graphs** tab.
You can apply an additional filter to create a “location wheel” and see at a glance the geographical origin of your ancestors and of their descendants.



Note: Since Heredis 2026, the options panel has been optimized. Click on the **Contents** or **Display** title to reduce the number of options displayed.

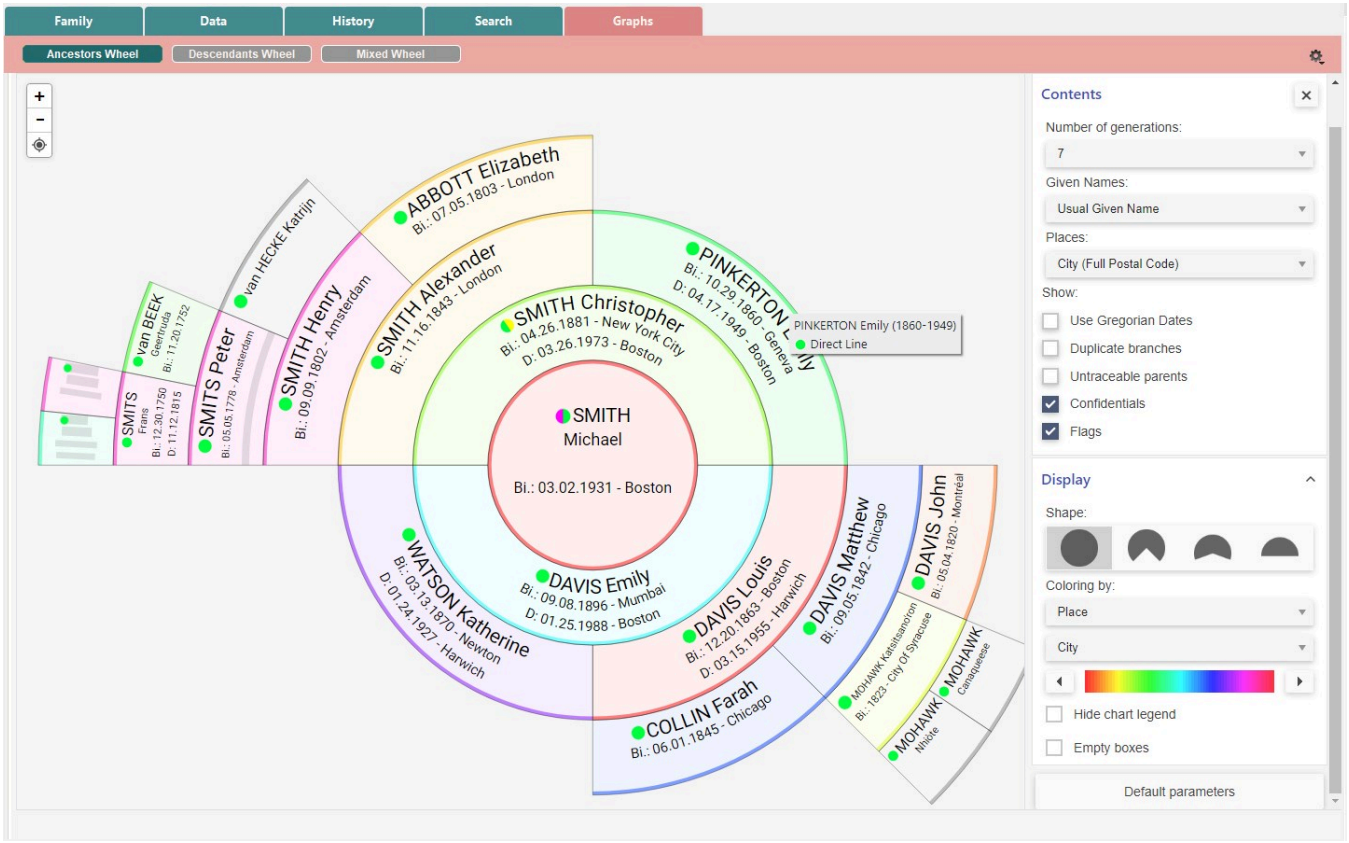
Create a location wheel

Select the primary person for whom you wish to create an Ancestors or Descendants location wheel.

Click on the **Graphs** tab.

Click on the type of wheel you have in mind: **Ancestors Wheel** or **Descendants or Mixed Wheel** .

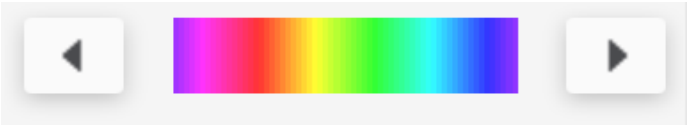
In the **Options > Display** section, choose the shape. In the **Options > Contents** section, specify the number of generations to manage.



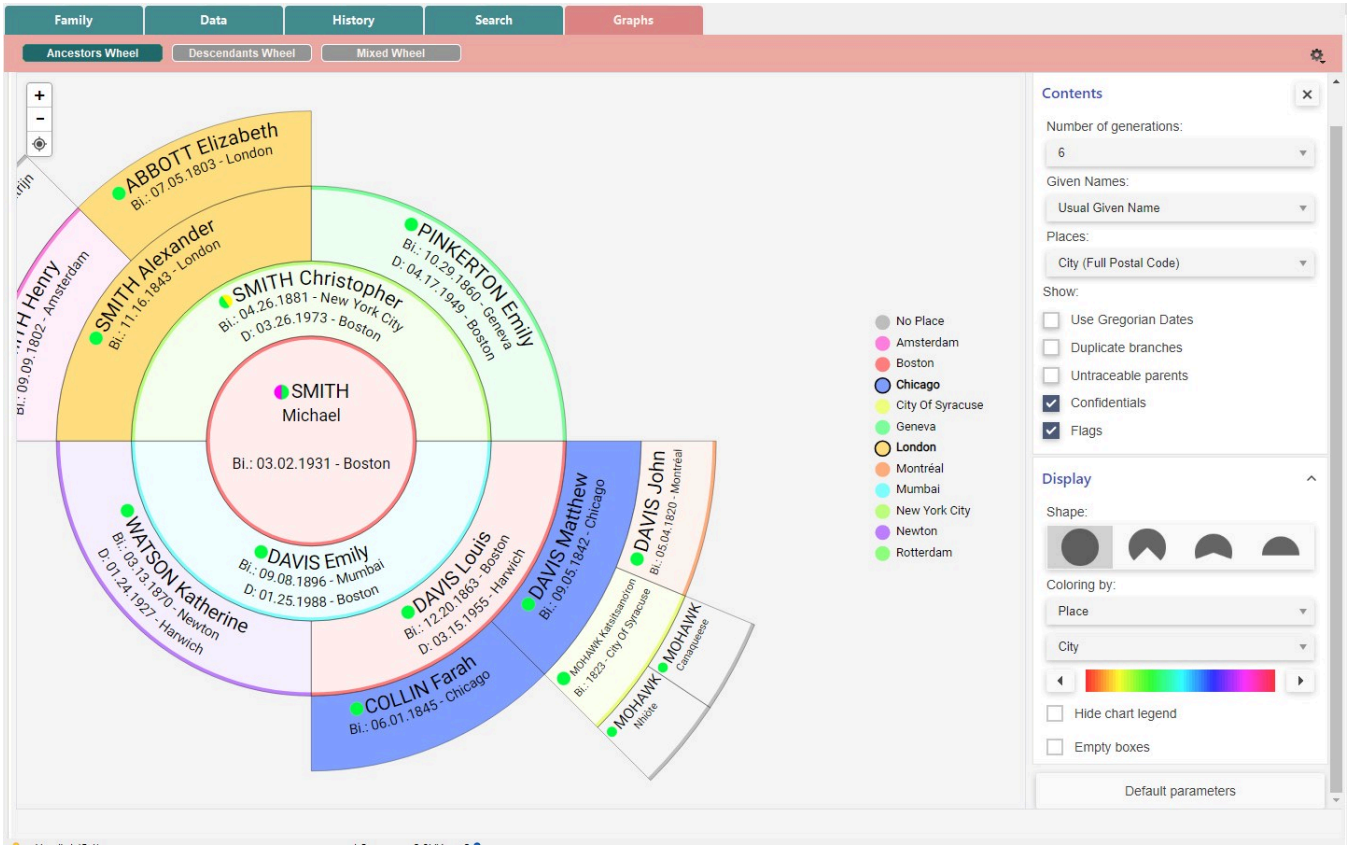
In **Display** section, click on the dropdown list and choose the coloring by **Place**, then proceed in the same manner with the next dropdown list to choose the coloring either by

- city
- county
- state/province
- country

You can modify your wheel's base color by clicking on the arrows or hold your mouse left click on the color strip and drag to the desired color.



Click on **Hide the legend** to remove the color legend available to the right of the wheel.
If you click on a location in the legend, all occurrences are highlighted. You can click on multiple locations at once.

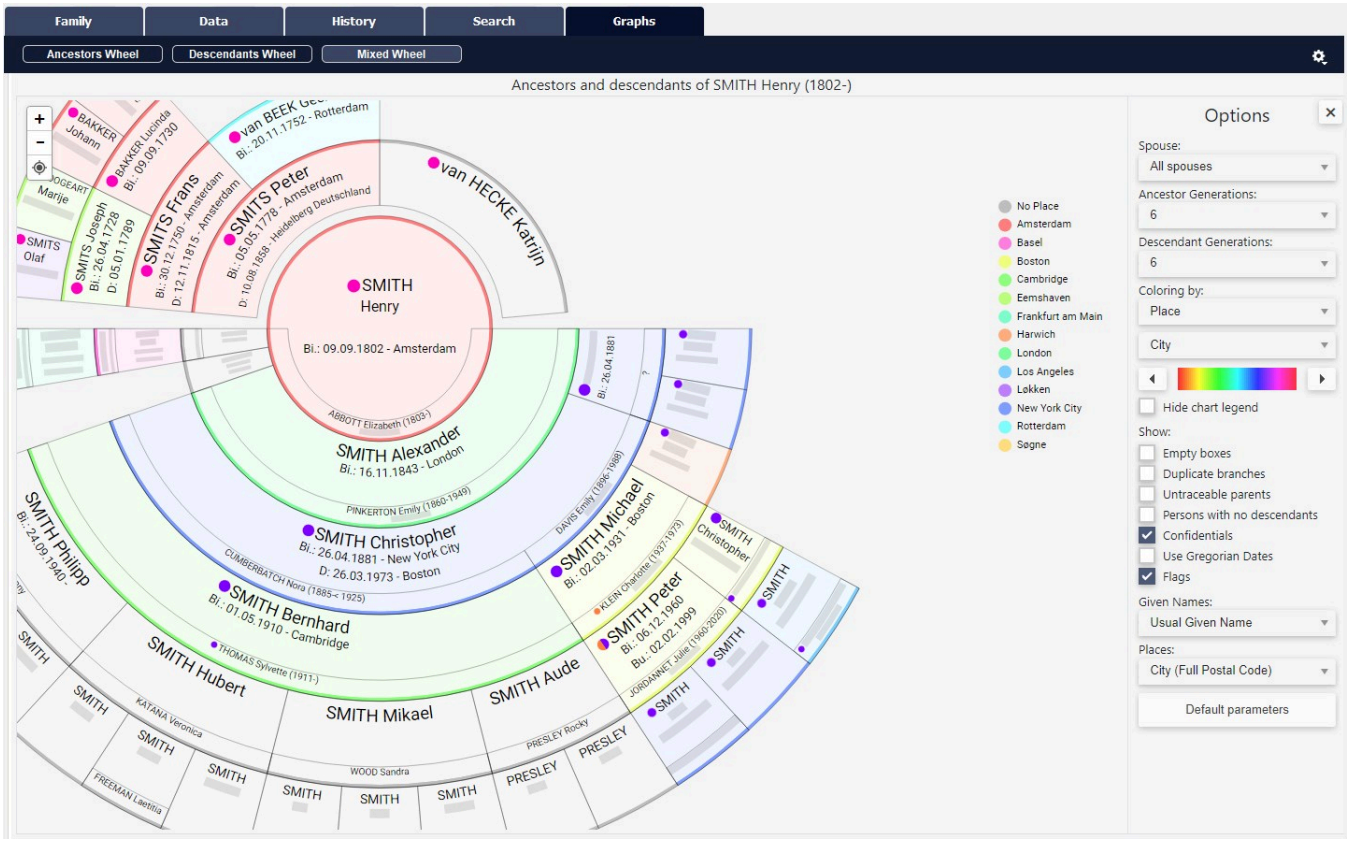


If the person has no place of birth, the box will be colored gray. Click on **No place** in the legend to highlight

In Contents section, as with the previous Ancestors, Descendants and Mixed wheels, you can check/uncheck the following boxes depending on the kind of wheel chosen:

- **Empty boxes**. To obtain a perfect wheel, or simply to view the remaining work, check the Show empty boxes box to view them.
- **Duplicate branches**. In genealogy, consanguineous marriages are common. These marriages lead to the repetition of branches, known as implexes. You can view implexes by checking the **duplicate branches** box. The text in the boxes of persons present several times in the wheel is then written in red. You can then right-click on one of the implexed boxes and choose **Show all occurrences** to see where the boxes for that person are located. Heredis highlights them for ease of use.
- **Persons with no descendants** (in Descendants and Mixed Wheels): If you have ticked the “Persons with no descendants” box (see The different data fields > Flags and their use (see page 87)) in personal data tab, you can display the end of the branch by ticking the box. Childless will then be written in a box to indicate the end of the branch.
- **Untraceable Parents** allows you to display the boxes of missing parents of an individual.
- **Confidentials** display or not the persons declared confidential in the genealogy. If “Confidential” is unchecked, persons will appear with the word Confidential in their box.
- **Use Gregorian Dates**. This option makes it possible to transform the dates entered into an unusual calendar into a Gregorian date for a better understanding, for your

family members, for example.
- **Flags**. If you have set tags for the persons in your genealogy and you tick the box, the persons present will be marked with the flag(s) icon(s).



Choose the format of your first names by clicking on the drop-down menu.

- all given names,
- first given name,
- usual given name
- or the given name and initials of subsequent names.

Choose the format of the places shown in the boxes.

Click the **Default parameters** button to go back to return to the default settings of the wheel.

Export and Print the Wheel

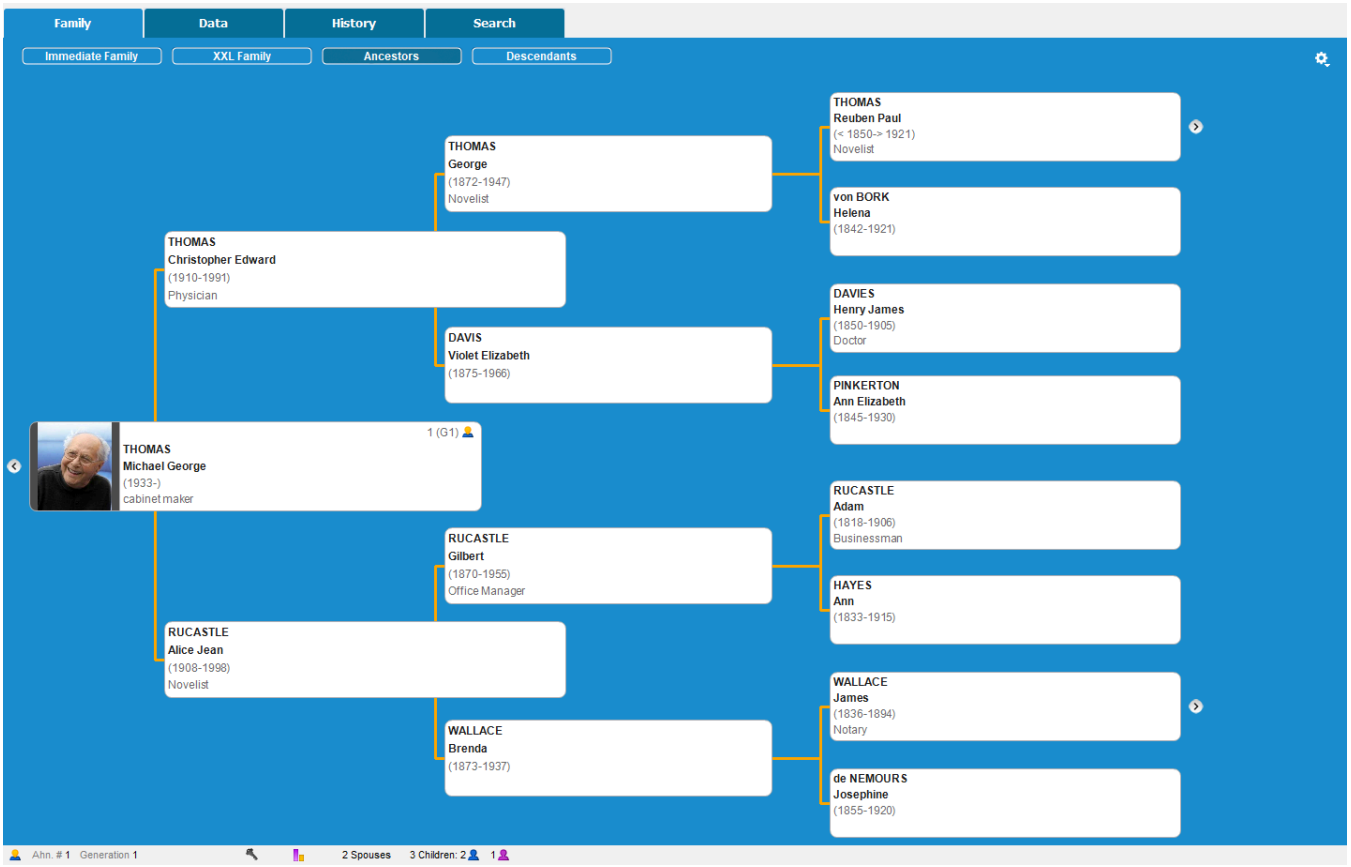
See the article Export a personal or family timeline or wheel for printing, which explains the details.

Location Tree

Under the **Ancestors** dynamic view, Heredis will automatically color code the banner of each box in the family tree, based on the place of birth of the persons displayed.
Heredis will also let you see the criteria on which the color coding is based, that is either the persons' City, County, State/Region, or Country of birth.

How to display the Location Tree

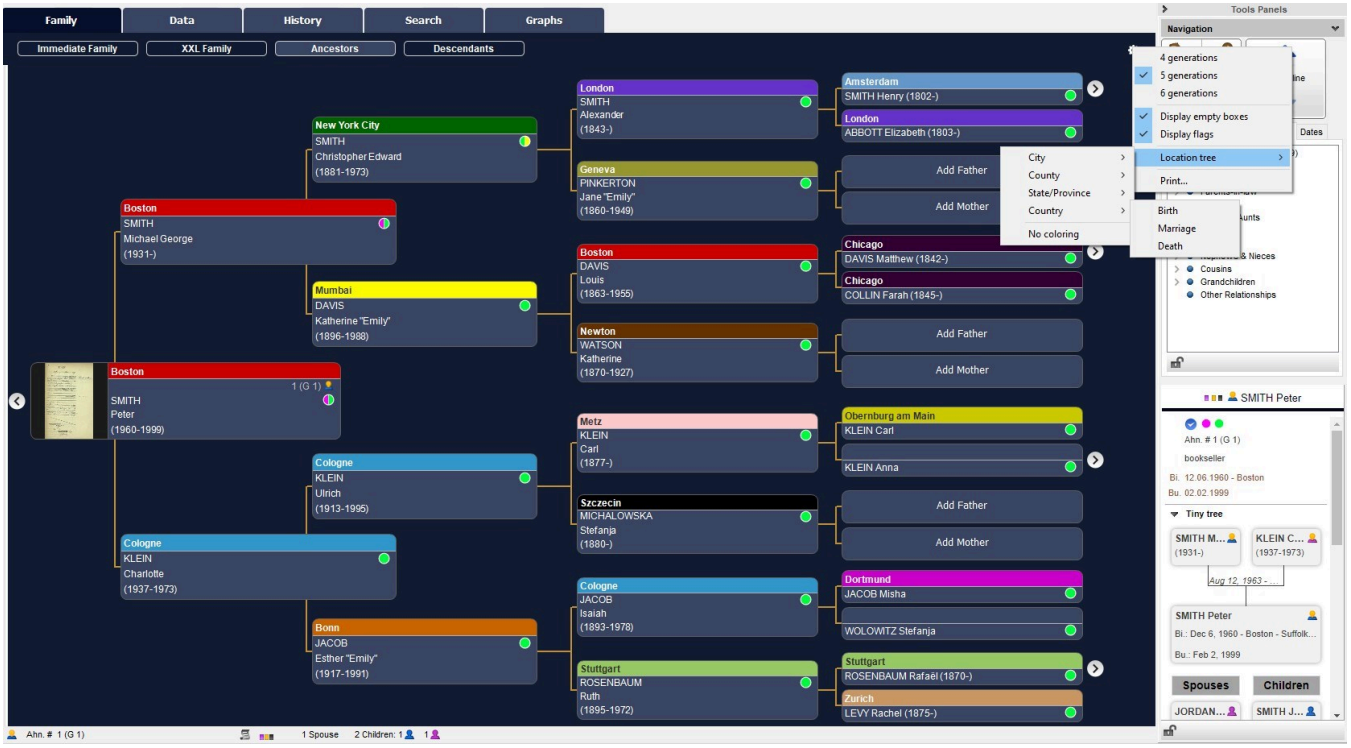
Standard Ancestors Tree Chart



- Click on the **Family** tab > **Ancestors**,
- Click on the cogwheel ,
- Select **Location tree**.
- Choose the administrative level: **City, County, State/Province** or **Country**.
- From Heredis 2025, choose the type of event for the banner coloring: **Birth**, **Marriage** or **Death**.

Note: if the person has had several spouses, it is the marriage to the spouse cited in the ancestry that will be taken into account.

Location Tree



Note: When no place has been entered for the person's major event selected, his/her banner is displayed empty without coloring. (Background coloring of this empty box depends on the Heredis theme chosen)

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.

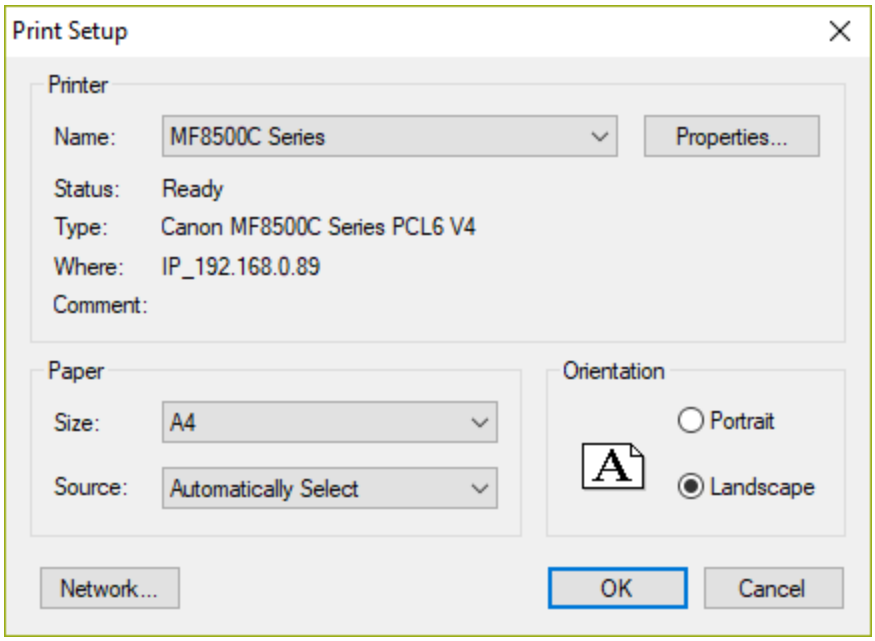
Printing the Location Tree

You can also choose to print the Location Tree by clicking again on the cogwheel and then on Print.

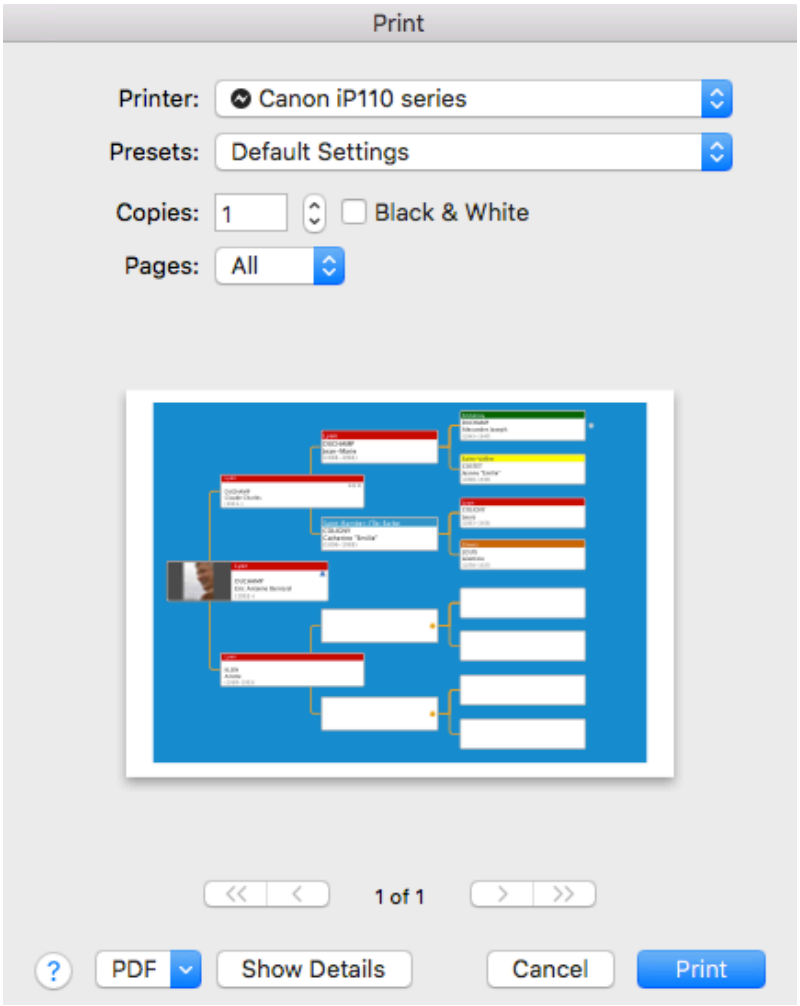
(Mac only) The printing format will depend on the size of your screen.

The Print window of your operating system pops up.

(Windows) Print window



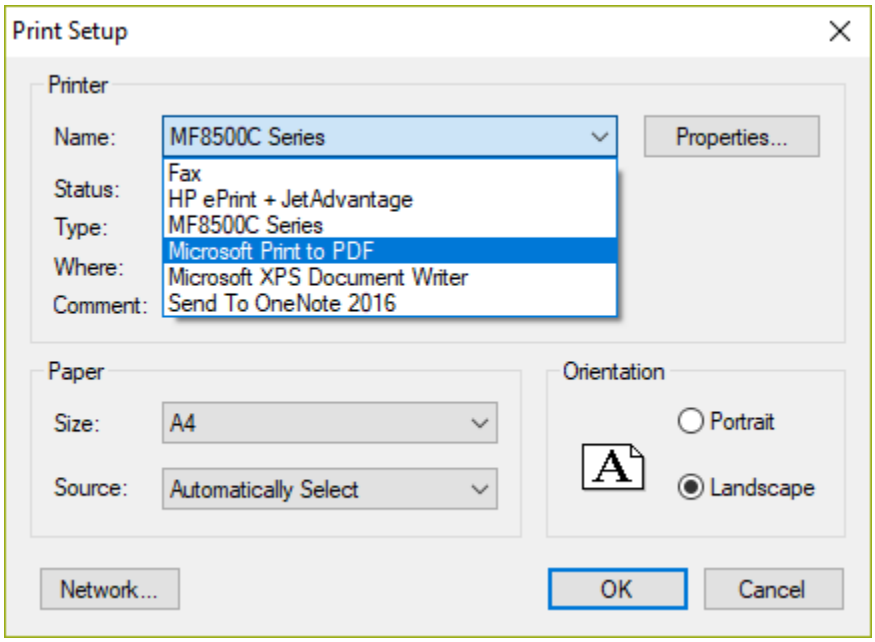
(Mac) Print window



Export to PDF

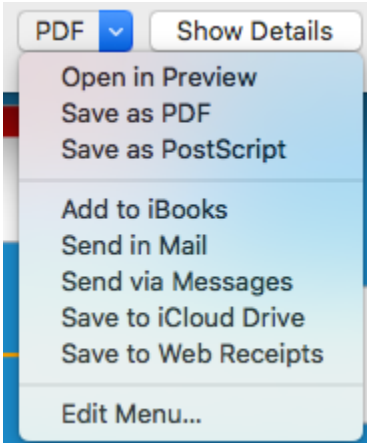
(**Windows**) If you wish to export to PDF, instead of choosing your printer, select Print-to-PDF or any other PDF add-on installed on your computer.

(Windows) Export to PDF



(Mac) Click the **PDF** button in the lower left corner of the Print window then select **Save as PDF**.

(Mac) Export to PDF

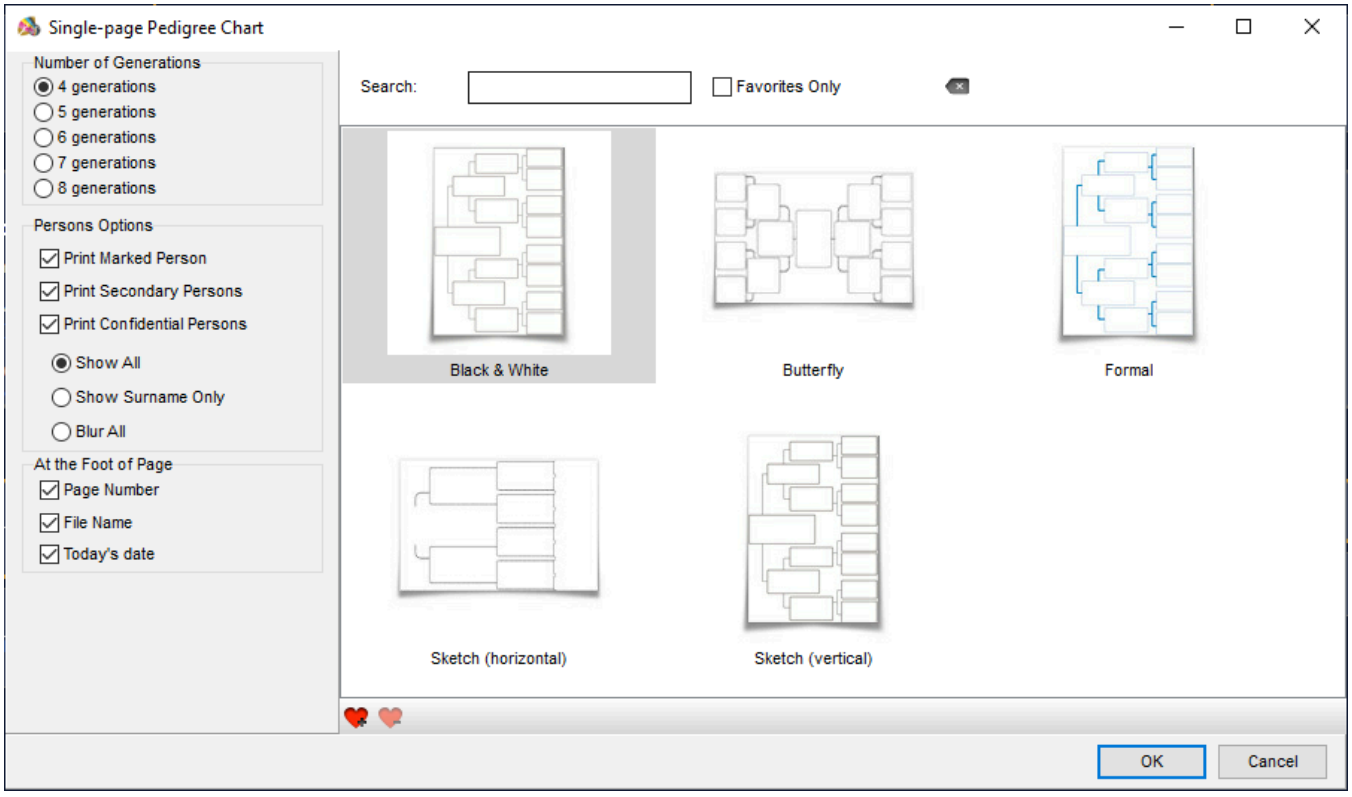


(Windows) Building single-page pedigree tree charts

Single-page pedigree trees are ancestors trees of predefined size whose presentation always conforms to the same scheme. They are designed to be printed on a single page.

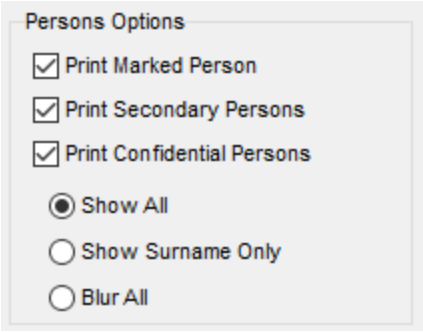
Choose the presentation of the chart

Select the **Charts menu – Ancestors Tree Charts – Single-page… ,** or click the button and click the thumbnail representing a single-page.
Graphic thumbnails show the different themes of single-page pedigree charts.
For each theme selected, Heredis indicates the format for which the document has been optimized. Some themes can accept up to 8 generations in a single-page. If so, choose how many generations you wish to see by page.



- Type the name of the theme that you want in the search bar.
- Display only your favorite themes (to set them, click the button).

The left-hand column allows you to specify who will be automatically included or not in the tree. Check or uncheck the boxes to print marked persons, secondary persons, persons declared confidential. If you choose to print persons declared confidential, you will need to specify how they will be displayed (in full or blur or partially). See the article The different data fields to find out what the marked, confidential and secondary tags are.



Choose to add the File name, page number and/or Today's date.

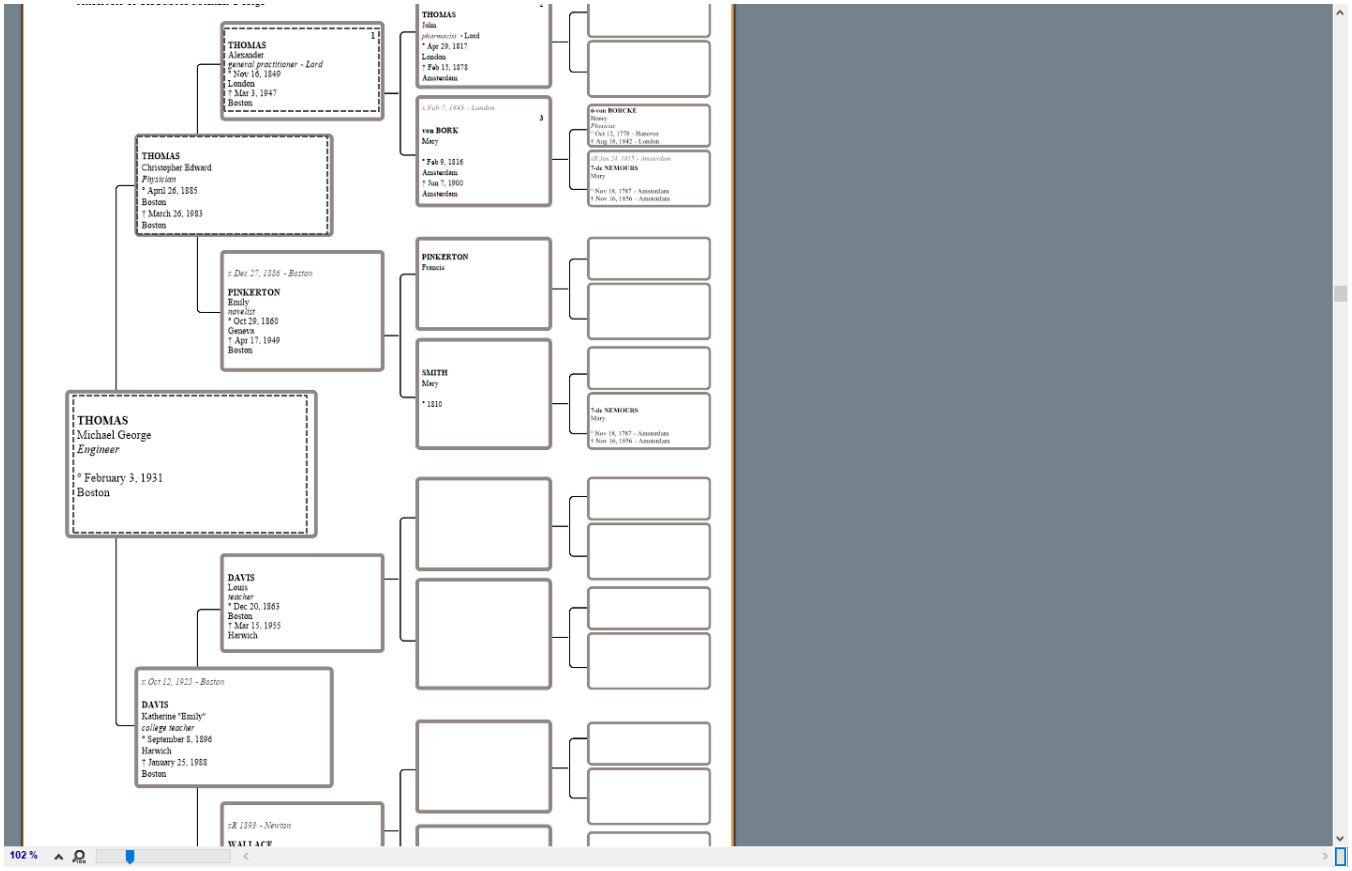
Click the **OK** button to start creating the single-page pedigree tree.

Change the chart layout

It is possible to make changes to the entire tree chart or to a selection of boxes.

Select boxes

Click a box in the tree chart to select it. To extend the selection to other boxes, maintain **Ctrl** key and **click** or **Shift** key and **click** the other boxes you need to select and make a personal multi-selection. You can also hold down the mouse button and draw a rectangle around the boxes you want to select, if those boxes are contiguous.



Use the **Search** panel and double-click one of the poeple in the tree to select their box.

Type **Ctrl A** to select the entire tree or use the **Select** menu **– Select All**.

Use the right click to make a multi-genealogical selection. Click on the first box to select and then right clik of the mouse to choose from the following options: **Select Person and All Ancestors – Select Person and All descendants- Select the generation – Select All** (the entire tree chart) **– Select Males Only – Select Females Only**.

To unselect a box, maintain **Ctrl** key and **click** or **Shift** key and **click** the box.

See the article (Windows Pro) Apply a selection to a tree chart (see page 735) for more details on box selection.

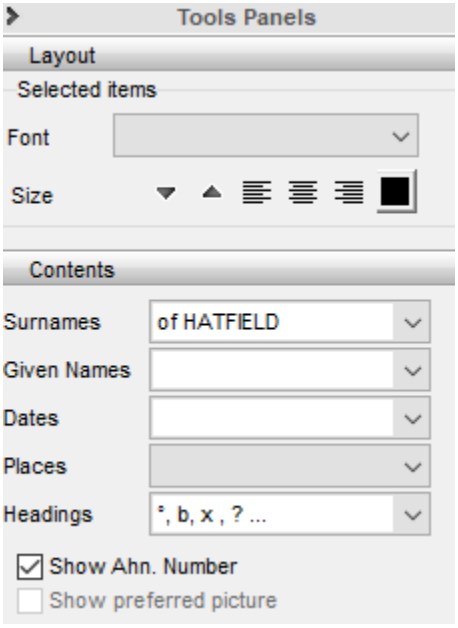
Change the presentation of the boxes

It is very simple to change the formatting of a selection of boxes using the options provided in the **Tools Panels**:

- Apply a different font
- Increase or decrease the overall font size
- Change the alignment of content
- Change the color of the text in all the selected boxes.

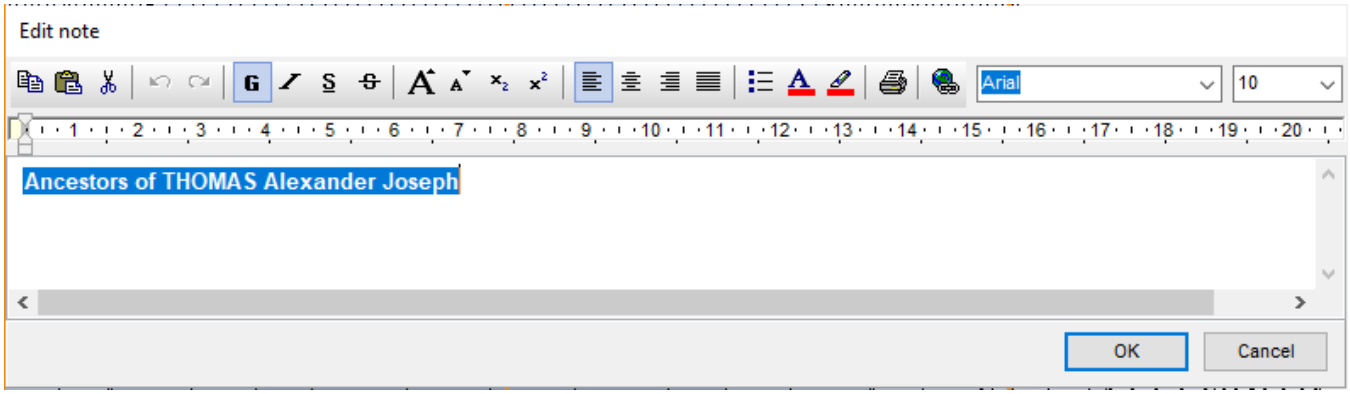
The changes can also relate to the content of the selected boxes:

- Change the format of the surnames
- Change the format of given names
- Change the format of dates
- Change the format of places
- Apply other headings as genealogical symbols
- Show or not the Ahnentafel number
- Show or not the picture in tree charts themes allowing pictures.



Change the title of the tree chart

The title of the tree chart is an editable text box. Heredis offers a title containing the name of the primary person. Double-click the title to open the text editor and make your content or text formatting changes. When the processing window has been closed, if necessary, use the mouse to change the size of the title area by clicking on the border and then dragging with the mouse in the desired direction.



See (Windows) Print or export as PDF the tree chart (see page 744) for layout and printing functions.

(Windows) Building Fan charts

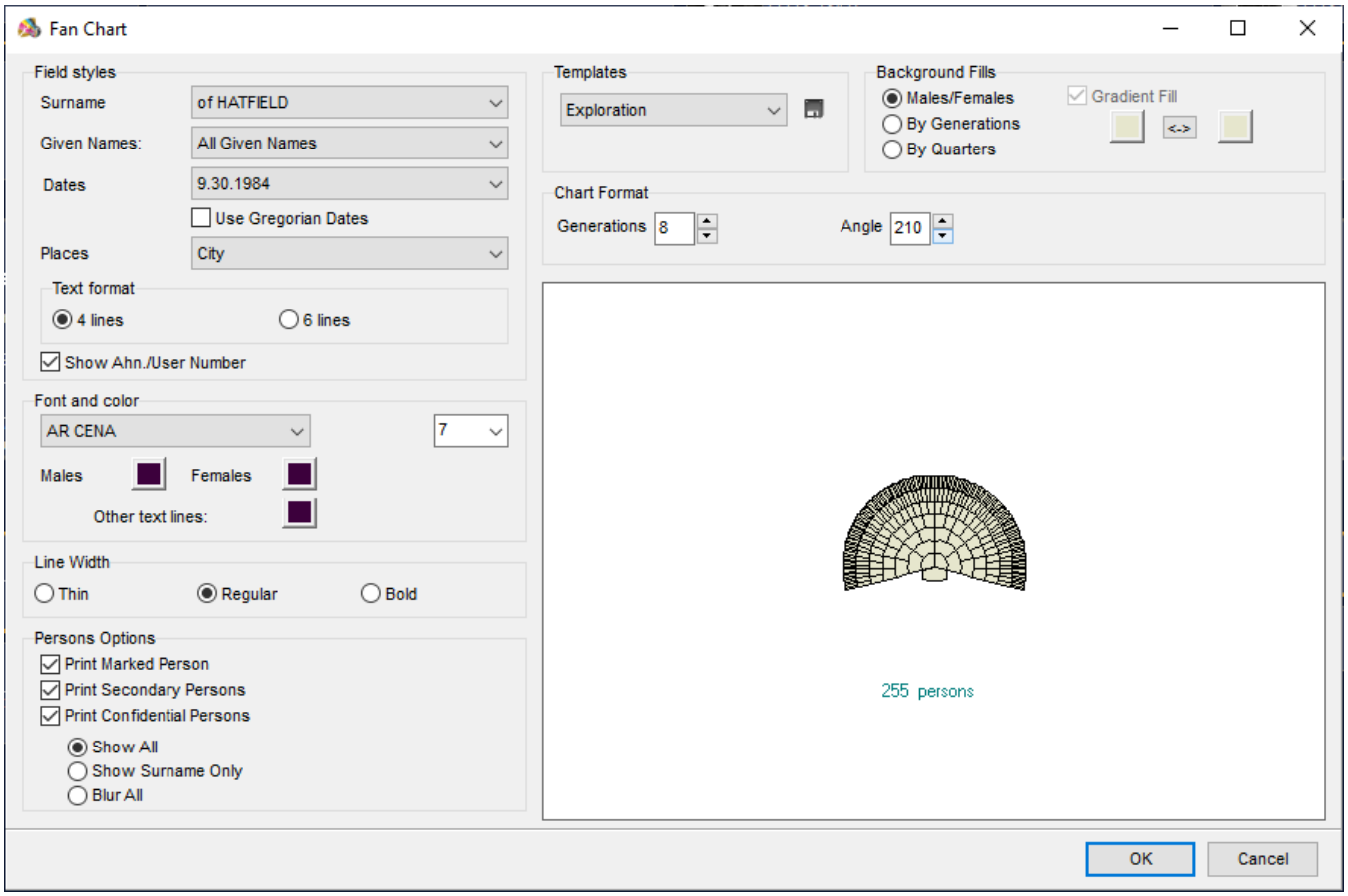
Trees of ancestors can be printed in the shape of a fan, with the primary character as the origin.

The number of generations represented on a fan chart can be up to 12 of ancestors (including the character at the base of the tree) .

These charts can be printed according to their dimensions on a single page or on several pages to be assembled. If they are printed on multiple pages, an assembling link-up zone between the pages makes editing easier.

Click the button and then click the thumbnail representing the Fan chart.

or Select the **Charts** menu **– Ancestors Tree Charts – Fan Charts**.



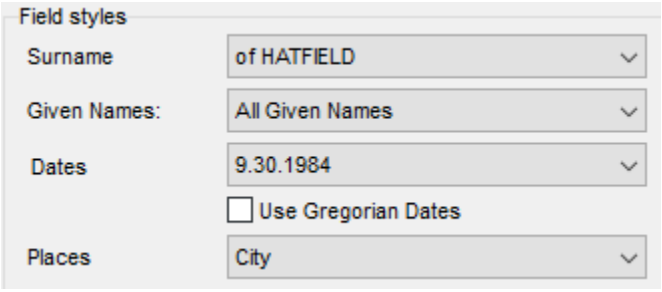
Choose the presentation of the chart

Formatting the contents of the boxes

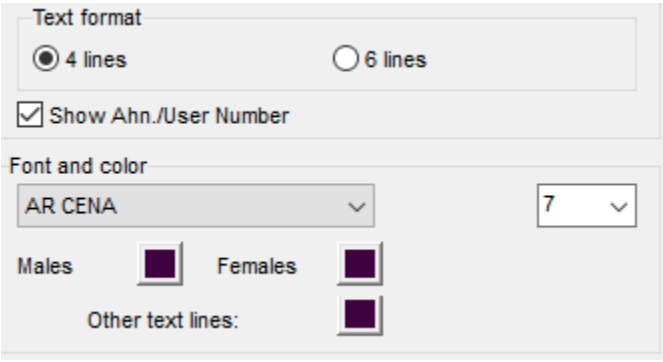
The content of the boxes is defined in the left part of the setup screen.

It can then be modified by clicking on once the fan chart is created.

- Choose the styles of the fields for the tree chart (should one or more given names be included, should the dates specify the day of the week…).

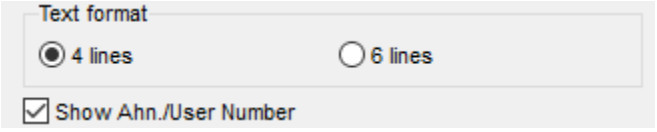


- Specify the formatting of the text: font, size, colors.



- Apply the limitations on the persons to be displayed (marked, confidential…). See the article The different data fields (see page 87) to learn all about this marking.

- Specify whether you want, in each box of the tree chart, succinct or more detailed information by clicking on the **buttons 4 lines** or **6 lines.** Heredis manages, depending on the generation, the maximum amount of information that can be edited.

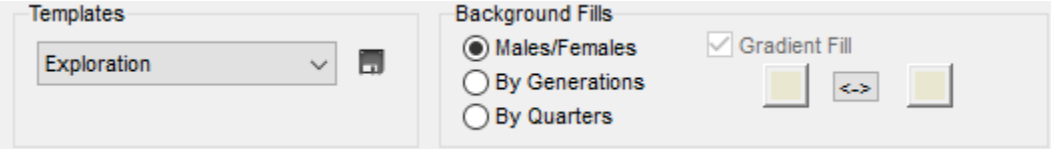


- Set the width of the printed line and specify whether you want to display the Ahnentafel number of persons.

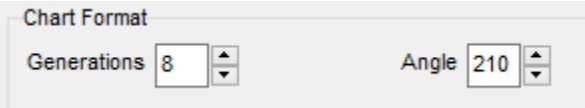
Graphic formatting

The right part of the setup screen includes the different tools to use to give the desired shape to the fan tree chart.

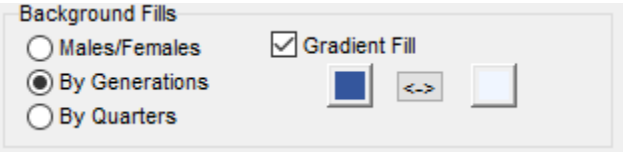
- Select a tree theme from the **Templates** drop-down menu and observe in the preview window the change made by each new layout you choose (number of generations, angle, colors…).



- Indicate the number of generations to be treated (up to 12), Heredis specifies the number of persons contained in the tree chart according to the number of generations chosen.
- Choose the angle of the fan (between 180° and 300°).
  Choose the shape of the fan (up to 300°).



- Move the slider to specify the number of different quarters to color if you chose the **By quarters**. The number of quarters can range from 4 to 16.
- Choose the color settings. Select the options:
  – **Males / Females** to color the different boxes according to the sex of the person,
  – **By generations** to apply a different color to each,
  – **By quarters** to materialize the 4, 8 or 16 chosen quarters.
- Select the **Gradient Fill** check box to choose the two extreme colors for generations or quarters coloring.
  or Click in each of the preview areas (generation, quarter…) to specify a fill color.



Click **OK** to draw the tree according to the choices you specified.

Save your modified theme

When you have made personal changes to a template, your formatting is preserved until the next personal edit you make in the tree chart.

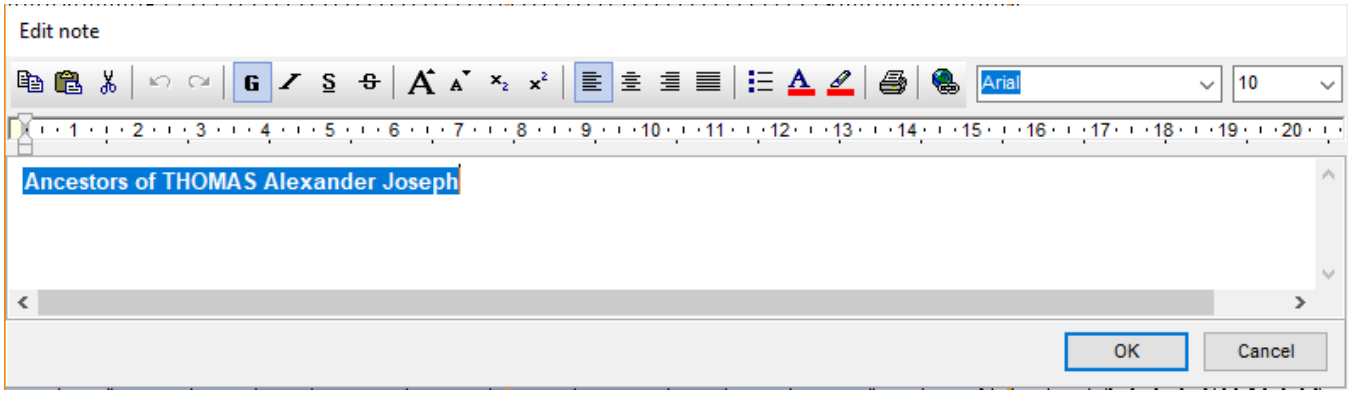
You will be able to try the different themes but also return to **Lastest layout** in the **Templates** drop-down menu.

Save the created template by clicking next to the template choice and give your template a name.

Change the tree chart layout

Change the title of the tree chart

The title of the tree chart is an editable text box. Heredis offers a title containing the name of the main person. Double-click the title to open the word processor and make your content or text formatting changes.



Change the formatting in the tree chart

In tree charts of fan ancestors, it is possible to make modifications, either to the whole tree or to a selection of boxes.

Select boxes

Click a box to select it. To extend the selection to other boxes, maintain **Ctrl** key and **click,** or **Shift** key and **click,** on the other boxes you select for a personal multiselection.
Type **Ctrl A** to select the entire tree.
Use the right click to do a genealogical multiselection. Click on the first selected box and choose from **Select** menu the following options: **Select Ancestors – Select Descendants – Select Generation – Select All** (the entire tree) **– Select Females Only – Select Males Only.**

Use the **Search** list and double-click one of the people in the tree chart to select their box.
To unselect one of the boxes, maintain **Ctrl** key and **click** or **Shift** key and **click** the box.

See the article (Windows) Apply a selection to a tree (see page 735) for more details.

Apply a change

It is possible to change the color of the selected box(es). Click the color pad in the **Boxes** panel and specify the new color to apply to the selected boxes.

Restore the fan tree chart according to the colors of the template by clicking on the **Default** button: each of the selected boxes will take the color defined by the template.

To return to the general settings of the tree chart, click the button or select the **Display** menu – **Graphical preferences** and change the number of generations, the template used, or any content or coloring options.
The new settings will apply as soon as you click **OK** to rebuild the fan tree chart.

See Finding your way around a tree (see page 737) for display and move functions in the tree chart.

See (Windows) Print or export as PDF the tree chart (see page 744) for layout and printing features.

(Windows) Unlimited size tree chart : ancestors, descendant and hourglass

You can create as many graphical representations of your genealogy as you wish. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

Choose from the different types of tree charts proposed in the **Charts** menu or click **Charts** on the toolbar to visually select the tree charts proposed by Heredis.

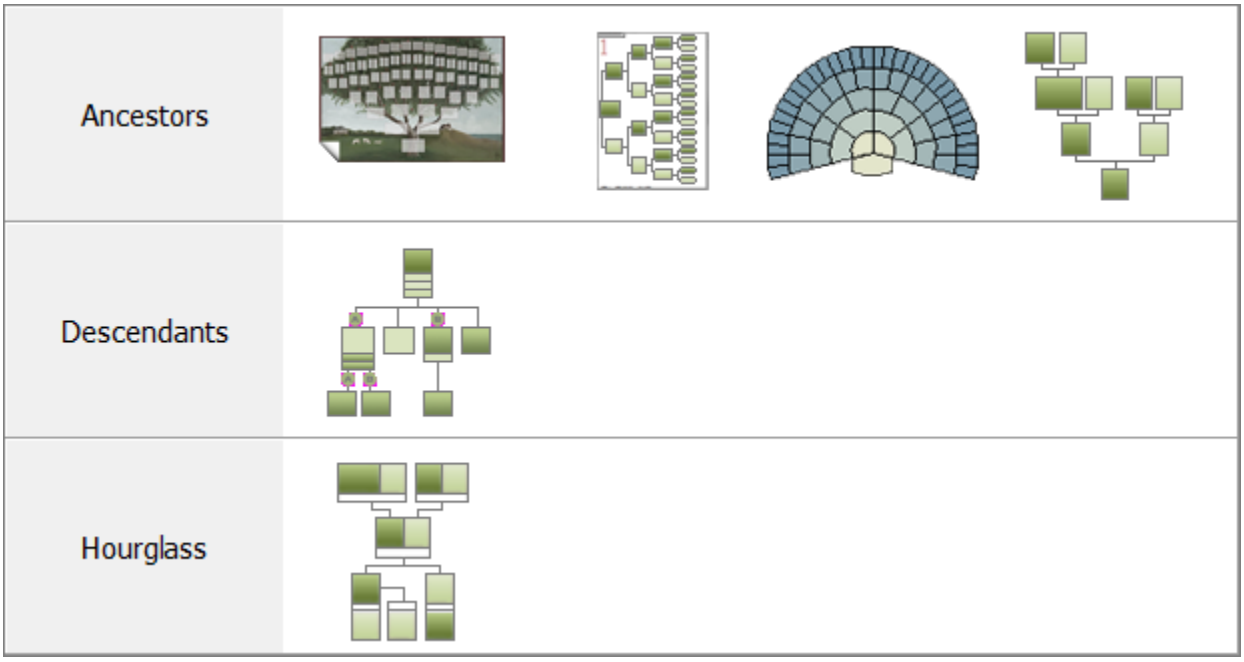
Edit a tree chart

The printing of a tree chart takes as its starting point the primary person displayed and will display his/her ancestors, descendants or both as an hourglass tree chart.

Choice of tree chart

In the **Charts** menu or in the displayed selection screen, choose the type of tree to build from the list to the right.

Choose a tree chart



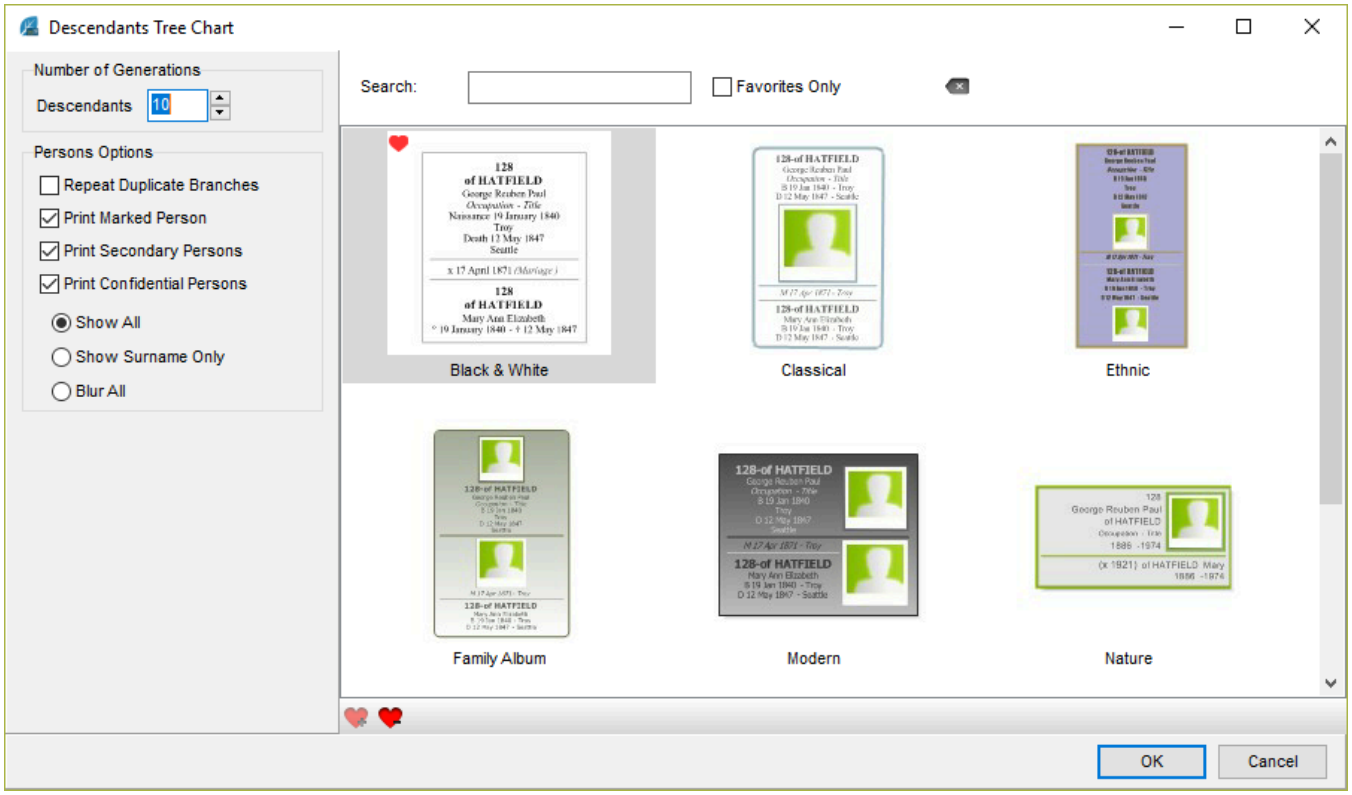
Heredis proposes various types of tree charts of unlimited size. Whatever the type of tree chart selected, you can print it or have it printed over several pages or a single long strip of paper.

When a tree exceeds the size of your printer, each page is printed with an overlap to facilitate

mounting of the chart.

Choice of theme

Choose a theme



Click a theme in the viewer. To facilitate your choice, Heredis displays an overall preview of the tree to be edited with this theme or a preview of a box. Scroll through the different themes by pressing the arrow keys or with the mouse. The last used themes are preset for each type of tree chart. After testing the different themes of tree charts, you may define your favorite themes. Click the **Add to Favorite** button and the theme is marked with a heart icon that allows it to be recognized.

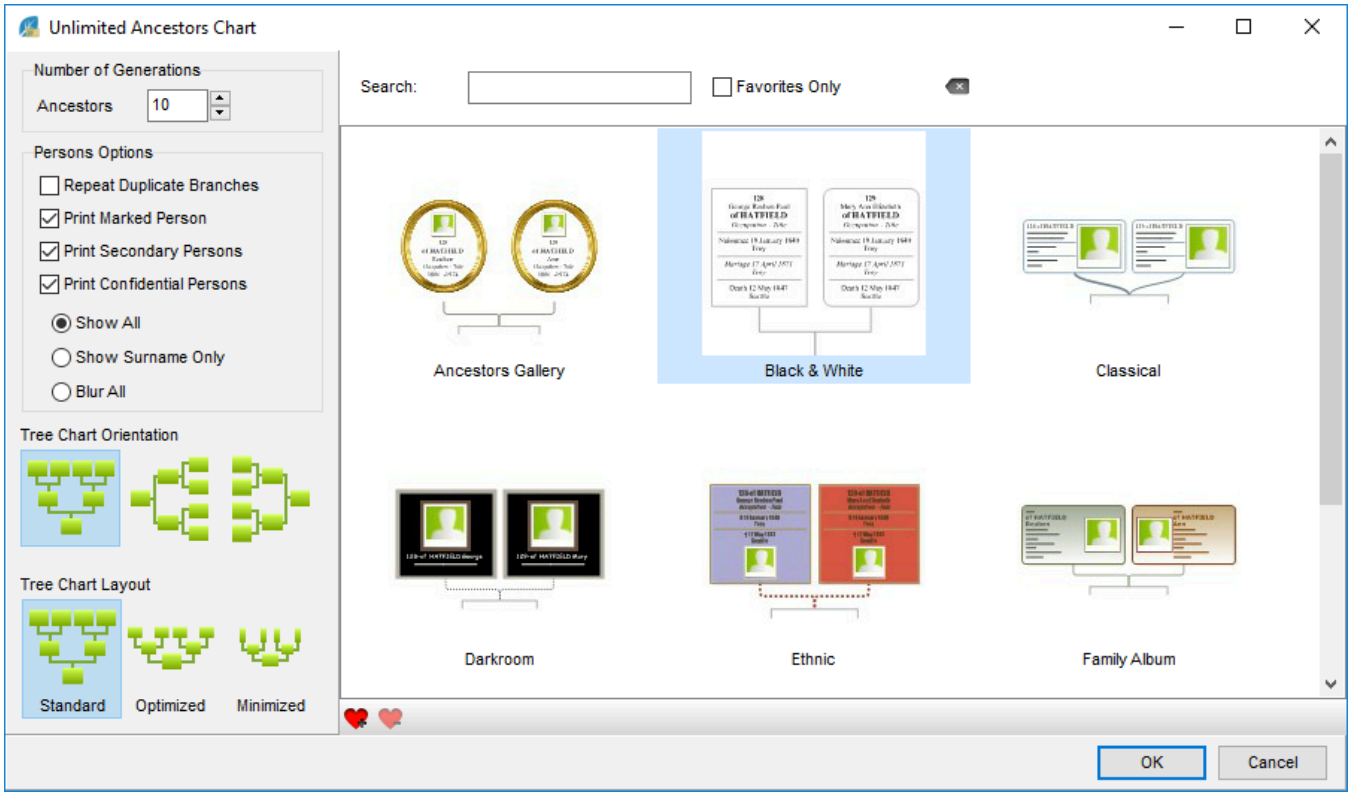
Info • You have a search filter for favorite themes. Thus, you can display only the themes that you commonly use.

Chart Settings

Specify the construction parameters that suit you for the selected theme: number of generations, people to be displayed or not on the tree chart.

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

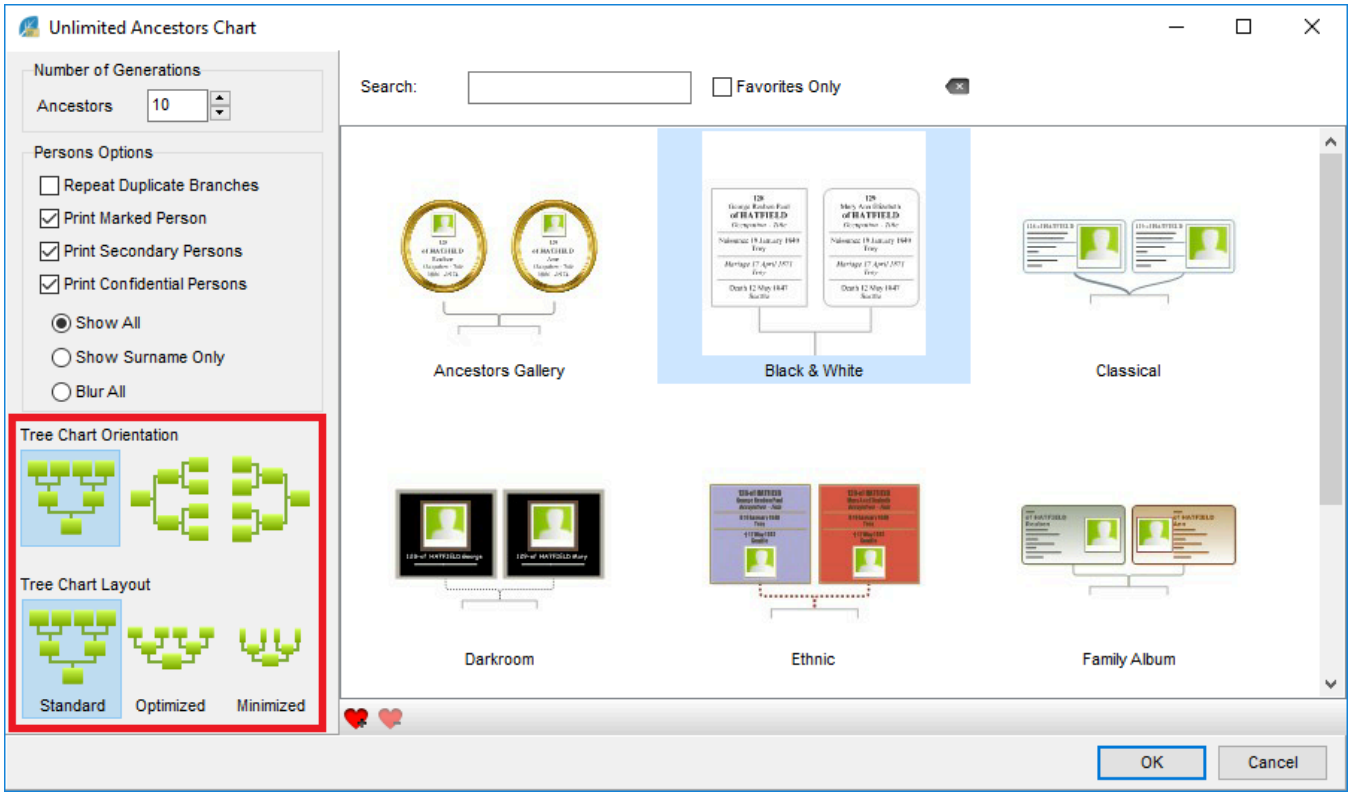
Unlimited Chart



If this option is available, specify who will be automatically included or not in the tree. Check or uncheck the box to print marked persons. Check or uncheck the box to print confidential persons. If you choose to print them, you will need to specify how they will be displayed (in full or blur). See the article The different data fields (see page 87) to know everything about this marking.

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

Choose Orientation & Layout



3. Choose a method for automatic construction according to the space you want to allocate to the tree chart.

• The **Default** tree chart is built with all boxes of the same size, that is to say that the box of the central character has the same size as that of persons shown in the third generation or 10th generation. In this tree chart, generations will be located one above the other without overlapping.

• In the **Optimized** tree chart, boxes gradually decrease in size with the higher generations and they slightly overlap.

• In the **Minimized** tree chart, the boxes will diminish in size and content and their position can be rotated at the end of the branch to save even more room.

4. Select the persons for inclusion on the tree chart. By default all persons appearing in the ancestry or descent of the primary person are displayed on the tree chart. You may untick secondary persons, or marked and confidential persons, for them not to be displayed on the tree chart. You may also hide all the data you have declared to be private (events, pictures, etc.).

Click **OK** to start the construction of the tree chart according to the theme selected and with the chosen parameters.

Tree Chart Screen

Heredis displays a tree chart representing the lineage of the primary person and which is printable immediately. If you want to make changes to the tree chart, you have tools in the

specific Tools panels of the various tree charts.

Toolbars and menus

When the tree chart is displayed, the menus and buttons are different from those for data management. You may use the buttons for normal actions: **Save, Pages, Add, Layout, Print.** Display only the buttons you use most often by choosing **Windows > Customize Toolbar.**

Use the tree chart menus to manage also the layout of the screen or the selection of people on the tree chart.
Info • You can open another previously saved tree chart while the tree chart is already open on the screen choose **File > Open**.

Persons displayed in the tree chart

The **Search** panel of the tree chart contains a list of all persons included in the chart. Clicking a person in the list previews that person's box in the tree chart. A double click navigates through the tree, if its size exceeds that of the screen, to display the box for a selected person.

To quickly find a person in the list of individuals on the tree chart, enter the surname or given name. Refine the search by selecting from the drop-down menu, the gender of the person sought if the name is multiple.

When there are marriages between blood relations (implex) on your tree chart, certain ancestors may be included more than once. By default, Heredis will only display one complete branch and duplicate branches are cut off. If you want to repeat the implex branches, tick the option in the settings screen of the tree chart prior to construction.

Click the name of the ancestor in the **Search** panel and Heredis displays the various positions of the person in the tree chart. Click on the first position to see the entire branch displayed. The different boxes for the ancestor have identical lettering.

Info • In **Search** panel of the tree chart, click the name of a person in the list, his/her summary appears in the **Summary** panel.

Preview of the selected box

The **Tools** panels displays the selected box. At the opening of the tree chart, Heredis displays a complete view of the document, whatever its size. The preview is very useful in large tree charts, when the content of the boxes is not readable on the screen. This visualization immediately displays any changes that you apply to the box.

For more details, see the article (Windows Pro) Apply a selection to a tree chart

Tree chart formatting

You may modify the unlimited tree charts to give them a more personal graphical appearance. In the fixed size tree charts, the changes apply only to the content of the boxes. The overall environment is not editable.

The different **Tools** panels allow either changes to be applied to the whole tree chart or changes to a given selection (one or more boxes).

Display screen

The central area of the screen shows all the boxes of the tree chart, the title of the tree and any images that you have added.

To help you check and estimate the size of your tree chart, materialize the pages on the screen.

In the toolbar, click **Pages > Show/Hide Page Breaks** or in the menu choose **Display> Show/Hide Page Breaks.**

The number of pages depends on the chosen page format for your printer. To change the format and page orientation in your printer, click the Page Setup button in the **Print** panel.

To move around the tree chart, use the horizontal and vertical bars, or change the zoom factor or double-click the name of a person from the Persons panel to display his/her box directly.

Zoom

You can increase (zoom in) or reduce (zoom out) the display of the tree chart. It is often necessary to reduce the display of a tree chart to visualize all required generations. Choose **Display > Zoom > Increase Magnification** or **Decrease Magnification.** To return to the actual size of the tree, choose **Display > Zoom > 100 %**.

You may also select different levels of zoom on the bottom bar of the tree chart screen.

• Click the arrow and select a value from the drop-down menu or use the slider to change the zoom level. Heredis indicates the factor used to reduce or enlarge to the left of the bar.

• Click the **100%** button to return to the real size of the tree.

• Hold down the **Alt** key. With a left click, the tree chart grows, with a right click, the tree chart is reduced. You may also use the mouse wheel up or down to enlarge or reduce.
Info • Remember to fold back the **Search** and/or **Tools** panels to have the maximum available space for display of the tree chart.

Selection

Before making changes to a tree chart, first select the boxes to which they will apply.

Depending on the type of change to be made, make individual selections or selections of a genealogical order.

• To select all boxes of the tree chart, choose **Select > Select All.** From anywhere in the tree chart, you can right-click the mouse and choose **Select All.**

• To select one or more boxes of the tree chart, drag the mouse cursor over the boxes to be selected.

• To select more boxes that are not contiguous, select the first box, and then, holding down the **Shift** key, the additional box or boxes To make genealogical selections from any box in the tree, right-click the mouse and choose **Select Men Only** (or **Women Only**, or **Person and All Ancestors**, or **Person and All Descendants** or **Generation**).

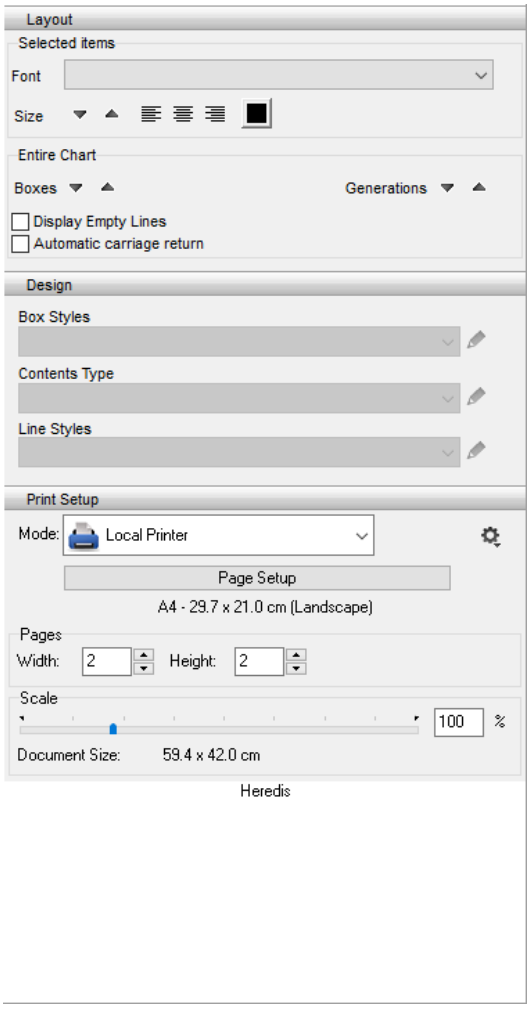
Info • Persons corresponding to the selected boxes are also selected in the **Search** panels.

For more details, see the article (Windows) Finding your way around a tree (see page 737)

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

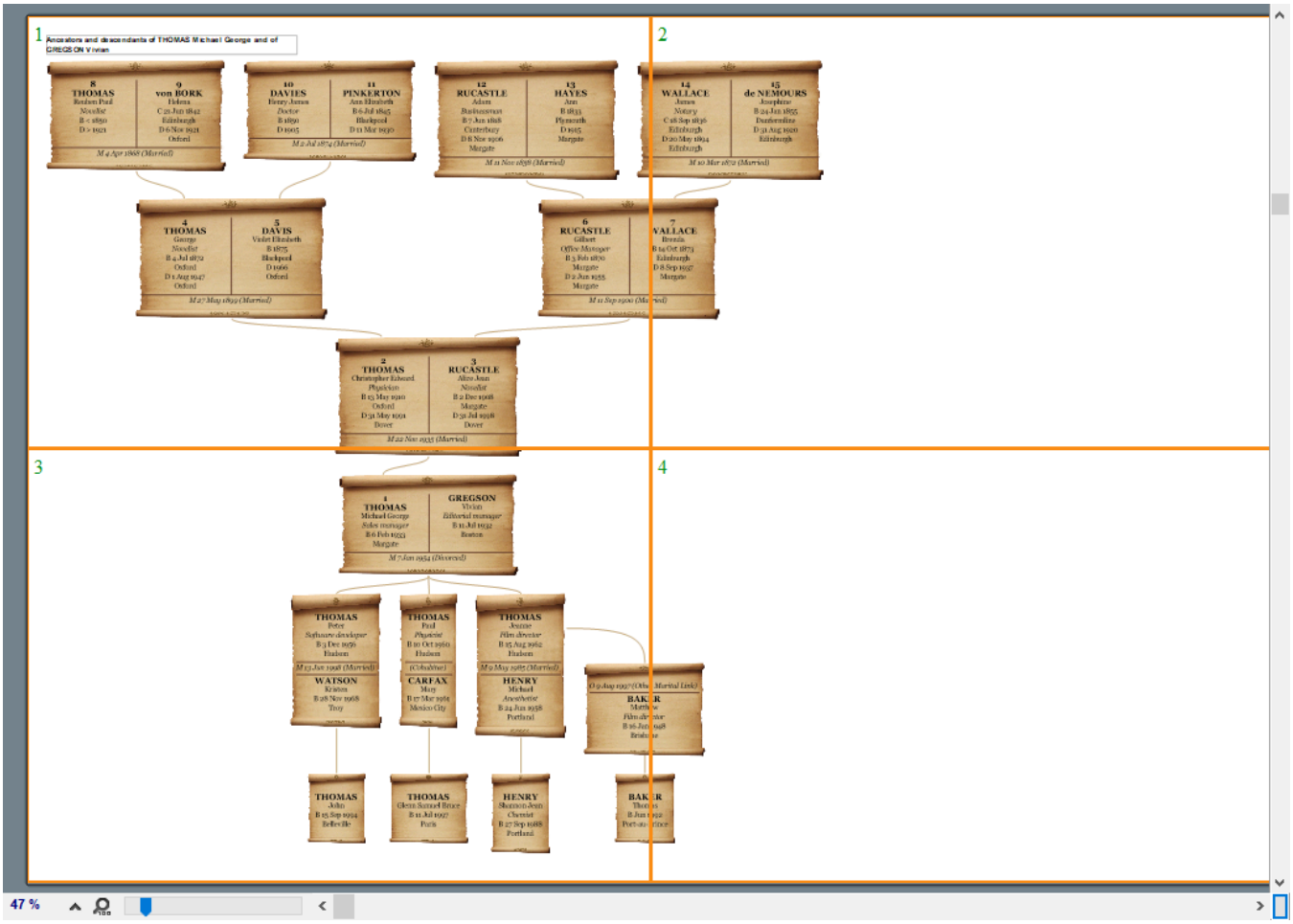
• Choose the content formats that suit you for surnames, given names, dates, places and genealogical headings from the drop-down menus.

• 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

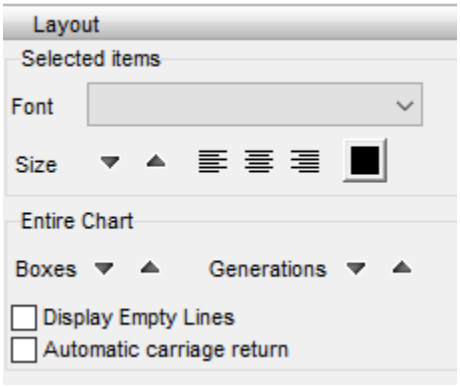
Change the graphical appearance of your tree charts with a few clicks. Some graphical changes apply to the whole tree chart, others apply only to the boxes you selected.

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.

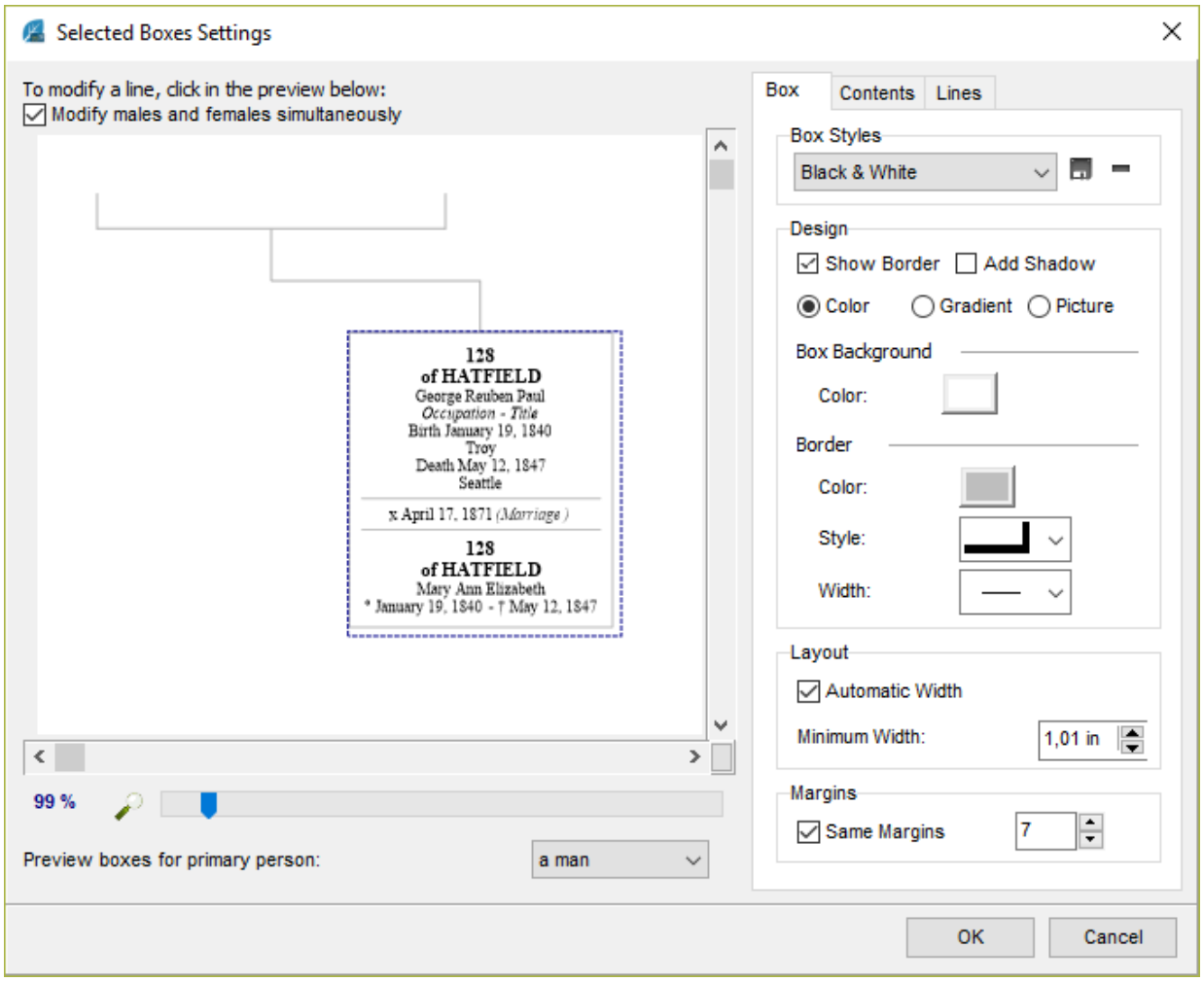


- You can change each preset of box styles, contents or connecting lines. Click the **Layout** button in the toolbar, use the right-click menu on the selected box, or click the **Edit…** box shown as a pencil to the right of each menu to access all the changes.

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.

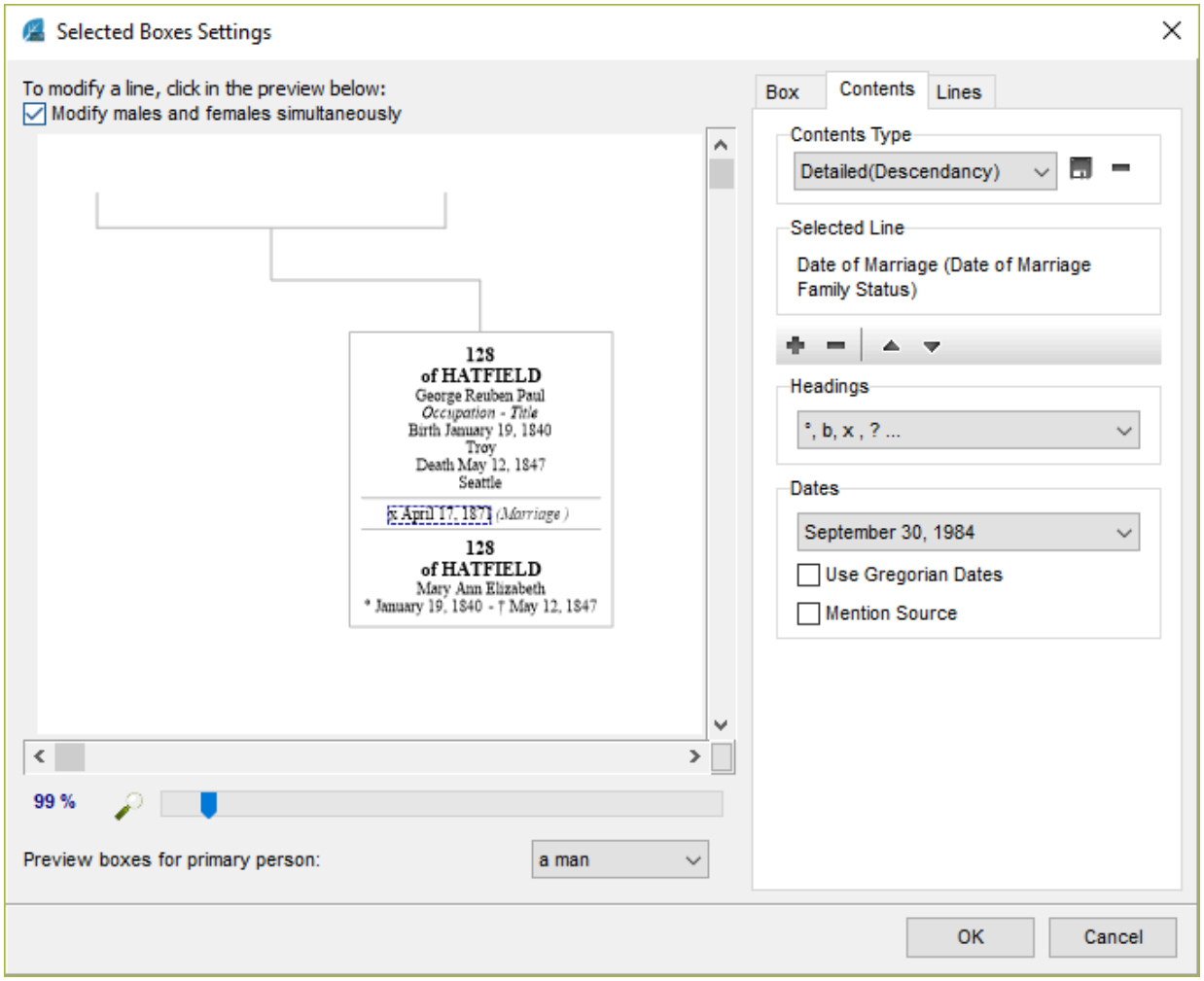
3. Click on the picture to determine its size, its border and its eventual position in the box.
Info • One can only change the borders of the drawn boxes If you choose an image for the box background, the outline must be included in the image.

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



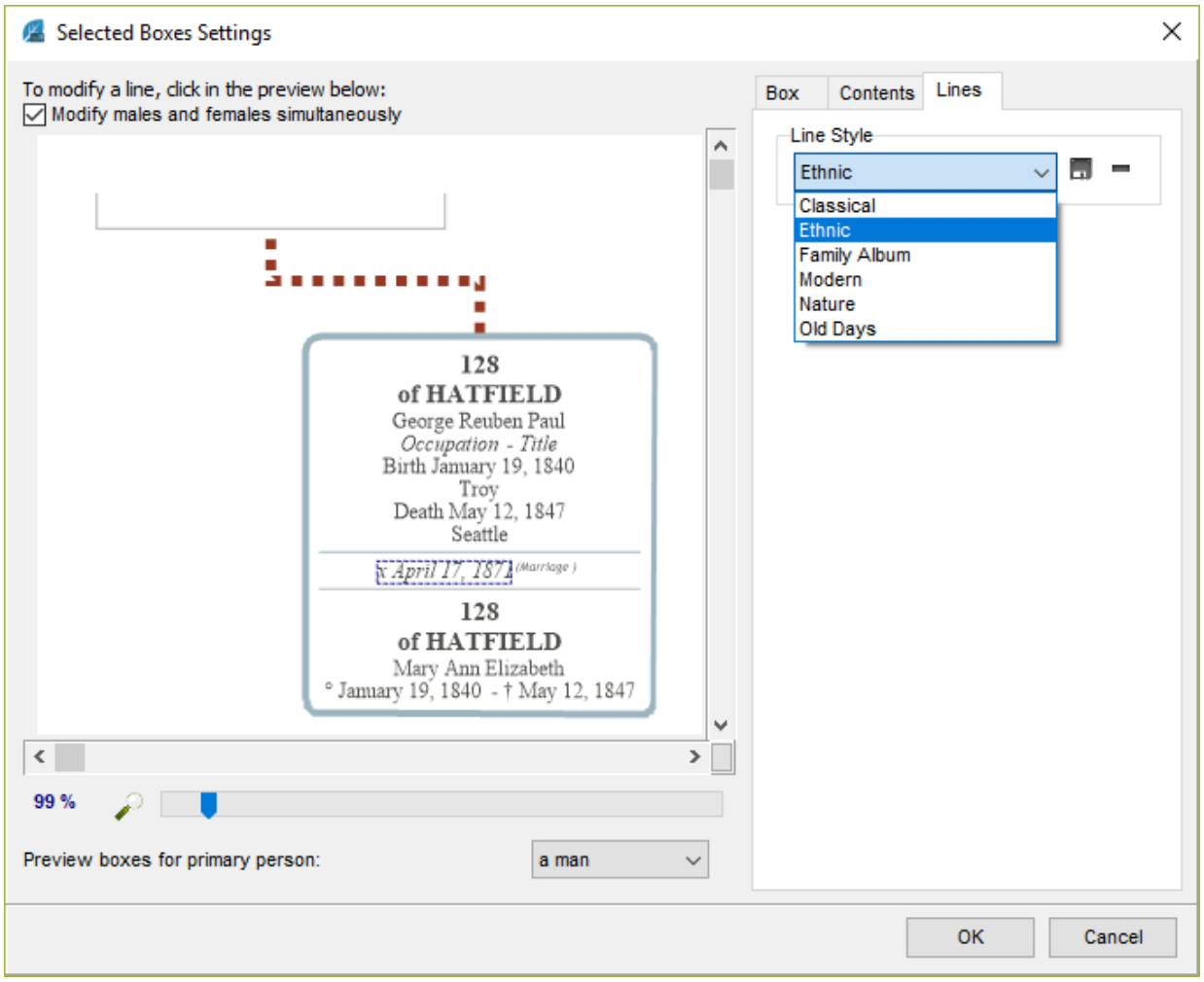
Change the **Content type** preset displayed or choose a different preset from the drop-down menu as a base for your custom formatting.

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.

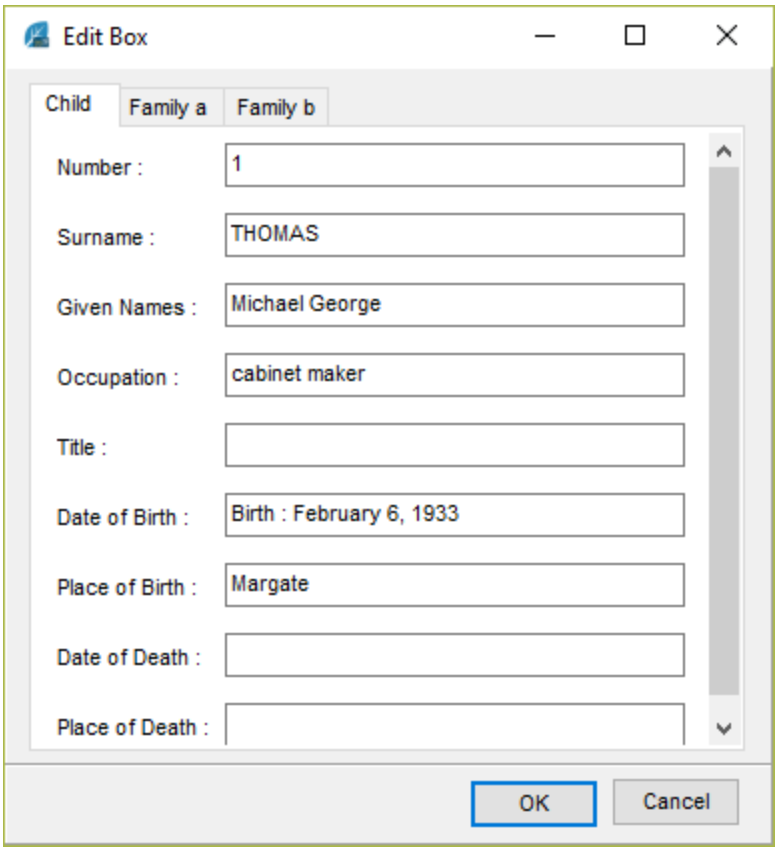
1. Click the border of the box or on the connecting line to display the **Line** tab.

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



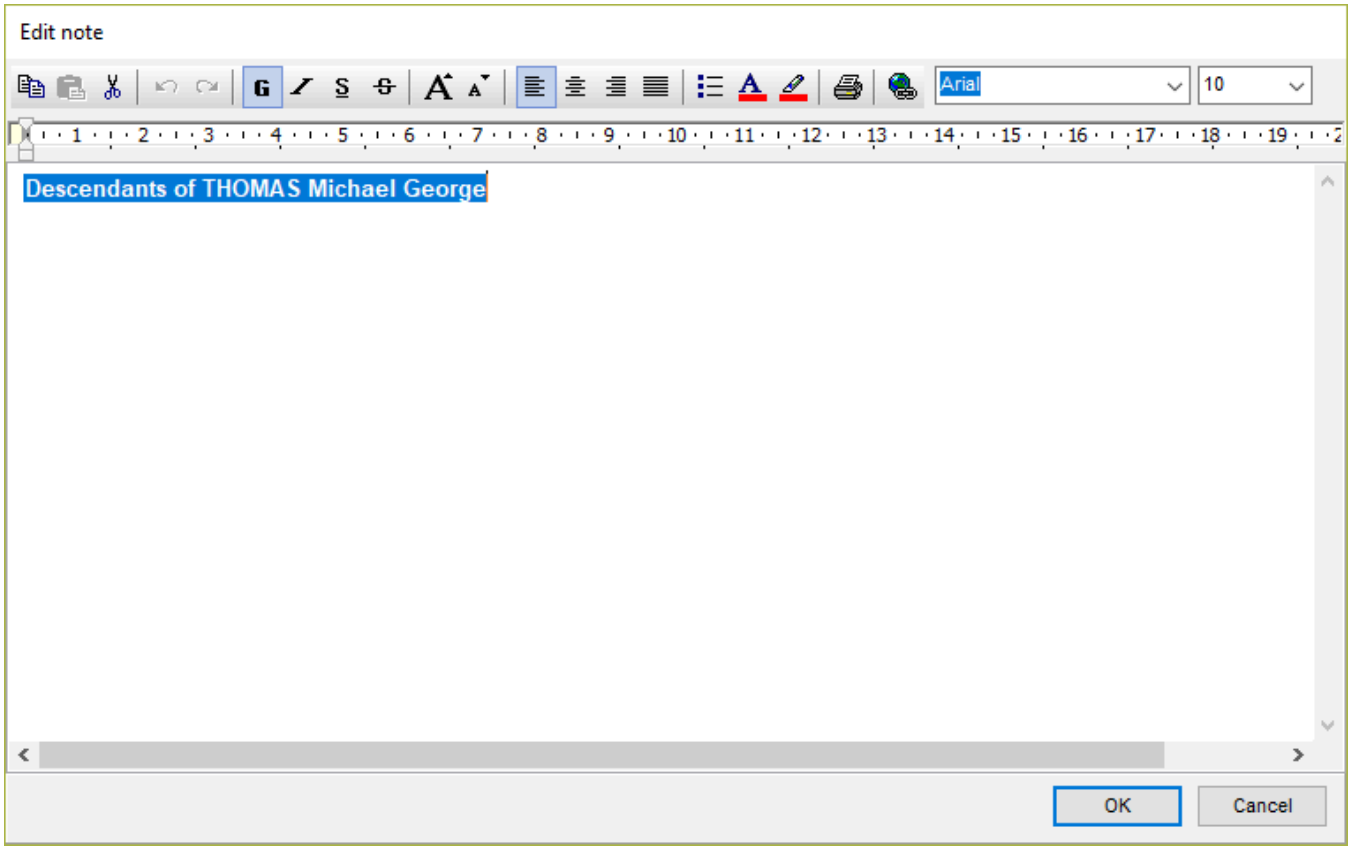
1. Right click on the box to be edited and choose Edit Text to open the editing field.

Info • You can only edit one box at a time.

2. Enter changes to the displayed text.

3. Click **OK** to apply changes.

Edit the tree chart title



The tree chart title is a modifiable text zone.

Heredis proposes a title containing the name of the primary person. Double-click the title to open the text editor and make the necessary content changes and formatting of the text.

Add a Picture

Select the **Edit > Add Picture** menu or click the **Add** button on the toolbar to add a graphic illustration to your tree chart.

The picture is added at the top left of the tree chart displayed

- It is possible to add several pictures. If they must overlap, there are options for stacking images. Right-click the image to move the selected image forward, backward or to the background if it is a background image for the tree chart. Whatever option chosen, the boxes of the tree chart remain in the foreground
- When the picture is enlarged or reduced manually with the mouse, it is possible to restore the proportion between the picture and its frame by using the right-click **Resize Image Proportionally** option.
- The right-click Resize Image to **Fit Frame** and **Default Picture Size** options allow to resize the image in its display area.
- The image is an object that can be formatted. Click the button on the toolbar or select **Modify Properties** from the right-click menu on the image. Only box style changes are possible As with the tree chart boxes, you have available presets

applicable to the surround of the image.

You can also consult our articles (Windows) Print or export as PDF a tree chart (see page 744), (Windows) Save a tree chart.

(Windows) Apply a selection to a tree chart

Heredis allows persons to be identified by applying a particular layout in ancestors tree charts, descendants tree charts, or hourglass tree charts.

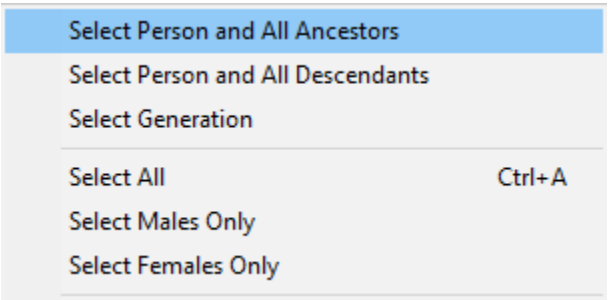
Select boxes in the tree chart

There are several possibilities for selecting a group of boxes.

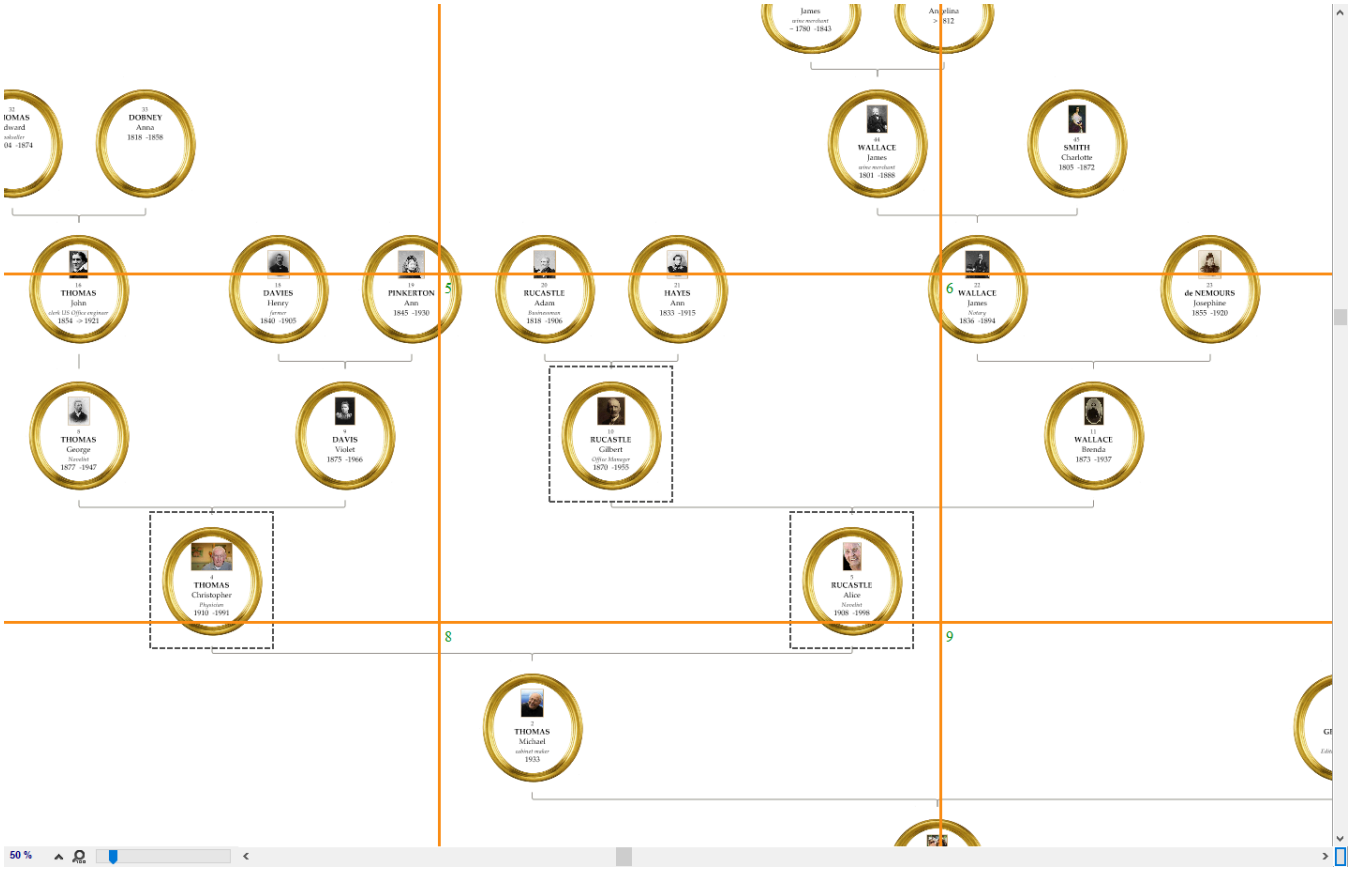
To select a box in the tree chart, click on the box.

To extend the selection, you can:

- hold down the left click of the mouse and draw a rectangle around the boxes you want to select.
- make a selection based on specific criteria, click right on the box or unroll the **Selection** menu. You can then extend the selection**(Ancestors, Descendants** or **Generation** of the selected **person**, or **All the Tree),** select only the **men,** or only the **women**.



- Use the **Shift** or **Ctrl** button to click on additional boxes or apply other extensions with the right click.



Apply a layout to the selection

In unlimited tree charts

Apply a preset of appearance or content to the selected boxes by selecting it from the drop-down menus of the **Tools panels**. You can also make a customized layout by clicking the button . Modify the **layout** and change any items in the selected boxes.

Check out the article (Windows) Unlimited size tree chart : ancestors, descendant and hourglass (see page 719) for the details of customization manipulations.

In predefined sized trees (fan, single-page, designed)

For Single-page tree charts and designed tree charts, use the Tools panels to change the **layout** and **contents** of the selected boxes.

For fan tree charts, choose the highlight color in the **Boxes** area of the Tools Panels, it will apply to all tree boxes containing the selected persons. If you want to go back to the tree presentation before the change, click the **Default** button for the same selection. You can change the format of the text by clicking the button **Layout**.

Check out the articles (Windows) Predetermined size tree charts : Single-page Chart, Designed Chart, Fan Chart for detailing the setting of these trees.

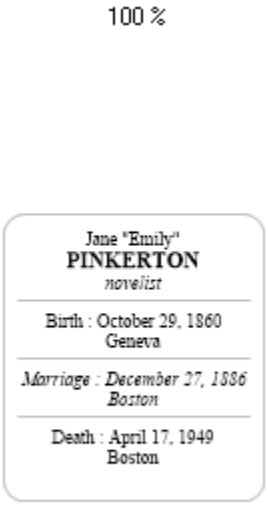
(Windows) Finding your way around a tree

Use the preview window

In trees (except fan or wheel of the Charts menu), a window displaying only one box at a time allows:

- immediately see a box formatting change.
- to view the contents of a box in a tree that would be displayed with a reduction rate preventing the direct reading of the contents of the boxes.

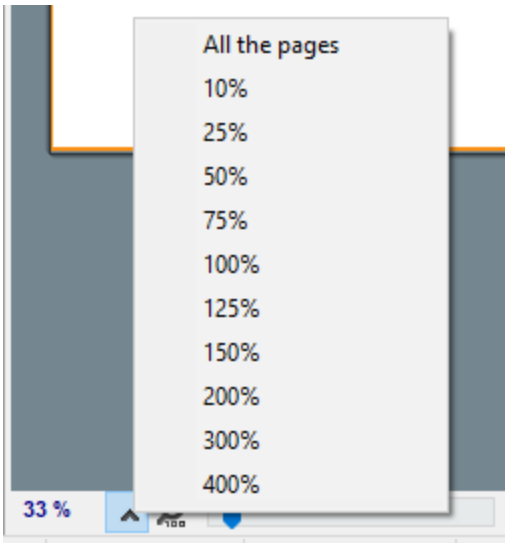
This window is displayed at the bottom of the Tools panel. As soon as you select one of the boxes of the tree, it updates by showing you, in full size, the selected box.



Enlarge or reduce the view of the tree

To display all the boxes, regardless of the actual size of the tree chart:

- Select the **Display menu – Zoom – All the Pages.**
- Select **All the Pages** from the zoom drop-down menu in the lower banner of the tree window or drag the slider to the left end.



To enlarge or collapse the tree chart image on the screen:

- Select a value from the zoom drop-down menu in the lower banner of the tree window, or drag the slider to change the display of the tree.

- Select the **Display menu – Zoom – Actual size** to get the full-size representation of the tree chart.
  or Select the **Display menu – Zoom – Zoom in** or **Zoom out**.
- Press the **Alt** key and left-click to increase and right-click to reduce the display of the part of the tree you click.

View pages

To materialize the pages according to the format of your printer:

- Select the **Display menu – Show/Hide Pages Breaks.**
- Click the button and then click the button on the tree toolbar. Click the same button to remove the display from the pages.

Go to a page in the tree

Use elevators to scroll the tree image horizontally and vertically.
or Press the **Spacebar** key**,** the cursor changes to a **Hand** tool that moves the tree chart image.

To view a particular page:

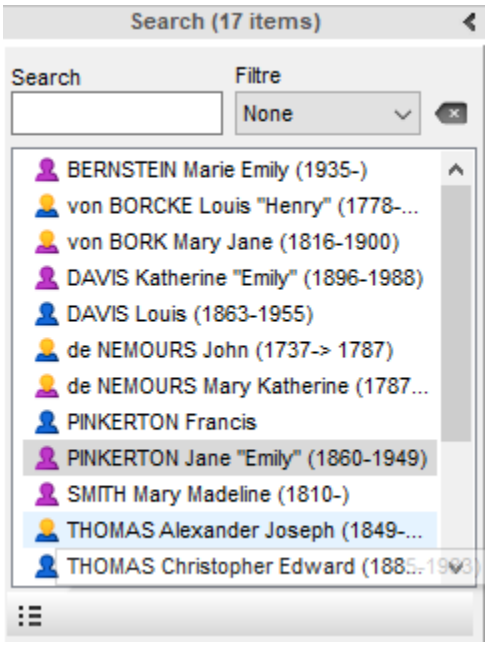
- Select the **Display menu – Go to Page** and then specify the number of the desired page.
- Validate with **OK.**

Spotting persons in the tree

Locate persons displayed on the tree screen

The **Search** list lists all the persons named in the tree chart.

A double-click on a name displays, in the center of the screen, the box of this person.



Spotting implexes

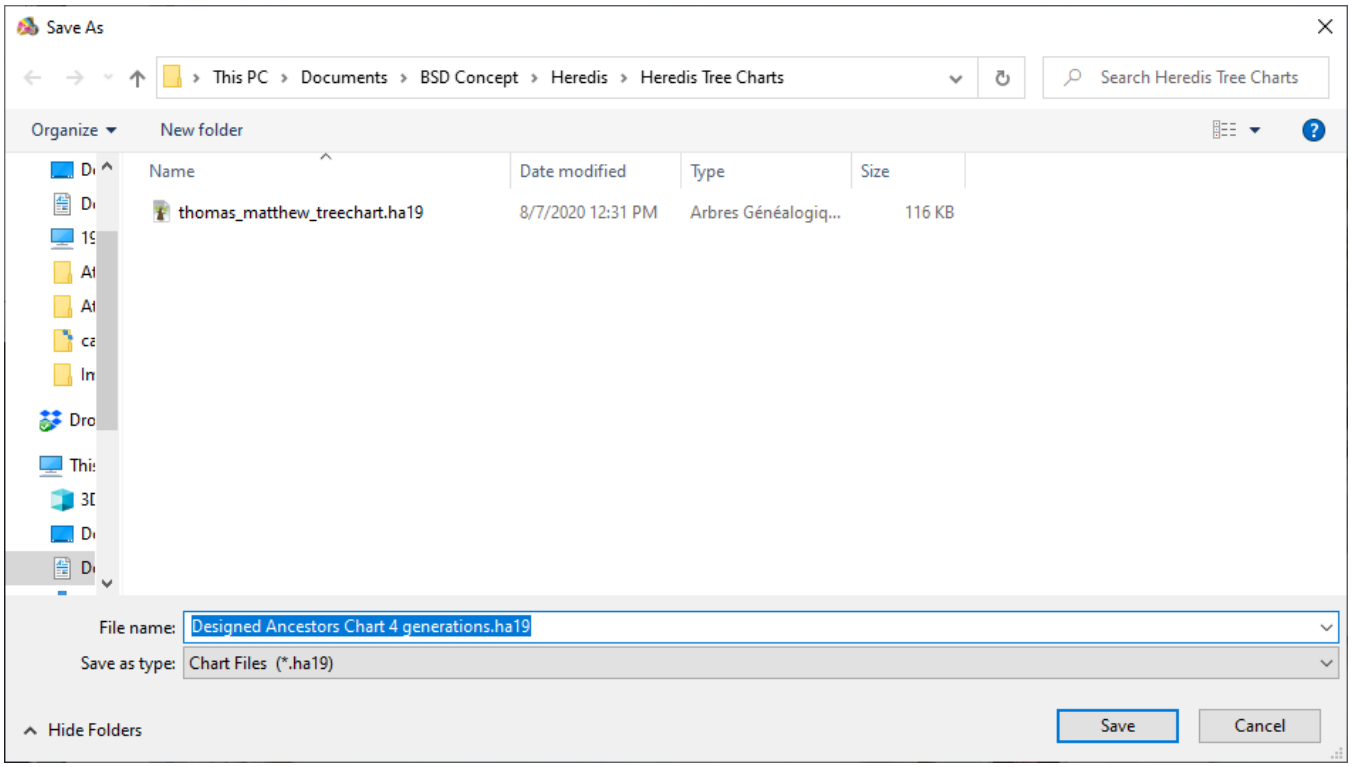
When you print a tree with ancestors for whom there is inbreeding (implexed), they appear several times.
If the **Repeat duplicate branches** option has not been checked, the branch in which the implexed ancestors appear is stopped as soon as an individual already present in the tree appears for the second time.
To find this person easily, Heredis places colored marks referring to the branch to consult the rest of the interrupted branch.

(Windows) Save the tree chart

Save the tree charts created with Heredis. You may modify or print them later. The tree chart file can be reopened, changed and saved, as a

Saving a tree chart for the first time

- Click the **Save** button, choose **File** menu **> Save.**
- In the **File name** field, change the name of the tree chart if necessary.
- Choose the location where the tree chart should be saved, if you do not want to save it in the default folder.



- Click **Save**

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

Save a copy of the tree chart

This action allows you to keep the displayed tree to continue its formatting and to duplicate it to apply other different changes or save it.

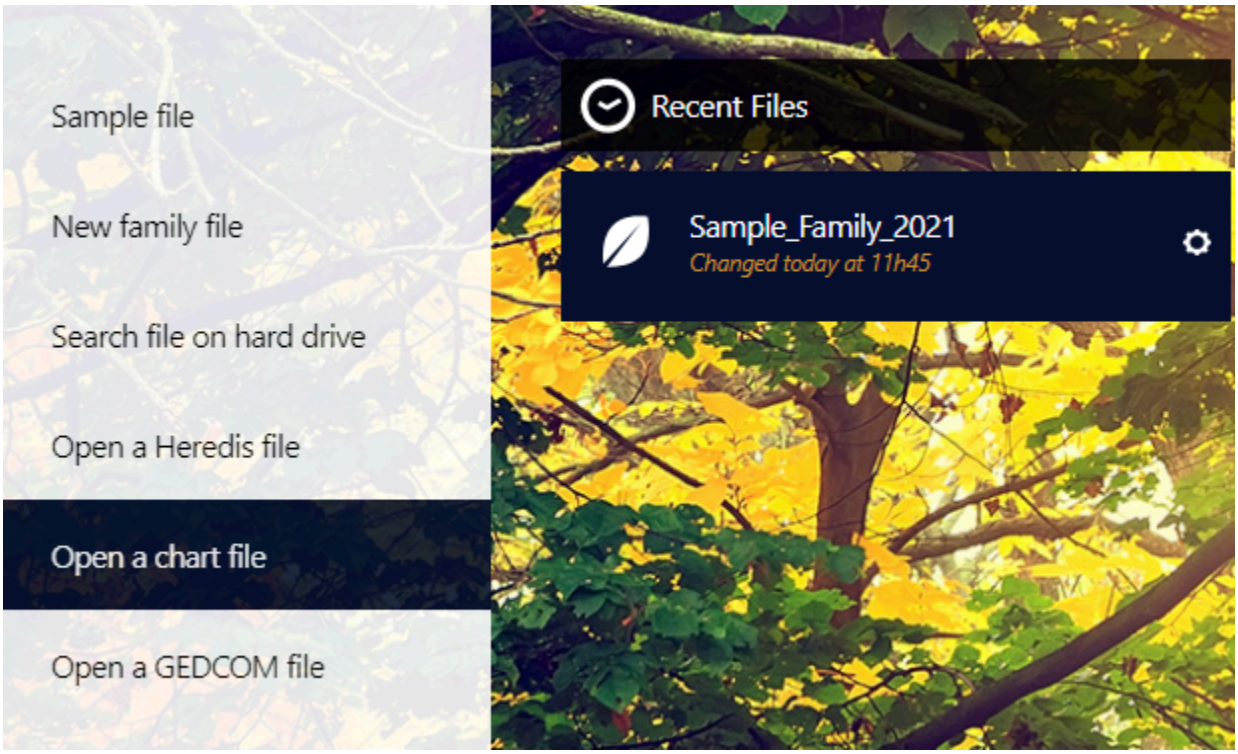
To obtain a copy of the tree chart and make further changes, select **File** menu > **Save a Copy…**

It doesn’t open automatically the copy of the tree chart. You can keep working on the original tree chart.

Reopen a saved tree chart

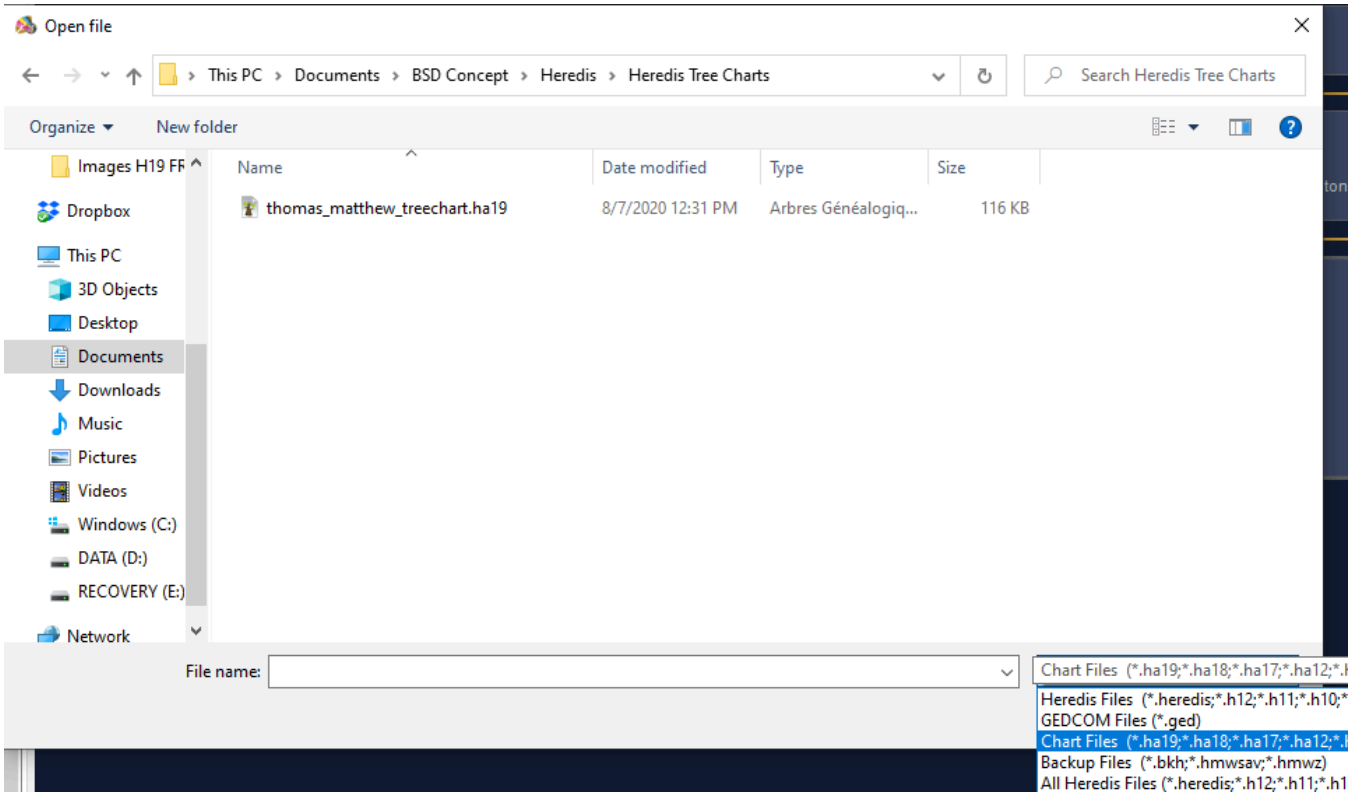
To reopen a saved tree chart:

- From the Heredis home page, click on **Open a chart file**.



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

- From your Heredis file, select the **File** menu > **Open**. Select the location of the tree file to open on your computer and make sure you have selected the **Charts Files** type. Heredis allows tree opening saved from version 11. Select the file you want to open. By default, Heredis saves the tree charts you created in the Documents/BSD Concept/Heredis/Heredis Tree Charts folder. If the tree chart was saved in another folder, select it in Windows Explorer.



Click **Open** button.

Open a Chart file

You have edited and saved a tree chart created with Heredis? You can reopen it to further edit it or print it. A tree chart file is a graphic file, it becomes independant of your Heredis file. It contains only the data of persons included in the tree chart. Data can not be changed in this tree chart file to modify the Heredis file.

- To open a tree chart saved when Heredis is already running, choose **File > Open**. Select the tree chart file your file directory and click **Open**.
- To open a tree chart from the **Home** page, click the **Home** button and choose **(Windows) Open a Chart file; (Mac) Chart File** from the **Open** menu. Click **OK** and then select it.
- To open a tree chart file when another tree is already open, click **(Windows) File > Open; (Mac)** the **Open** button in the tree chart toolbar. Select the file in your tree chart directory of files and click **Open.**

Read also (Mac) Unlimited size tree chart : ancestors, descendant and hourglass, (Mac) Save the tree chart, (Mac) Predetermined size tree charts: Single-page Chart, Designed Chart, Fan Chart, (Windows) Unlimited size tree chart : ancestors, descendant and hourglass (see page 719), (Windows) Save the tree chart (see page 740), (Windows) Building single-page pedigree tree charts (see page 710), (Windows) Building fan charts (see page 714), (Windows) Apply a selction to a tree chart (see page 735), (Windows) Print or export as PDF the tree chart (see page 744)

(Windows) Print or export as PDF the tree chart

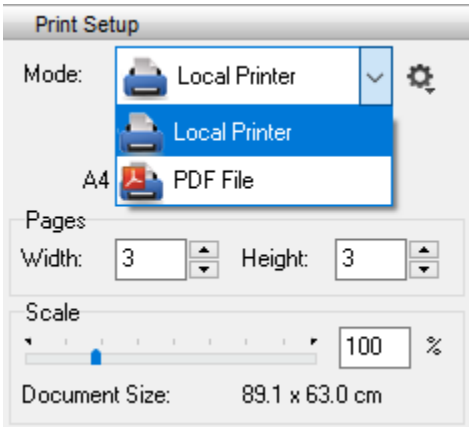
You can create as many graphical representations of your genealogy as you wish. A tree chart may be saved with the data it contains and its layout. It can then be reopened, modified in its presentation, printed again. It has become independent of the Heredis data file.

Choose from the different types of tree charts proposed in the **Charts** menu or click **Charts** on the toolbar to visually select the tree charts proposed by Heredis. The tree chart will be created from the primary person.

Printing mode

First, choose between **Local Printer** or **PDF File** in the **Print Setup** panel.

Then, you'll be able to setup the page setup as you wish.



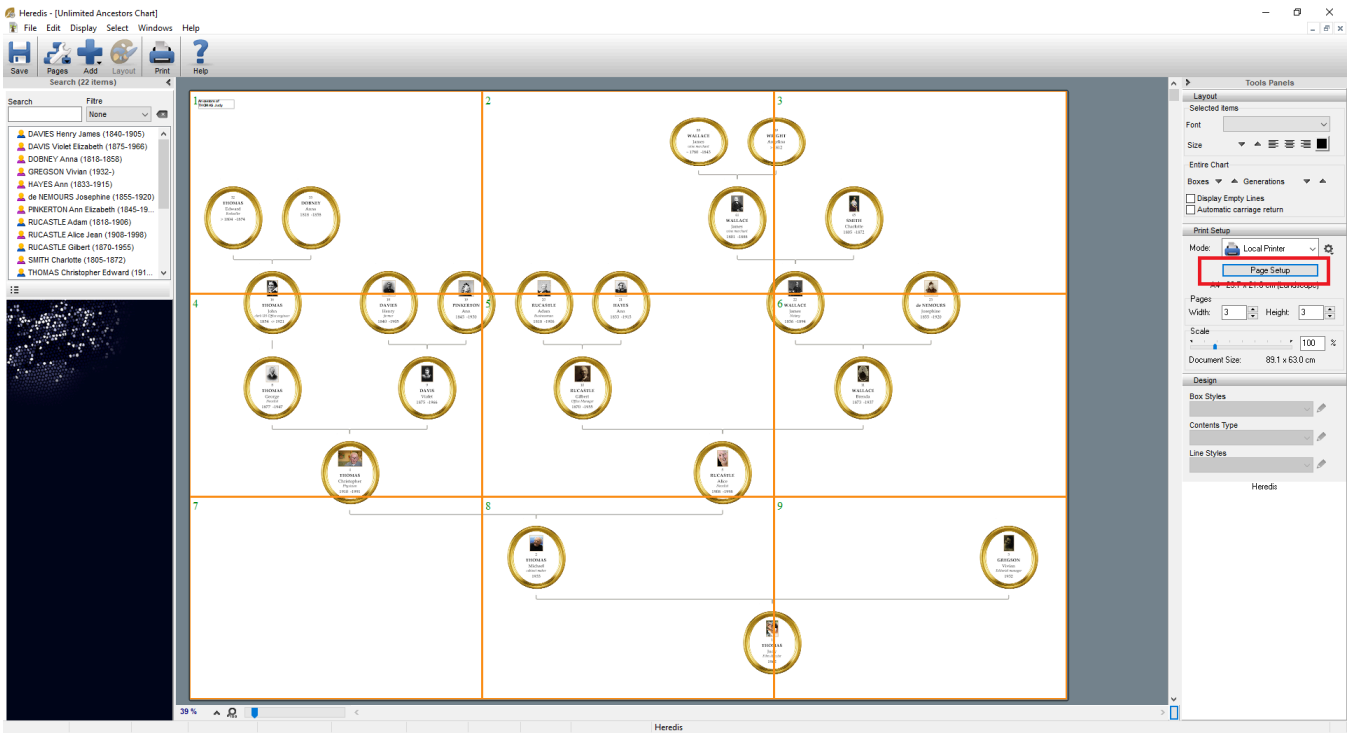
Adjust the size of a tree chart.

Before printing, you must make sure that the size and orientation of the paper are set as you wish. This setup will be different if you chose Local Printer or PDF file.

Paper size

After choosing the print mode and before printing the tree, indicate the paper size your printer uses (A4 – A3…) and the orientation of the paper you want (portrait, landscape).

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



A window opens and may be different according to your printer. Choose the orientation and paper size.

- Select the printer you will use in the **Name** menu.
- Choose a standard paper size in the corresponding menu. In PDF file Mode, if you want to select a customized paper size, choose **Personalized Paper Size** in the drop-down menu.
- Click the round button corresponding to the desired orientation.
- Click **OK** to confirm the print size.

Note: If you want to print through a professional printer, export to PDF. The PDF format can go up to 200″ x 200″ , if your tree is larger and your printer has rolls larger than 200″, consider removing the assembling link-up zone (see PDF Export part of this article).

If the tree is too large, you may change its size by reducing the number of pages in the **Print Setup** panel, but make sure to be able to still read what will be print (click on 100% focus button to see if you can read on your screen).

- Select **Display > Show/Hide Page Breaks** or click the **Pages > Show/ Hide Page Breaks** button Heredis displays how many pages corresponding to the selected paper size will be needed to print the tree chart.
- Change the number of pages in width and/or height.
- To enlarge or reduce the overall size of the tree chart, enter a percentage in the **Scale** field or move the cursor. A value below 100% reduces the size of the tree chart, a value greater than 100% enlarges it.

It only remains to launch the printing of the tree chart.

Launching the print-out

Depending on the printer you are using, you can print the tree on one page or series of pages to be assembled together.

- Click the **Print** button on the toolbar or choose **File > Print.**
- Select the printer you want to use from the list of available printers. If your printer does not appear, select **Find Printer** in the **Windows Print** screen.

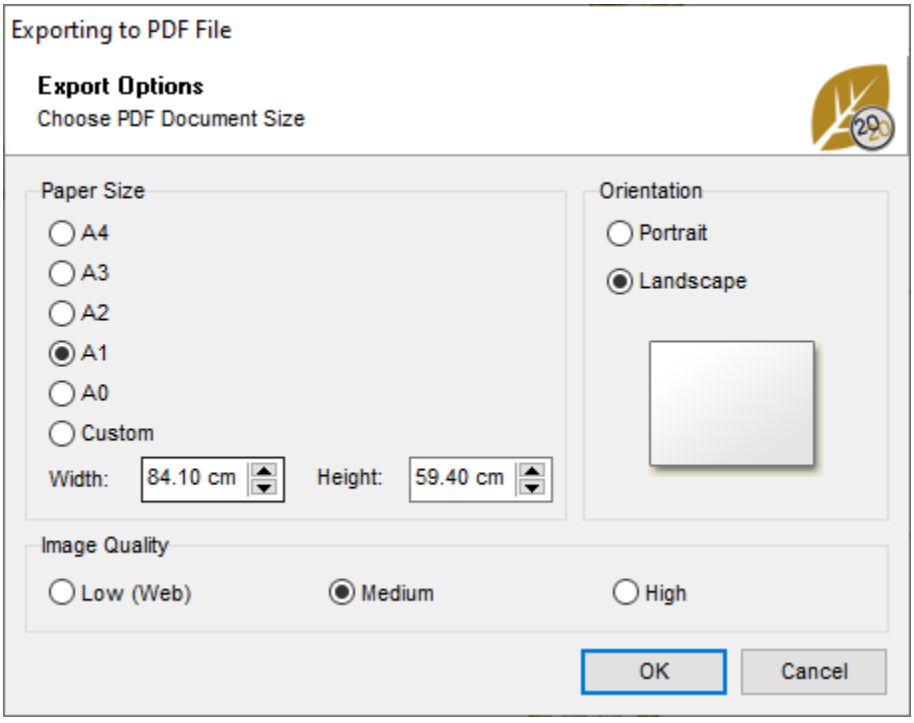
Info • For more information on adding a printer, type Add Printer in Windows Help.

- Click **OK** to start printing.

Export a PDF tree chart

Export the displayed tree to get it printed by a professional or share your Heredis trees with people who do not have the software. Heredis constructs a tree chart using a file format that is likely to be used on other computers or devices in the form of a readable file.

- Choose **Edit > PDF File Mode** or choose **PDF File** from the **Print Setup** drop-down menu.
- The **Print** button changes form and name. Click the **Export** button on the toolbar.
- Before to export the tree chart, make sure to setup the paper size format and orientation. Click on **Page Setup** button in **Print Setup** panel.



- Choose the location where the tree file in PDF format will be saved, if you do not want to save it in the default folder. If necessary, change the name of the tree proposed by

Heredis in the **File Name** field.

Important: Note that you can generate customized size, but be carefull, PDF format allows only 200″ x 200″. If your XXL Family is bigger and your printer can print on a paper roll, then click on the cogwheel near the PDF file mode (or assembling link-up zone of the new charts as the XXL Family for example) and chose **Delete assembling link-up zone**.

- Click **Save.**

Share your genealogy

What is a Heredis file?

Heredis files come in the form of a *.hmw* folder stored at the chosen location when it was created. On Windows, they are stored by default in a*Documents/BSD Concept/Heredis/ Heredis Files* folder of your documents. *Documents*

In this folder you will find various types of files: *.bak, .hmw,*media folder…

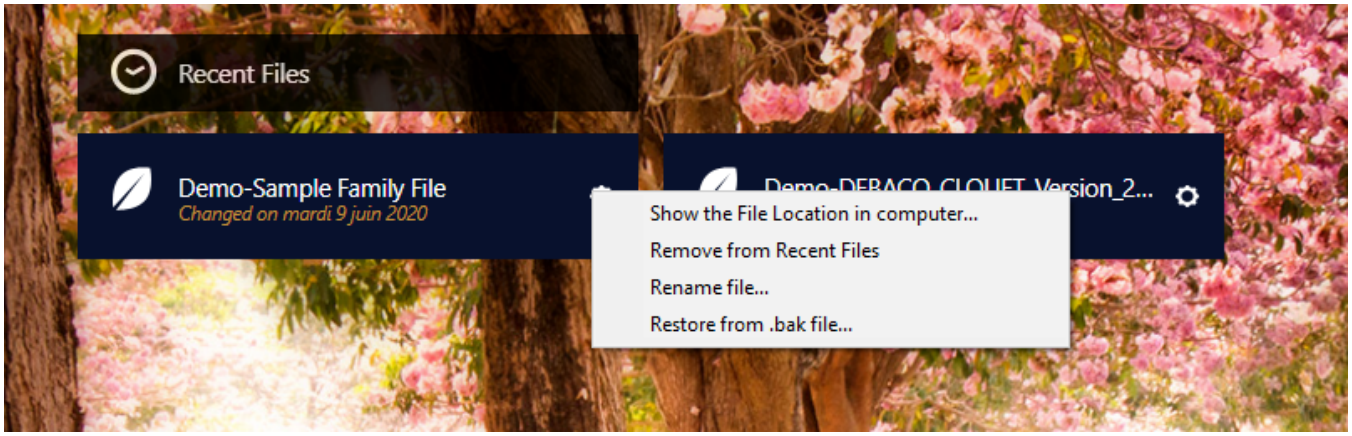
Do NOT change, move or delete files in this folder. Indeed, if you move, rename, modify these files, you may no longer be able to use this genealogy.

To rename your files or know where they are stored, use the cogwheel from the Heredis homepage.

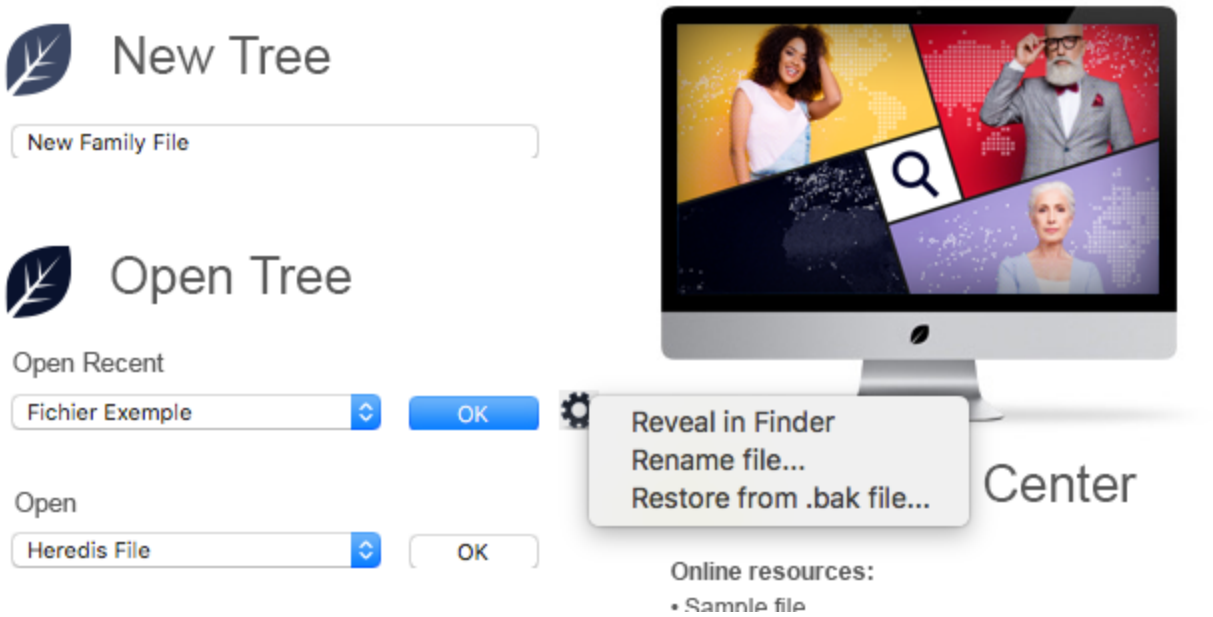
(Windows) To find out where your files are stored click **Show the file location in computer**.

(Mac) To find out where your files are stored click **Reveal in Finder**.

(Windows) Homepage cogwheel



(Mac) Homepage cogwheel



Check out the article Find a file on your computer (see page 306) for more details.

Export a complete file in Heredis format

You export your data for exchange. To exchange with other users of the same version of Heredis as you, use Heredis export.

If you wish to exchange data with someone who has an older version of Heredis or another software, you will need to export in GEDCOM format.

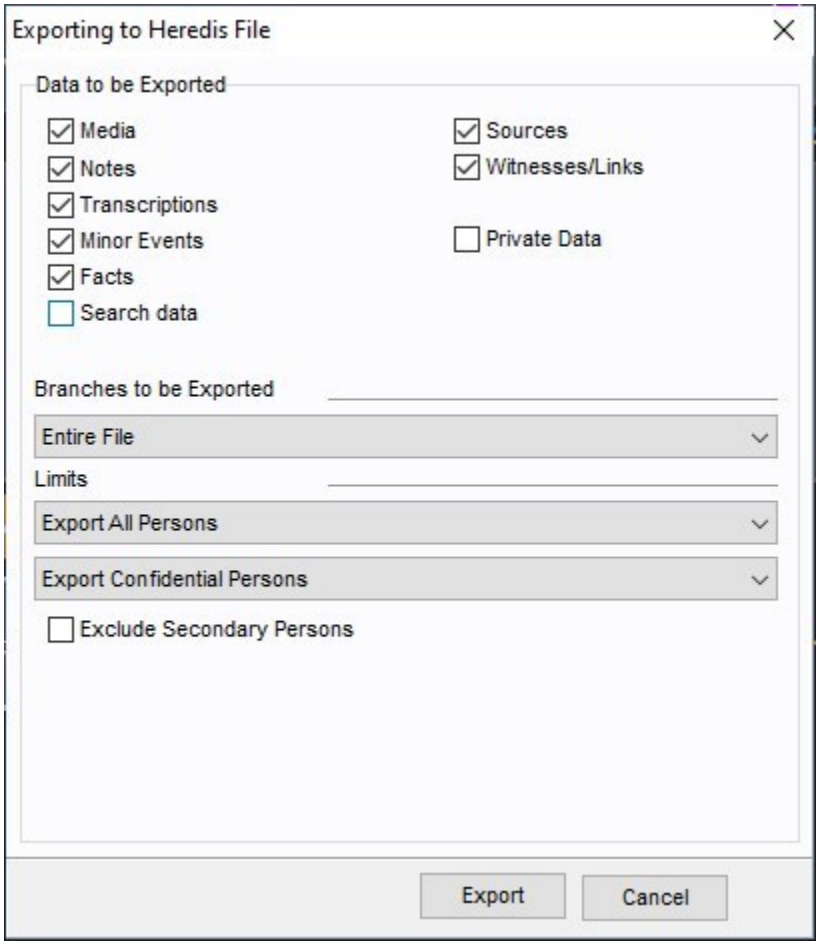
See the articles What is a GEDCOM (see page 765), Export a complete file in GEDCOM format (see page 768) and Export a branch in GEDCOM format (see page 776).

In a Heredis export, you can select the data to be exported: exclude confidential persons, restrict to one branch or exclude living persons.

Windows & Mac

Click on the **File** menu **> Export > Heredis File**.

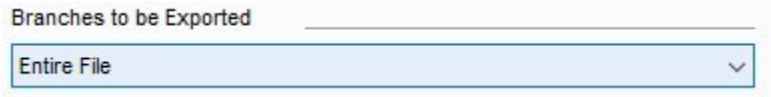
(Windows) Heredis export settings window



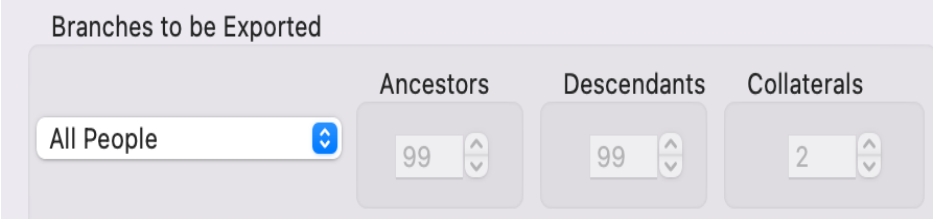
(Mac) Heredis export settings window

- Export (Windows) **Entire file** or (Mac) **All People**

(Windows)



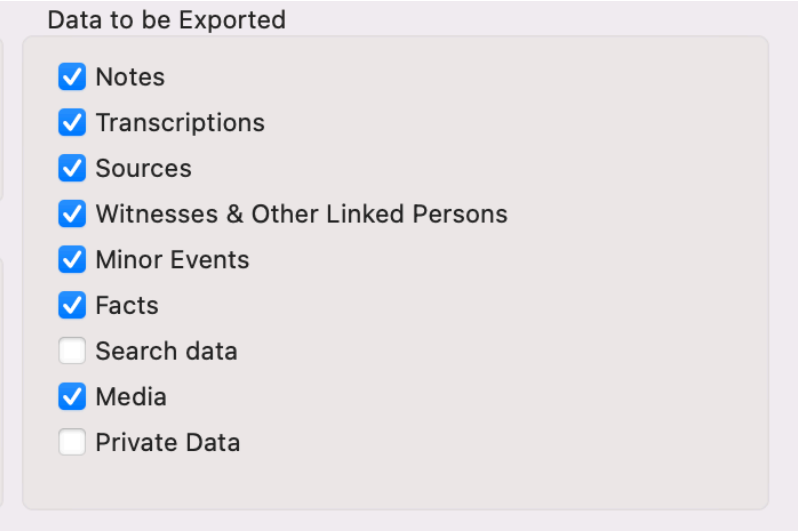
(Mac)



- Select the type of data to be exported (media, notes…).

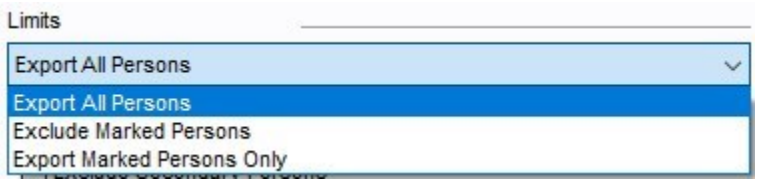
(Windows) Data selection

(Mac) Data selection

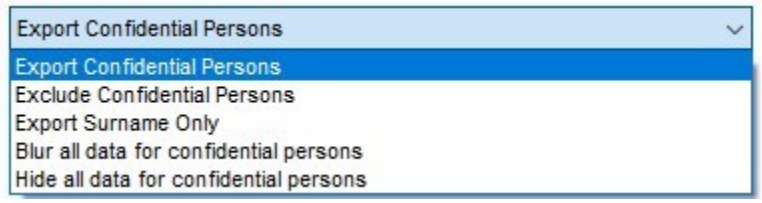


(Windows) Select the persons to be included in the exported file

- **Export all persons**: exports all persons contained in the file.
- **Exclude marked persons**: persons who have been marked in their personal data tab are not exported.
- **Export marked persons only**: only persons who have been marked in their personal data tab and are contained in the file are exported.



- **Export confidential persons, Exclude confidential persons, Export surname only** (of the confidential persons)**, Blur all data for confidential persons,** or **Hide all data for confidential persons.** applies the indicated treatment to individuals for whom the **Confidential** tag has been ticked in the personal data tab. They are exported without further specification.



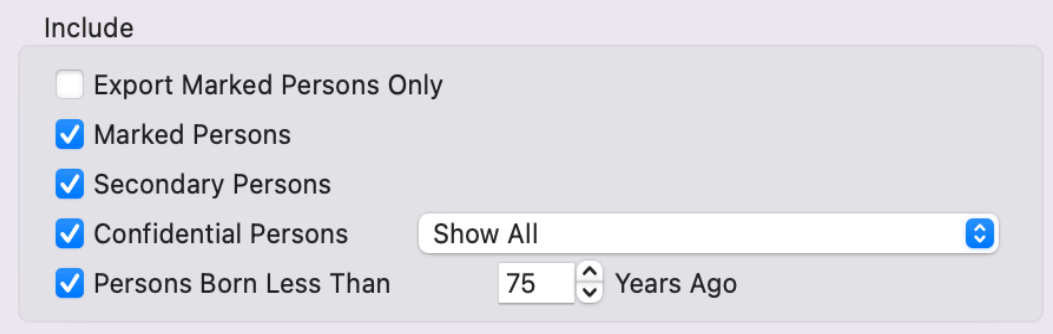
- ◦ (Windows) Check the box **Exclude secondary persons** ; (Mac) Untick the box **Secondary Person** to avoid exporting people you have declared secondary because they are of little genealogical interest to you (children who died in infancy, unrelated persons).

Info – It is therefore possible to ignore a branch just by marking a person. There are many

applications for marking persons: cutting branches, eliminating duplicates, eliminating stillborn babies, not showing people who are still alive… See the article The different data fields (see page 87) to find out more about tags. You can check off these labels on several persons at the same time, thanks to the smart search. See Smart search (see page 371).

(Mac) Select the persons to be included in the exported file

- To prevent the export of certain types of person (marked, confidential or secondary), uncheck the corresponding boxes. See The different data fields (see page 87) for more information on labels.



  - To export data in part, specify your choices in the local menus.
    Confidential persons: You can export all information, or only the surnames of confidential persons, or their surnames and givennames. You can also export people by blurrying all the data. The recipient of your file will simply know that there is a person at such and his/her place in the lineage, without knowing any information about that person.
  - **Persons born less than…:** Choose the number of years to be taken into account for exporting contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of persons born less than… years ago, enter the value and uncheck the box.

Info – It is possible to exclude a branch from the exported file. Declare the person at the origin of this branch as a Marked person, then uncheck the Marked persons option in the export window. You can check off the labels , or on several persons at the same time thanks to the smart search. See Smart search (see page 371).

Windows & Mac

- Click on **Export**.
- Give the new file a name and choose the location where it should be saved. Heredis offers the same folder as your genealogy file. To select another location, choose one in your file directory.
  (Mac) If your file directory is not visible, click on the display triangle (arrow) to the right of the **Save as** field.

Info: Search information is always exported. If you wish to exclude notes from search information, check the **Private** box available when editing the note and uncheck the **Private**

data box in the export settings window.

To export a branch rather than the whole file, see Export a branch to Heredis.

Export a branch in Heredis format

You export your data for exchange. To exchange with other users of the same version of Heredis as you, use Heredis export.

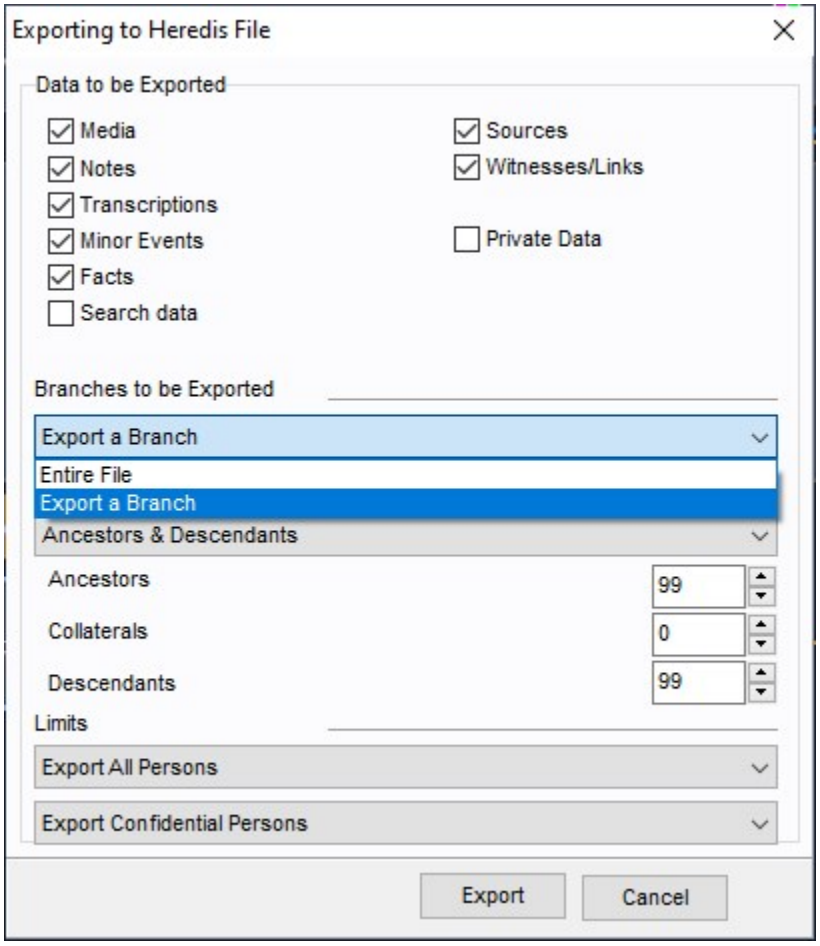
If you wish to exchange data with someone who has an older version of Heredis or another software, you will need to export in GEDCOM format.
See the articles What is a GEDCOM (see page 765), Export a complete file in GEDCOM format (see page 768) and Export a branch in GEDCOM format (see page 776).

In a Heredis export, you can select the data to be exported: exclude confidential persons, restrict to one branch or exclude living persons.

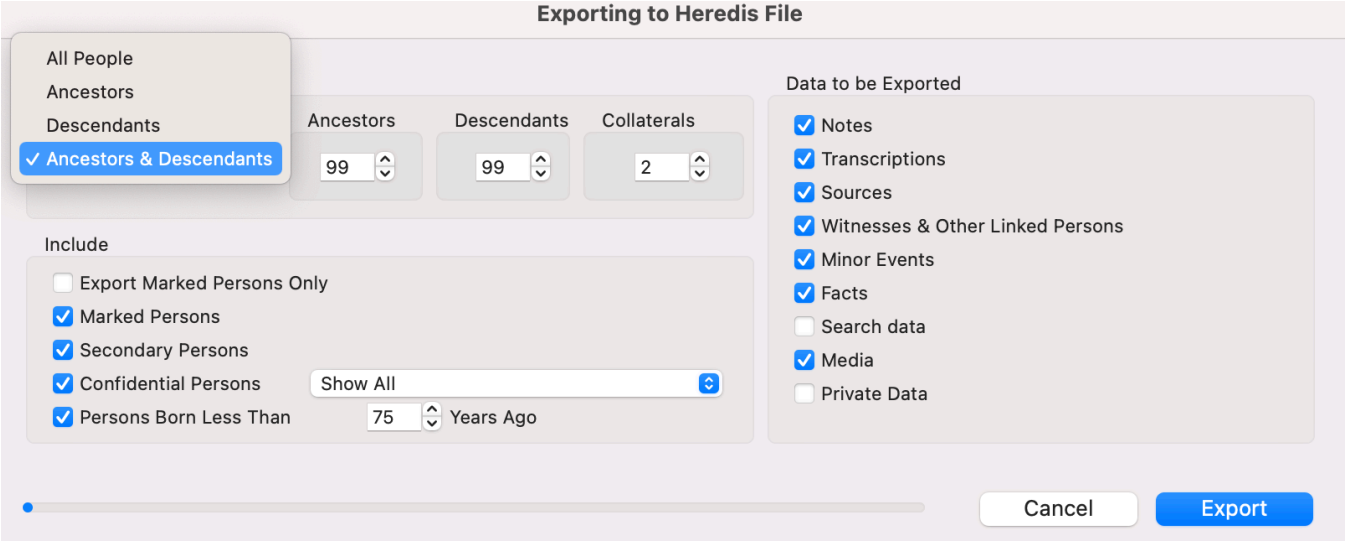
Windows & Mac

Click on the **File** menu **> Export > Heredis File**.

(Windows) Heredis export settings window



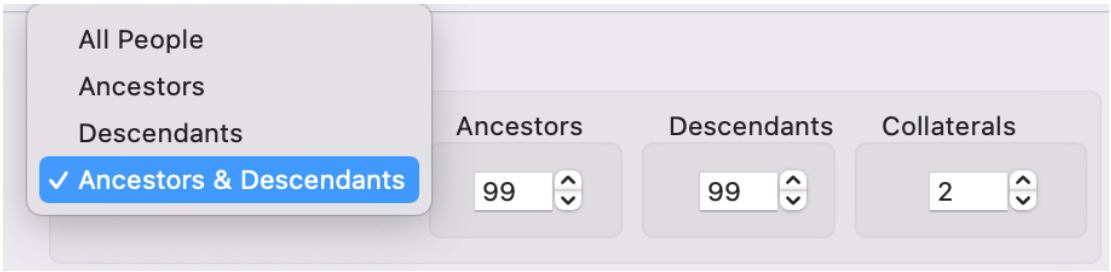
(Mac) Heredis export settings window



- (Windows) Choose the branch to export**.**
- Select branches from the drop-down menu: **Ancestors**, **Descendants** or **Ancestors & Descendants**.

(Windows)

(Mac)



Indicate the **number of generations** in ascendance, descendance, or both.

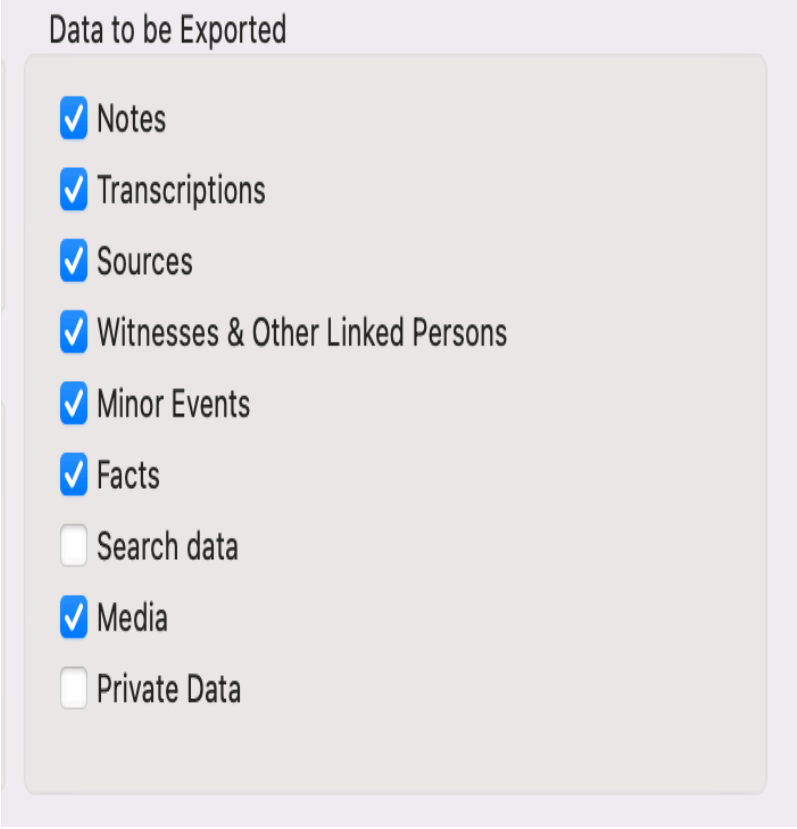
- Specify the **number of degrees of collaterals** for ancestors branches. Heredis goes through the branches, tracing back the lineage of each direct ancestor to include these people in the exported file.
    - 0 = only direct ancestors are exported (with their spouses).
    - 1 = export direct ancestors with all their children and spouses.
    - 2 = export direct ancestors, their children and grandchildren, accompanied by their spouses.

    - 3 = export also their great-grandchildren, etc.

- Select the type of data to be exported (media, notes…).

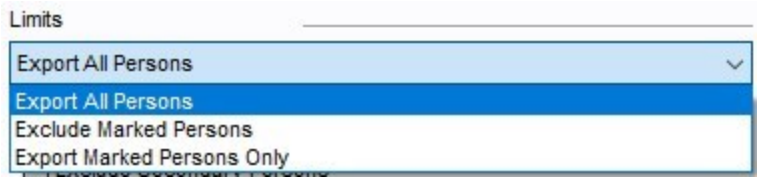
(Windows) Data selection

(Mac) Data selection

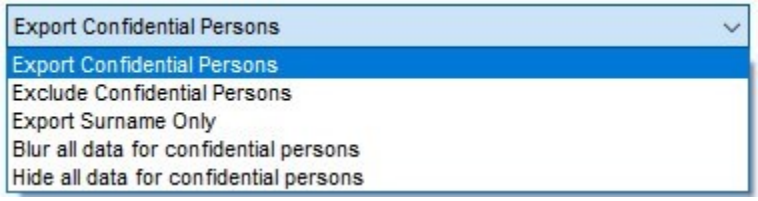


(Windows) Select the persons to be included in the exported file

- **Export all persons**: exports all persons contained in the file.
- **Exclude marked persons**: persons who have been marked in their personal data tab are not exported.
- **Export marked persons only**: only persons who have been marked in their personal data tab and are contained in the file are exported.



- **Export confidential persons, Exclude confidential persons, Export surname only** (of the confidential persons)**, Blur all data for confidential persons,** or **Hide all data for confidential persons** applies the indicated treatment to persons for whom the **Confidential** tag has been ticked in the personal data tab. They are exported without further specification.



- (Windows) Check the box **Exclude secondary persons** ; (Mac) Untick the box **Secondary Person** to avoid exporting people you have declared secondary because they are of little genealogical interest to you (children who died in infancy, unrelated persons).

Info – It is therefore possible to ignore a branch just by marking a person. There are many applications for marking persons: cutting branches, eliminating duplicates, eliminating stillborn babies, not showing people who are still alive… See the article The different data fields (see page 87) to find out more about tags. You can check off these labels on several persons at the same time, thanks to the smart search. See Smart search (see page 371).

(Mac) Select the persons to be included in the exported file

- To prevent the export of certain types of person (marked, confidential or secondary), uncheck the corresponding boxes. See The different data fields (see page 87) for more information on labels.

- To export data in part, specify your choices in the local menus.
  - **Confidential persons**: You can export all information, or only the surnames of

confidential persons, or their surnames and givennames. You can also export people by blurrying all the data. The recipient of your file will simply know that there is a person at such and his/her place in the lineage, without knowing any information about that person.

- **Persons born less than…:** Choose the number of years to be taken into account for exporting contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of persons born less than… years ago, enter the value and uncheck the box.

Info – It is possible to exclude a branch from the exported file. Declare the person at the origin of this branch as a Marked person, then uncheck the Marked persons option in the export window. You can check off the labels , or on several persons at the same time thanks to the smart search. See Smart search (see page 371).

Windows & Mac

- Click on **Export**.
- Give the new file a name and choose the location where it should be saved. Heredis offers the same folder as your genealogy file. To select another location, choose one in your file directory.
  (Mac) If your file directory is not visible, click on the display triangle (arrow) to the right of the **Save as** field.

Info: Search information is always exported. If you wish to exclude notes from search information, check the **Private** box available when editing the note and uncheck the **Private data** box in the export settings window.

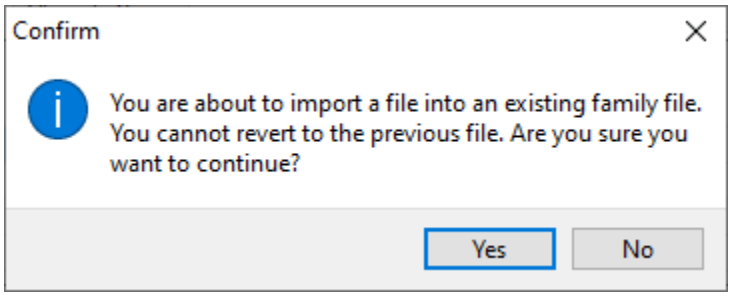
To export the whole file rather than just a branch, see Export a complete file in Heredis format (see page 752).

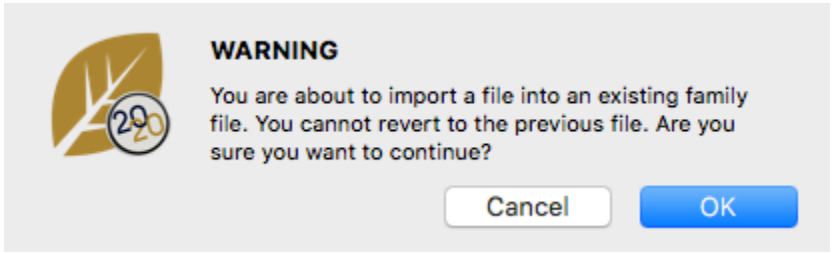
Import a Heredis file in an existing file

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

1. Choose **File > Import > Heredis File**.

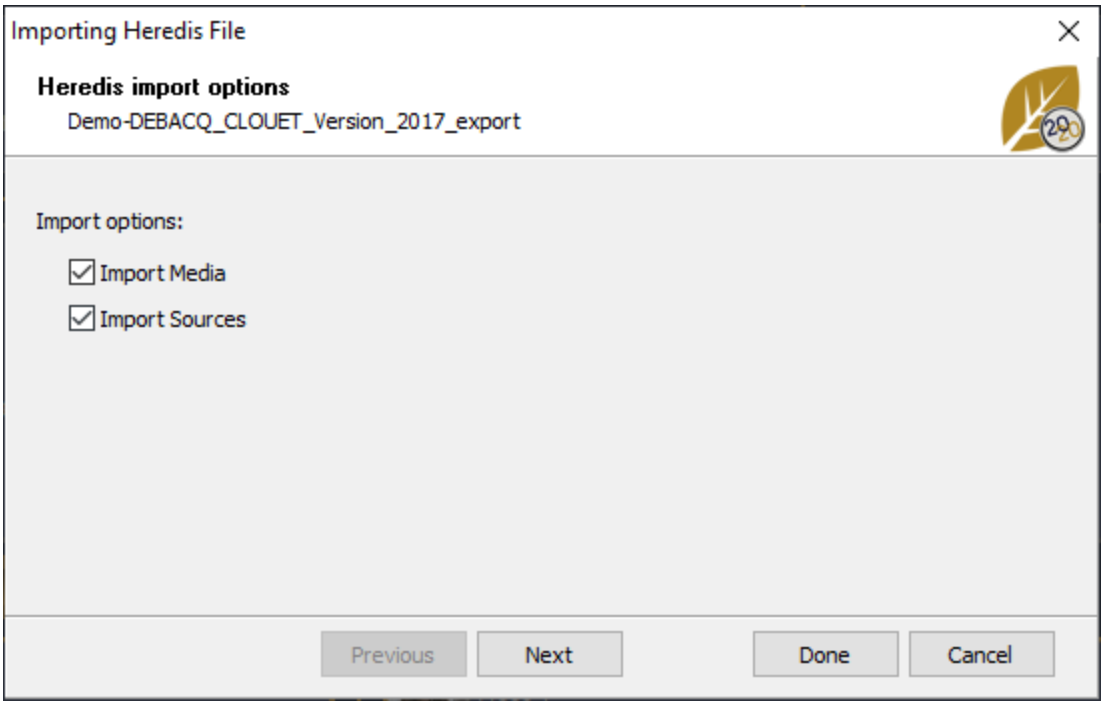
Note: A message will alert you that it is irreversible, so please make sure to make a copy of your file in case the result doesn't please you.

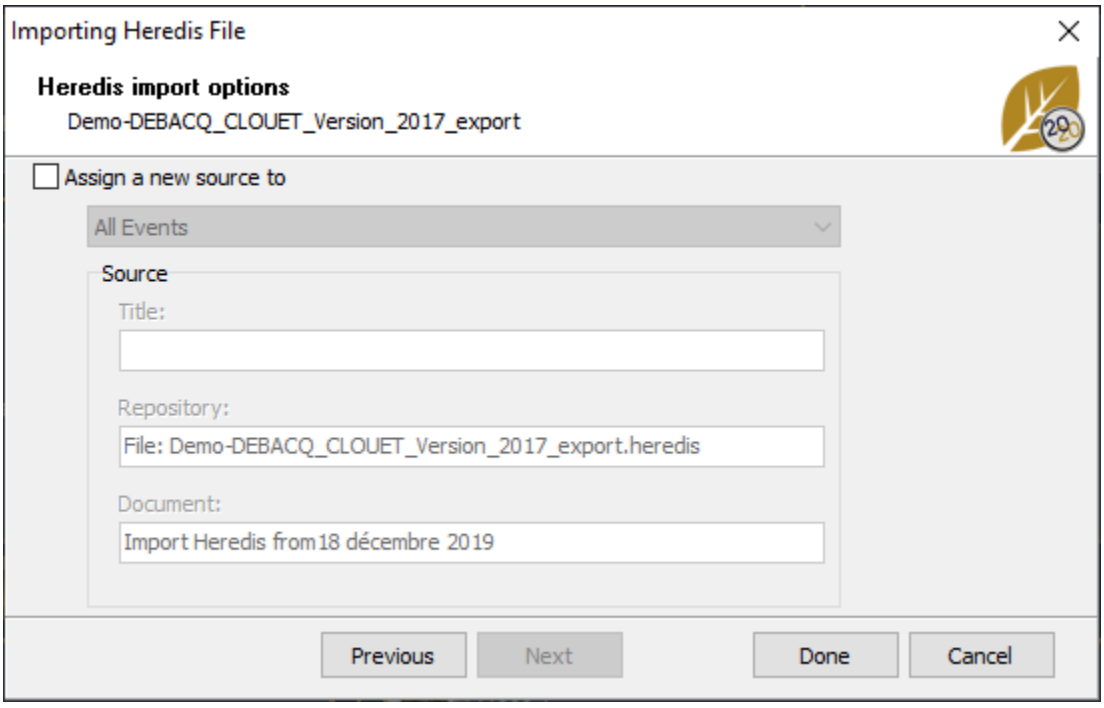




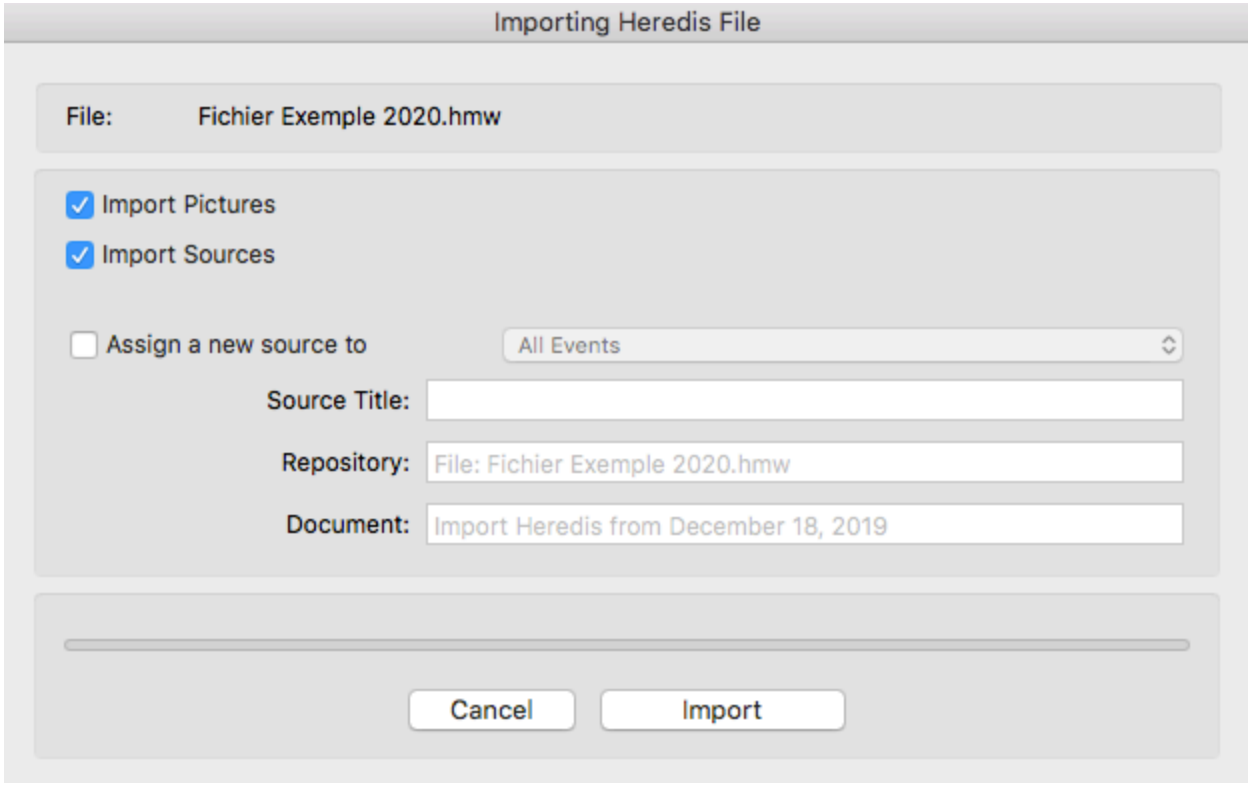
2. Select the Heredis file. Only files created with the same version of Heredis may be merged (Mac file or Windows folder with the extension *.hmw*).
3. Click **Open**. Choose if you want to import or not medias and sources. **(Windows)** Click on **Next**. **(Mac)** Click on **Import**.

(Windows) Import Options





(Mac) Import Options



4. If you desire to associate a common source of data from the import, tick the box **Assign a new source to** and select in the list where you want this source to be assigned. Fill up the fields of this new source. You will be able to modify it on your **Sources index** later. After importing the new data, you must create links that will connect the imported persons to those already present in the main file.

See also Find Duplicates (see page 324), Merging two persons (see page 330).

What is a GEDCOM?

The GEDCOM format is a genealogical data format that was created to facilitate the exchange of data between different software, sites, etc.

You want to pass on your data to other genealogists who do not have Heredis to read them, or who use an older version of Heredis? Use the GEDCOM format.

This universal format is recognized by almost all genealogy software. It makes it possible to transmit information concerning persons: surname, first names, gender, profession, dates and places of birth, marriage, death, notes, etc., but also retains the family ties established between the different persons.

Some things are normalized, others are not. Each software labels the data that are not normalized, etc. as it wishes using proprietary “Tags” (specific to the software), as for minor events (Residency, Census etc.). It is therefore possible that these proprietary Tags, starting with a _ followed by a literate code, are not read by some software.

GEDCOM 5.5.1

GEDCOM 5.5.1 file is a text file, it NEVER includes media. Indeed, only the name and path leading to your media is exported. You can check them back in through the media idex (if their name hasn’t changed, Heredis will quickly check all of your media back in a few clicks). See the article The Media Index > Searching for missing media for more details)

Heredis can export and import a GEDCOM 5.5.1.

Note: The Anhentafel numbering is a mobile data, it can be changed at any time, therefore it is not a data that is exported. See the article on The Root Person (see page 137).

See also the articles Create a new file from a GEDCOM 5.5.1 (see page 786), Import a GEDCOM 5.5.1 into an existing file (see page 805), GEDCOM tags generated by Heredis. (see page 822)

GEDCOM 7

The GEDCOM 7 format is an evolution of the previous GEDCOM 5.5.1 format.
The evolution to GEDCOM 7 format now allows you to include media in your GEDCOM.

Files in GEDCOM 5.5.1 have the extension .ged while the GEDCOM 7 format has the extension .gdz

Starting with the 2023 version of Heredis, GEDCOM 7 files can be imported.

See also the articles Create a new genealogy from a GEDCOM 7 file (see page 795),

Importing a GEDCOM 7 file to your existing genealogy (see page 812), GEDCOM tags generated by Heredis. (see page 822)

How do I export a GEDCOM?

You export your data for exchange. If you want to pass them on to other genealogists who don't have Heredis to read them, or if they use an older version of Heredis, or if you want to keep a version that can be used by other software, use the GEDCOM format. This is a text-based file format, containing only text and no media. See the article What is a GEDCOM? (see page 765) for more details.

Important : if you make limitations on persons (marked, confidential…) and the root person (in the case of an export of the whole file) or the central character (in the case of an export of a branch) is affected by these limitations, then your GEDCOM file will be empty! You can't create a file without having a referent person at the base of your file.

Note: Ahnentafel numbering is a mobile data, and can be changed at any time, so it is not exported. See the article on The root person (see page 137).

To export an entire file, consult the article: Export a complete file in GEDCOM format (see page 768)

To export a part or a branch of a file, consult the article: Export a branch in GEDCOM format (see page 776)

Export a complete file in GEDCOM format

You export your data for exchange. If you want to pass them on to other genealogists who don't have Heredis to read them, or if they use an older version of Heredis, or if you want to keep a version that can be used by other software, use the GEDCOM format. Heredis exports in GEDCOM 5.5.1 format. This is a text-only file format, with no media. See the article What is a GEDCOM? for more details.

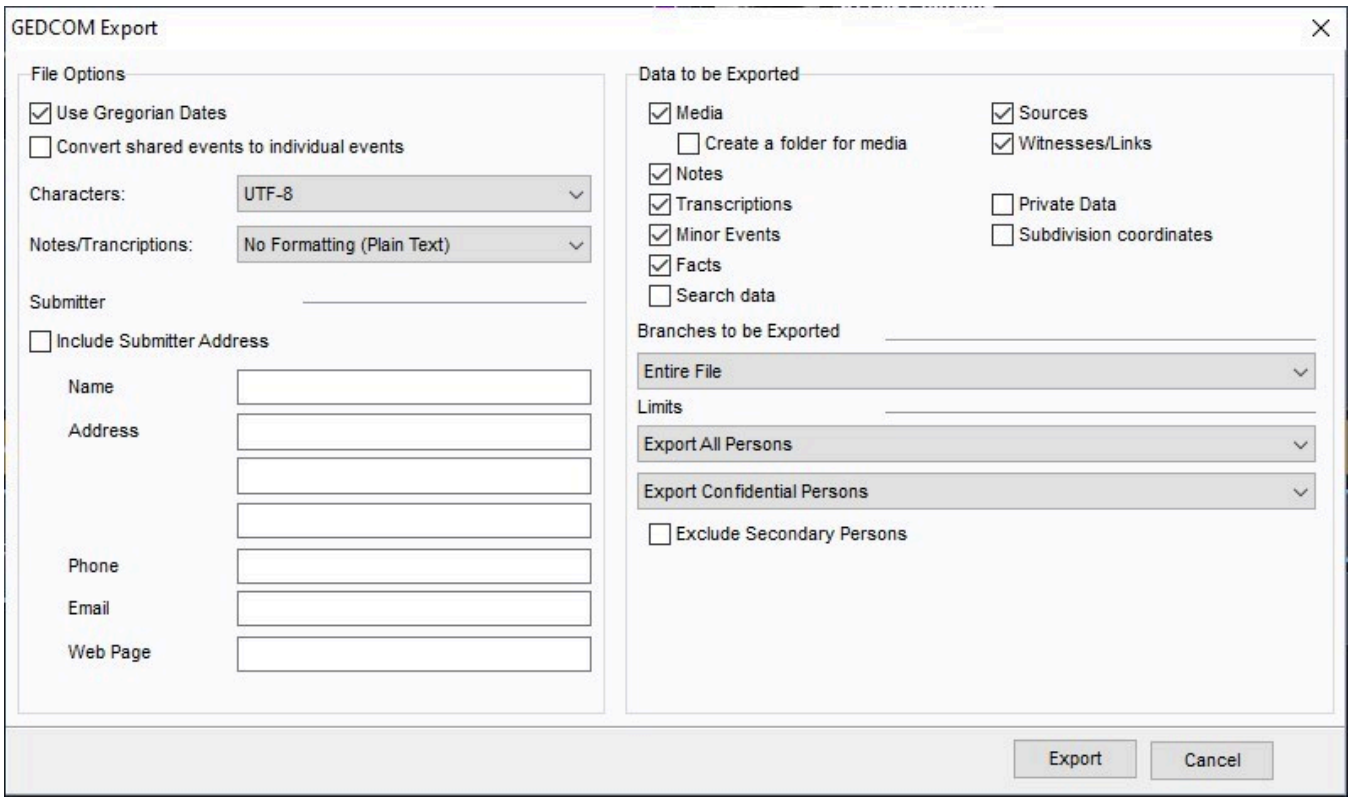
Important: if you make limitations on persons (marked, confidential…) and the root person (in the case of an export of the whole file) or the primary person (in the case of an export of a branch) is affected by these limitations, then your GEDCOM file will be empty! You can't create a file without having a referent person at the base of your file.

To switch from one version of Heredis to another, it is not necessary to create a GEDCOM format. See the article Is it possible to recover data created with an older version of Heredis?

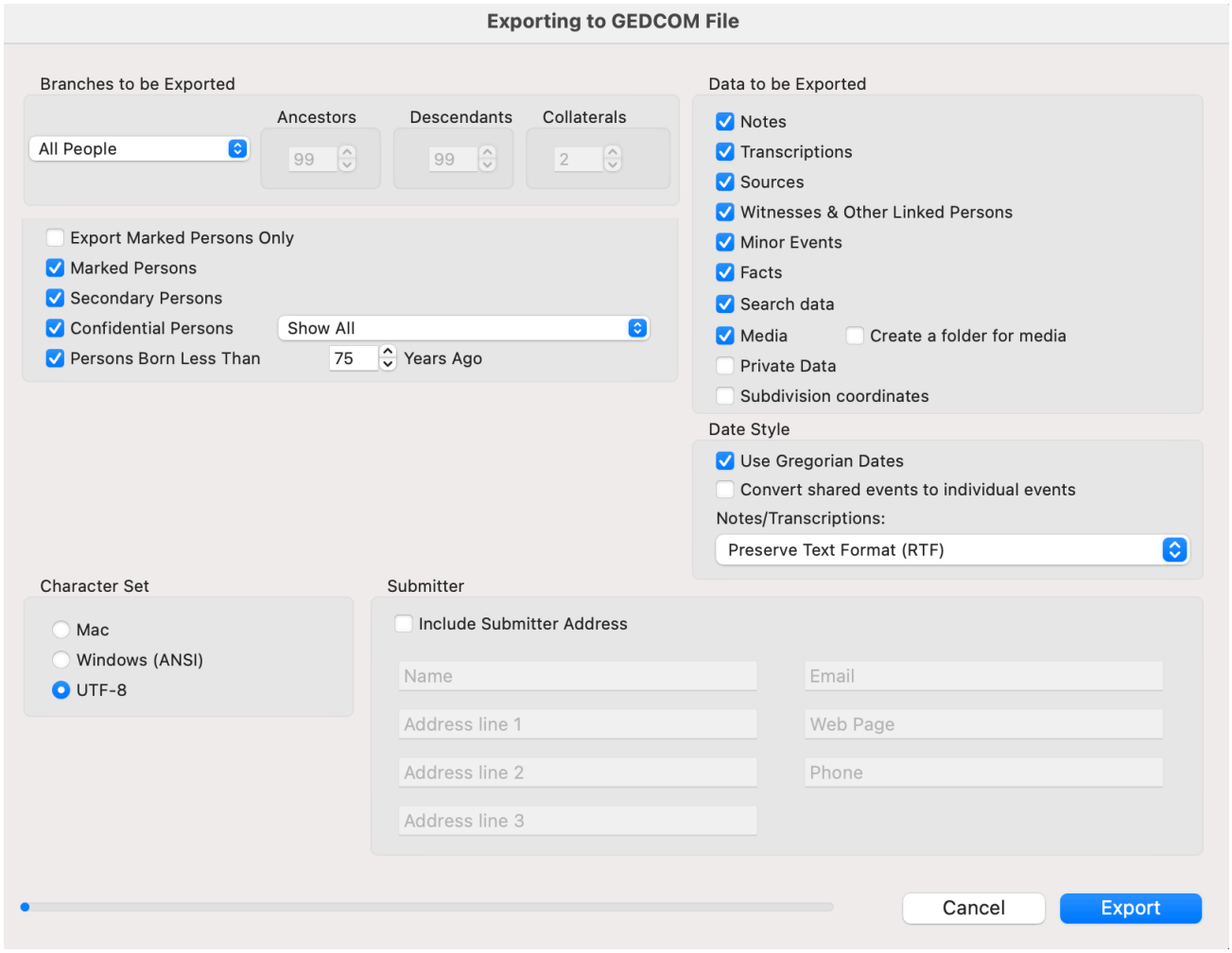
Windows & Mac

- Click on the **File menu > Export > GEDCOM**.

(Windows) GEDCOM export settings window



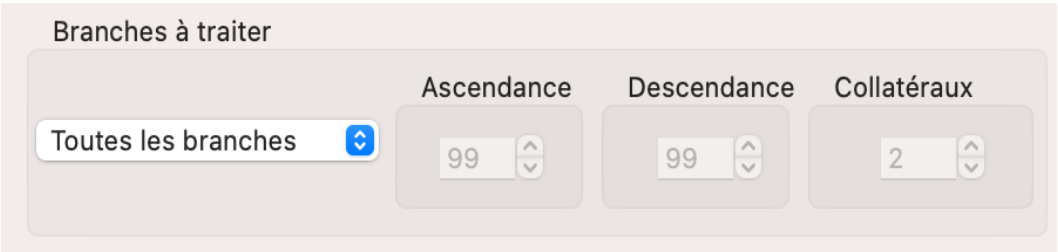
(Mac) GEDCOM export settings window



Export (Windows) **Entire file** or (Mac) **All branches**

(Windows)

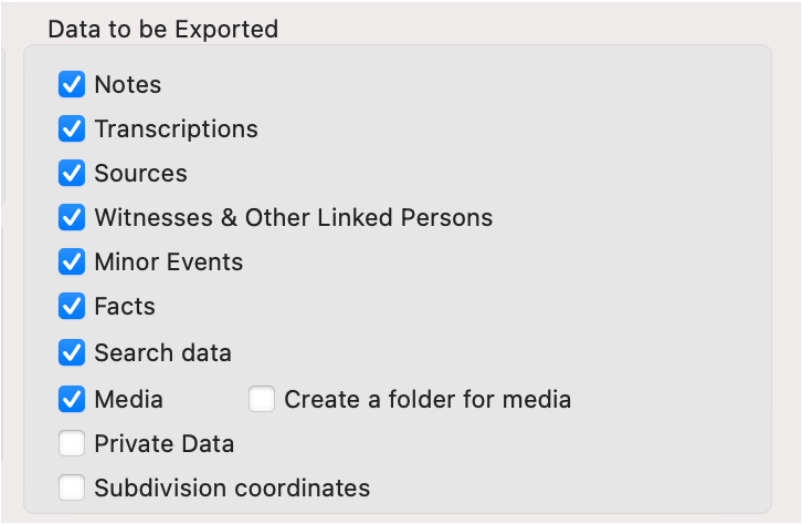
(Mac)



- Select the type of data to be exported (media, notes…).

(Windows)

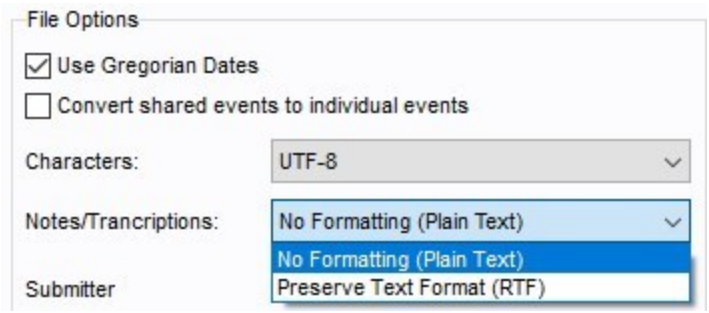
(Mac)



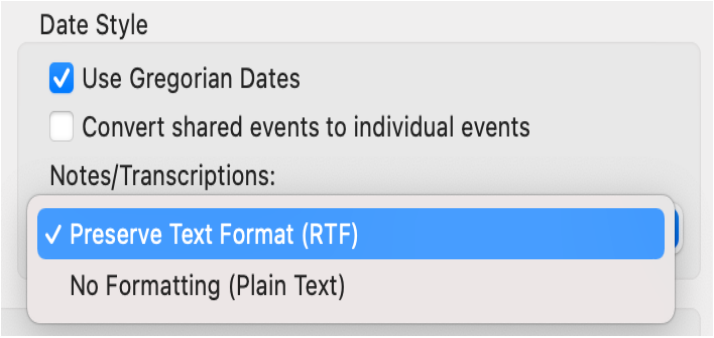
Info – Check the **Create media folder** box to accompany the GEDCOM file with a folder containing all the media linked to the data. The media paths indicated in the GEDCOM file correspond to the media contained in this folder. If you check the box, Heredis will fetch the originals and make a copy which will be placed in a folder parallel to the .ged file. If you don't, only the media path will be indicated in the GEDCOM, there will be no media.

- If you're exporting notes, choose whether you want to **Preserve text format** or **No format**.
  Note: Some software programs cannot read formatting. To be sure of retaining the information in your notes, it's best to ignore the formatting.
- Heredis recognizes the dates of the revolutionary calendar – not all programs are able to do this. Check the box **Use Gregorian dates** to be sure of having the dates entered.
- Heredis lets you share an event. This function is specific to Heredis.
  Check the **Convert shared events to individual events** box to have Heredis copy the event for each person concerned by the shared event.

(Windows)



(Mac)



Choose the character format for the data to be exported:

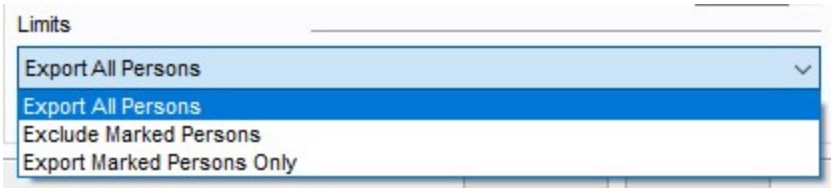
- **Mac**: characters readable by all Mac programs
- Windows**(ANSI)**: use this format if you know that the recipient of the file uses Windows software.
- **UTF-8**: use this format to preserve all special characters. This is a recent universal format. Please note that some genealogy programs do not support this format.

Info: Use UTF-8 characters, which is an international language for computer encoding, if the software that will open the GEDCOM is less than 6 years old.

You can add information about the sender of the file. They enable the person receiving the file to identify you and contact you if necessary.

(Windows) Select the persons to be included in the exported file

- **Export all persons**: exports all persons contained in the file.
- **Exclude marked persons**: persons who have been marked in their personal data tab are not exported.
- **Export marked persons only**: only persons who have been marked in their personal data tab and are contained in the file are exported.

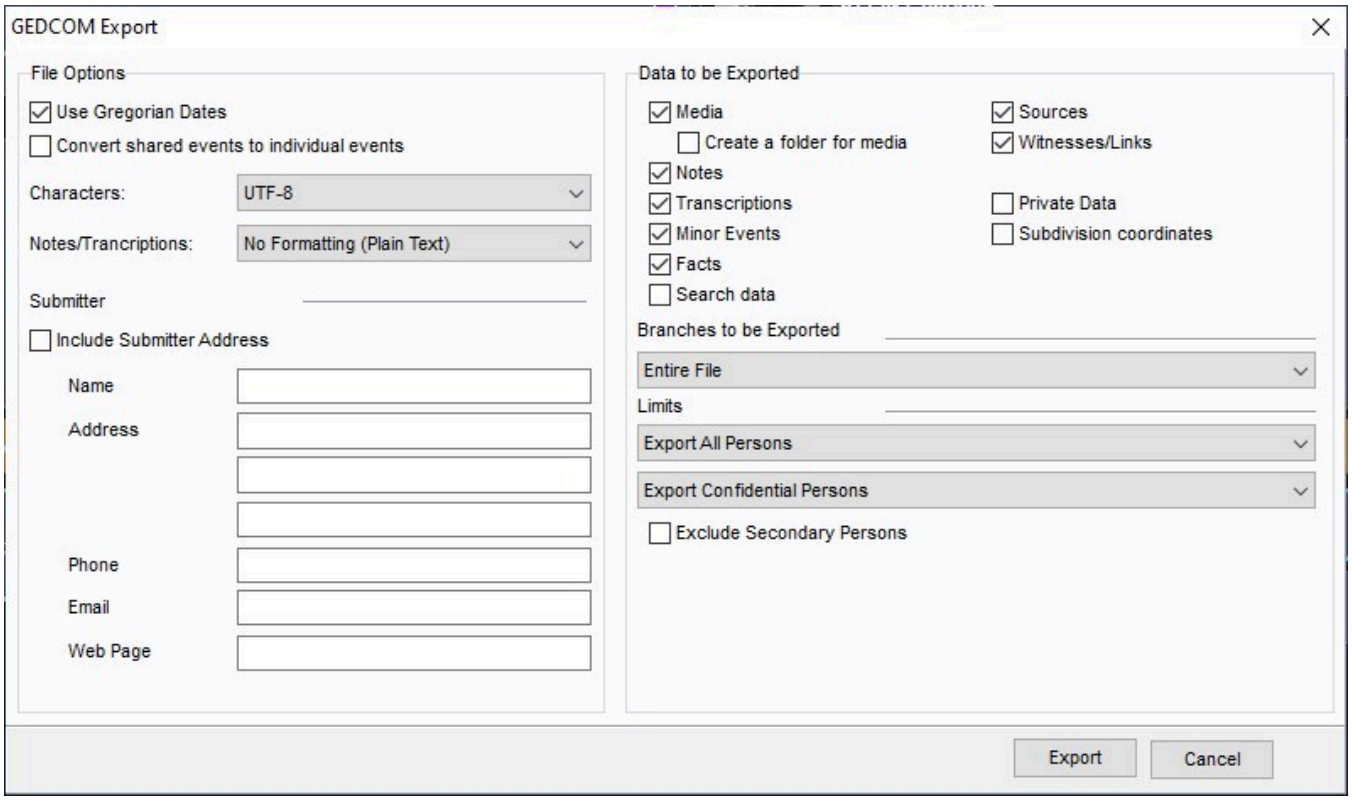


- **Export confidential persons, Exclude confidential persons, Export surname only (of the confidential persons), Blur all data for confidential persons, or Hide all data for confidential persons.** applies the indicated treatment to persons for whom the **Confidential tag** has been ticked in the personal data tab are exported without further specification.

- (Windows) Check the box **Exclude Secondary Persons**; **(Mac) Untick the box Secondary Person** to avoid exporting people you have declared secondary because they are of little genealogical interest to you (children who died in infancy, unrelated persons).

Info – It is therefore possible to ignore a branch just by marking a person. There are many applications for marking persons: cutting branches, eliminating duplicates, eliminating stillborn babies, not showing people who are still alive… See the article The different data fields to find out more about tags. You can check off these labels on several persons at the same time, thanks to the smart search. See Smart search.

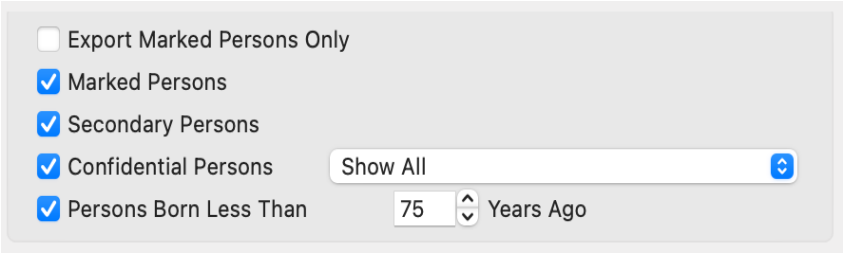
(Windows) GEDCOM creation window



Add your contact details to the GEDCOM file so that the recipient of the file knows who it's from.

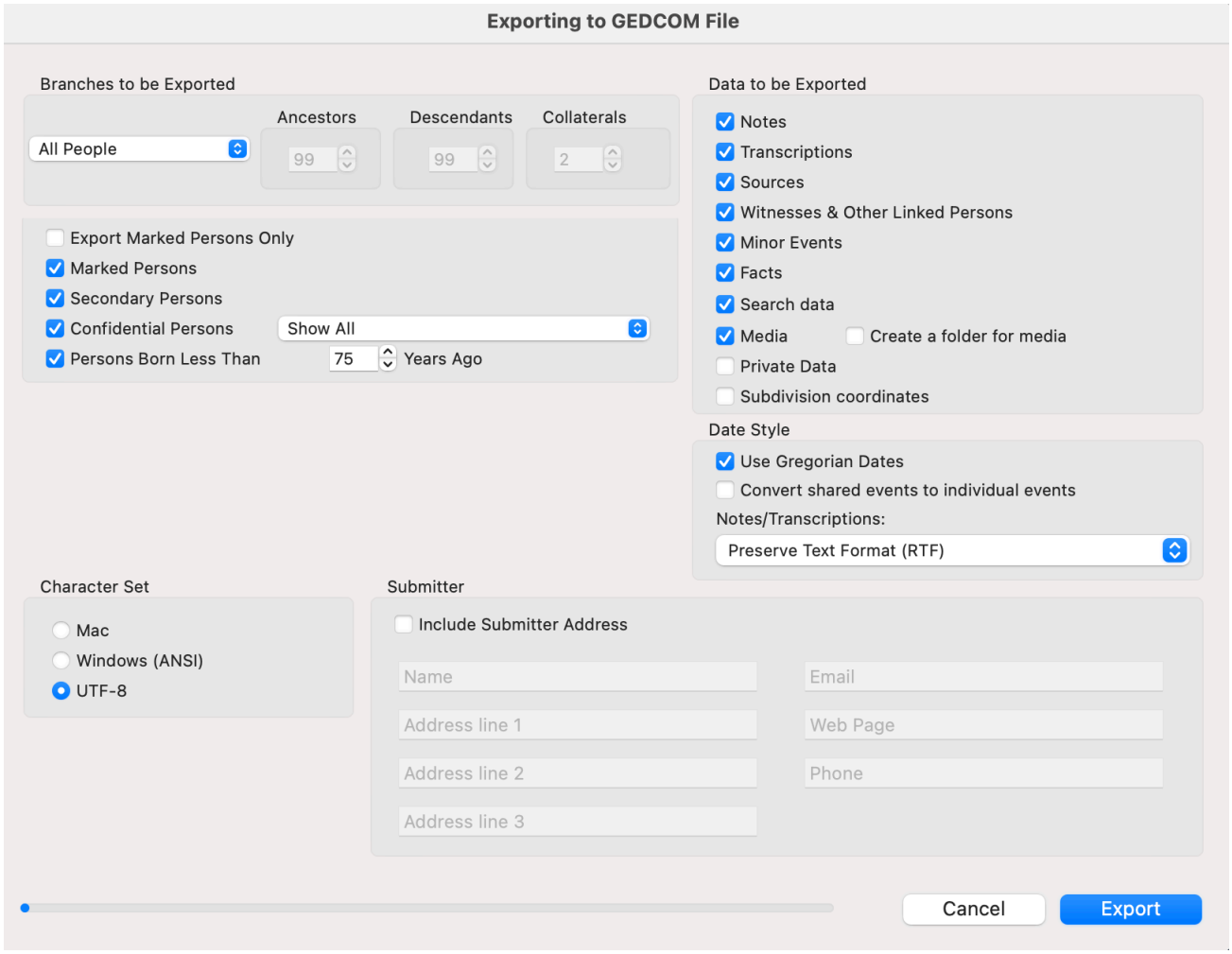
(Mac) Select the persons to be included in the exported file

- Check all the boxes to include all the people registered in the file except the Export marked persons only box.
- To prevent the export of certain types of people (marked, confidential or secondary), uncheck the corresponding boxes. See The different data fields for more information on labels.
- To export data in part, specify your choices in the local menus.
    - **Confidential persons**: You can export all information, or only the surnames of confidential persons, or their surnames and givennames. You can also export people by blurrying all the data. The recipient of your file will simply know that there is a person at such and his/her place in the lineage, without knowing any information about that person.
    - **Persons born less than…:** Choose the number of years to be taken into account for exporting contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of persons born less than… years ago, enter the value and uncheck the box.



Info-It is possible to exclude a branch from the exported file. Declare the person at the origin of this branch as a Marked person, then uncheck the Marked persons option in the export window. You can check off the labels , or on several persons at the same time thanks to the smart search. See Smart search.

(Mac) GEDCOM creation window



Add your contact details to the GEDCOM file so that the recipient of the file knows who it's from.

Windows & Mac

- Click on **Export**.

- Give the new file a name and choose the location where it should be saved. Heredis offers the same folder as your genealogy file. To select another location, choose one in your file directory.
  (Mac) If your file directory is not visible, click on the display triangle to the right of the **Save as** field.

Note: Ahnentafel numbering is a mobile data, and can be changed at any time, so it is not exported. See the article on The root person.

Info: Search information is always exported. If you wish to exclude notes from search information, check the **Private** box available when editing the note and uncheck the **Private data** box in the export settings window.

To export a branch rather than the entire file, see Export a branch in GEDCOM format.

Export a branch in GEDCOM format

You export your data for exchange. If you want to pass them on to other genealogists who don't have Heredis to read them, or if they use an older version of Heredis, or if you want to keep a version that can be used by other software, use the GEDCOM format. Heredis exports in GEDCOM 5.5.1 format. This is a text-only file format, with no media. See the article What is a GEDCOM? (see page 765) for more details.

Important: if you make limitations on persons (marked, confidential…) and the root person (in the case of an export of the whole file) or the primary person (in the case of an export of a branch) is affected by these limitations, then your GEDCOM file will be empty! You can't create a file without having a referent person at the base of your file.

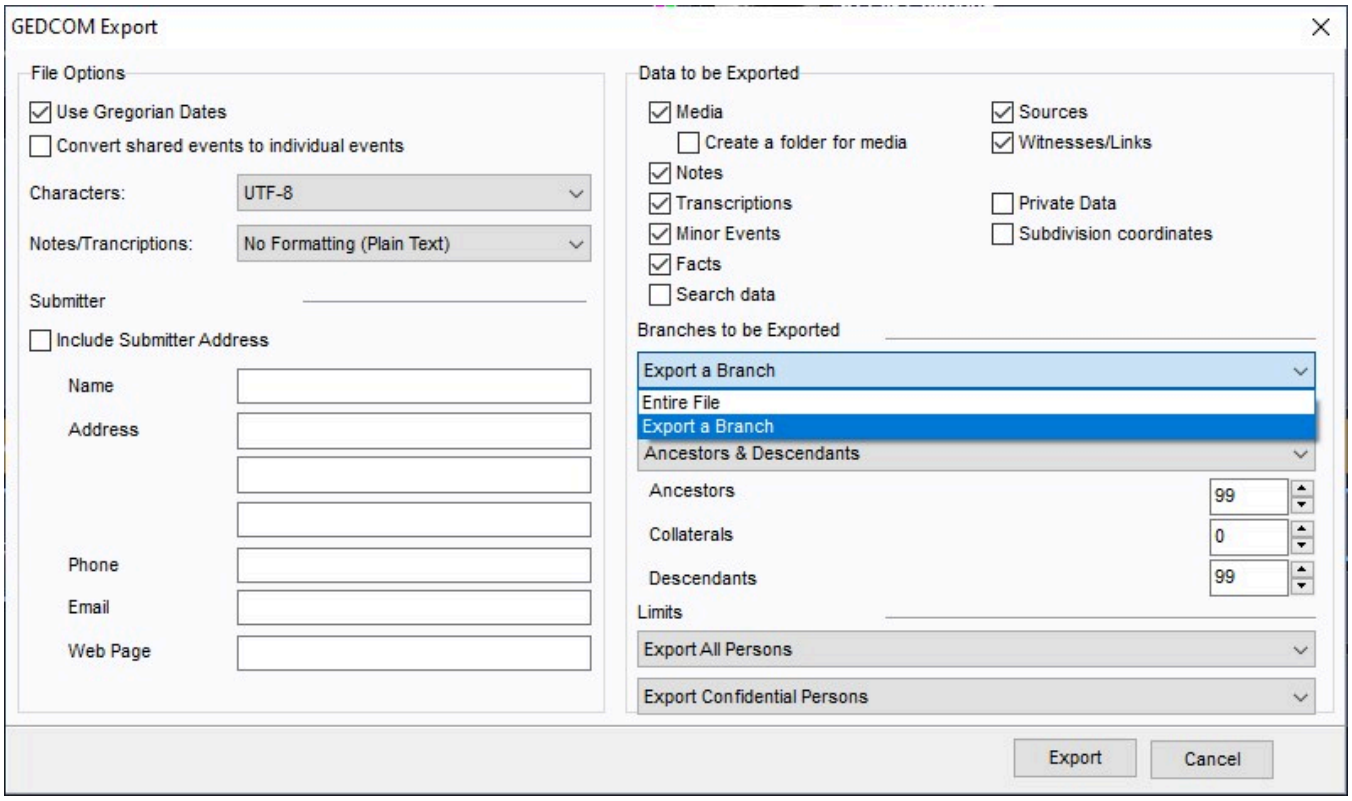
To switch from one version of Heredis to another, it is not necessary to create a GEDCOM format. See the article Is it possible to recover data created with an older version of Heredis? (see page 39)

Windows & Mac

Put the person you want as the primary person at the base of the GEDCOM.
If you want your spouse's ancestry, you'll need to use one of the couple's children as the primary person.

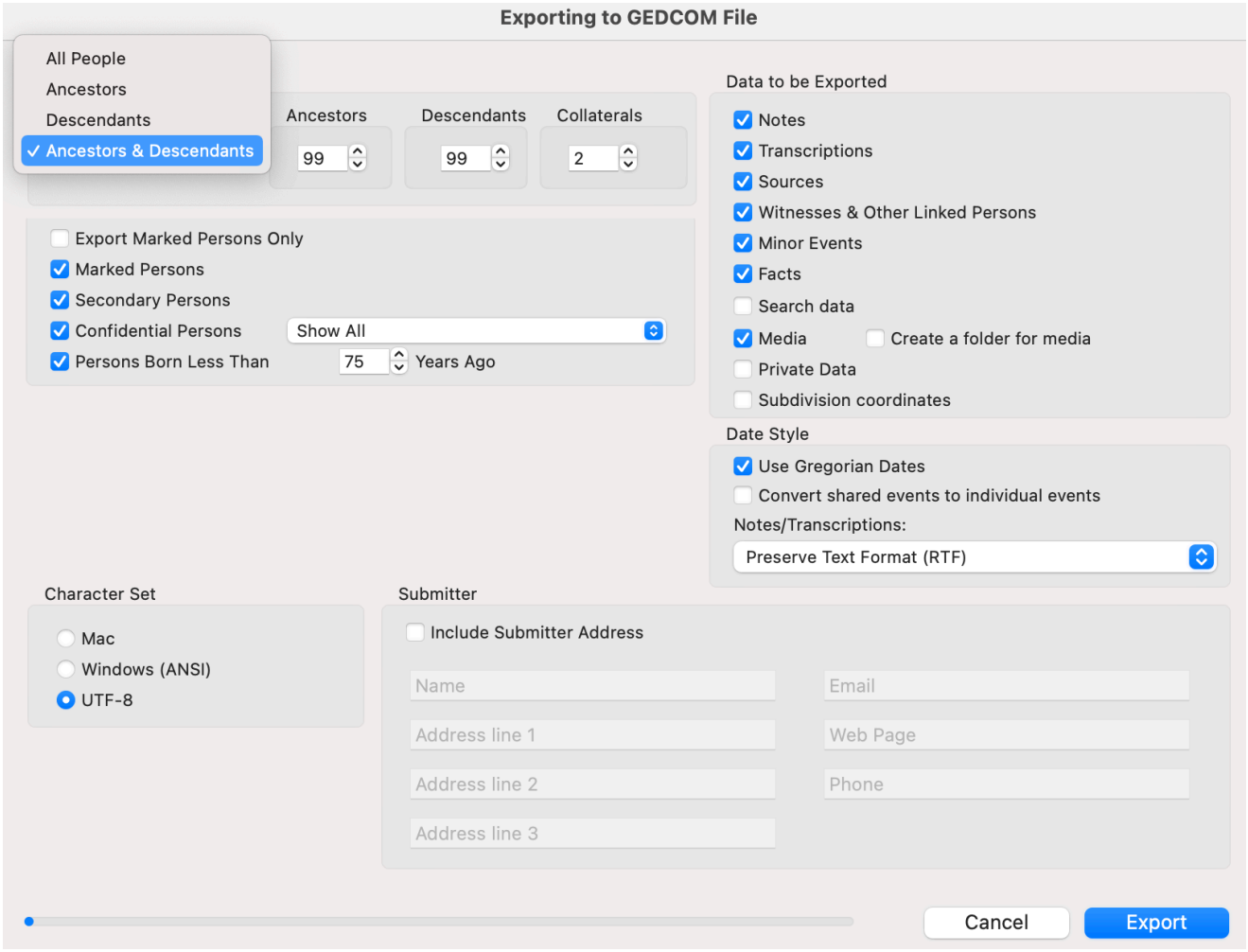
- Click on the **File** menu **> Export > GEDCOM**.
- (Windows) Choose **Export branch.**

(Windows) GEDCOM export settings window



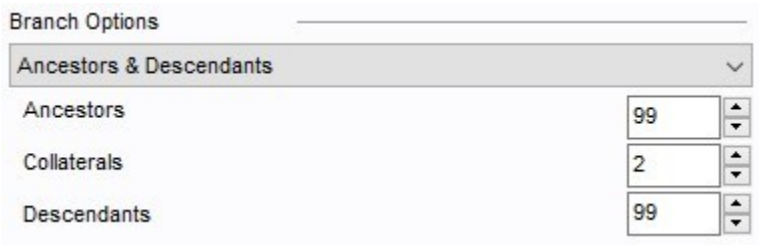
- (**Mac**) Select the branches to export.

(Mac) GEDCOM export settings window

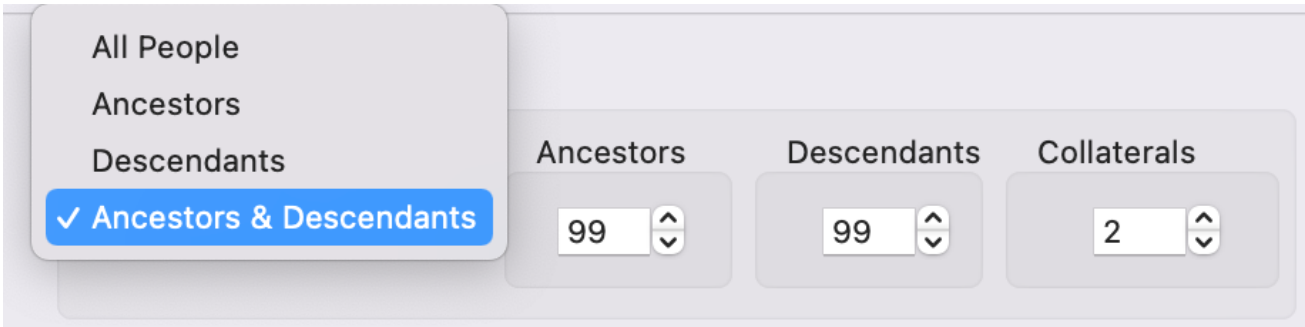


- Select branches from the drop-down menu: **Ancestors**, **Descendants** or **Ancestors & Descendants**.

(Windows)



(Mac)



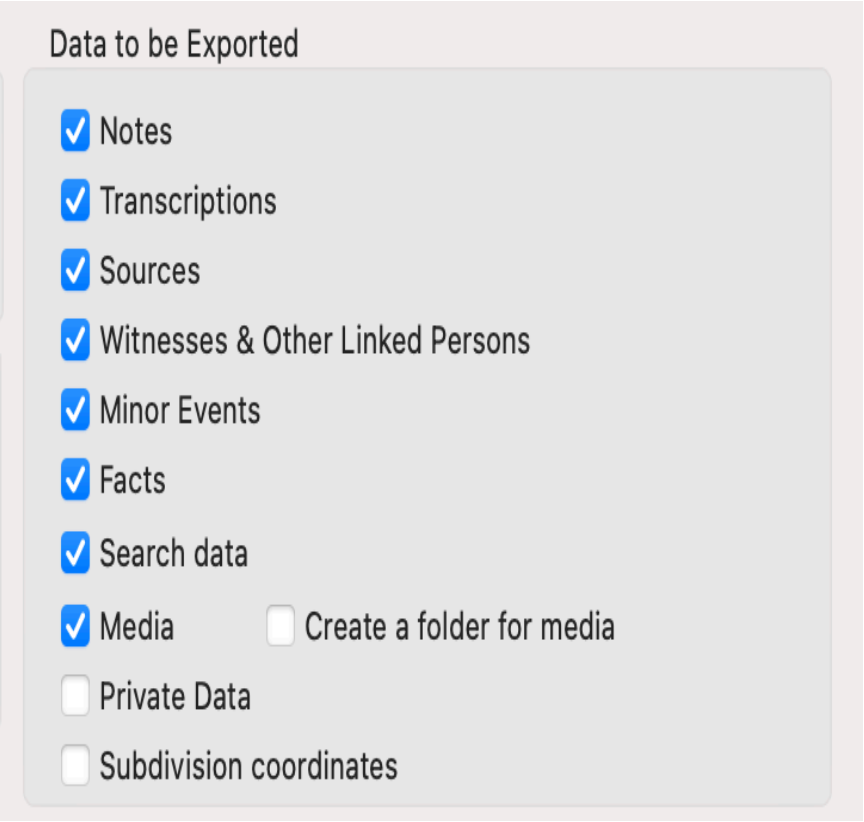
Indicate the **number of generations** in ascendance, descendance, or both.

- Specify the **number of degrees of collaterals** for ascending branches. Heredis goes through the branches, tracing back the lineage of each direct ancestor to include these people in the exported file.
    - 0 = only direct ancestors are exported (with their spouses).
    - 1 = export direct ancestors with all their children and spouses.
    - 2 = you export direct ancestors, their children and grandchildren, accompanied by their spouses.
    - 3 = you also add their great-grandchildren, etc.

- Select the type of data to be exported (media, notes…).

(Windows)

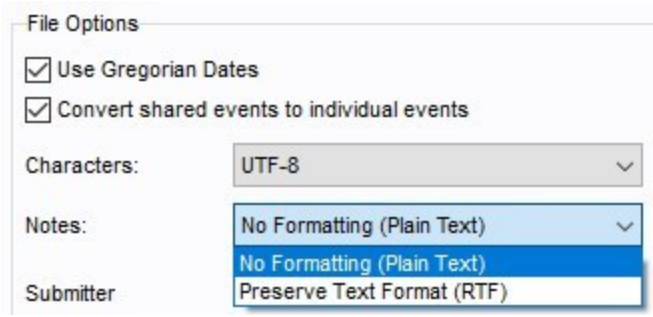
(Mac)



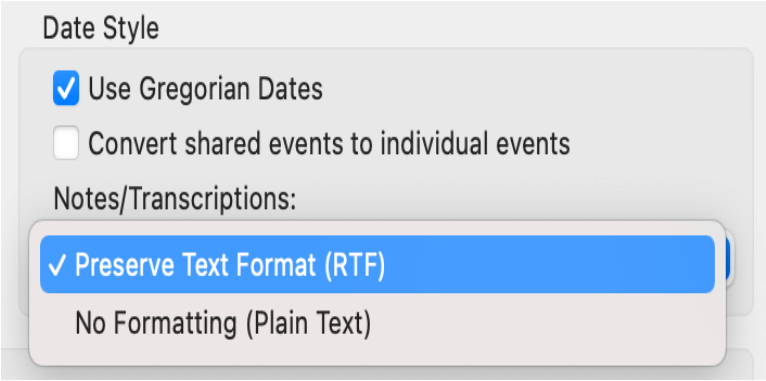
Info – Check the **Create a folder for media** box to accompany the GEDCOM file with a folder containing all the media linked to the data. The media paths indicated in the GEDCOM file correspond to the media contained in this folder. If you check the box, Heredis will fetch the originals and make a copy which will be placed in a folder parallel to the .ged file. If you don't, only the media path will be indicated in the GEDCOM, there will be no media.

- If you're exporting notes, choose whether you want to **Preserve text format** or **No format**.
  Note: Some software programs cannot read formatting. To be sure of retaining the information in your notes, it's best to ignore the formatting.
- Heredis recognizes the dates of the revolutionary calendar – not all programs are able to do this. Check the box **Use Gregorian dates** to be sure of having the dates entered.
- Heredis lets you share an event. This function is specific to Heredis.
  Check the **Convert shared events to individual events** box to have Heredis copy the event for each person concerned by the shared event.

(Windows)



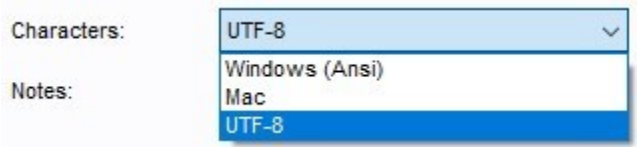
(Mac)



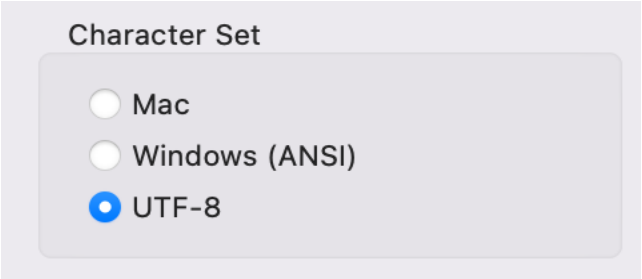
- Choose the character format for the data to be exported:
  - **Mac**: characters readable by all Mac programs
  - Windows**(ANSI**): use this format if you know that the recipient of the file uses Windows software.
  - **UTF-8**: use this format to preserve all special characters. This is a recent universal format. Please note that some genealogy programs do not support this format.

Info: Use UTF-8 characters, which is an international language for computer encoding, if the software that will open the GEDCOM is less than 6 years old.

(Windows)



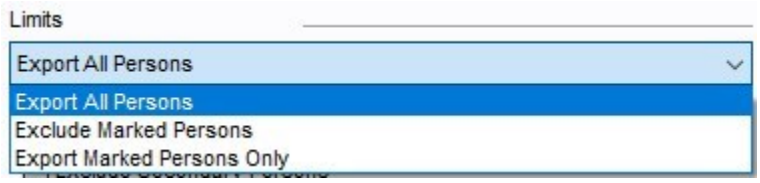
(Mac)



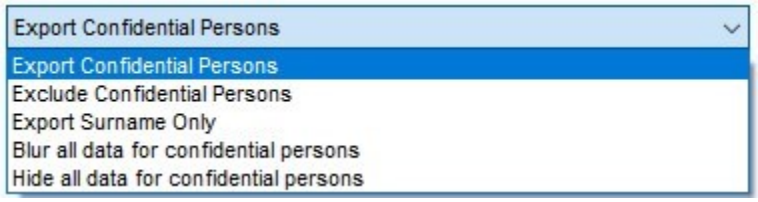
You can add information about the sender of the file. They enable the person receiving the file to identify you and contact you if necessary.

(Windows) Select the persons to be included in the exported file

- **Export all persons**: exports all persons contained in the file.
- **Exclude marked persons**: persons who have been marked in their personal data tab are not exported.
- **Export marked persons only**: only persons who have been marked in their personal data tab and are contained in the file are exported.



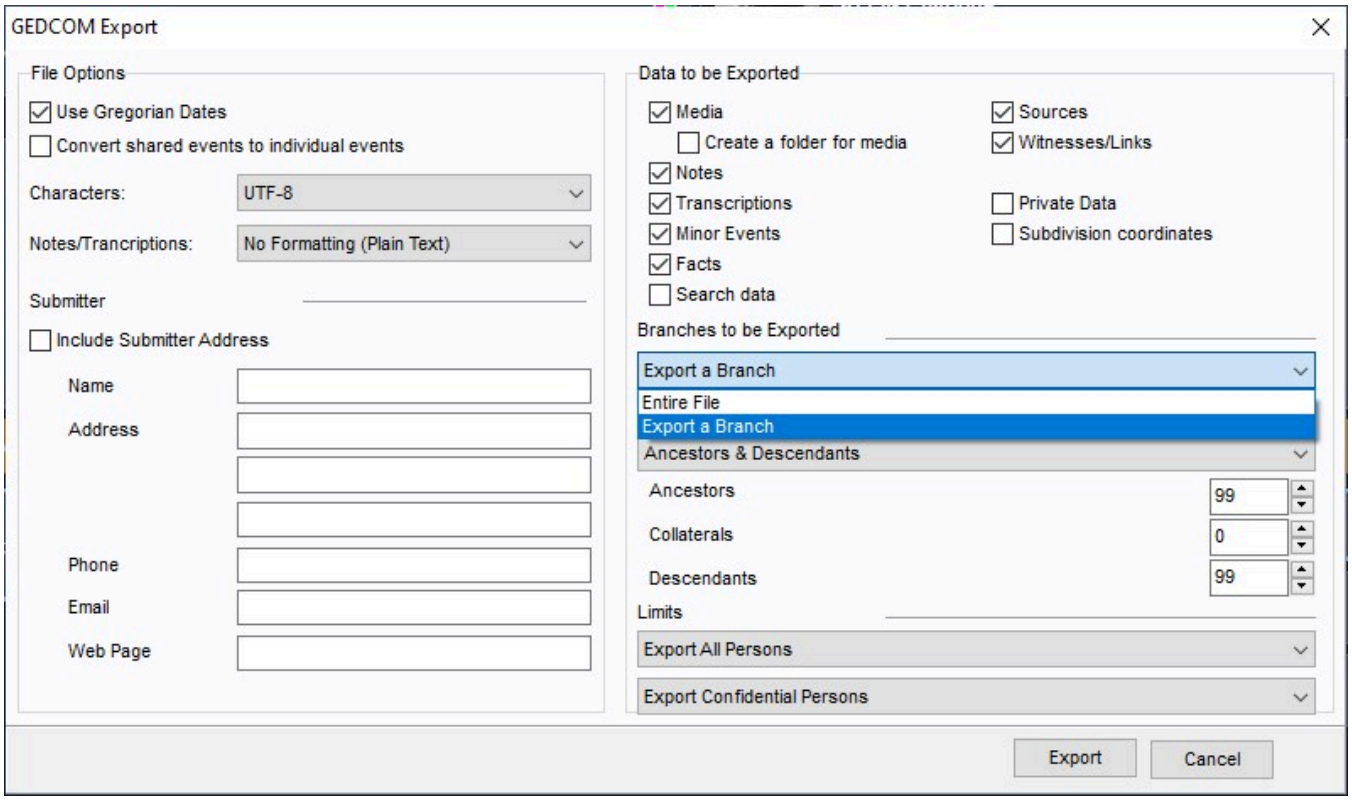
- **Export confidential persons, Exclude confidential persons, Export surname only** (of the confidential persons)**, Blur all data for confidential persons, or Hide all data for confidential persons.** applies the indicated treatment to persons for whom the **Confidential** tag has been ticked in the personal data tab are exported without further specification.



(Windows) Check the box **Exclude Secondary Persons**; (Mac) Untick the box **Secondary Person** to avoid exporting people you have declared secondary because they are of little genealogical interest to you (children who died in infancy, unrelated persons).

Info – It is therefore possible to ignore a branch just by marking a person. There are many applications for marking persons: cutting branches, eliminating duplicates, eliminating stillborn babies, not showing people who are still alive… See the article The different data fields (see page 87) to find out more about tags. You can check off these labels on several persons at the same time, thanks to the smart search. See Smart search (see page 371).

(Windows) GEDCOM creation window



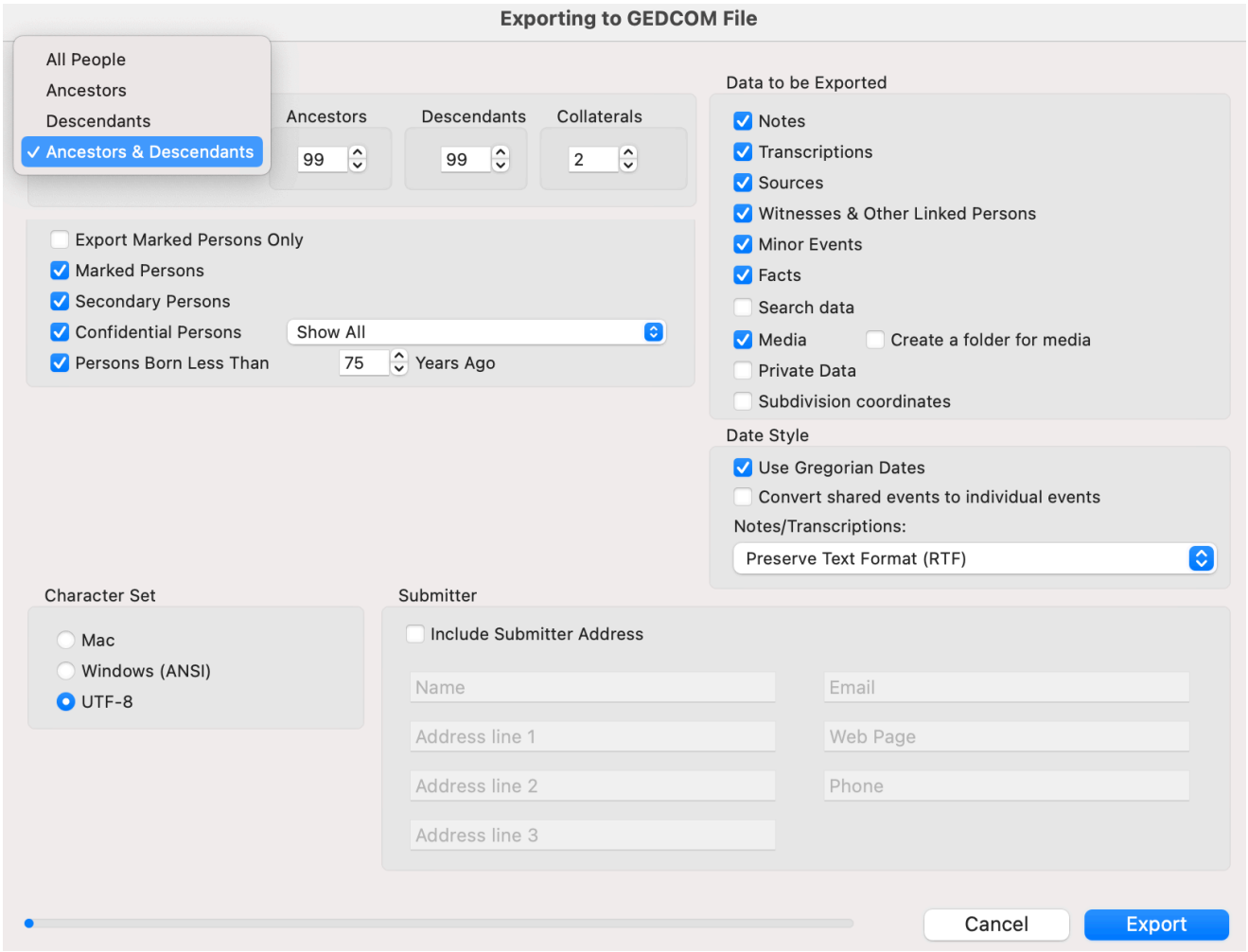
Add your contact details to the GEDCOM file so that the recipient of the file knows who it's from.

(Mac) Select the persons to be included in the exported file

- Check all the boxes to include all the people registered in the file except the Export marked persons only box.
- To prevent the export of certain types of people (marked, confidential or secondary), uncheck the corresponding boxes. See The different data fields (see page 87) for more information on labels.
- To export data in part, specify your choices in the local menus.
    - **Confidential persons**: You can export all information, or only the surnames of confidential persons, or their surnames and givennames. You can also export people by blurrying all the data. The recipient of your file will simply know that there is a person at such and his/her place in the lineage, without knowing any information about that person.
    - **Persons born less than…:** Choose the number of years to be taken into account for exporting contemporaries. Type a value or use the arrows to change the proposed value. To prevent the export of persons born less than… years ago, enter the value and uncheck the box.

Info-It is possible to exclude a branch from the exported file. Declare the person at the origin of this branch as a Marked person, then uncheck the Marked persons option in the export window. You can check off the labels , or on several persons at the same time thanks to the smart search. See Smart search (see page 371).

(Mac) GEDCOM creation window



Add your contact details to the GEDCOM file so that the recipient of the file knows who it's from.

Windows & Mac

- Click on **Export**.
- Give the new file a name and choose the location where it should be saved. Heredis offers the same folder as your genealogy file. To select another location, choose one in your file directory.
  (Mac) If your file directory is not visible, click on the display triangle to the right of the **Save as** field.

Note: Ahnentafel numbering is a mobile data, and can be changed at any time, so it is not exported. See the article on The root person (see page 137).

Info: Search information is always exported. If you wish to exclude notes from search information, check the **Private** box available when editing the note and uncheck the **Private data** box in the export settings window.

To export the entire file rather than just a branch, see Exporting a complete file in GEDCOM format (see page 768).

Create a new file from a GEDCOM 5.5.1

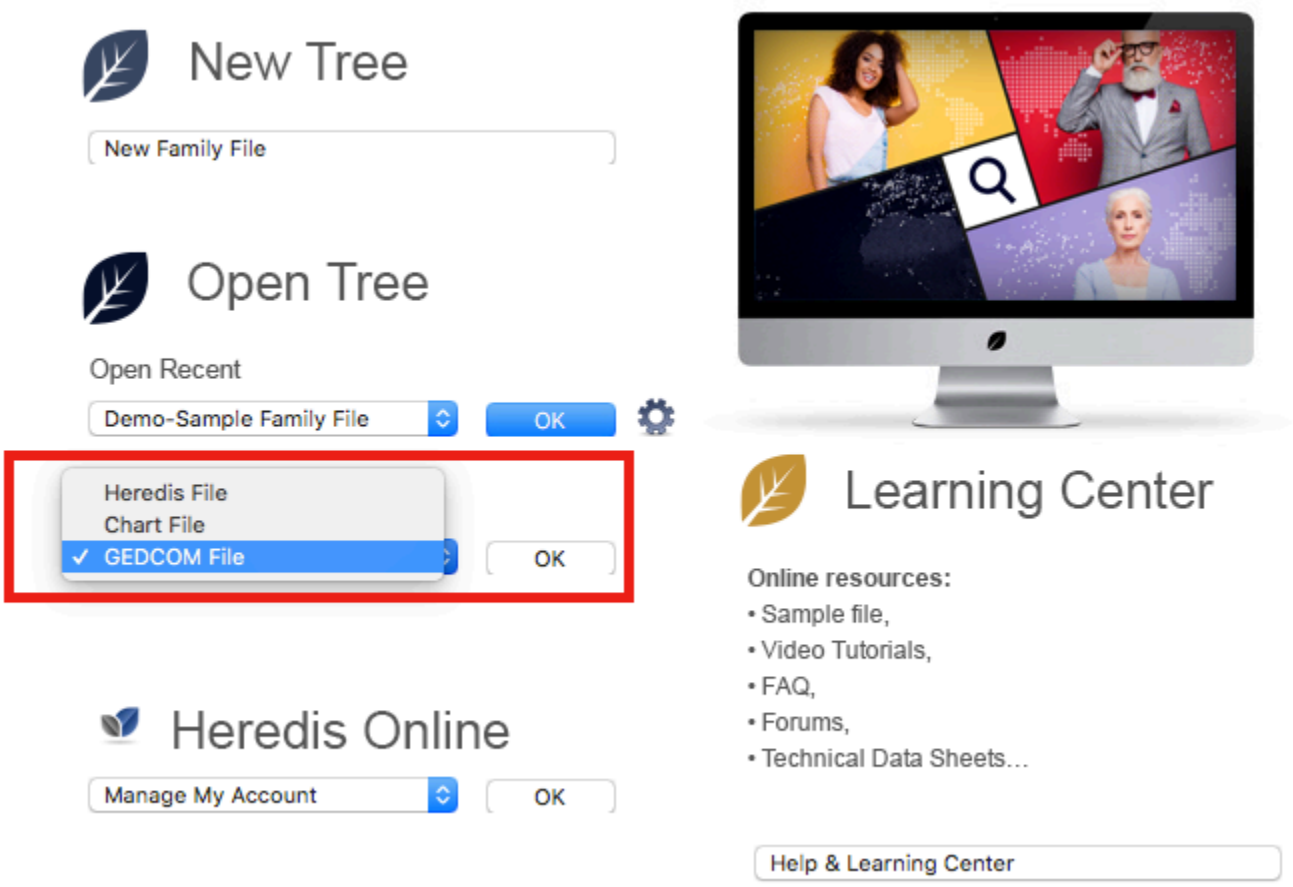
You have already created a genealogy file or you have been given one created on another application? Importing a GEDCOM file, the recognized standard in the world of genealogy, is very simple.

Though, importing a GEDCOM or opening it for the first time, takes time. Do not validate too quickly the import options, you won't be able to change the import afterwards.

On Mac

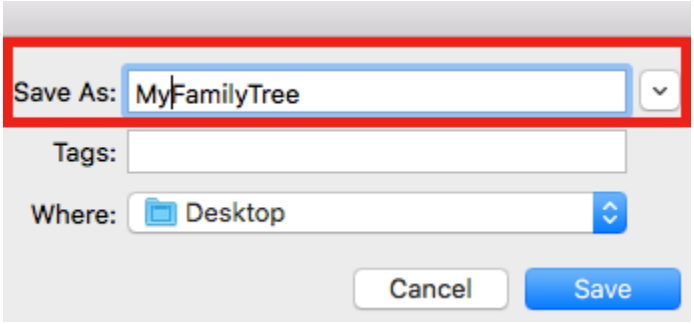
- From the Heredis **Home Page**, choose the **GEDCOM File** in the **Open** menu and click **OK**.
- The GEDCOM file must have the extension *.ged* to be recognized by Heredis. Select the file and click **Open**.

Note: Heredis recognize also .gdz format, this kind of files are GEDCOM 7 file. See Creating a new genealogy from a GEDCOM 7 file (see page 795).



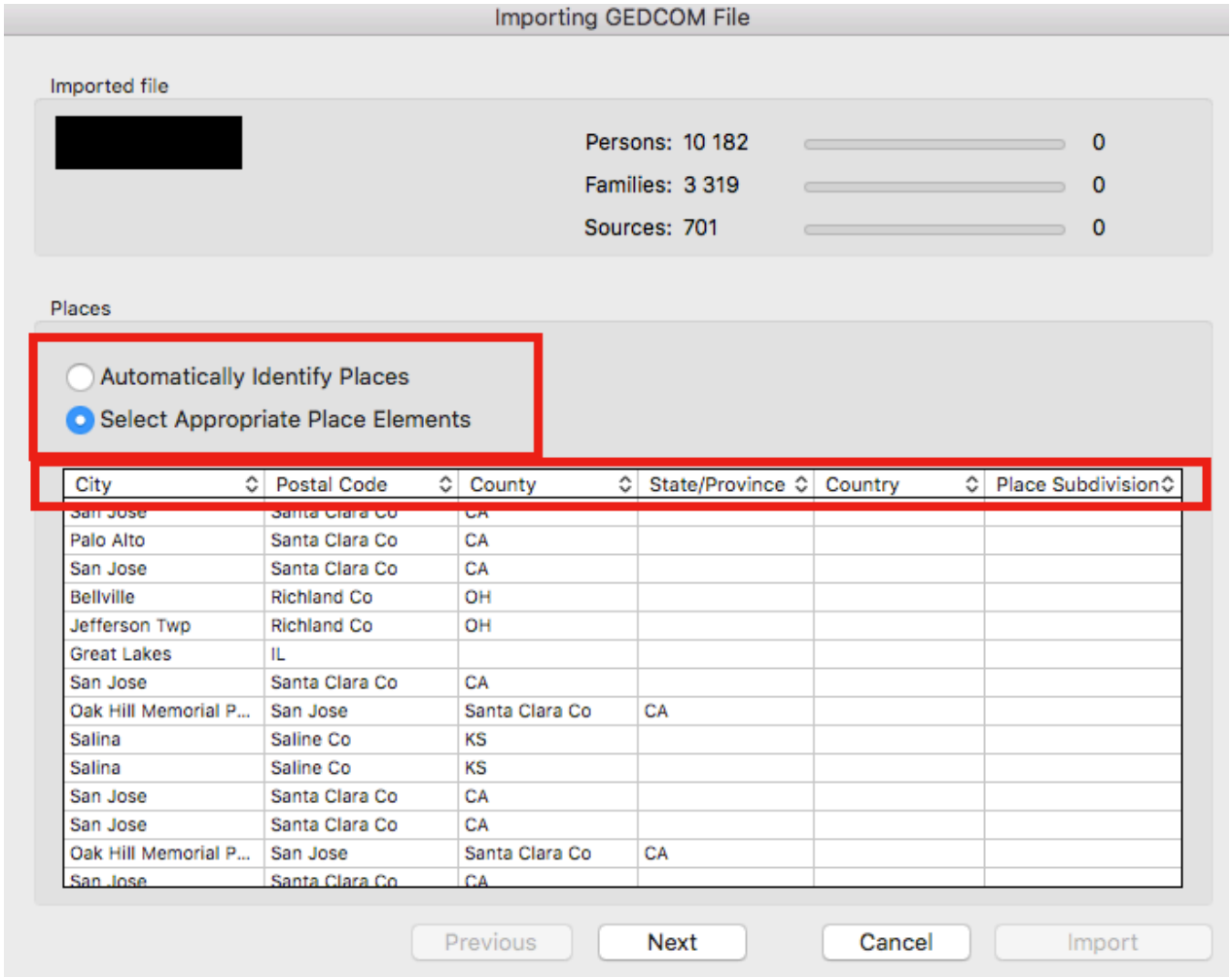
- Give it a name.
- Choose where to store it on your hard drive disk. Use the arrow on the right to access

to all folders on your computer.



- Validate by clicking on **Save** and wait while Heredis analyzes the data.
- Check the information found in the GEDCOM file (quantity of data, structure of places). All softwares do not manage all data of places the same way. Click on **Select Appropriate Place Elements** if you need to reorganize the data and click on the headings of columns to change them.

It will not be possible to modify this order once the file is open! So take your time.



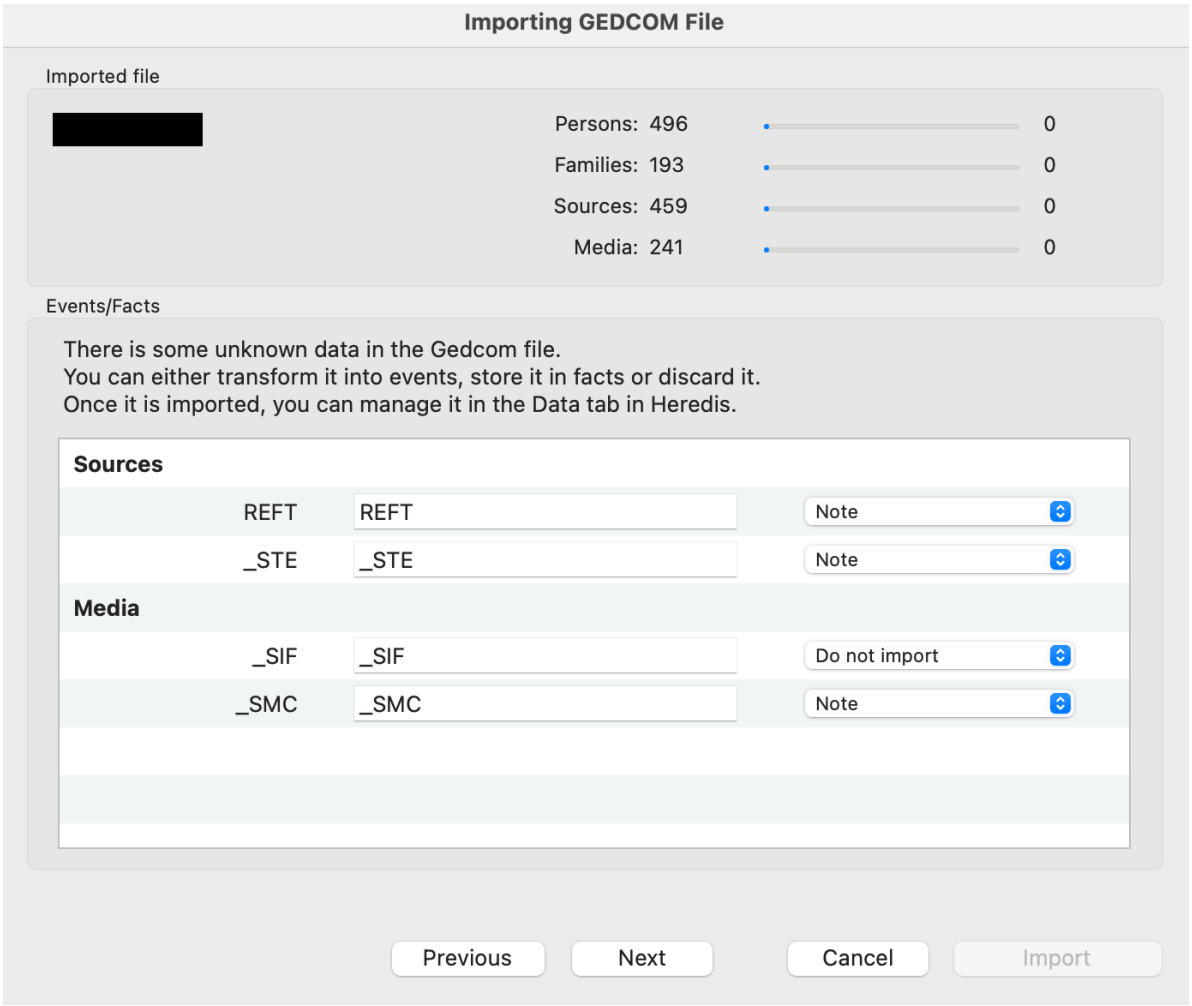
- Click on **Next** when your done with places.

Each program has its own GEDCOM tags to indicate non-standard data. See the articles What is a GEDCOM file? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more information on the subject.

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be possible to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

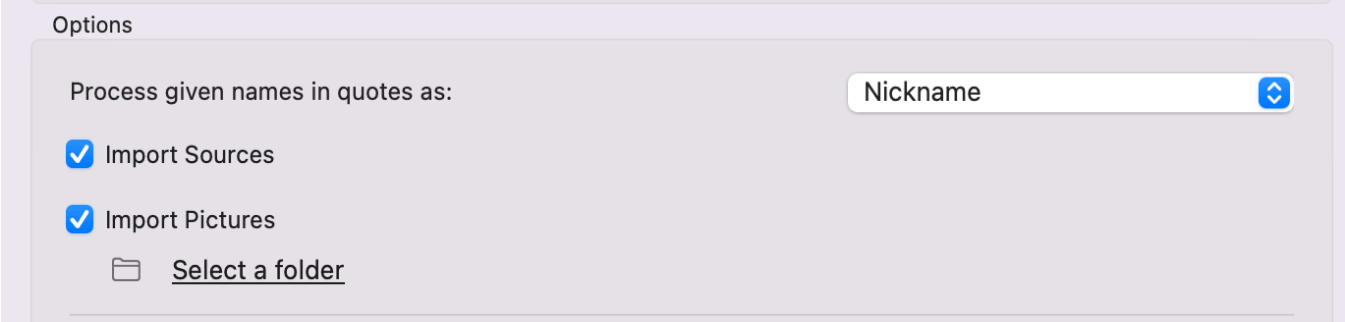
If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

- Once the tags are taken care of, click **Next**.
- Choose how to manage given names in quotes.
- Choose to import or not medias and sources.

Be aware that a GEDCOM 5.5.1 file **never contains media**, only the name and way to the original of the media. So even if you choose to import a media, you'll import only the name and way to the original.

- If you have the media on your computer, click on **Select a folder** to indicate to Heredis where they are stored.



- You may add a source common to all data imported. In this case, tick the box **Assign a new source to** and choose the kind of data to source (events, facts…). Fill in the name, repository and type of document of the source.

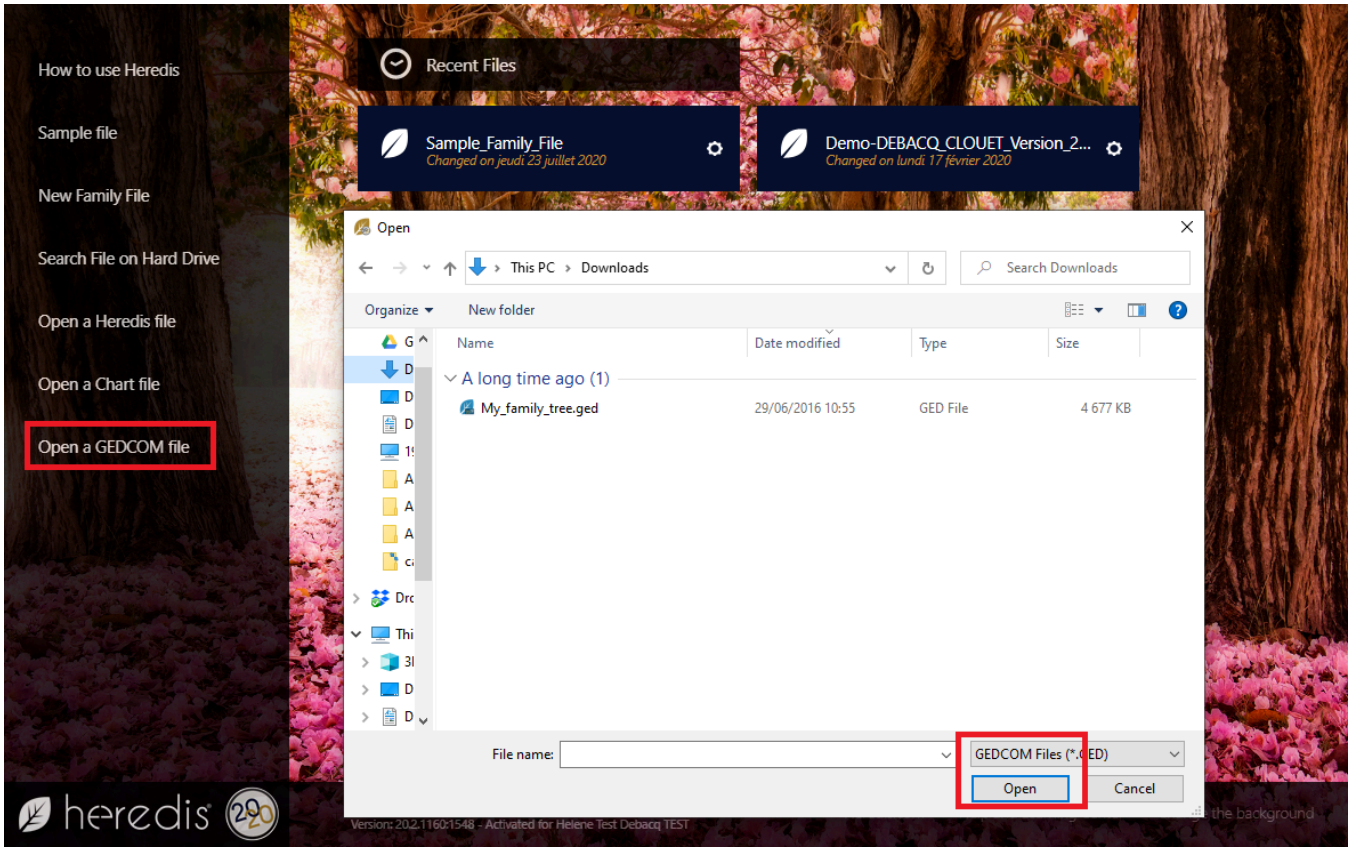
- Click on **Import** to start converting your GEDCOM 5.5.1 into a Heredis format. This step can take some time depending on the size of the file, so be patient. Your GEDCOM file will still be available in the GEDCOM format. Heredis extract the data from the GEDCOM file and converted them into a Heredis format.

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering woshed. See The Root Person (see page 137) article.

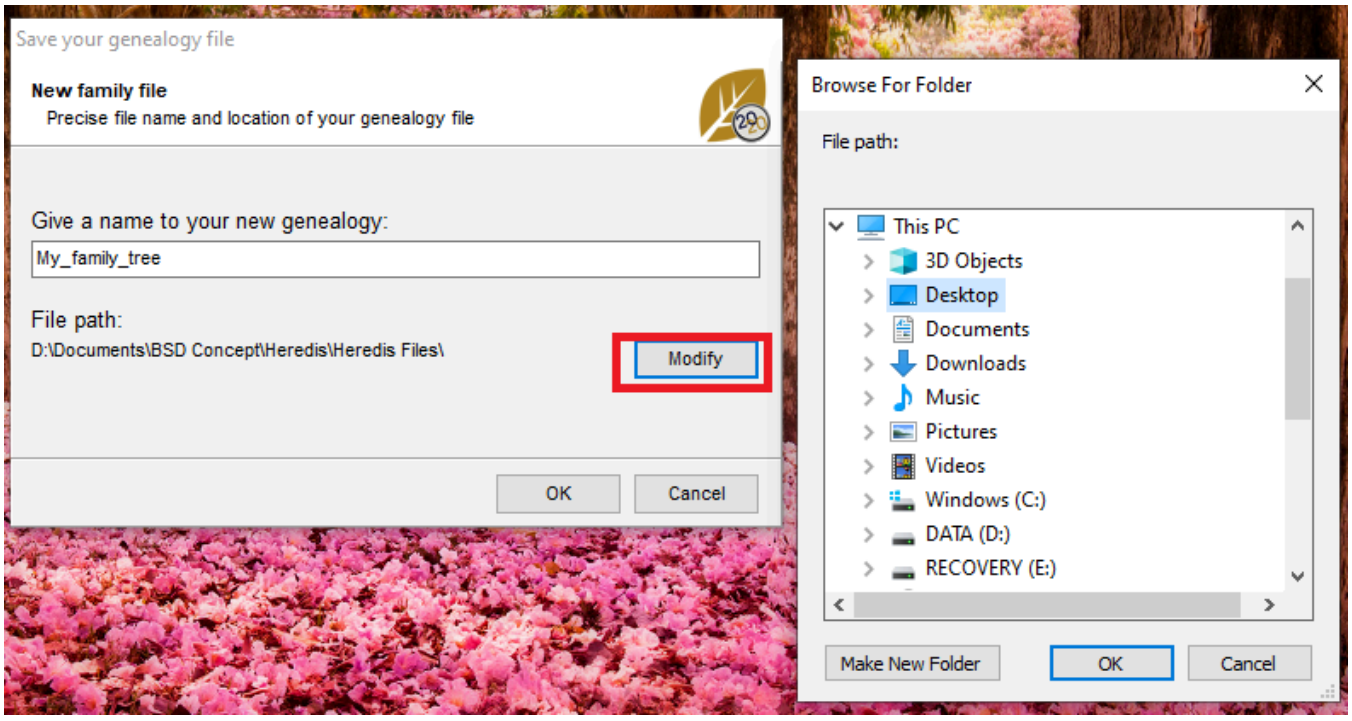
On Windows

- From the Heredis **Home Page**, click on **Open a GEDCOM file**.
- The GEDCOM file must have the extension *.ged* to be recognized by Heredis. Select the file and click **Open**.

Note: Heredis recognize also .gdz format, this kind of files are GEDCOM 7 file. See Creating a new genealogy from a GEDCOM 7 file (see page 795).



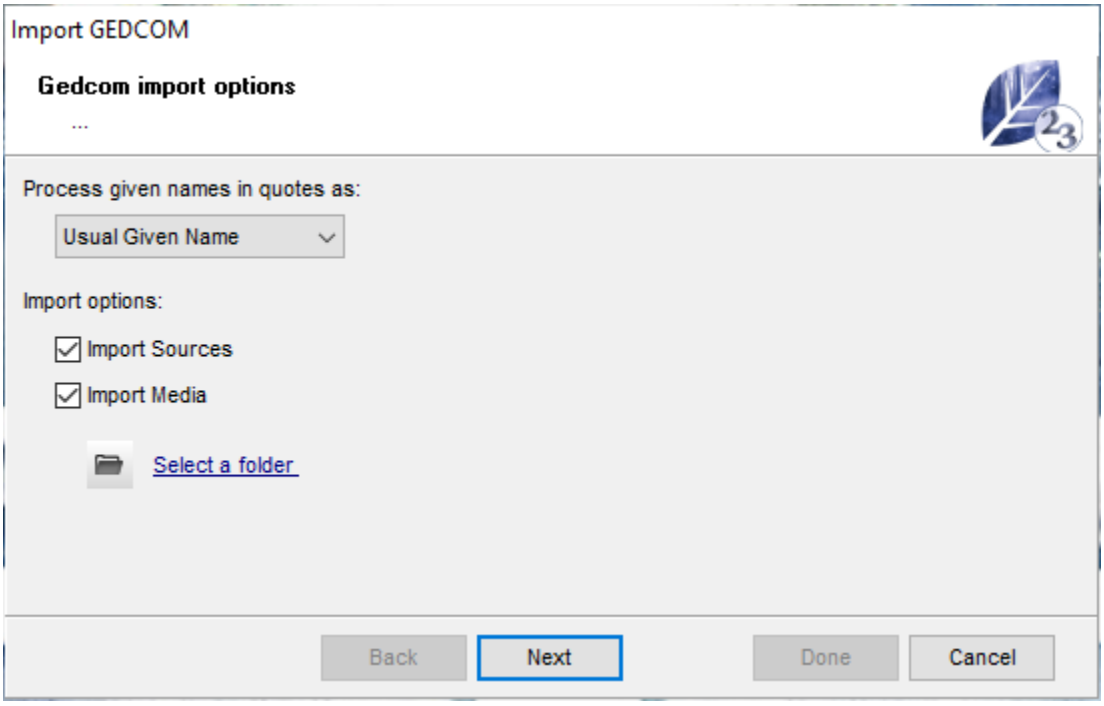
- Give it a name.
- Choose where to store it on your hard drive disk. Click on **Modify** to change where to keep your file. By default Heredis puts it in Document > BSD Concept > Heredis > Heredis files.



- Validate by clicking on **OK** and wait while Heredis analyzes the data.
- Choose how to manage given names in quotes.
- Choose to import or not medias and sources.

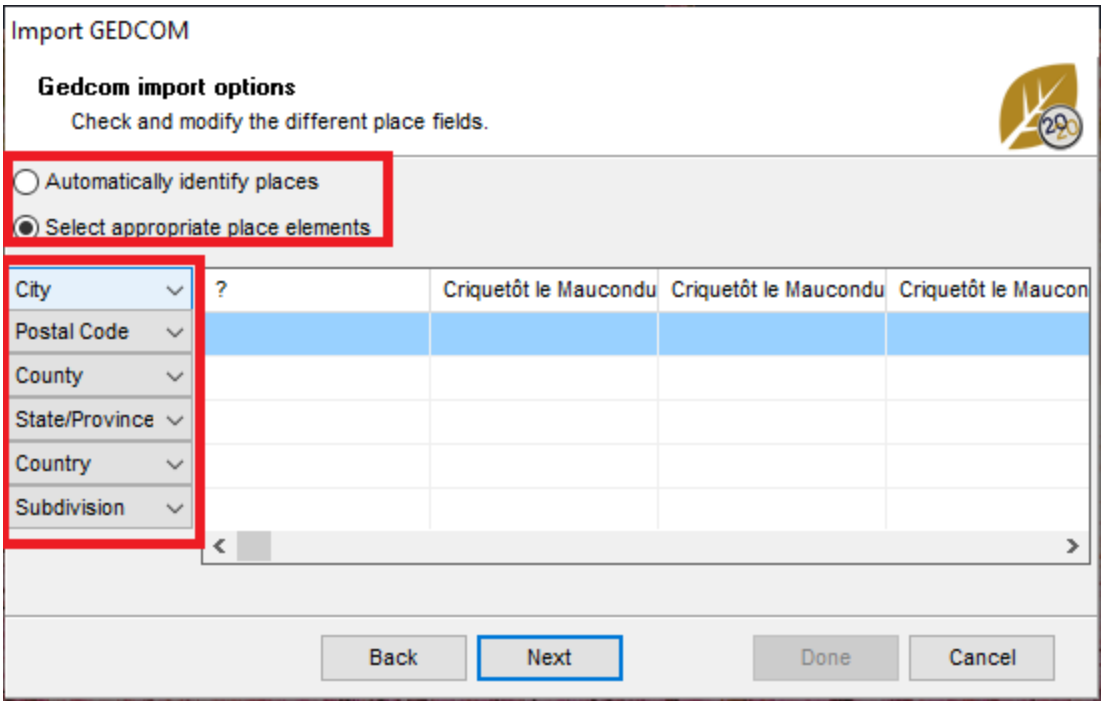
Be aware that a GEDCOM 5.5.1 file **never contains media**, only the name and way to the original of the media. So even if you choose to import a media, you'll import only the name and way to the original.

- If you have the media on your computer, click on **Select a folder** to indicate to Heredis where they are stored.
- Click on **Next**.



- Check the information found in the GEDCOM file (quantity of data, structure of places). All softwares do not manage all data of places the same way. Click on **Select Appropriate Place Elements** if you need to reorganize the data and click on the headings of lines to change them.

It will not be possible to modify this order once the file is open! So take your time.



- Once the places have been listed correctly, click Next.

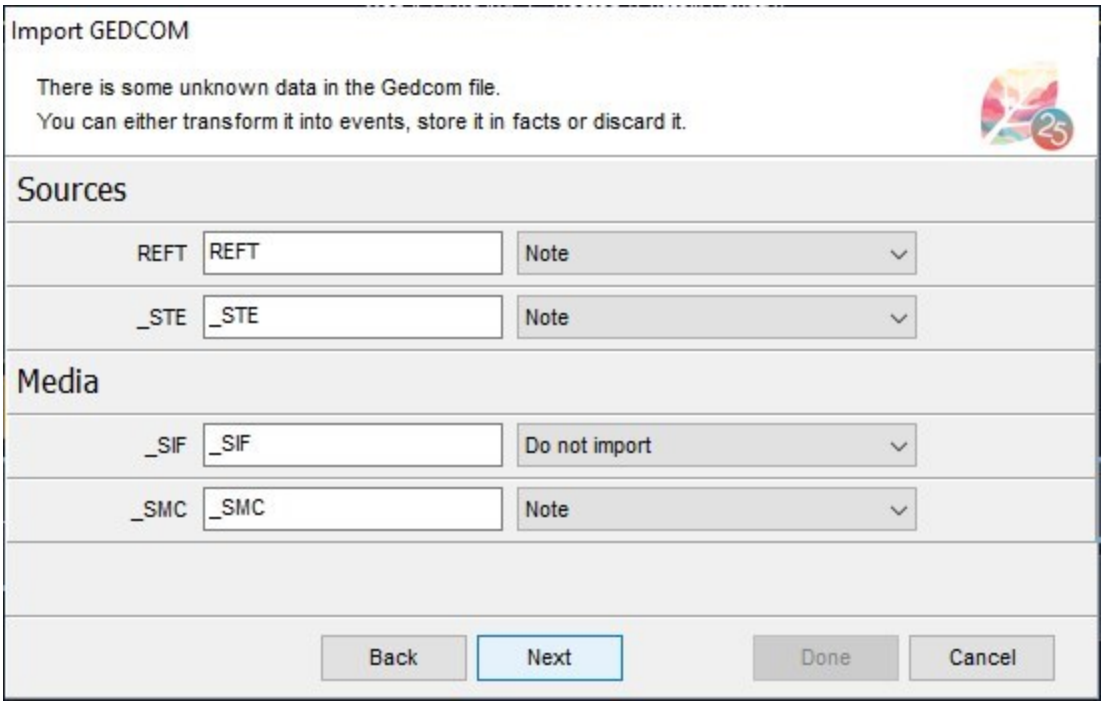
Each program has its own GEDCOM tags to indicate non-standard data. See the articles What is a GEDCOM file? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more information on the subject.

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be possible to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

It will not be easy to modify this order once the file is open! So take your time.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

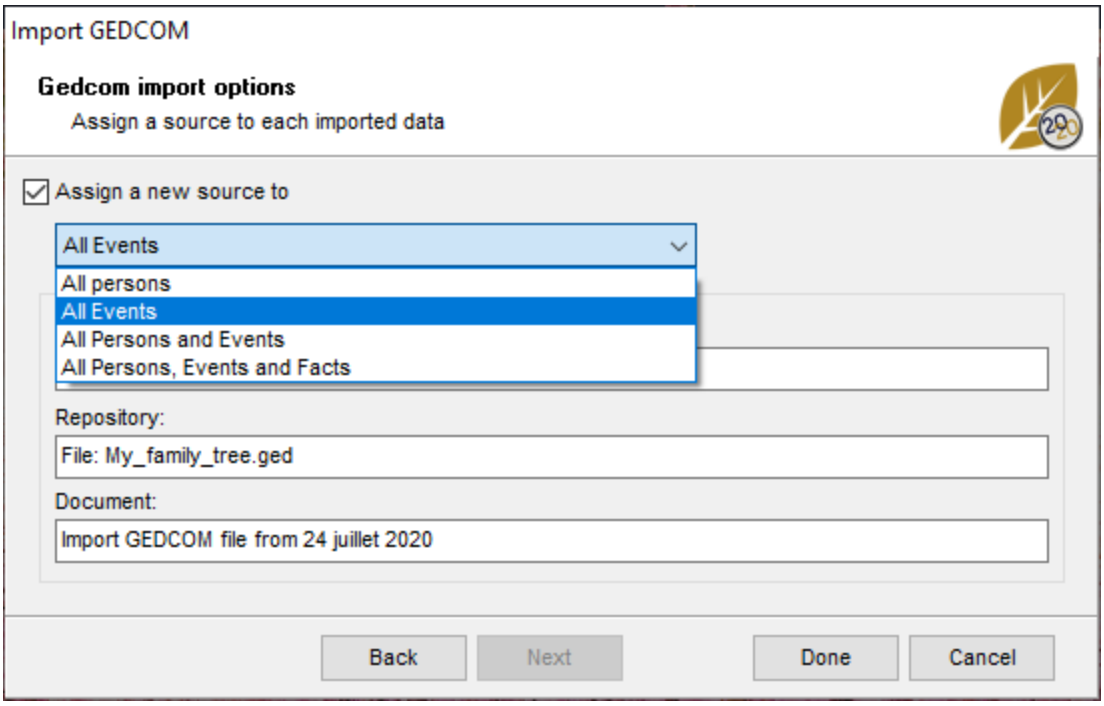
For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

- Once the tags are taken care of, click **Next**.

You may add a source common to all data imported. In this case, tick the box **Assign a new source to** and choose the kind of data to source (events, facts…). Fill in the name, repository and type of document of the source.



- Click on **Done** to start converting your GEDCOM into a Heredis format. This step can take some time depending on the size of the file, so be patient. Your GEDCOM file will still be available in the GEDCOM format. Heredis extract the data from the GEDCOM file and converted them into a Heredis format.

Note: Ahnentafel numbering is a mobile data, it can be changed at any time, so it is not a data stored in the GEDCOM format. You might have to change the root person to get the Ahnentafel numbering woshed. See The Root Person (see page 137) article.

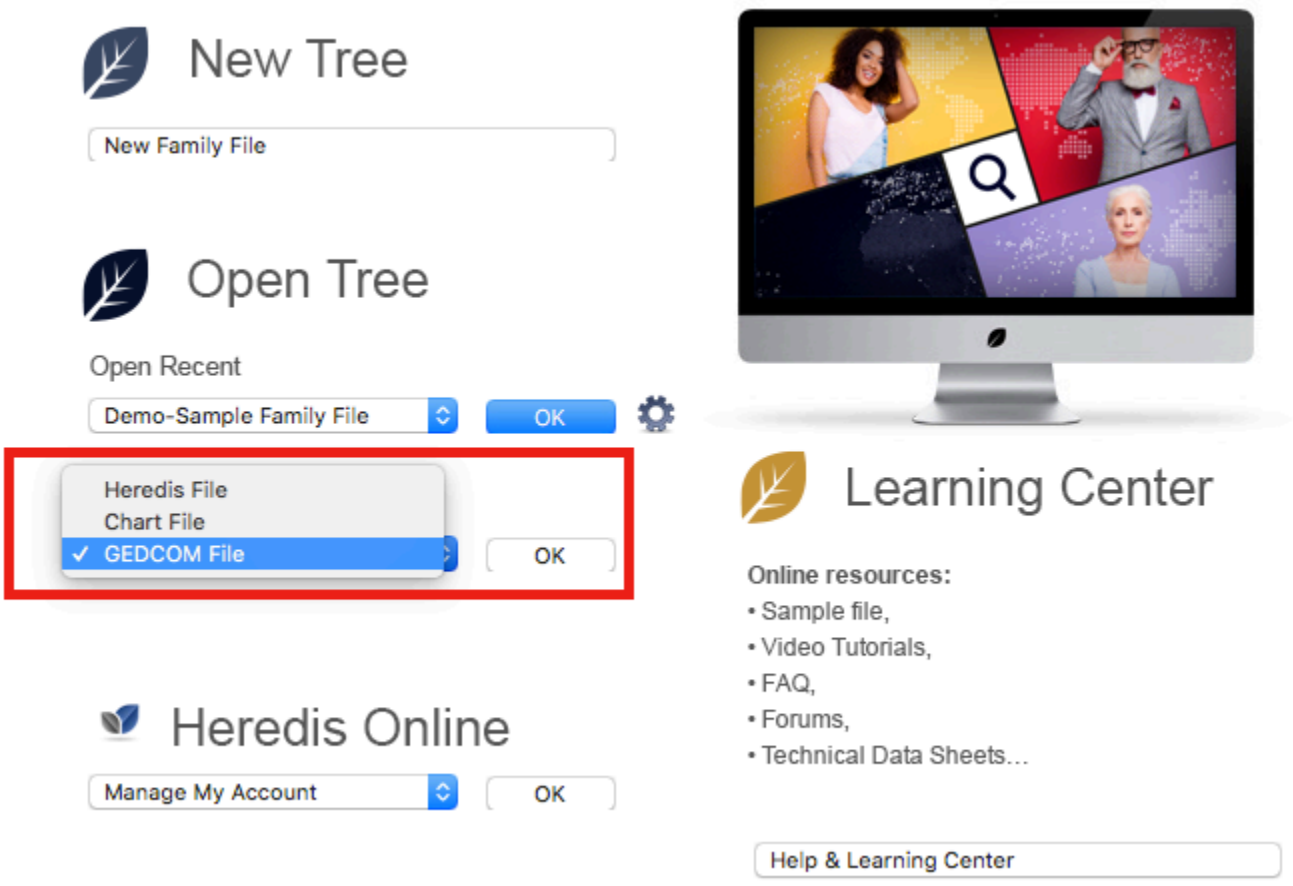
Create a new genealogy from a GEDCOM 7 file

You want to know what is a GEDCOM? See the What is a GEDCOM file? (see page 765) article.

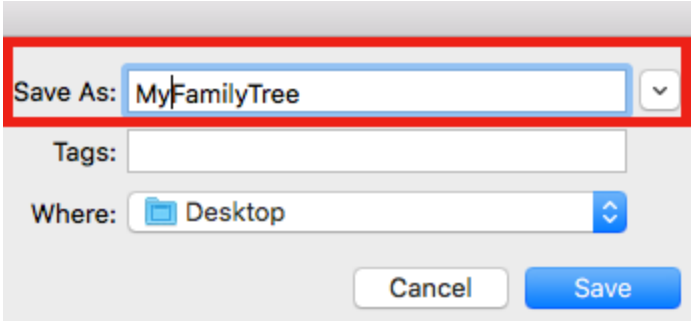
(Mac) Creating a new genealogy from a GEDCOM 7 file

Important! Opening a GEDCOM file requires your full attention, do not just click on next, next, finish. It is important to take the time to read the different steps required by Heredis.

Launch Heredis.
From the Home page, choose **GEDCOM File** under **Open an existing file** menu.
Click **OK.**



Choose the location where the file is stored on your computer. Select it and click **Open**.



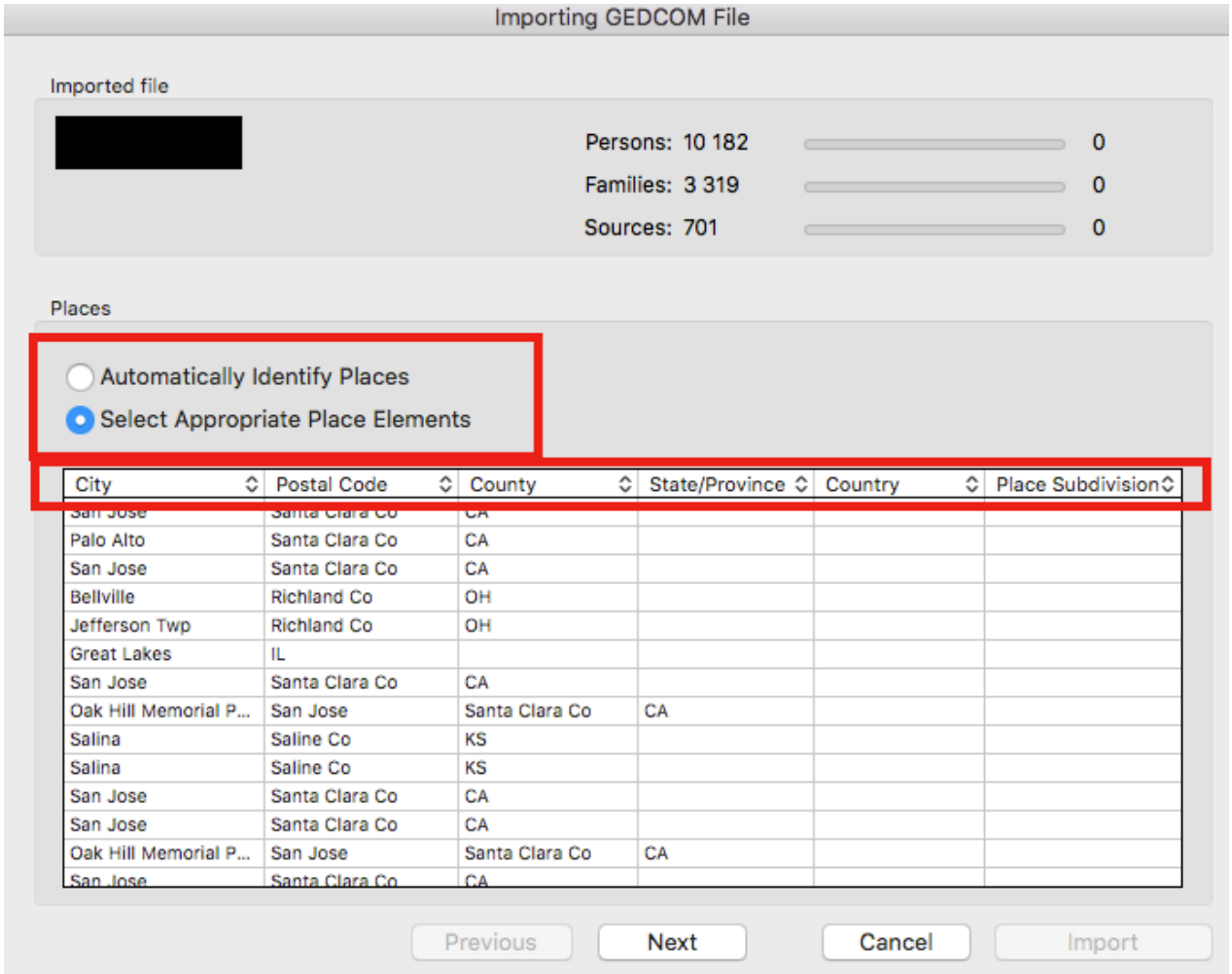
Name this new genealogy file. Choose where to save the file on your computer.

Click on **Save** to confirm.

Heredis will detect whether it is a GEDCOM 7 or an older format.

Make sure that places are listed correctly.
If not, click on **Select appropriate places elements** and modify the line titles by clicking on the dropdown list at the beginning of the line. Choose the appropriate heading.

It will not be possible to modify this order once the file is open!



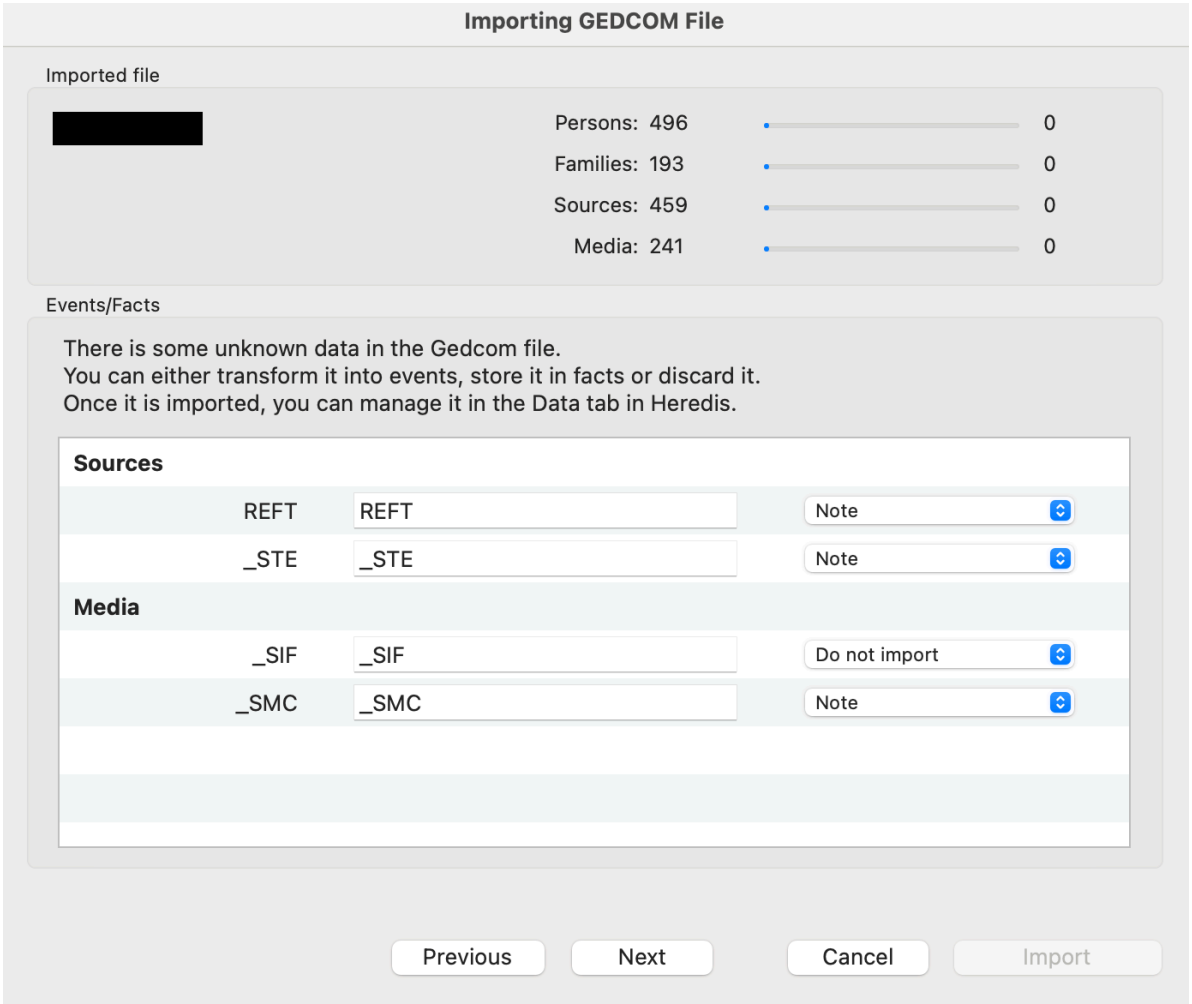
- Once the places have been listed correctly, click **Next**.

Each program has its own GEDCOM tags to indicate non-standard data. See the articles What is a GEDCOM file? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more information on the subject.

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be possible to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type.

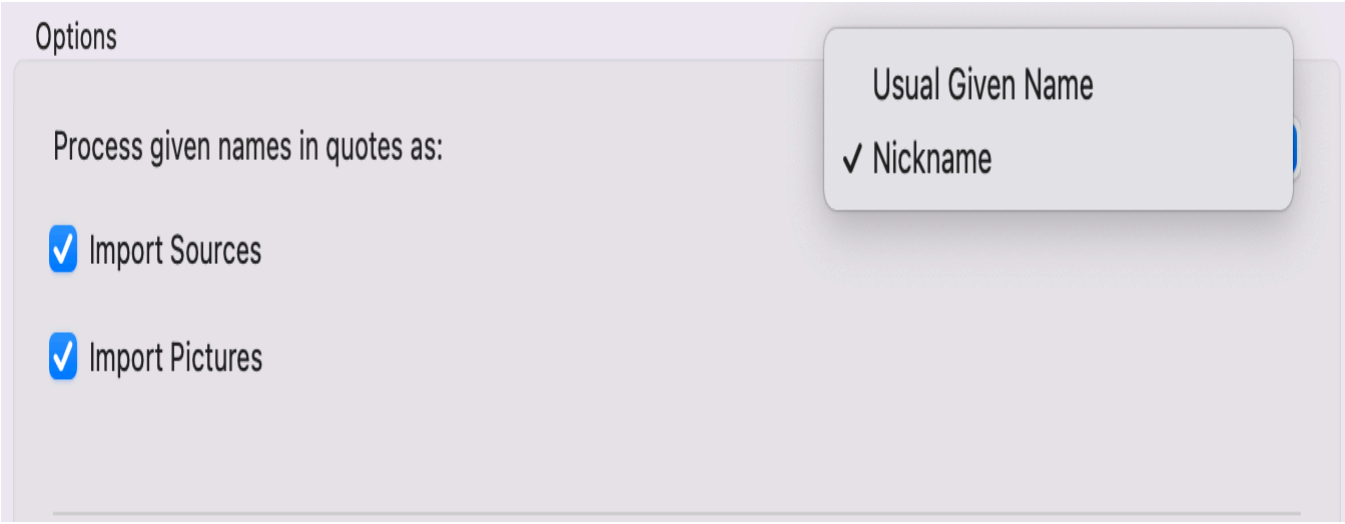
Click on the drop-down list and choose the location where you wish to see this element: **Document**.

If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

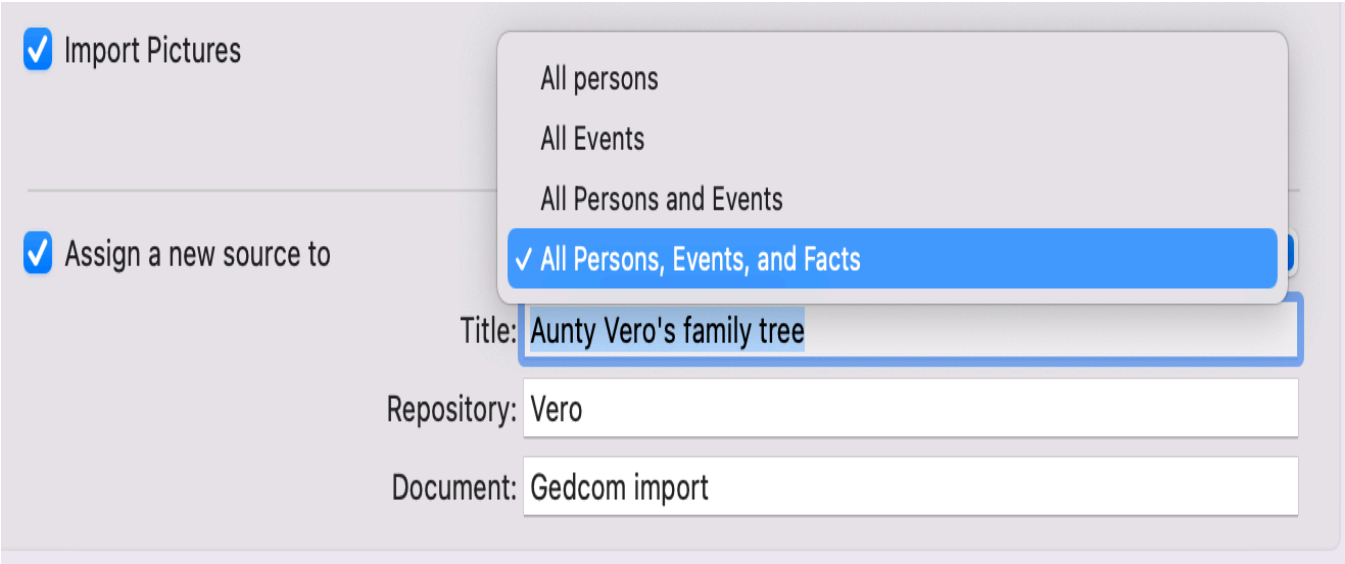
Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

Once the tags are taken care of, click **Next**.

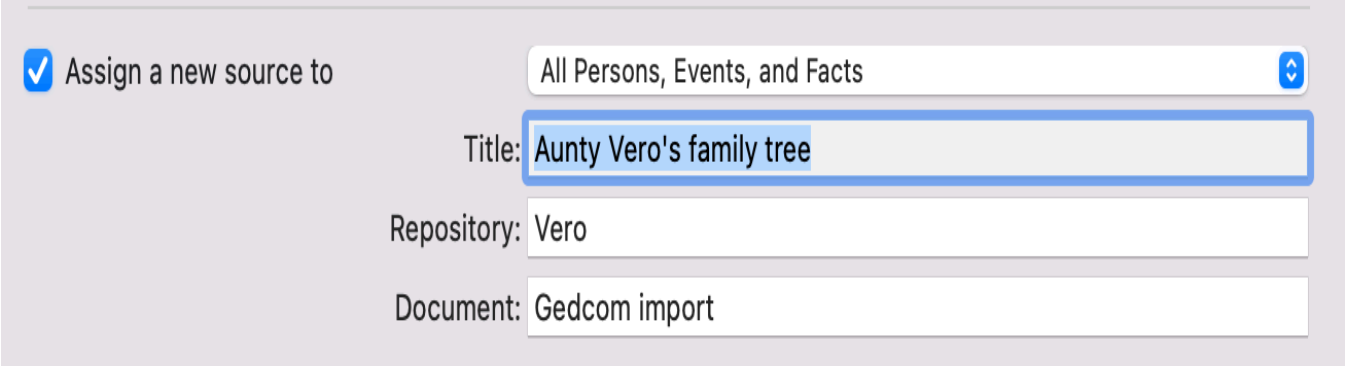
Click on the dropdown menu to choose how to handle given names in quotes.
Choose whether or not to import sources and media.



Check the "**Assign a new source to**" box to add a source to the file data. Choose from the dropdown list which type of data you are adding the source to: All persons, All events, All persons and events, All persons, events, and facts.



Specify a title for this source, the Repository (where the information is stored), and the Document.



Click on **Import** to validate the opening of the file.

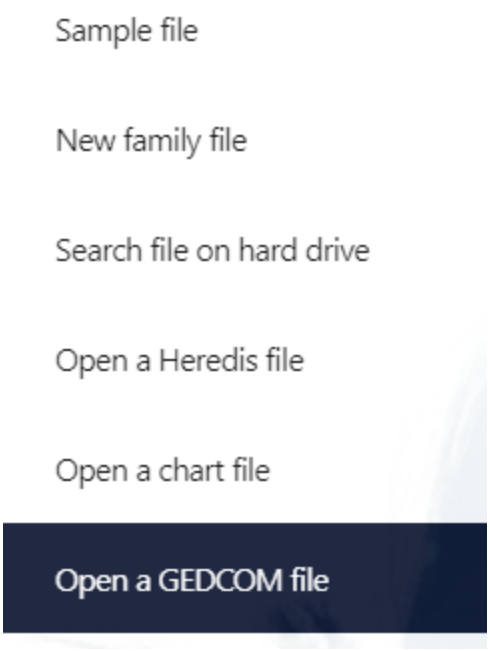
Let Heredis finish the import. A GEDCOM import can be more or less fast depending on the number of data to be processed but also the power and occupancy of your computer. Be patient and let your computer finish!

Heredis retrieves the data from the .gdz file and puts it in a new file in the Heredis format. The .gdz file remains on your computer.

(Windows) Creating a new genealogy from a GEDCOM 7 file

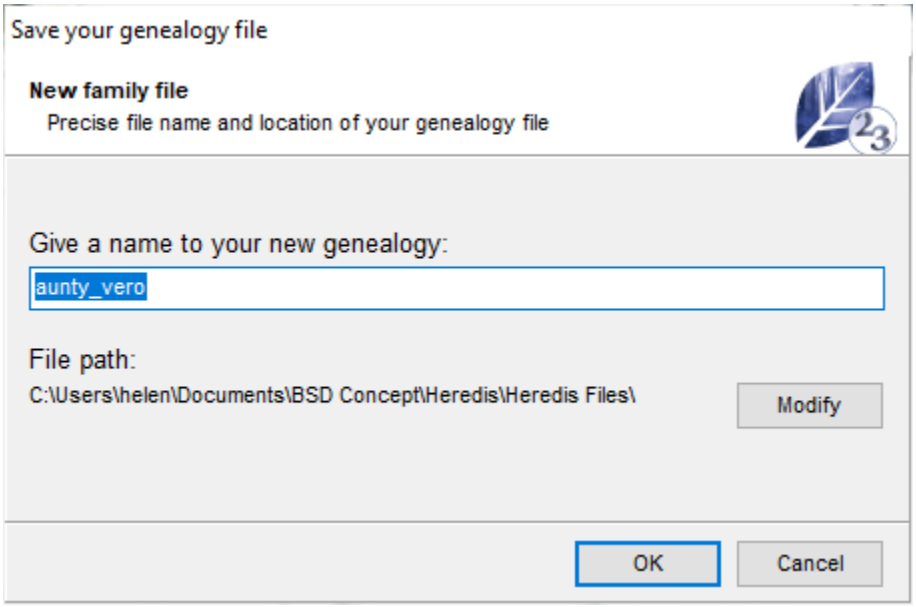
Important! Opening a GEDCOM file requires your full attention, do not just click on next, next, finish. It is important to take the time to read the different steps required by Heredis.

Launch Heredis.
From the Home page, click on **Open a GEDCOM File** menu on the left.



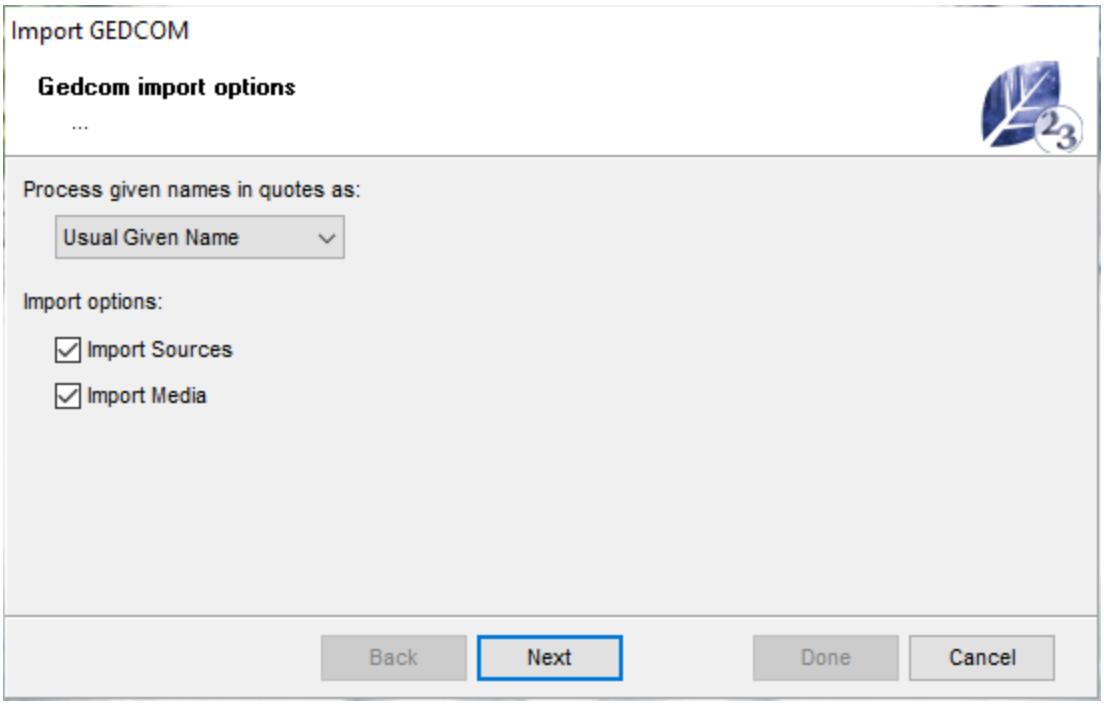
Choose the location where the file is stored on your computer. Select it and click **Open**.

Name this new genealogy. If you wish to, click **Modify** button to change the default “save” location.



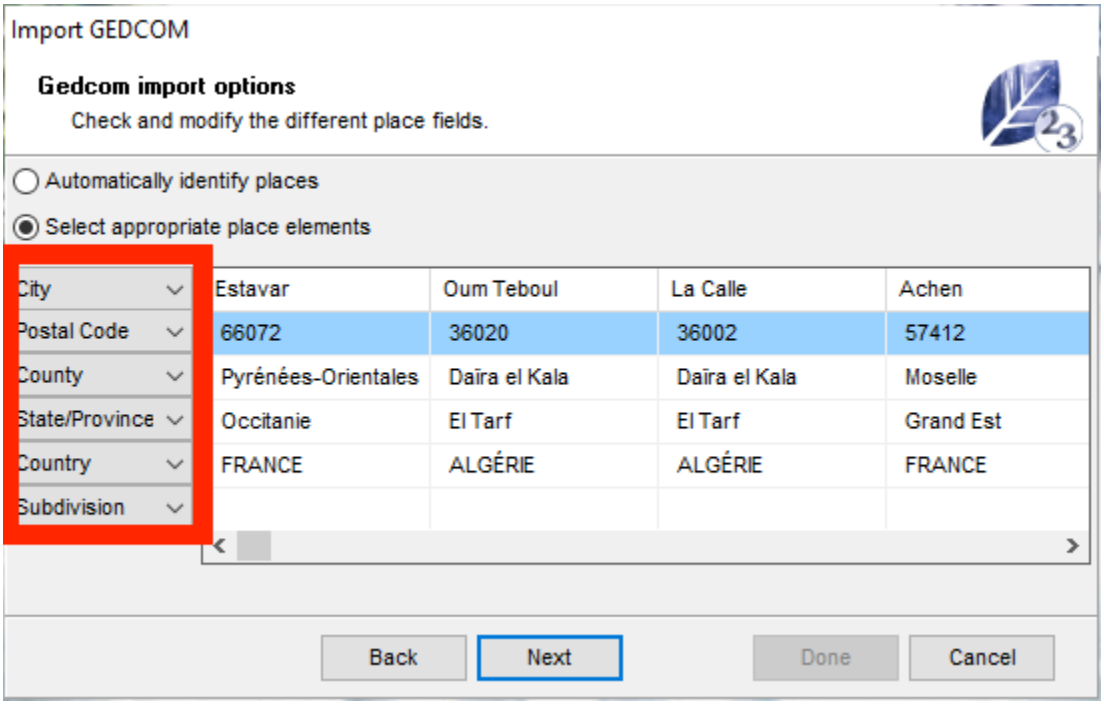
Heredis will detect whether it is a GEDCOM 7 or an older format.

Choose whether or not to import sources and media.
Click on the dropdown menu to choose how to handle given names in quotes.



Click **Next**.
Make sure that places are listed correctly.
If not, click on **Select appropriate places elements** and modify the line titles by clicking on the dropdown list at the beginning of the line. Choose the appropriate heading.

It will not be possible to modify this order once the file is open!



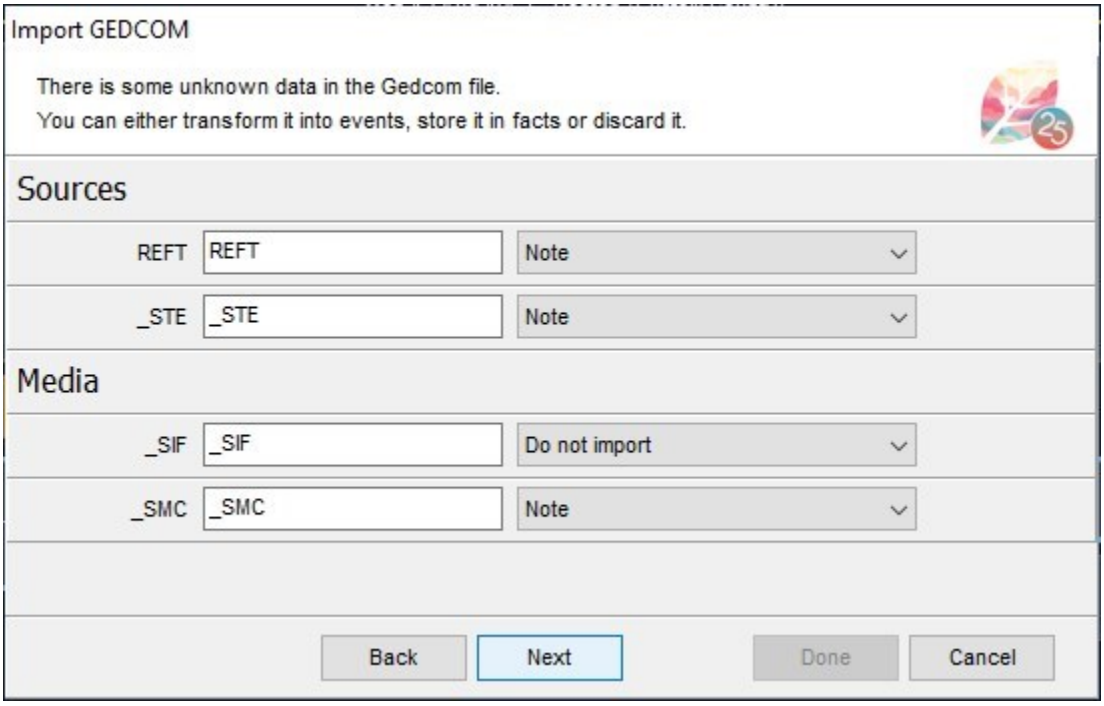
- Once the places have been listed correctly, click **Next**.

Each program has its own GEDCOM tags to indicate non-standard data. See the articles What is a GEDCOM file? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more information on the subject.

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be possible to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



If you know the type of data indicated, click in the white box and modify the tag by indicating the title.
For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

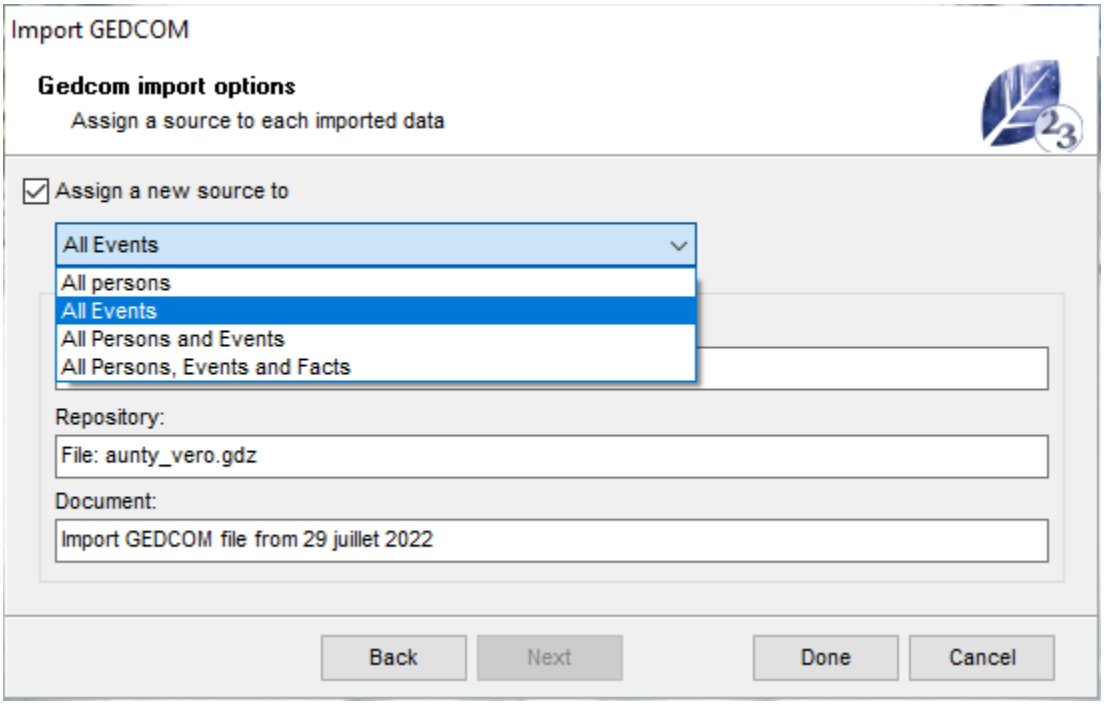
If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

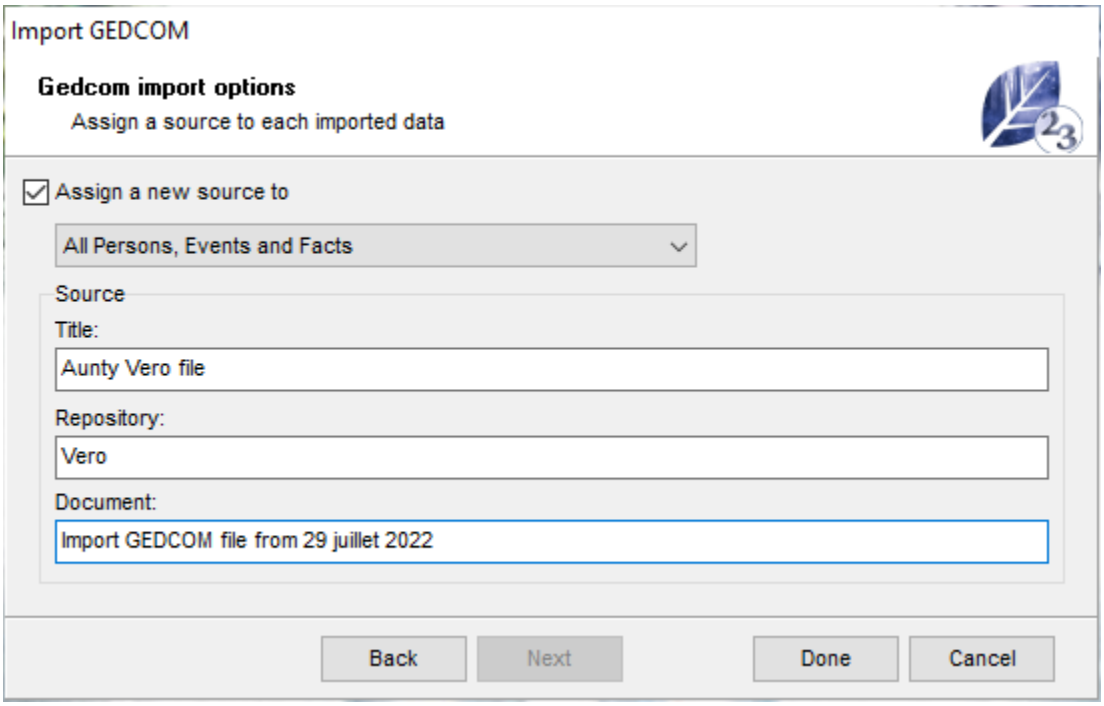
- Once the tags are taken care of, click **Next**.

Check the "**Assign a new source to**" box to add a source to the file data. Choose from the

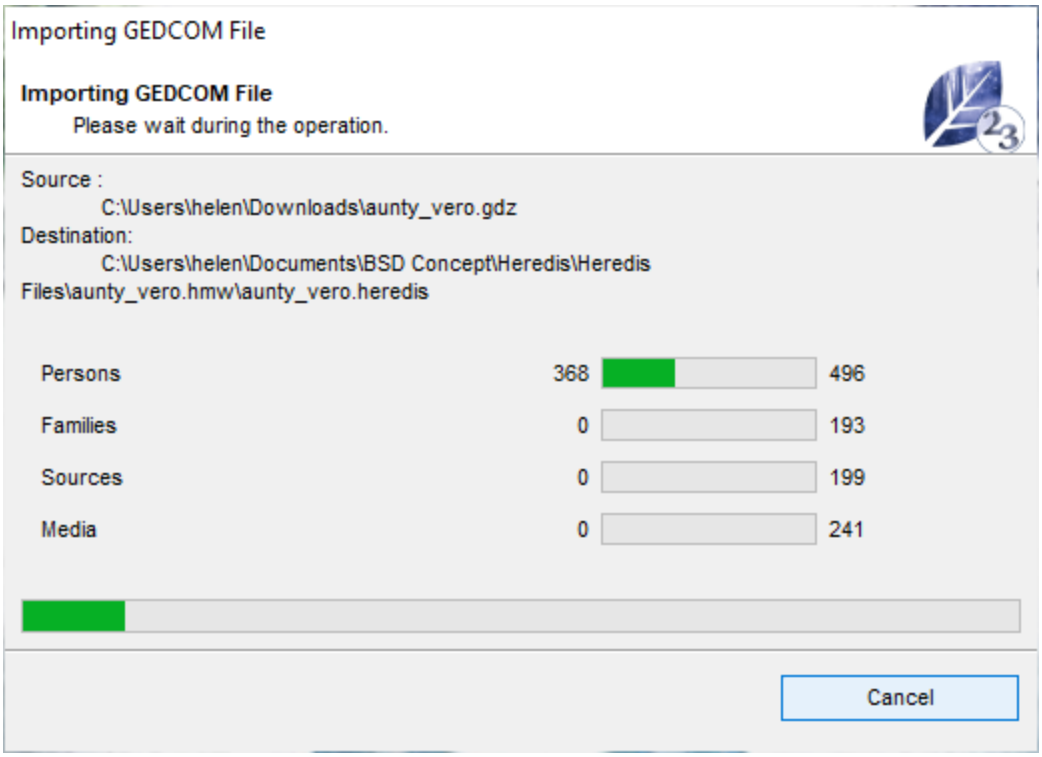
dropdown list which type of data you are adding the source to: All persons, All events, All persons and events, All persons, events, and facts.



Specify a title for this source, the Repository (where the information is stored), and the Document.



Click on **Done** to validate the opening of the file.
Heredis retrieves the data from the .gdz file and puts it in a new file in the Heredis format. The .gdz file remains on your computer.



Let Heredis finish the import. A GEDCOM import can be more or less fast depending on the number of data to be processed but also the power and occupancy of your computer. Be patient and let your computer finish!

The file will open once the import is completed.

Import a GEDCOM 5.5.1 into an existing file

Warning: Any import into an existing file changes its structure. Consider before this type of operation to save a copy of your original file if necessary or back up the modified file under another name.

Importing a GEDCOM requires taking its time, don't validate too fast, you won't be able to make any changes after the import.

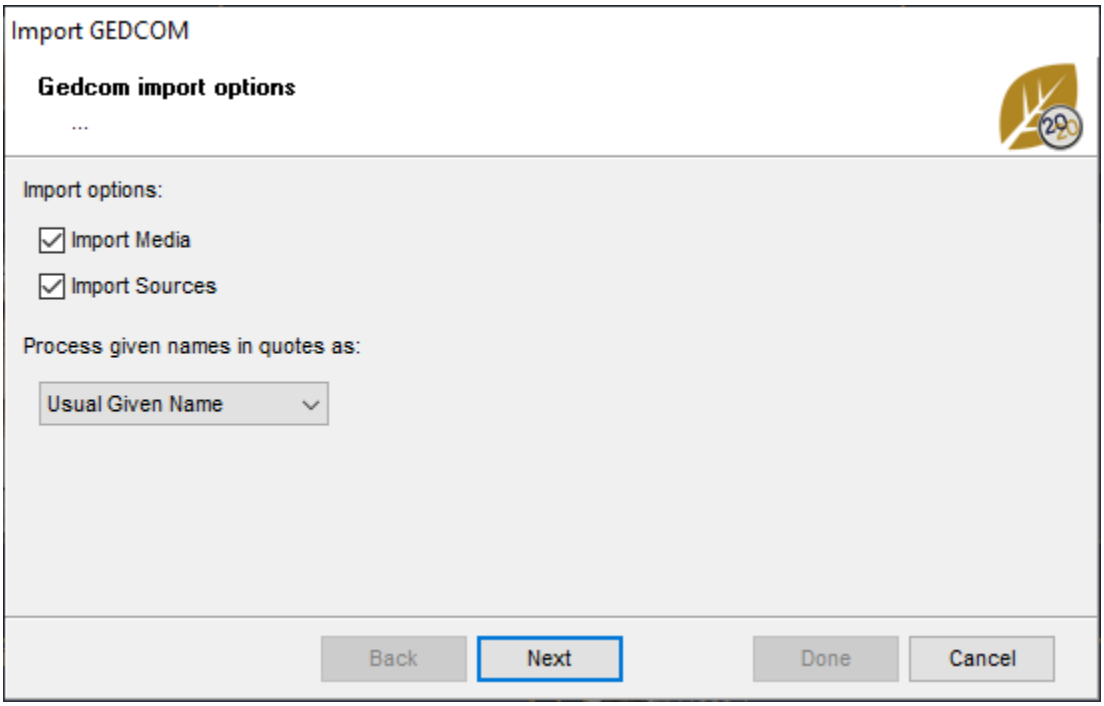
(Windows) Importing a GEDCOM

From the file in which you want to import the GEDCOM file.

- Launch Heredis.
- Open your genealogy file.
- Choose **File > Import > GEDCOM file.**

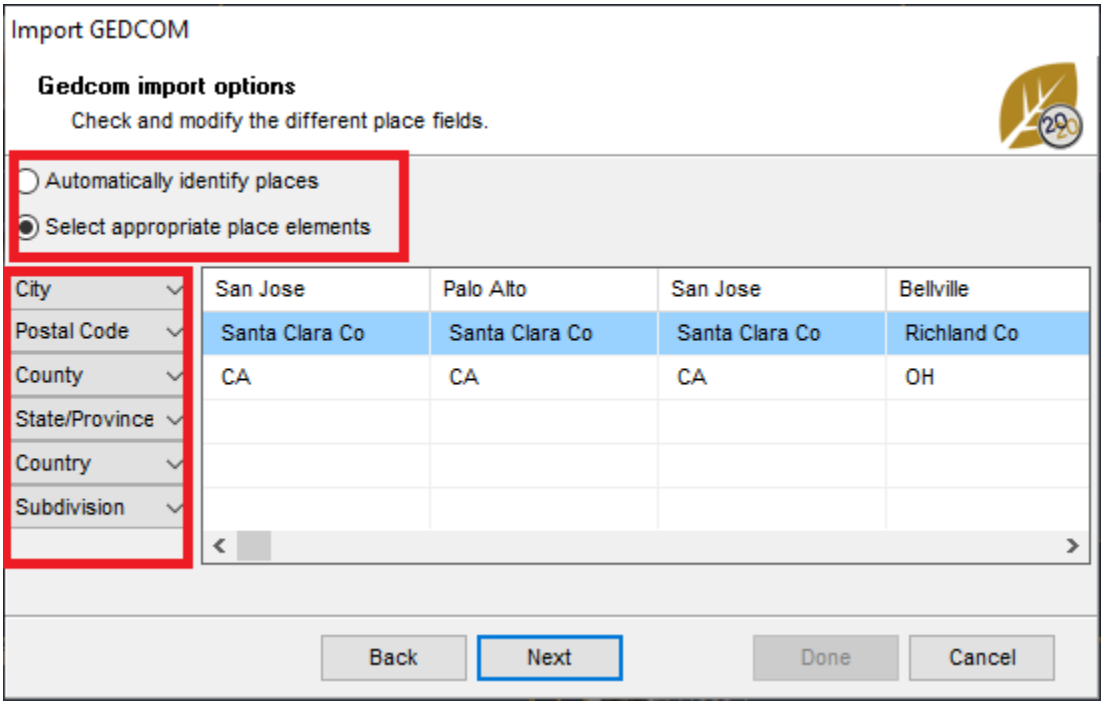
A message will warn you that the process is irreversible; if you have not created a backup, we advise you to click on No and to create one beforehand.

- Select the file (it must carry a *.ged* extension to be recognized by Heredis), then click **Open.**
- Select it and click **Open**.
- Choose whether or not to import media and sources, and how to handle quote names.



- Click **Next**
- You will probably have to check the places, not all software manages them in the same

way. If you see a window like the one below, check the locations. Click **Select appropriate places elements** if the order does not match the data correctly. Click on the title of the column on the left to change the categories. *(Example: below, the line Postal Code should be County)*



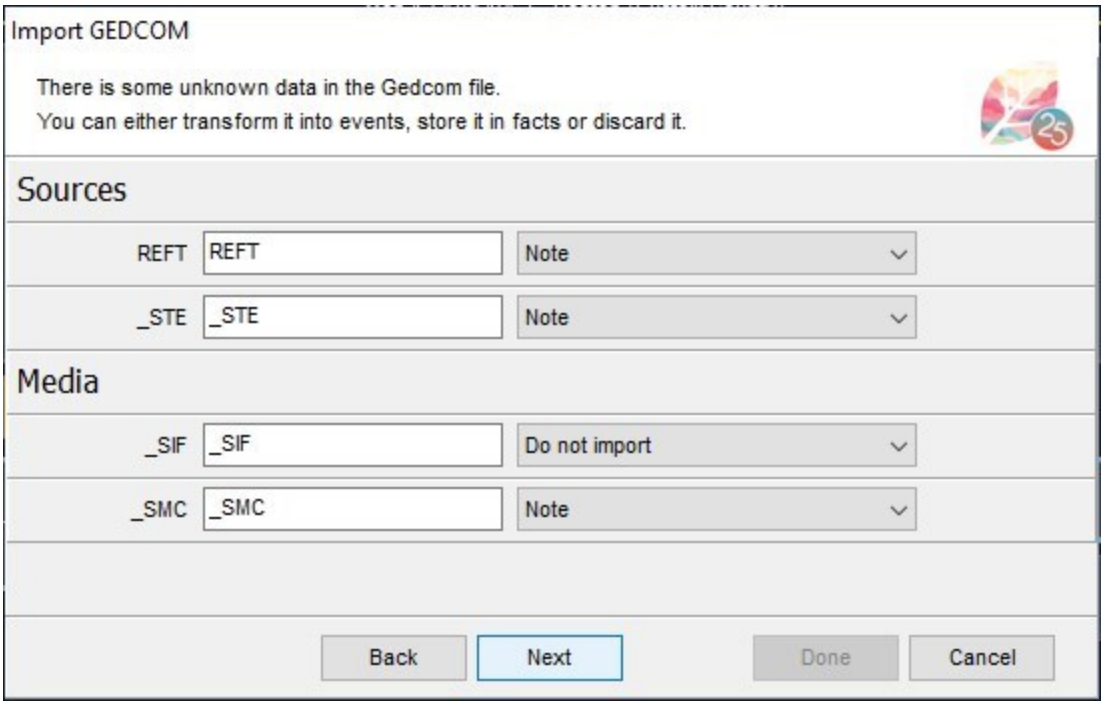
- Once the places have been listed correctly, click **Next**.

Each software has its own way of managing certain data in the GEDCOM format. So there are Owner Tags that may be unknown to Heredis (see article What is a GEDCOM? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more details).

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be easy to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



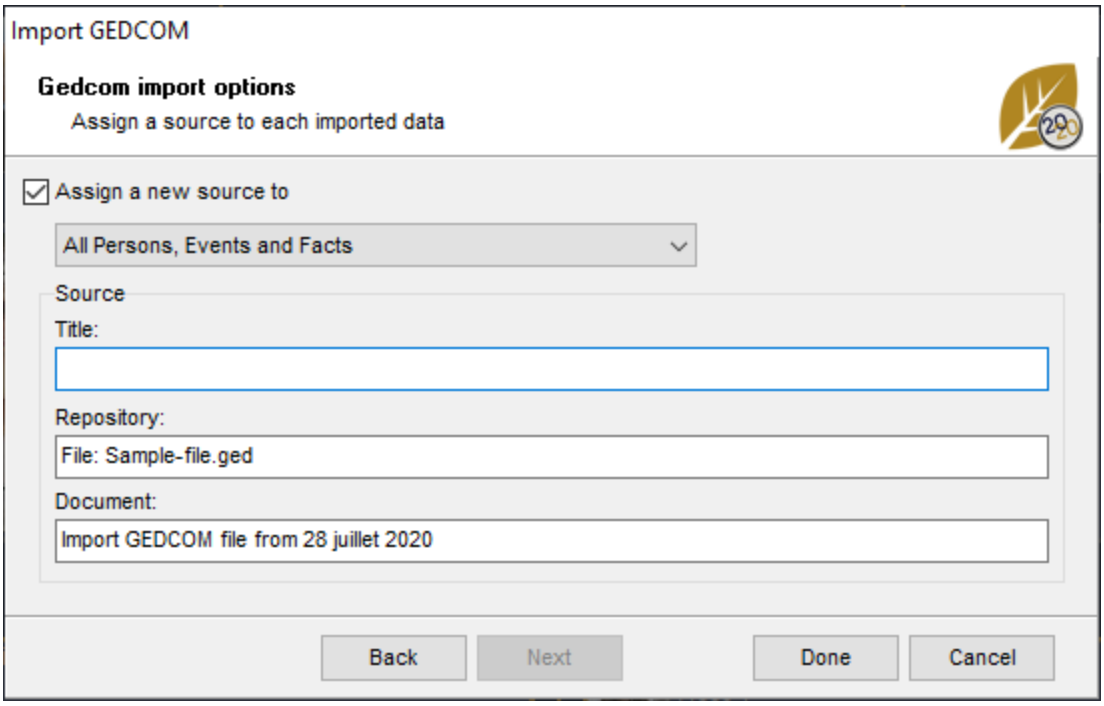
If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

- Once the tags are taken care of, click **Next**.
- Check the **Assign a new source to** box and choose which data to add that source to you. Fill the fields out of the source if you want to assign one. By adding a common source to all the information from this GEDCOM, you'll know where you get your information from.



- Click **Done** to validate the import with the settings you've indicated.
- After the GEDCOM data is imported, it is necessary to create the links that will link the imported persons to those that were already present in the main file. To do this, use the **Add** features.

A GEDCOM never contains media because it is a text file format. On the other hand, the path and the name of the media are kept, so you can reintegrate them through the media index (if their name has not changed, Heredis will quickly reintegrate all of your media in a few clicks). See the article Media > Searching Media (see page 198) for more details.

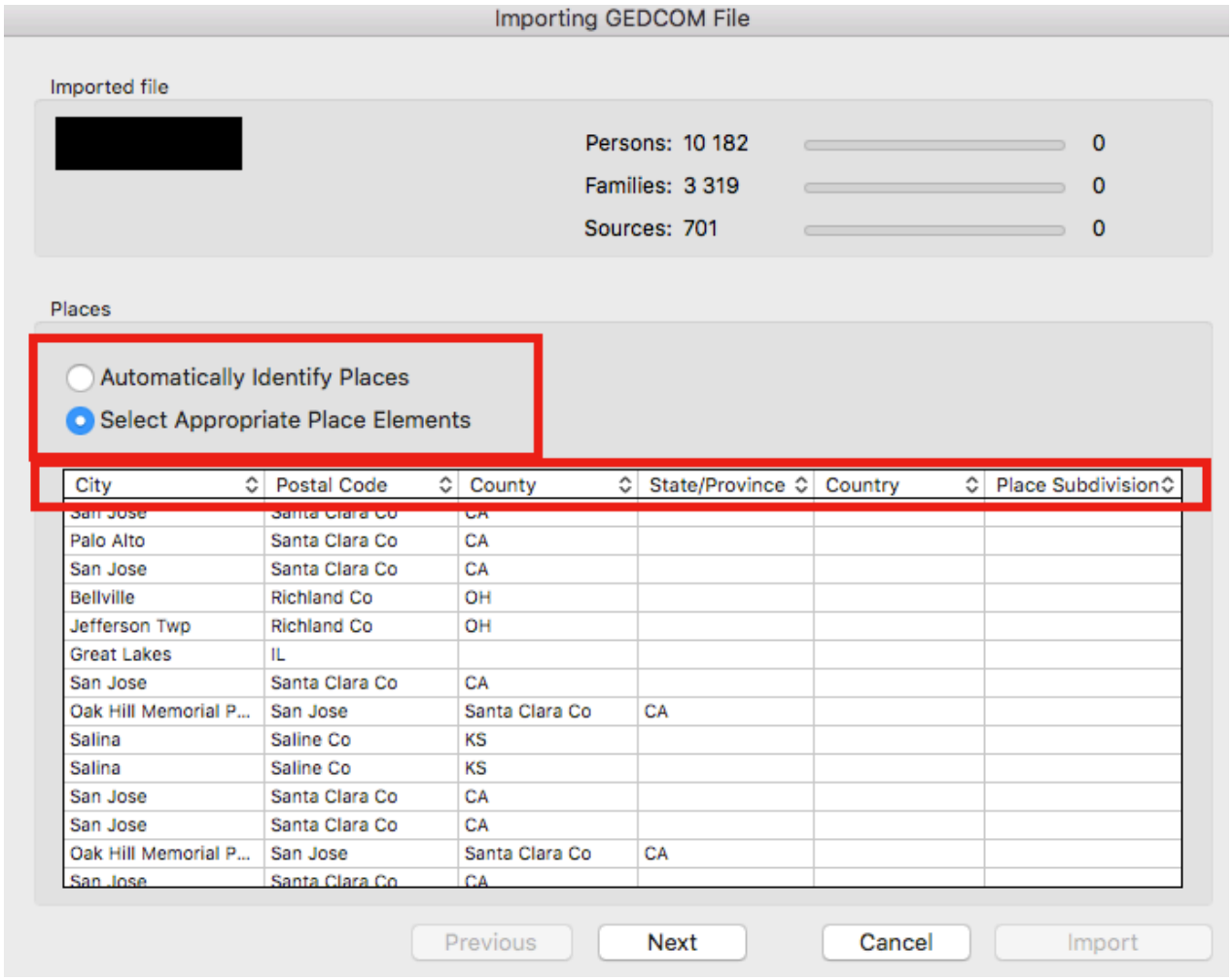
(Mac) Importing a GEDCOM

From the file in which you want to import the GEDCOM file.

- Launch Heredis.
- Open your genealogy file.
- Choose **File > Import > GEDCOM file.**

A message will warn you that the process is irreversible; if you have not created a backup, we advise you to click on No and to create one beforehand.

- Select the file (it must carry a *.ged* extension to be recognized by Heredis), then click **Open.**
- Select it and click **Open**.
- You will probably have to check the places, not all software manages them in the same way. Click **Select Appropriate Place Elements** if the order does not match the data correctly. Click on the header of the column to be changed to change the categories. *(Example: below, the line Postal Code should be County)*

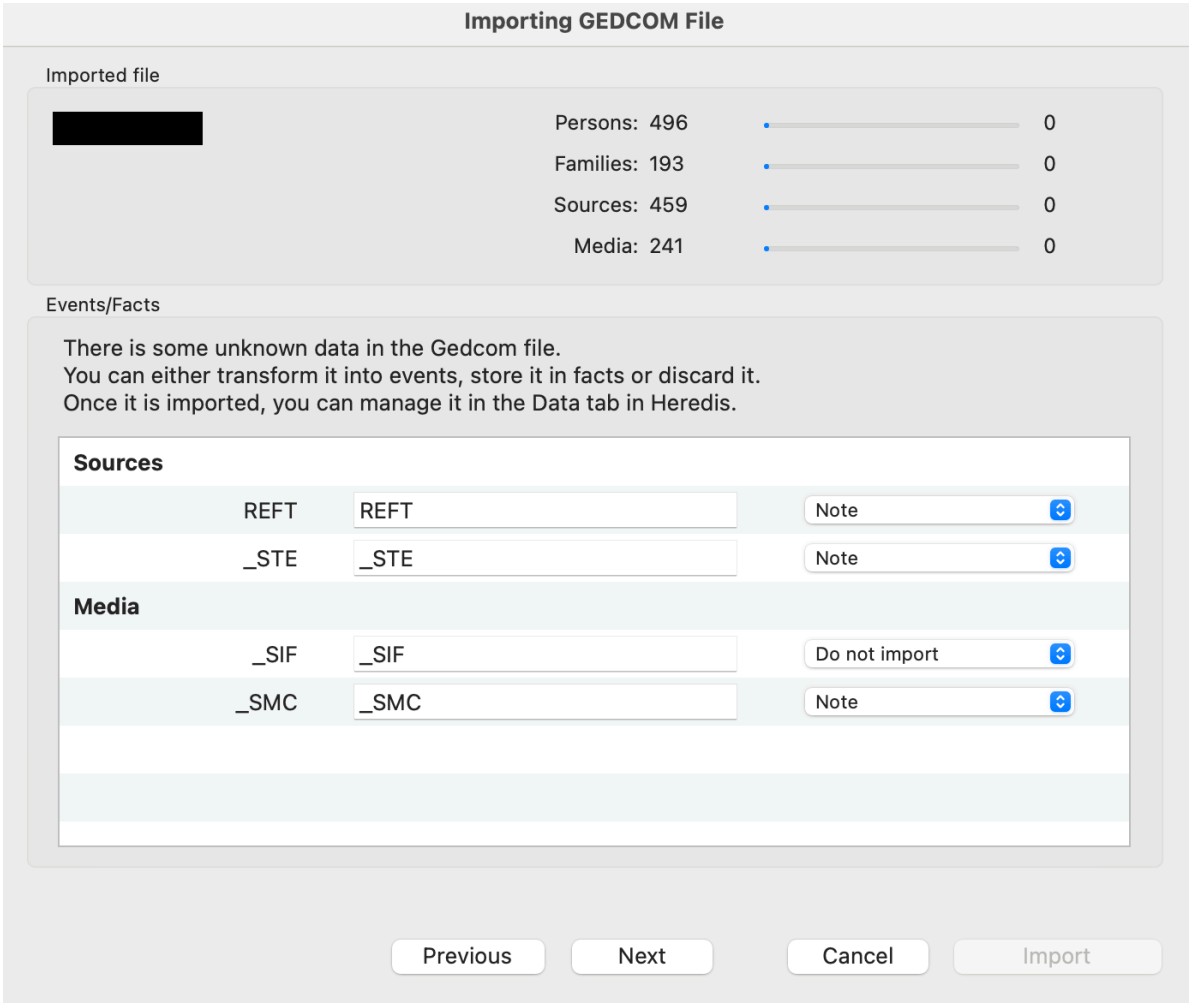


Each software has its own way of managing certain data in the GEDCOM format. So there are Owner Tags that may be unknown to Heredis (see article What is a GEDCOM? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more details).

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be easy to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



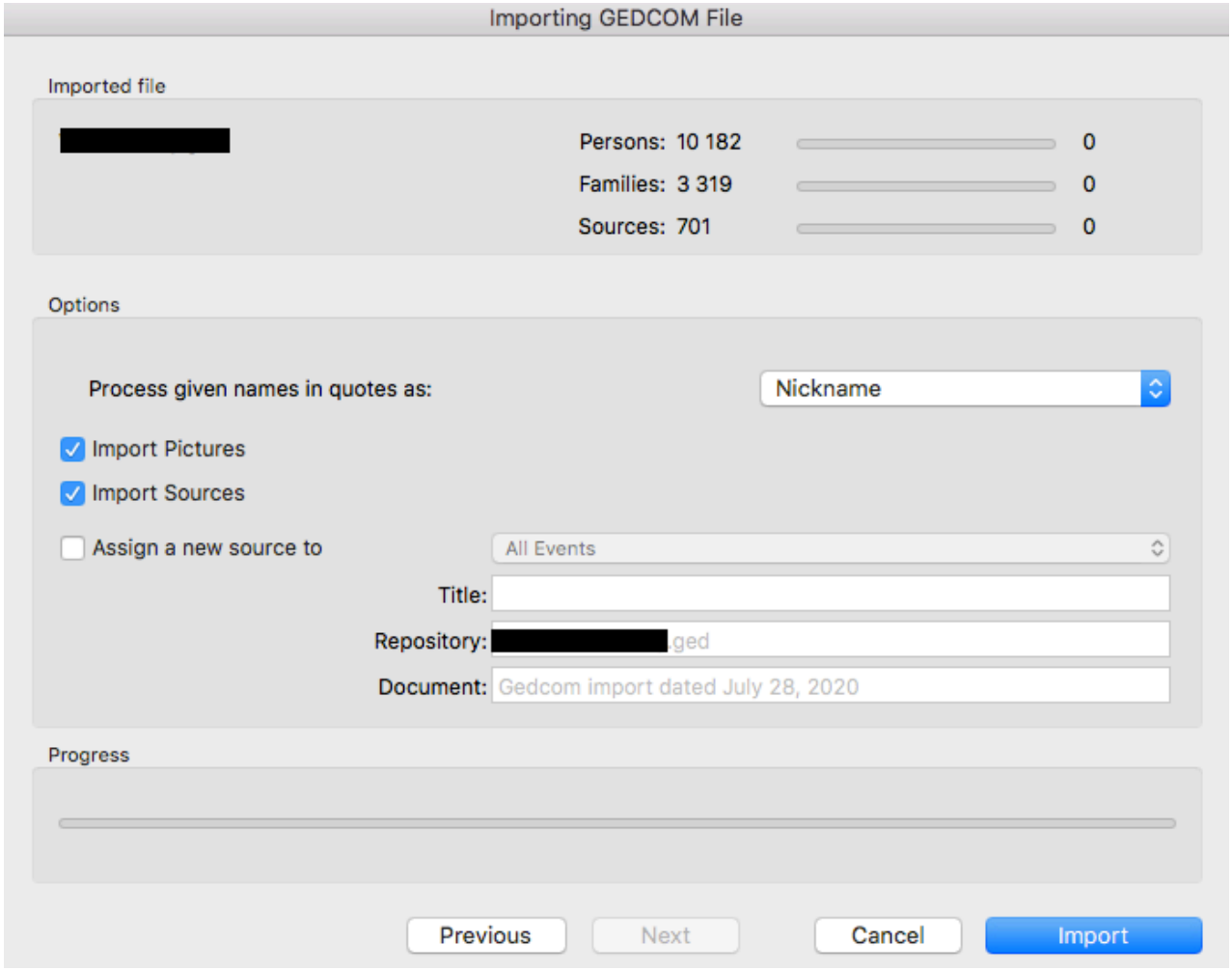
If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

- Once the tags are taken care of, click **Next**.
- Choose whether or not to import media and sources, and how to handle quote names.
- Check the **Associate a Common Source** box and choose which data to add that source to you. Fill the fields out of the source if you want to assign one. By adding a common source to all the information from this GEDCOM, you'll know where you get your information from.



- Click **Launch import** to start importing. This may take more or less time depending on the size of the file to be imported.
- After the GEDCOM data is imported, it is necessary to create the links that will link the imported persons to those that were already present in the main file. To do this, use the **Add** features.

A GEDCOM never contains media because it is a text file format. On the other hand, the path and the name of the media are retained, so you can reintegrate them through the media index (if their name has not changed, Heredis will quickly reintegrate all of your media in a few clicks). See the article Media > Searching Media (see page 198) for more details.

You will then need to link the persons in your file to those in the imported file. You should also check for duplicates. See also (Windows) Permanent control for duplicates, (Mac) Permanent control for duplicates and Merging Two Persons. (see page 330)

Importing a GEDCOM 7 file to your existing genealogy

To understand what a GEDCOM file is and the different type of GEDCOM, read What is a GEDCOM? (see page 765)

Be careful! Heredis does not compare files, so importing a file into another one can generate many duplicates. Since this operation is irreversible, we advise you to make a copy of your file before the import. Thus, if the result does not suit you, you can delete the new genealogy and start again from the copy created before the import.

See the article How to save your file (see page 127).

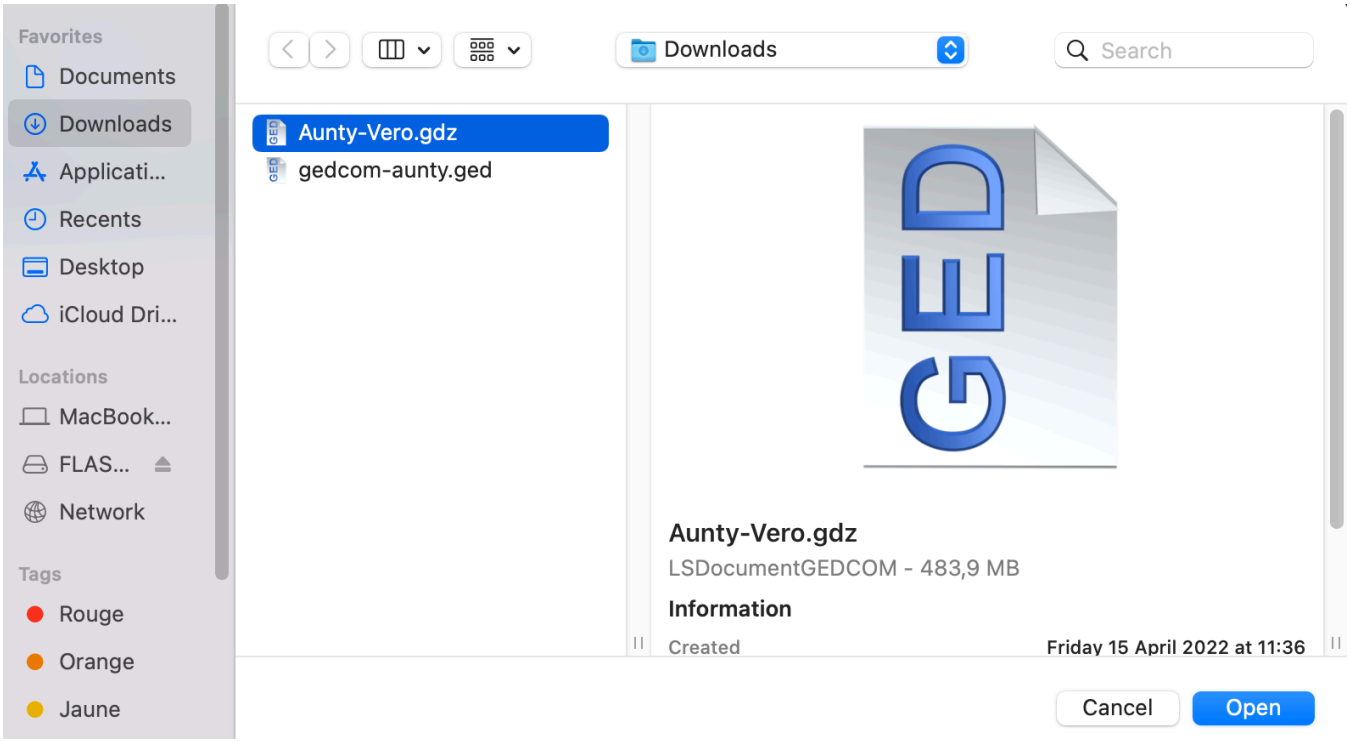
(Mac) Importing a GEDCOM 7 file to your existing genealogy

Important! Opening a GEDCOM file requires your full attention, do not just click on next, next, finish. It is important to take the time to read the different steps required by Heredis.

- Launch Heredis.
- Open your genealogy file.
- Click on the menu **File > Import > GEDCOM File**.

A message will warn you that the process is irreversible; if you have not created a backup, we advise you to click on **No** and to create one beforehand.

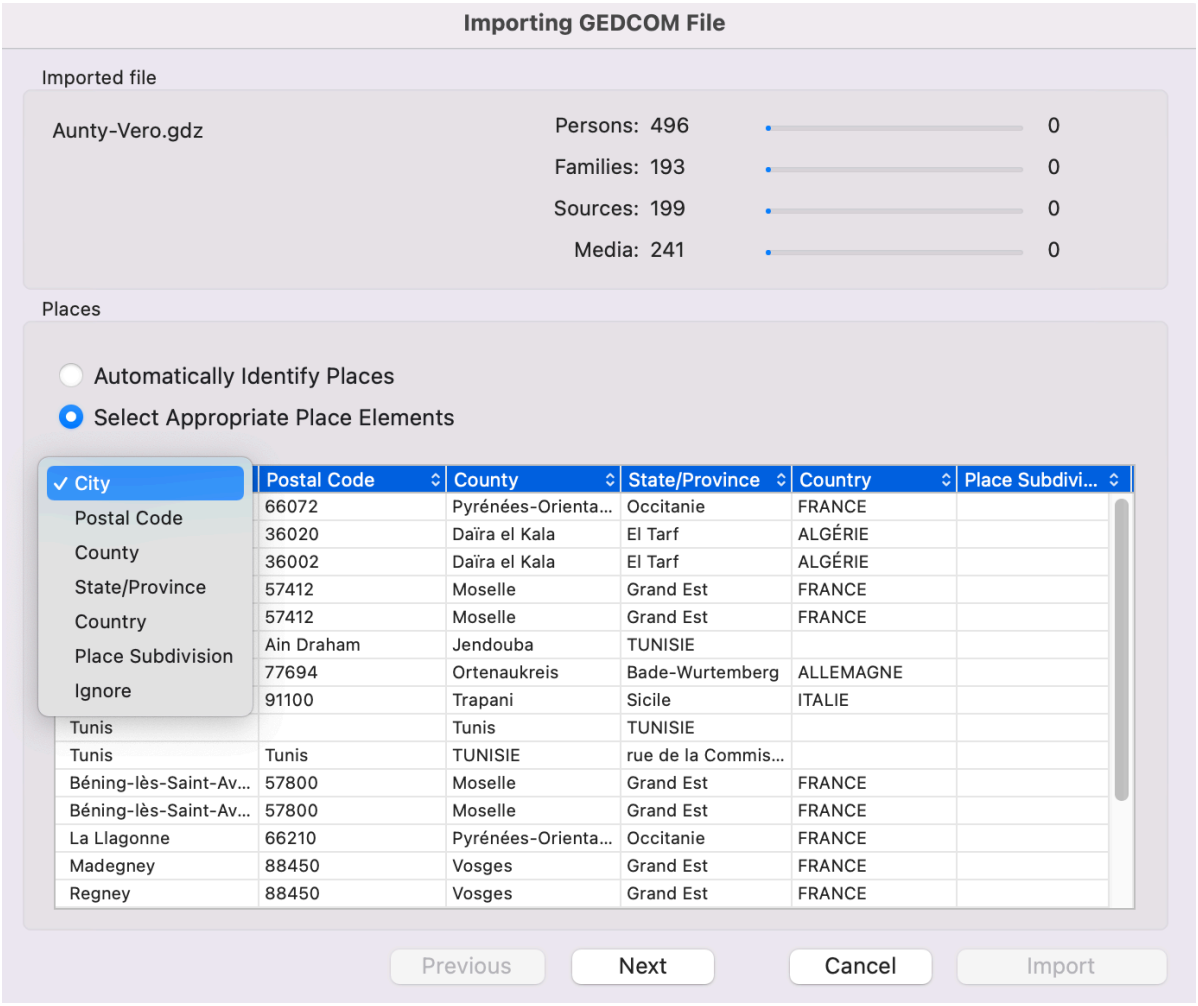
- Choose the location where the .gdz file is stored on your computer.
- Select it and click **Open**.



Heredis will detect whether it is a GEDCOM 7 or an older format.

Make sure that places are listed correctly.
If not, click on **Select appropriate places elements** and modify the line titles by clicking on the dropdown list at the beginning of the line. Choose the appropriate heading.

It will not be possible to modify this order once the file is open!



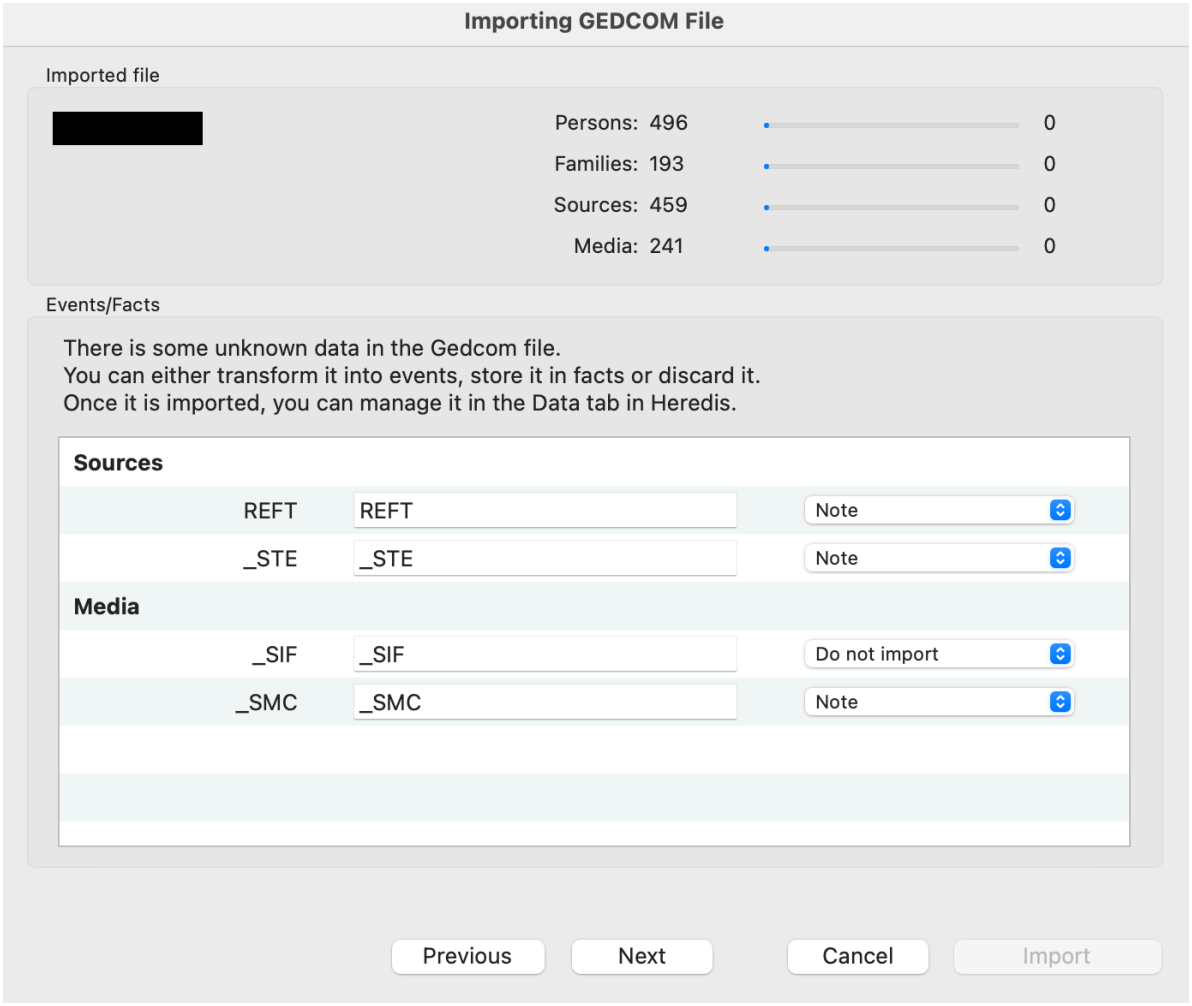
Once the places have been listed correctly, click **Next**.

Each program has its own GEDCOM tags to indicate non-standard data. See the articles What is a GEDCOM file? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more information on the subject.

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be easy to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



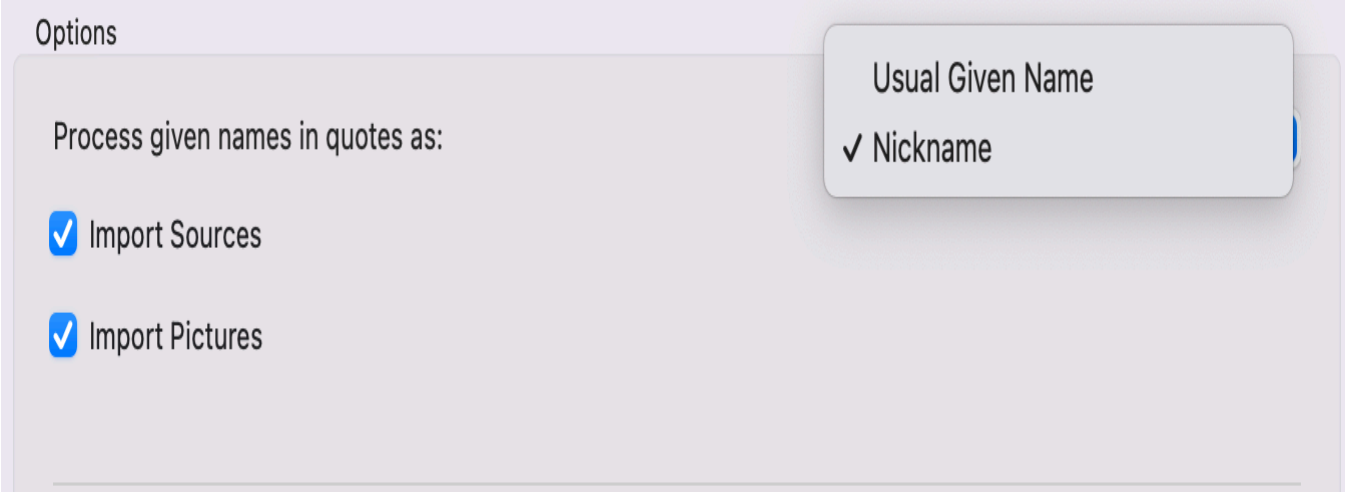
If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

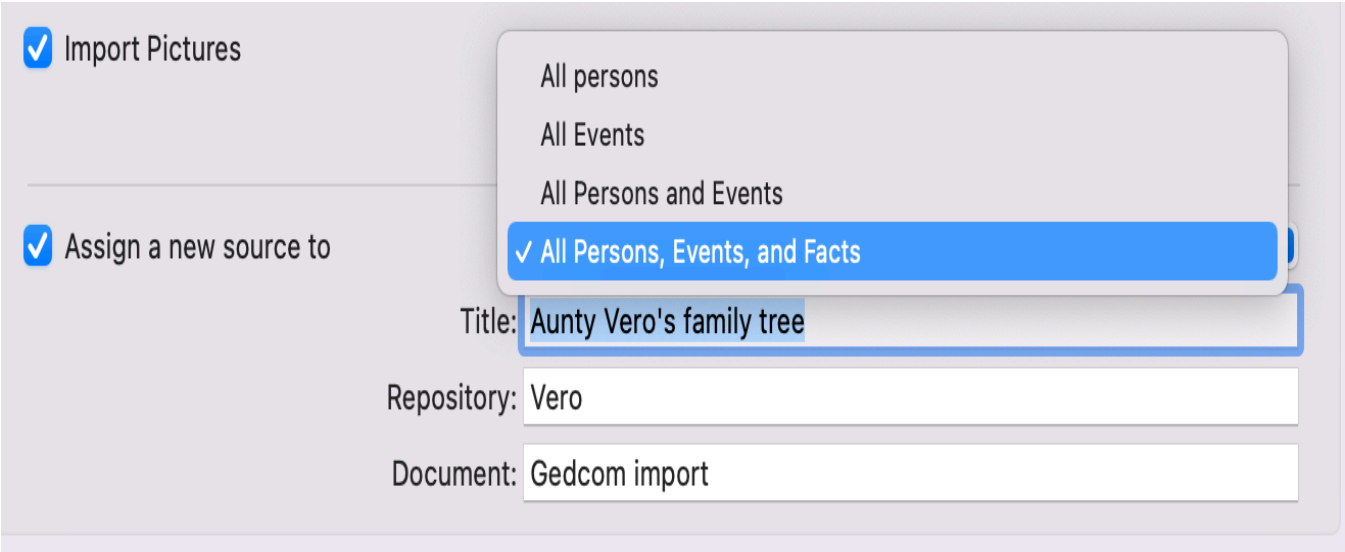
If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

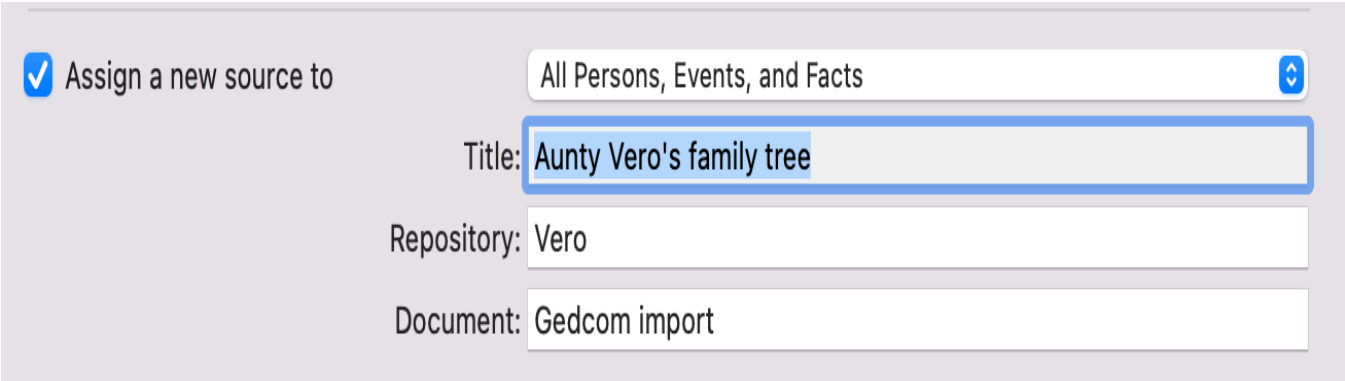
- Once the tags are taken care of, click **Next**.
- Click on the dropdown menu to choose how to handle given names in quotes.
- Choose whether or not to import sources and media.



Check the “**Assign a new source to**” box to add a source to the file data. Choose from the dropdown list which type of data you are adding the source to: All persons, All events, All persons and events, All persons, events, and facts.



Specify a title for this source, the Repository (where the information is stored), and the Document.



- Click on **Import** to validate the opening of the file.

Let Heredis finish the import. A GEDCOM import can be more or less fast depending on the number of data to be processed but also the power and occupancy of your computer. Be patient and let your computer finish!

Heredis retrieves the data from the .gdz file and puts it in a new file in the Heredis format. The .gdz file remains on your computer.

Once the import is complete, consider linking the persons linking your file to the one you imported. Also check if there are duplicates. See the article Find duplicates (see page 324).

(Windows) Importing a GEDCOM 7 file to your existing genealogy

Important! Opening a GEDCOM file requires your full attention, do not just click on next, next, finish. It is important to take the time to read the different steps required by Heredis.

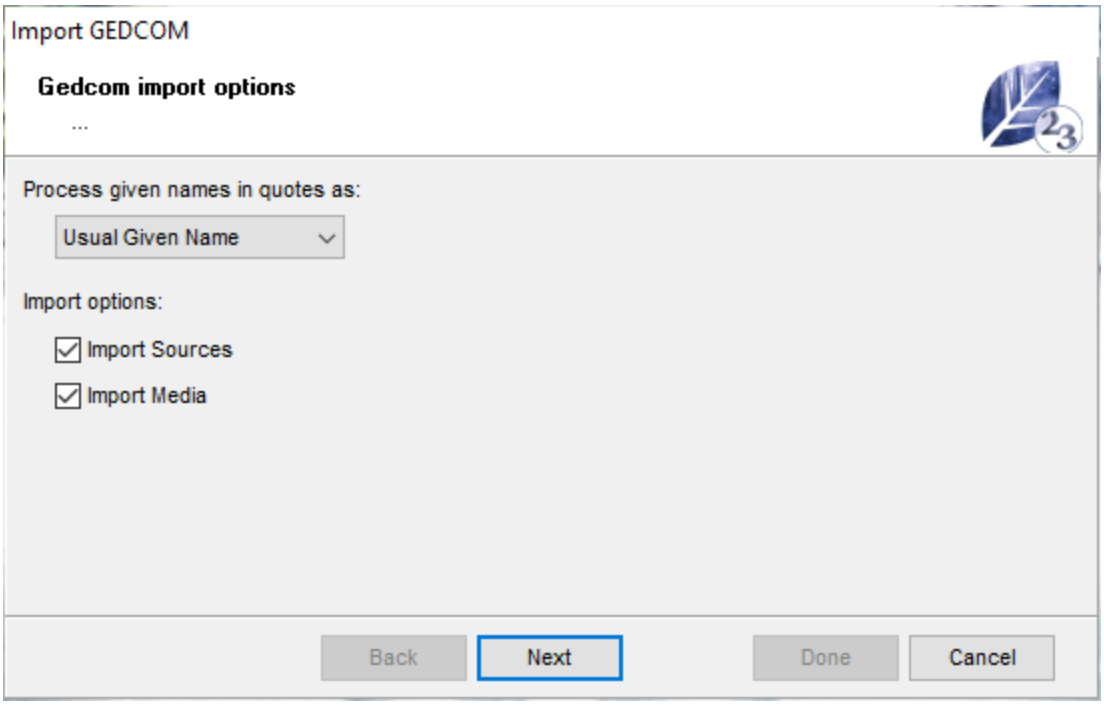
- Launch Heredis.
- Open your genealogy file.
- Click on the menu **File > Import > GEDCOM File**.

A message will warn you that the process is irreversible; if you have not created a backup, we advise you to click on No and to create one beforehand.

- Choose the location where the file is stored on your computer.
- Select it and click **Open**.

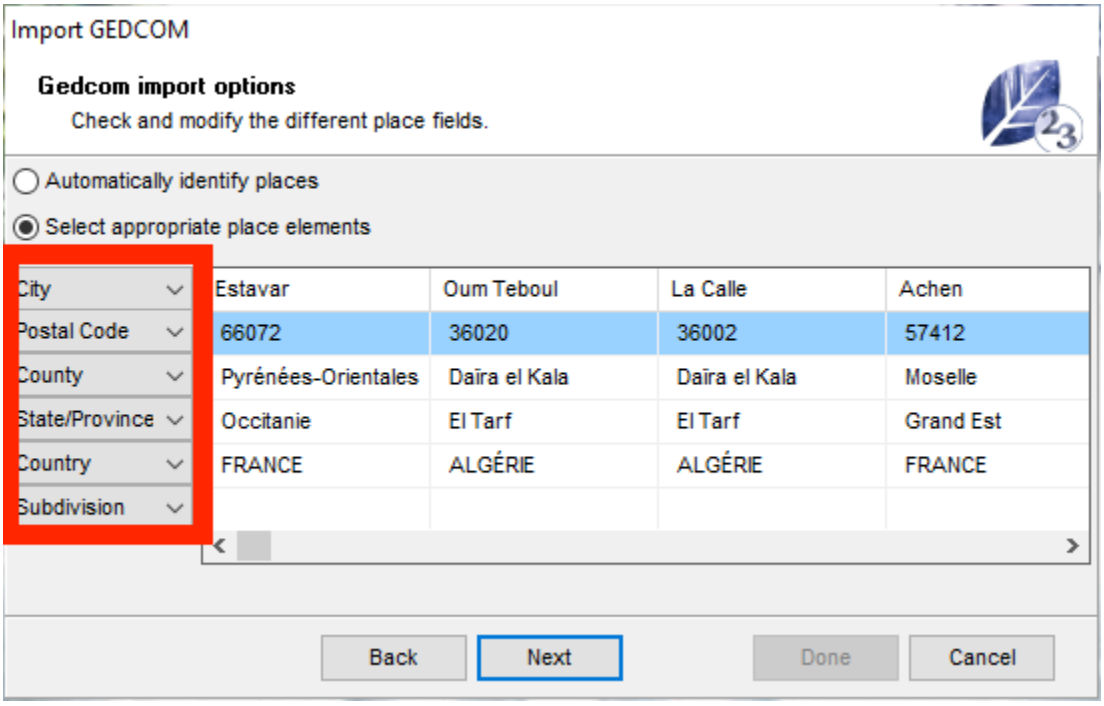
Heredis will detect whether it is a GEDCOM 7 or an older format.

- Click on the dropdown menu to choose how to handle given names in quotes.
- Choose whether or not to import sources and media.



- Click **Next**.
- Make sure that places are listed correctly. If not, click on **Select appropriate places elements** and modify the line titles by clicking on the dropdown list at the beginning of the line. Choose the appropriate heading.

It will not be possible to modify this order once the file is open!



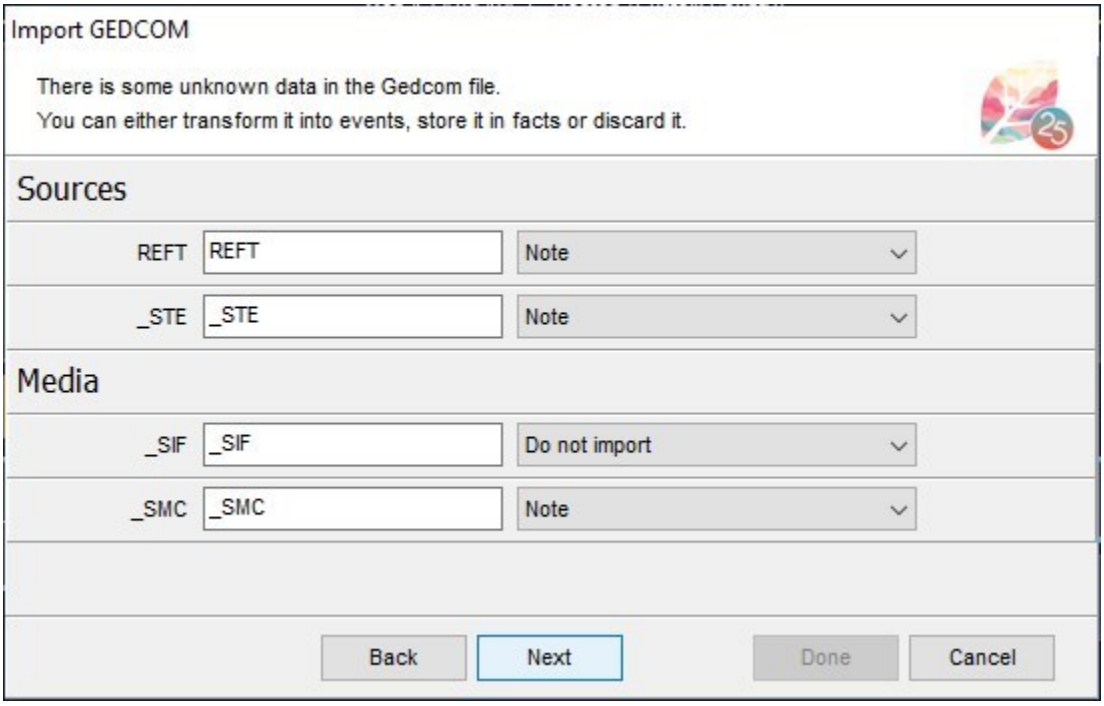
- Once the places have been listed correctly, click **Next**.

Each program has its own GEDCOM tags to indicate non-standard data. See the articles What is a GEDCOM file? (see page 765) and GEDCOM tags generated by Heredis (see page 822) for more information on the subject.

If Heredis does not understand a tag, then a window will open and ask you to handle this information yourself.

It will not be easy to modify it once the file is opened! Hence the importance to take the time to go through this process carefully.

You can choose whether or not to import unknown elements (tags). Heredis informs you of the type of data, e.g. whether it is a Source or Media item, etc.



If you know the type of data indicated, click in the white box and modify the tag by indicating the title.

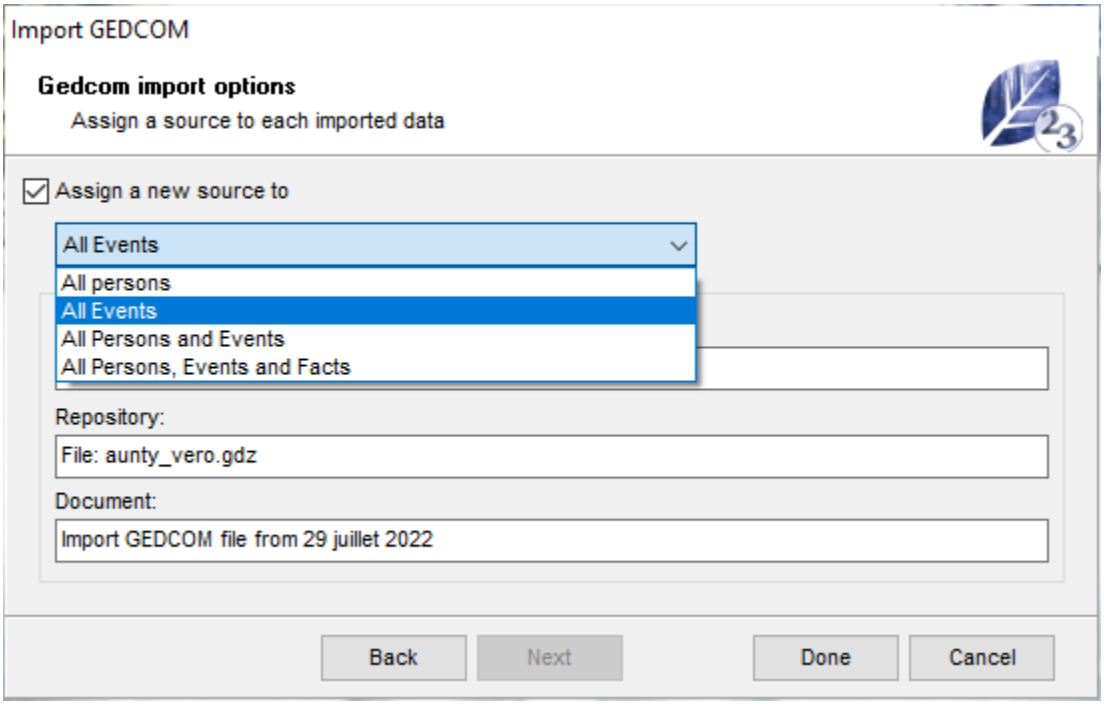
For example, you know that the REFT tag used by the software that created the GEDCOM corresponds to the document type. Click in the white box, delete REFT and indicate Type. Click on the drop-down list and choose the location where you wish to see this element: **Document**.

If you don't know the data type, choose **Do not import** to avoid polluting your file with unknown elements.

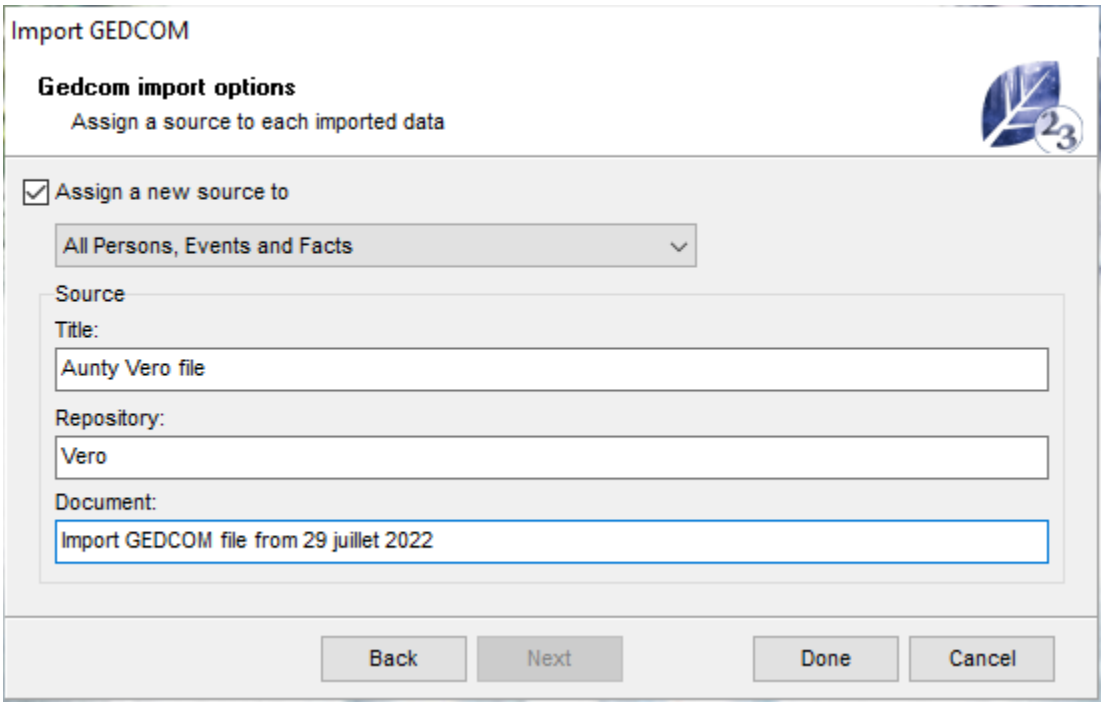
Consult the user's manual of the software that created the GEDCOM file to figure out what the "unidentified" tags refer to.

- Once the tags are taken care of, click **Next**.
- Check the "**Assign a new source to**" box to add a source to the file data. Choose from

the dropdown list which type of data you are adding the source to: All persons, All events, All persons and events, All persons, events, and facts.



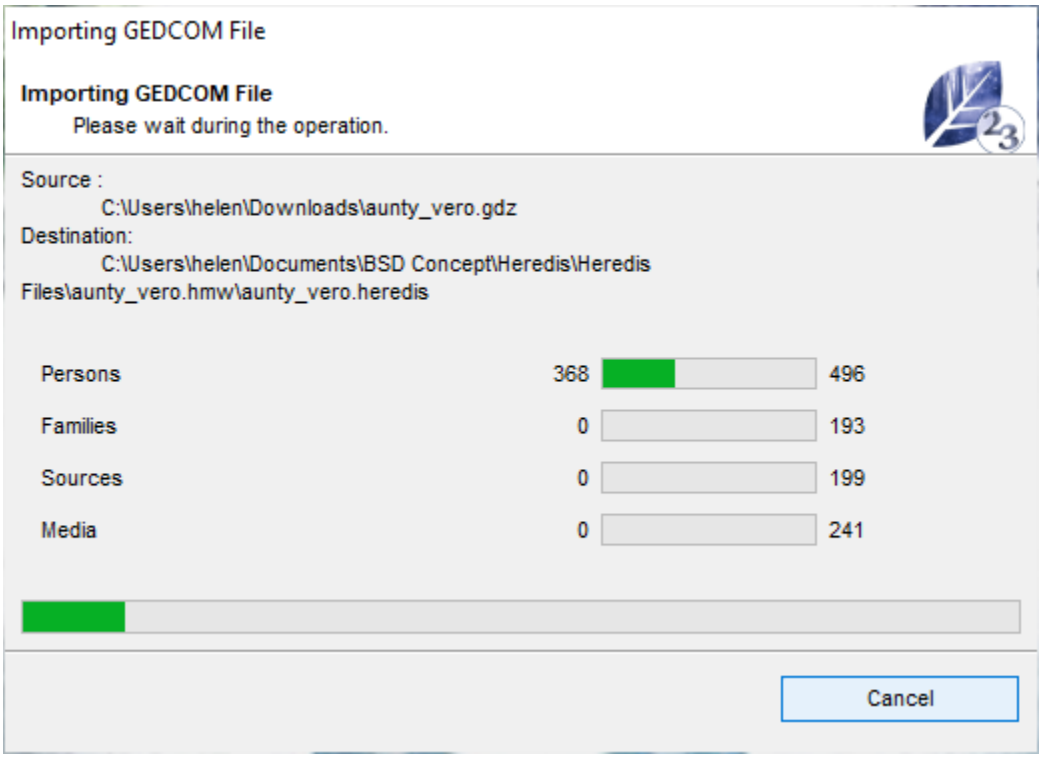
Specify a title for this source, the Repository (where the information is stored), and the Document.



- Click on **Done** to validate the opening of the file.

Heredis retrieves the data from the .gdz file and puts it in a new file in the Heredis format. The

.gdz file remains on your computer.



Let Heredis finish the import. A GEDCOM import can be more or less fast depending on the number of data to be processed but also the power and occupancy of your computer. Be patient and let your computer finish!

Once the import is complete, consider linking the persons linking your file to the one you imported. Also check if there are duplicates. See the article Find duplicates (see page 324).

GEDCOM tags generated by Heredis

Some owner tags of Heredis

Each software tags the data as it pleases them (minor events, facts…), these tags are called Owner Tags and can be very different according to the software used to create the GEDCOM file. So some software might not be able to read the data.

Here are some owner tags you might found if you create a GEDCOM with Heredis.

_ARCH = Archiving the Source
_CLS = Person without descendants
_CREA = Date the item was created
_DATE = Date (of anything that is not standardized such as media dates etc.)
_ETI = Personalized flags
_EVID = Quality of the proof
_FIL = Child Status
_FNF = Father not find, untraceable (from Heredis 2021)
_FNA = Search Status of an event
_FSFTID = FamilySearch Identification Number
_GUID = File ID
_INFO = Quality of the information
_MNF = Mother not find, untraceable (from Heredis 2021)
_PRIM = Defined if the media is primary
_QUAL = Quality of completed citations
_QUAL._SOUR = Quality of the source
_QUAL._INFO = Quality of the information
_QUAL._EVID = Quality of proof
_RECH = Search Data of event
_RECH._PROJ = Search Data Project
_RECH.TYPE = Search Document type of Search Data tab
_RECH.PLAC = Search Place of Search Data tab
_RECH.DATE = Search date of Search Data tab
_RECH.REFN = Search data call number
_RECH.WWW = Search data website field
_RECH.NOTE = Research note
_SEC = Secondary person
_SHAR = Link for shared events
_SOUR = Quality of the source
_SUBMAP = Geolocation of subdivisions
_ULS = Unmarried person
_UST = Union type

This is a non-exhaustive list.

See also What is a GEDCOM file? (see page 765)

Send my genealogy to a family member or friend

To send your genealogy to a family member or friend, you need to choose the format.

You can send him

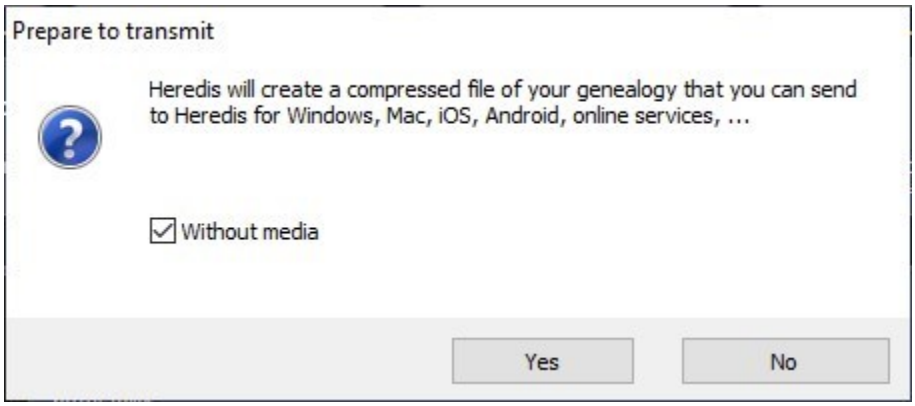
- a **document**, consult the articles Create and edit a book (see page 566) or Create and edit sheets (see page 588), depending on the document you wish to create.
- for a **graphic representation**, please consult the articles
    - Mac or Windows illustrated trees
    - unlimited tree sizes for Mac or Windows (see page 719)
    - ancestors (see page 677), descendants (see page 684) or mixed (see page 693) wheels
    - etc.
- **your entire file**
    - if the recipient uses the same version of Heredis as you, send him/her a Heredis format file. See the article Export a complete file in Heredis format (see page 752).
    - if the recipient uses an different software or an earlier version of Heredis than yours, send him/her a GEDCOM format file, see the article Export a complete file in GEDCOM format (see page 768).
- **part of your file**
    - if the recipient uses the same version of Heredis as you, send him/her a Heredis format file. See the article Export a branch in Heredis format (see page 757).
    - if the recipient uses a different software or a version of Heredis older than yours, send him/her a GEDCOM format file. See the article Export a branch in GEDCOM format (see page 776).

Prepare to transmit

Use the “Prepare to transmit” function to transfer your genealogy from your computer to your tablet or smartphone.

- Launch Heredis.
- Open the file to be transmitted.
- Click on **File > Prepare to transmit**.

A window informs you that a compressed file is about to be created. By default, the file is sent without media. You can uncheck the box to set the media.



Note: Your media make the file heavier. If it’s too heavy, it may be difficult to send.

Click **Yes** to start preparation. If you click on **No**, preparation will be cancelled.

By default, Heredis creates the file in the same folder as your usual file.

The file created to send has the extension .hmwz
hmw being the usual Heredis format, the z is added to specify that this is a compressed version.

Send this file to your tablet or smartphone

By email

If your .hmwz file is less than 10 MB in size, you can send it as an e-mail attachment.

- Open your mailbox, write an e-mail with .hmwz attached.
- From your phone or tablet, open your e-mail.
- Download the attachment and place the file on the device, NOT in a cloud.

The procedure for opening the file depends on the device, on the system and system version. Contact the support of your device for further information.
Usually:

- Press on the file.
- Press the button to select the file opening application.
  On **iPad**, the button takes the form of a vertical rectangle with an upward arrow.
  Choose Heredis.
- On **Android**, after downloading the file, launch Heredis, click on **Import a Heredis File** from main menu (not in the file) and select the downloaded file. It's usually in the download folder of your mobile device.

The file will decompress and open. This may take several minutes, depending on the size of the file.

With a cloud

- Place this .hmwz file in a cloud (Google Drive, OneDrive, iCloud, Dropbox etc.).
- From your mobile device, connect to your cloud.
- Download the .hmwz file and place it **in the device**. Handling depends on the cloud. Ask your chosen cloud support for more information.
- Finally, press on the file and click on the button to choose the application for opening the file.
  On **iPad**, the button takes the form of a vertical rectangle with an upward arrow.
  Choose Heredis.
  On **Android**, after downloading the file, launch Heredis, click on **Import a Heredis File** from main menu (not in the file) and select the downloaded file. It's usually in the download folder of your mobile device.

The file will decompress and open. This may take several minutes, depending on the size of the file.

Share on the local network

To share the open genealogy in Heredis, select the **File** menu **> Share on the local network** or click the **Share** button in the toolbar, if you've put it. Check out the Customize Heredis article to learn more about customizing the toolbar.

This tool allows you to have your file on multiple remote devices (computer, tablet or phone).

Requirements for sharing

- Make sure you have 2 compatible versions of Heredis. For a connection between 2 computers, you must have the same version of Heredis on both computers. On your phone or tablet, you need the Heredis app for Android or iOS.

Beware, for versions prior to Heredis 2020, you need the iOS or Android Heredis app without a version number. Since Heredis 2020, each version of Heredis now has its own app. When you change versions, consider downloading the similar version for iOS or Android.

- Make sure your computer and/or Internet box firewall or anti-virus allows Heredis to access your private network.
- Open Heredis on both devices.
- Turn off 3 or 4G on your phone or tablet. Sharing is done via WiFi only.

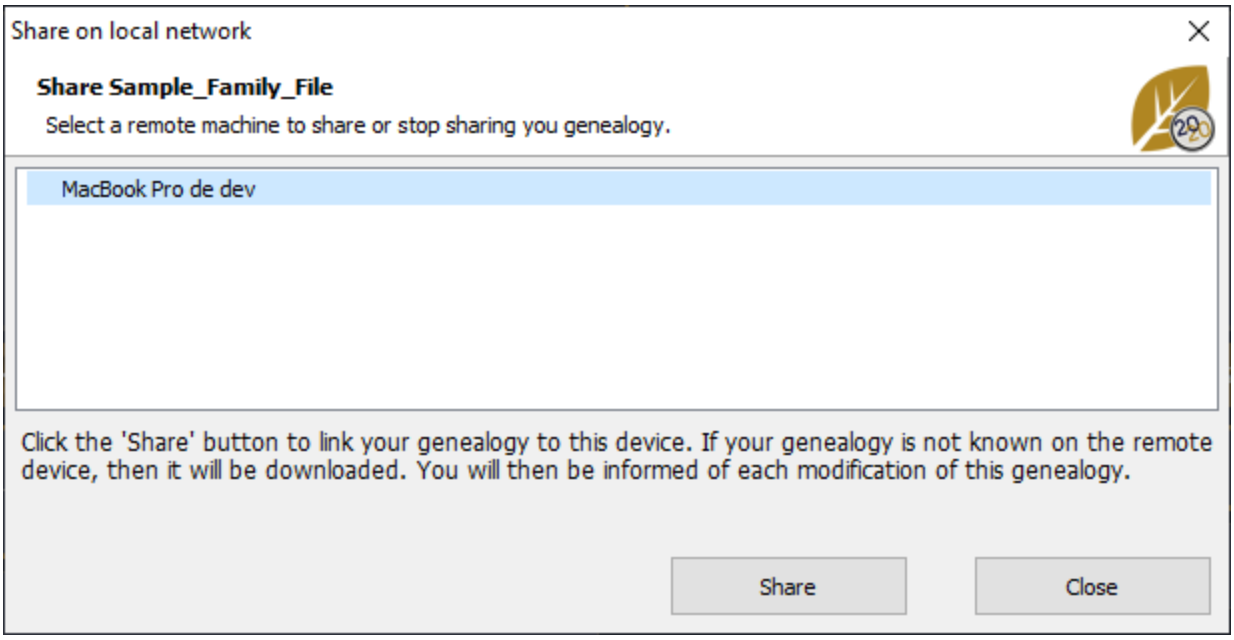
Share your file for the first time

Heredis opens a sharing window and displays the list of devices connected to your local network and on which the software is launched.

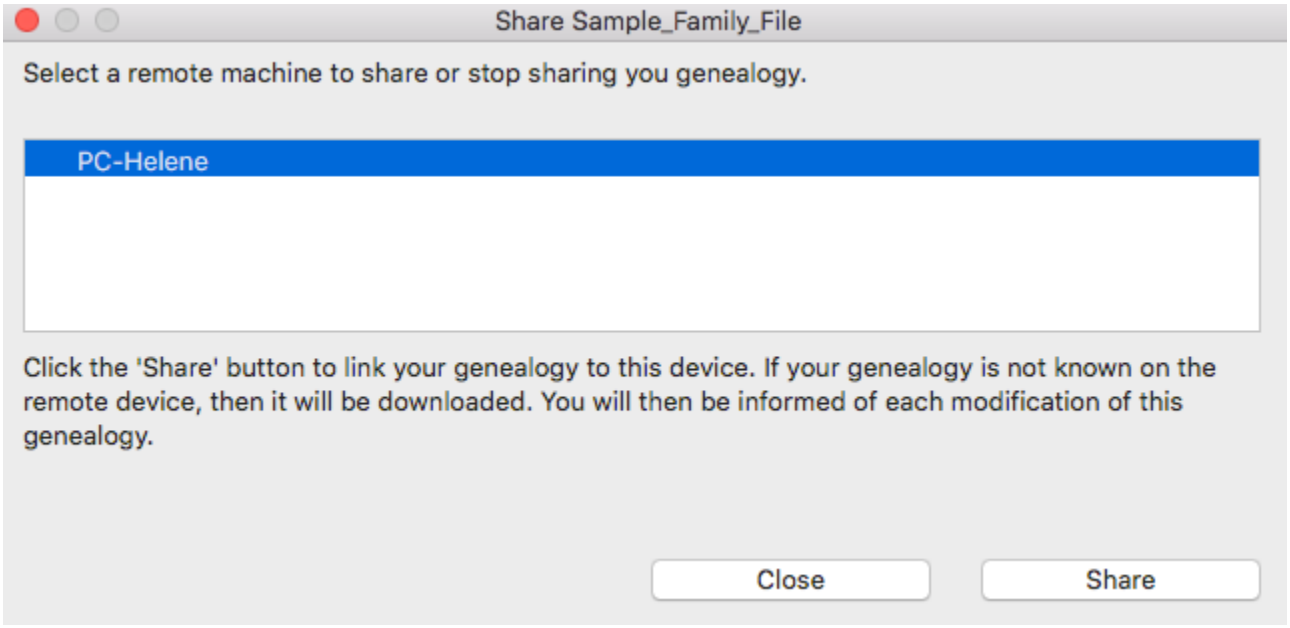
If the open genealogy has never been shared, choose a device available from the proposed list and then click **Share** to link the genealogy with the chosen device. The remote device then receives a sharing request.

Note: The remote device must have double the volume of the transferred file. Be sure to turn off your device's automatic sleep.

(Windows) Share on local network window



(Mac) Share on local network window



On the remote device, Heredis asks you for permission to receive the file. When you click the button (Windows) **Yes**, (Mac) **Accept**, Heredis copies, on the remote device, all the data of the open genealogy as well as the media.
Your genealogy is now linked to two devices, such as your desktop computer and your laptop or your phone.

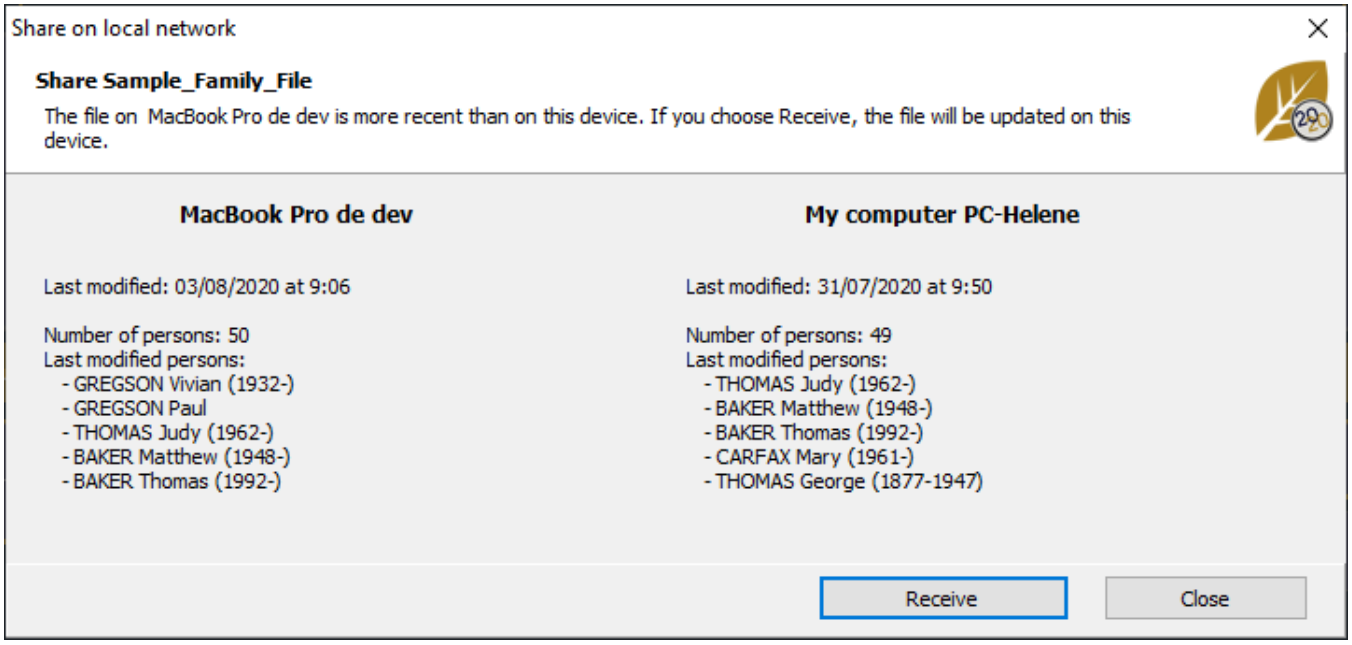
Share your file again after changes when the link is already made

From Heredis on your laptop or phone or tablet, make changes and save new data in your genealogy.
Then open this genealogy on all your devices with this shared file.

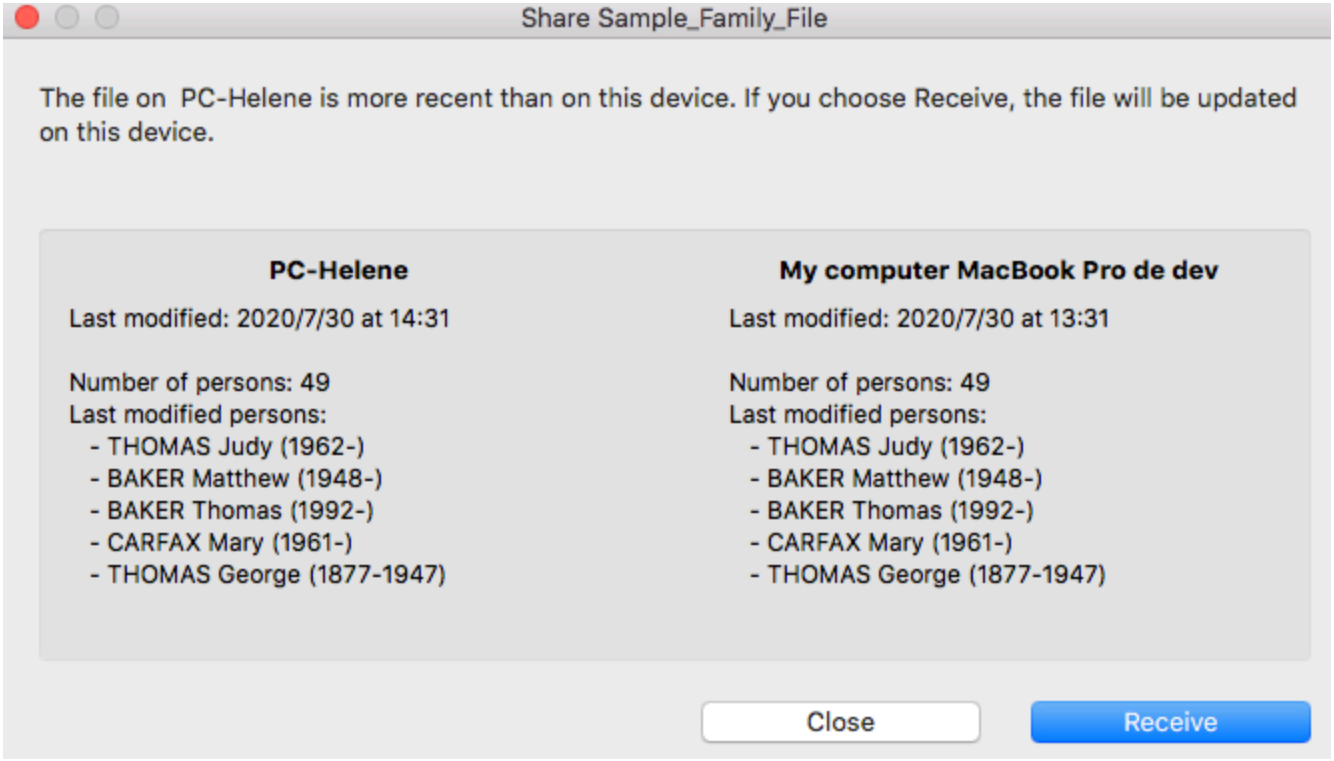
If you're connected to the local private network, Heredis automatically alerts you that a newer version of your file is available on the device from which you made changes and which is connected to your local network. In this window, the key info in the remote file is displayed (change dates, number of individuals, last modified individuals) and you can compare them with those of the open file.

If you click the **Receive** button, Heredis updates the genealogy with the data entered or changed. Only genealogical data or media that have been modified, or added will be transmitted.

(Windows) Receive changes



(Mac) Receive changes



Warning: Remember to update your devices before making any changes. If you've made changes to your phone without updating your file on your computer, and then make changes to the computer, Heredis will only keep the latest information in chronological order. So you'll lose the modified data on the phone.

Heredis will always offer you the latest file. If you agree to receive it, changes made to the least recent file will be lost.

If you no longer want to share your file with a remote device:
From the **File** menu **> Share on local network,** select the device.
Click the **Don't Share** button.

The device in question will no longer receive notifications regarding updates to this genealogy. You can reactivate this sharing at any time by clicking the **Share** button **again.**

Info – For the information to be shared, the genealogy file must be recorded.

A problem with sharing?

Share on the local network no longer works:

- Make sure your firewall and/or antivirus doesn't block Heredis. On Windows, there is a built-in firewall, so it may duplicate if you have one in your anti-virus. Also check the firewall of your Internet box.
- Make sure you have 2 similar versions of Heredis. For example, Heredis 2020 for Windows communicates with Heredis 2020 for Mac, iOS or Android only.
- Are you on Windows? Check out the article (Windows) Heredis cannot detect my

remote devices – I am getting Bonjour messages.

Sync via USB

What for?

Heading back to your country home? Synchronize your genealogy on a USB device, then connect it to your stationary computer in the country. You'll be able to update your file instantly. Before you leave, synchronize your computer with the USB device and pick up your weekend's work as soon as you get home.

Note: If you don't have a WiFi network, or don't have your devices on the same premises, you can synchronize your genealogy by connecting a removable volume (USB key or external hard drive).

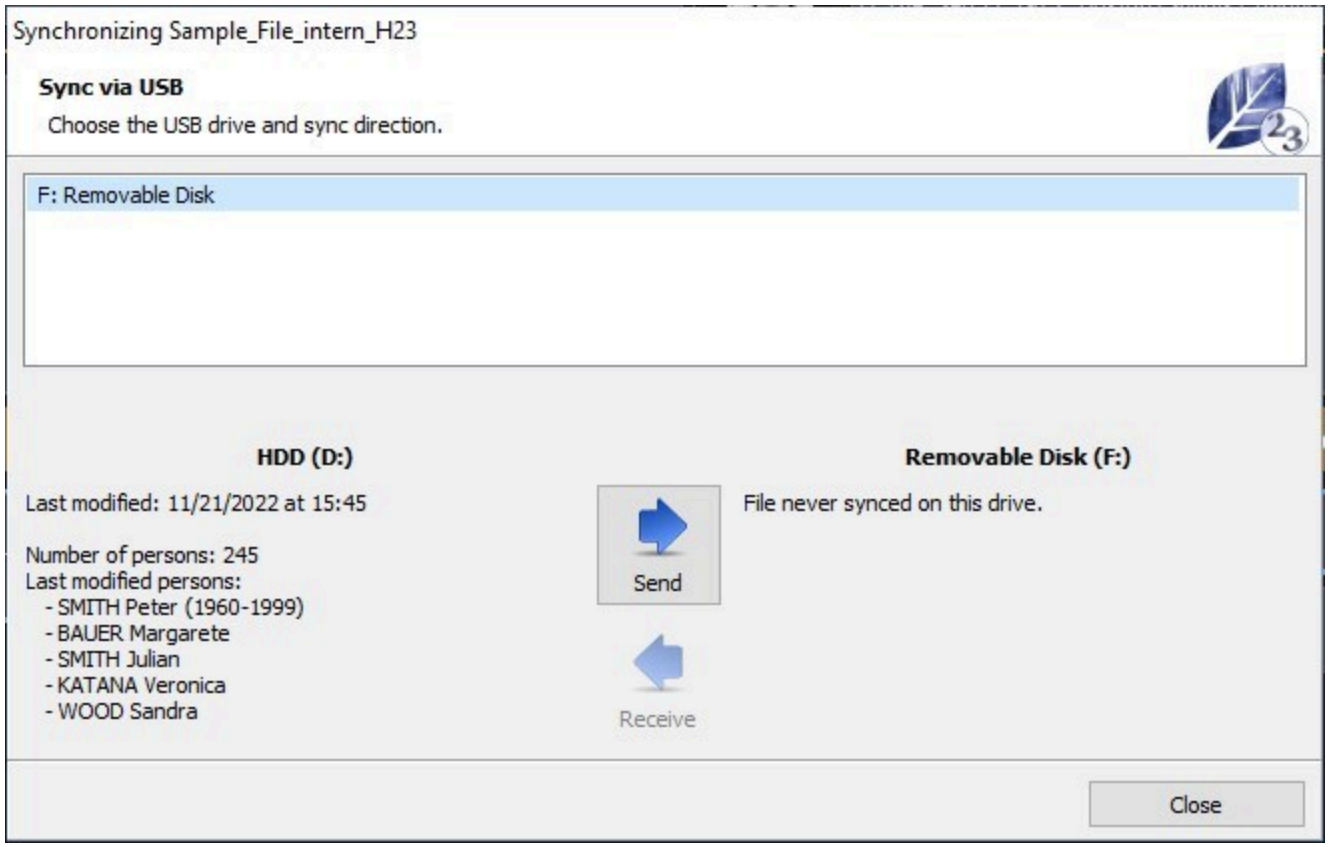
Sync via USB also makes it easier to switch from Mac to Windows via USB key or external hard drive.

Operation

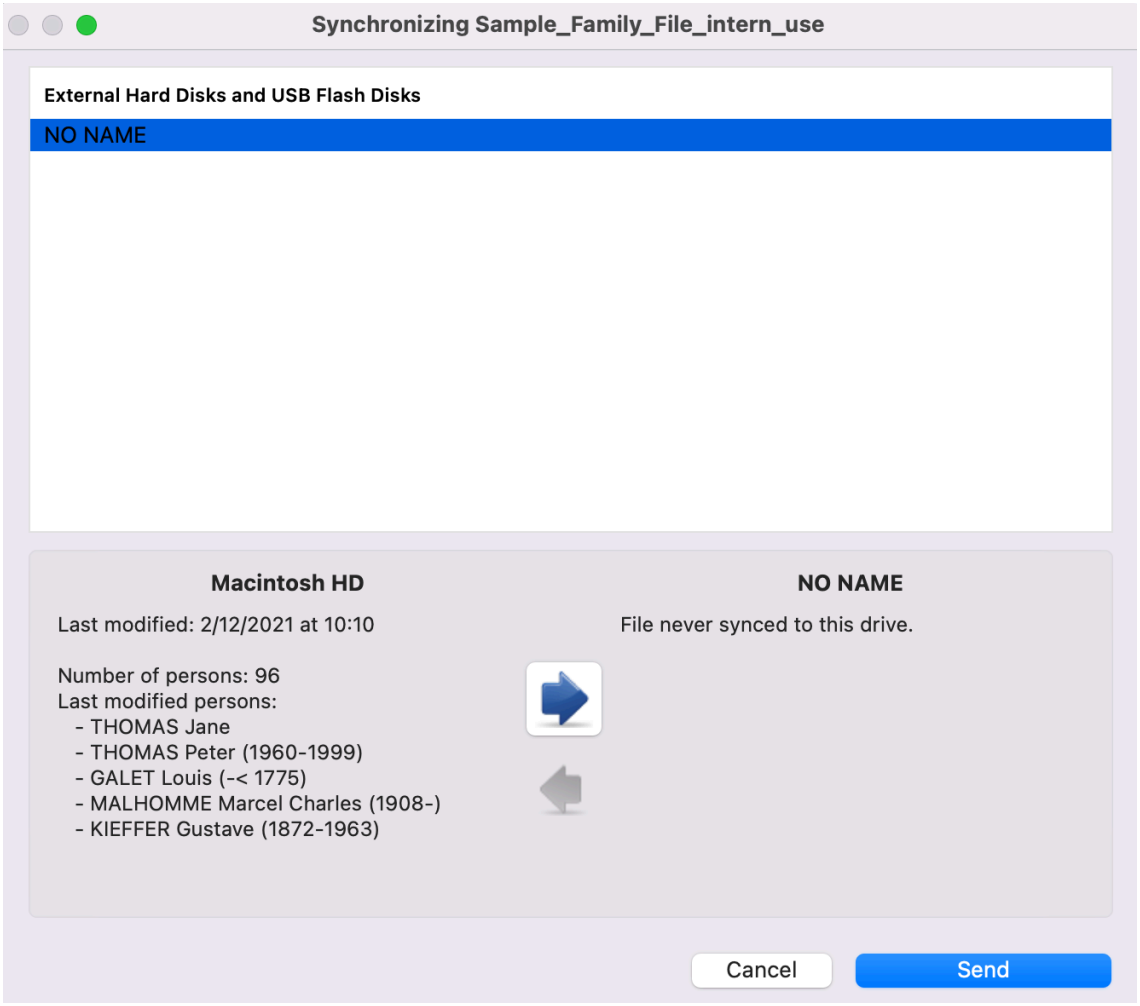
First synchronization

Click on the button in the toolbar or in the **File** menu choose **Sync via USB**…
In the synchronization window, select the volume you have connected and click on **Send**.

(Windows) Synchronization window



(Mac) Synchronization window



When synchronization is complete, eject the USB device.

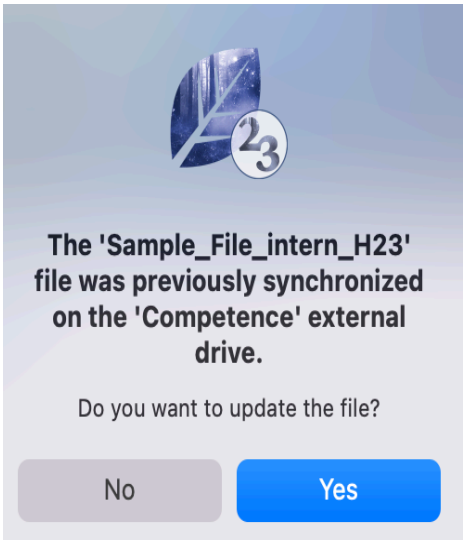
To transfer to another computer, plug the USB device into it.

Launch Heredis. a message informs you that an unknown file is present on the USB key or external hard drive and asks whether you wish to synchronize it or not.
Click **Yes** to agree to receive this file.

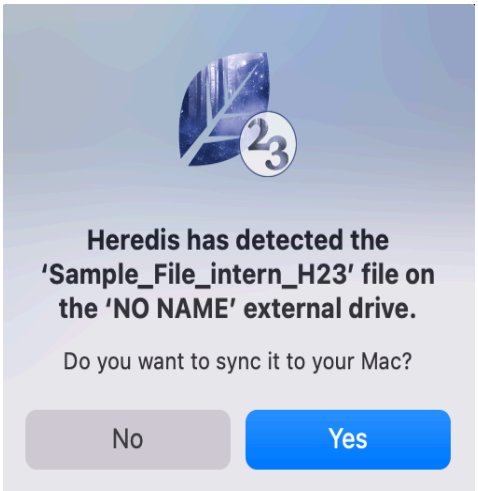
Next applications

Next time, plug in the USB device and launch Heredis.

Work on one of the computers.
When you exit Heredis, you will be asked whether or not you wish to synchronize the USB device.
Click **Yes** to accept and update this file.



Finally, to update the second computer, plug in the USB device.
Launch Heredis and open the file on your computer.
A message informs you that a more recent version of the file is available on the USB device.



Click **Yes** to update the file and avoid losing your data.

If you clicked on **No**. Open the file. Click on the **File** menu **> Sync via USB**.
In the synchronization window, select the device you've connected, check the synchronization direction and then click on **Receive** or **Send**, depending on the synchronization direction you've chosen. Once synchronized, you can't go back!

Share a Heredis file with another device (computer, tablet, smartphone)

If you have Heredis for Windows or Mac, it is preferable to import a file in Heredis format rather than a GEDCOM.

Share a file from a Windows or Mac computer

File in Heredis format.

There are several methods.

- Send via the cloud, see Preparing to transmit (see page 824)
- Send by e-mail, see the article Prepare to transmit (see page 824)
- Send via the local network (your private internet connection), see Share on the local network (see page 826).
- If your device has a USB port, you can use USB synchronization. See the Sync via USB (see page 831) article for more details.

File in GEDCOM format

To export the file in GEDCOM format, see What is a GEDCOM (see page 765), Export a complete file in GEDCOM format (see page 768) or Export a branch in GEDCOM format (see page 776).

Send the file either by e-mail, attaching the GEDCOM file to the message.
On your remote device, download the attachment.
Press on the file to open it.
Click on the button to choose the application for opening the file (this step depends on the device and OS – please refer to your device manual if necessary). Choose Heredis. The file will be converted to Heredis format.

Share a file from Heredis Android

There are several ways to send your file from the Heredis Android application to Heredis Windows, Mac, Android or iOS.
The Android version only exports files in Heredis .hmwz format.

- Send via the local network (your private internet connection), see Share on the local network (see page 826).
- Send a genealogy file in Heredis format by email, see the article Export a Heredis genealogy from Heredis Android (see page 961)

Send a file from Heredis iOS

There are several ways to send your file from the Heredis Android application to Heredis Windows, Mac, Android or iOS.

File in Heredis format

Useful for transmitting files from your tablet or smartphone to be opened with Heredis – same version number on computer, tablet or smartphone.

- To send via the local network (your private internet connection), see Share on local network (see page 826).
- To send by email, see the article Export a Heredis genealogy from Heredis iOS. (see page 927)

File in GEDCOM format

Useful for transmitting files from your tablet or smartphone to be opened with other software.
Export the file in GEDCOM format from Heredis iOS, see the article Export a GEDCOM from Heredis iOS (see page 932).
Send the file by e-mail to the recipient. To do this, open your mailbox (Gmail, Hotmail, Apple, etc.) from your iOS device.
Write your e-mail, include the recipient’s e-mail address and attach the .ged file.

Send your family tree 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.

If you have internet access on both devices, see the article Share a Heredis file to another device (computer, tablet, smartphone) (see page 835).

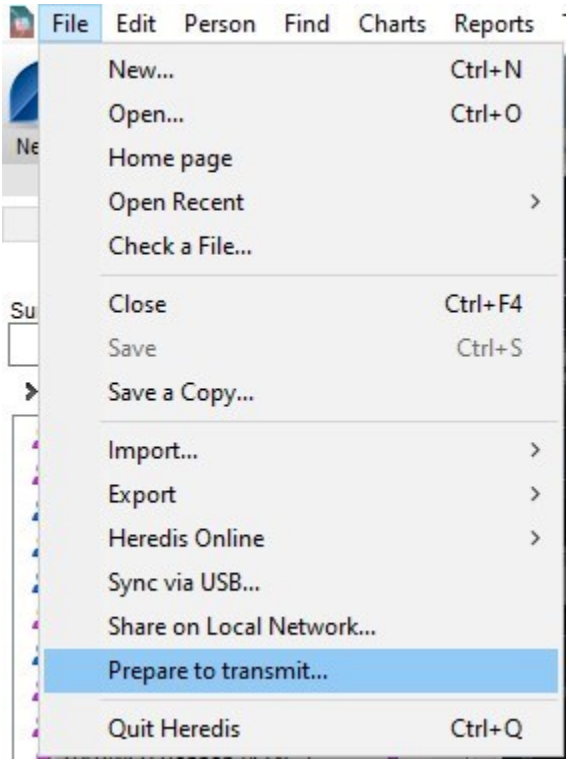
If you don't have internet access, follow these steps.

Share with an iOS device via iTunes

(**Windows**) To transfer your genealogy to a mobile iOS, prepare the file to be sent via iTunes. Open Heredis and the file to share. Click on **File** menu **> Prepare to transmit**. The follow the steps bellow.

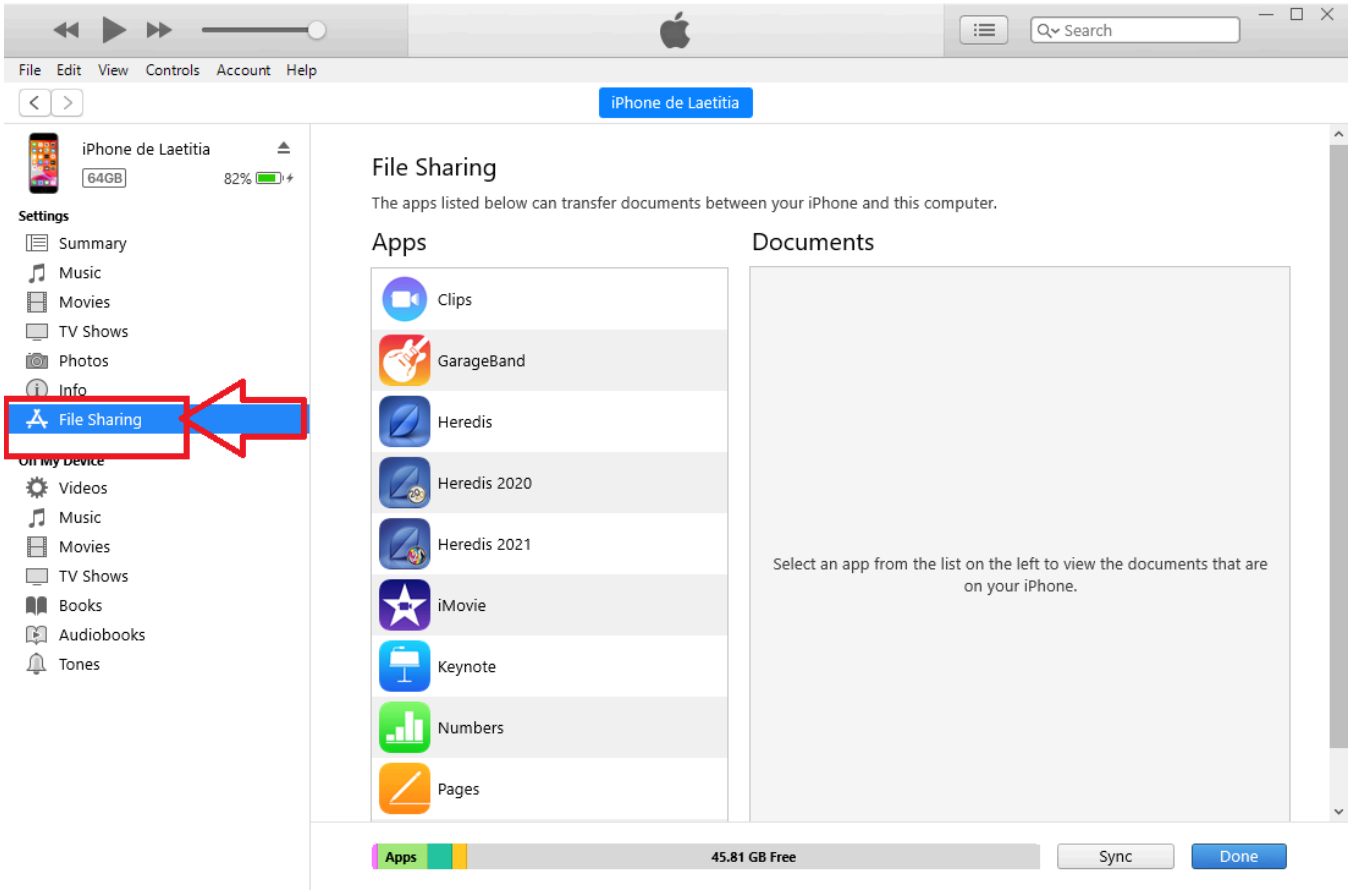
Heredis creates a compressed file, recognizable by both iTunes and on your mobile iOS. This file contains all your data and all your media.

- Click **Yes** to create the file. It has the same name as the original file with an extension *.hmwz.*
- Heredis opens Windows Explorer to show you where the file is for transfer to iTunes.

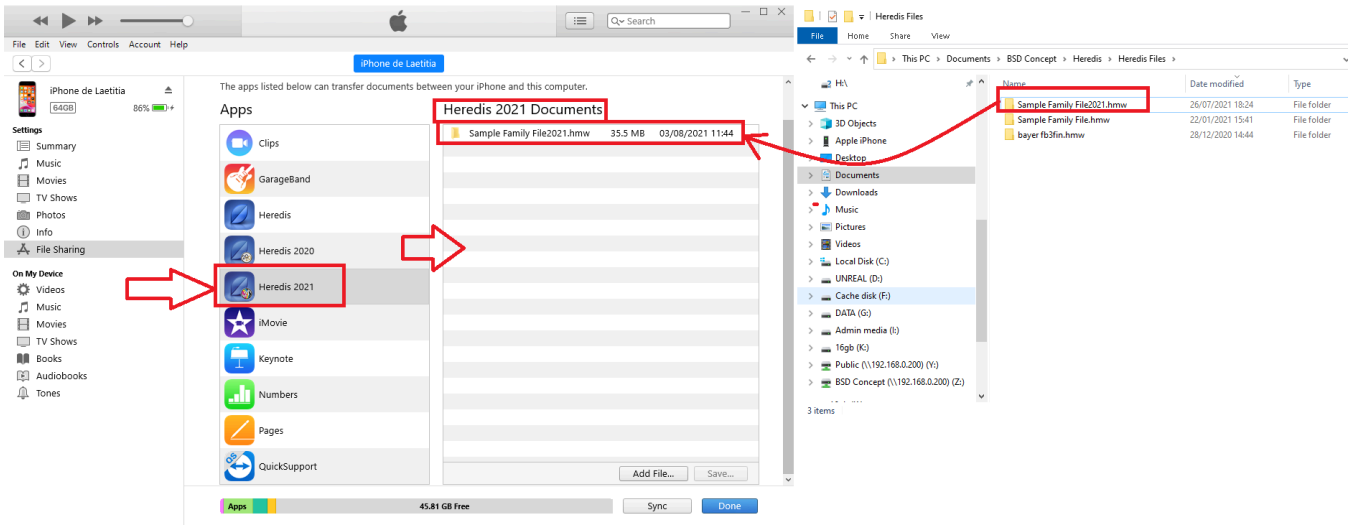


(**Mac**) No need to prepare the file, it is already compatible iOS. If you have a Mac OS version greater than 10.14 (Mojave), you do not have to go through iTunes. Simply plug your device into your computer.

- Launch iTunes.
- Connect your iPad, your iPhone or iPod touch and select it in iTunes.
- Click the **Apps** tab (at the top of the screen), then scroll down the list of applications until you reach **File Sharing**.



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



- 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 *.hmwz* or .hmw file modified on the **Apps – File Sharing** tab.
- To extract it from iTunes, click **Save to…** and save the genealogy file recovered to the location of your choice.

Info • Remember to select the same folder if you want to replace the existing genealogy file on your Mac or Windows.

Share with an Android device

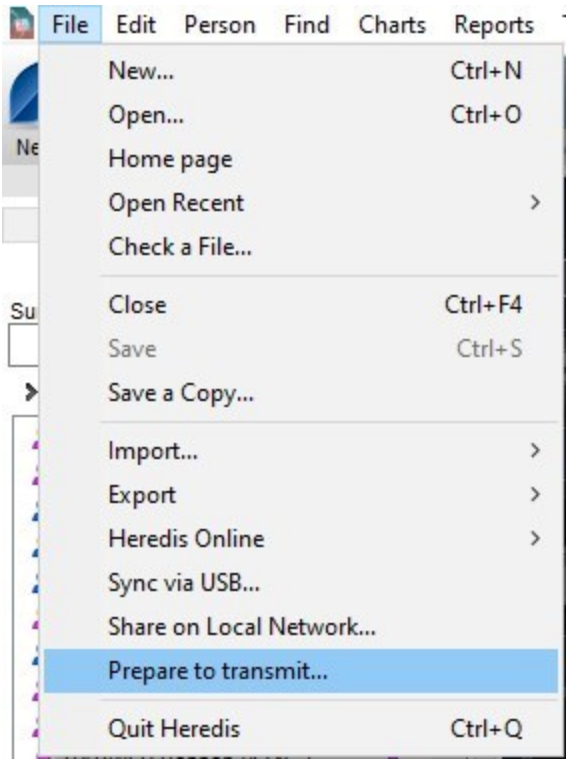
Before you can copy your family tree from the Heredis format onto an Android device, you must prepare this family tree.

Prepare your family tree for Android

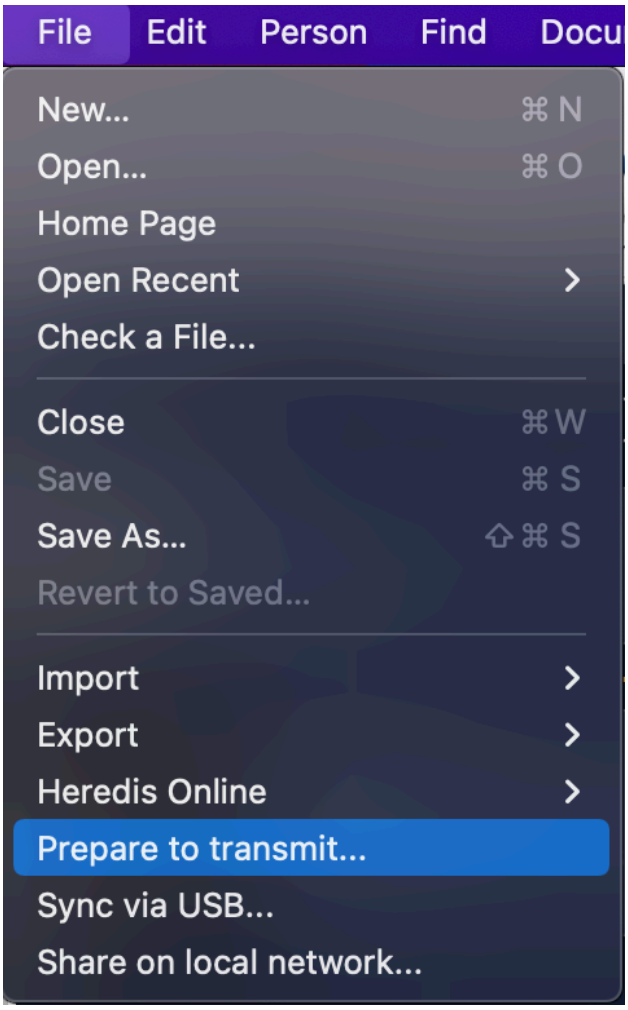
From your computer:

- Launch Heredis
- Open your family tree.
- Select the menu **File > Prepare to transmit…**

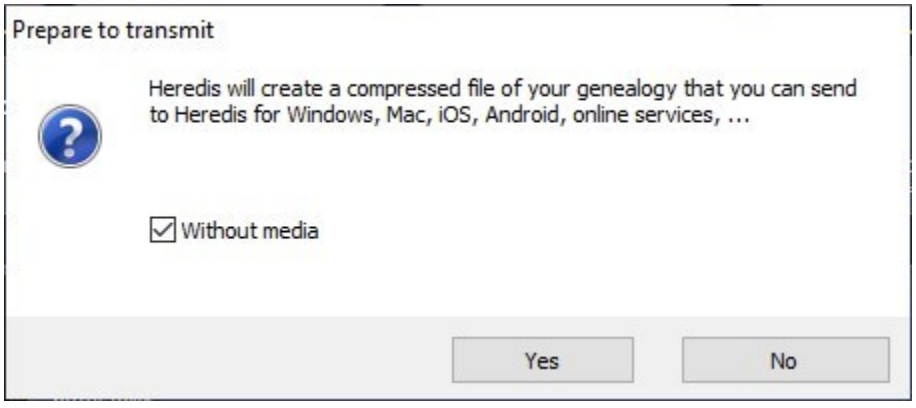
(Windows) Prepare to transmit



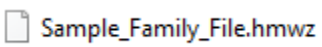
(Mac) Prepare to transmit



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 *.hmwz*
- Heredis opens (**Windows**) Windows Explorer; (**Mac**) Finder, showing you where to find the compressed file.
- Righ-click on the .hmwz file and choose **Copy**.



Connecting the device via USB

You can send .hmwz files from your computer to your mobile device using the mobile device's USB cable.

Connect your mobile device to your computer using the USB cable. On your computer, open File Explorer and navigate to the **Download** folder on your mobile device.

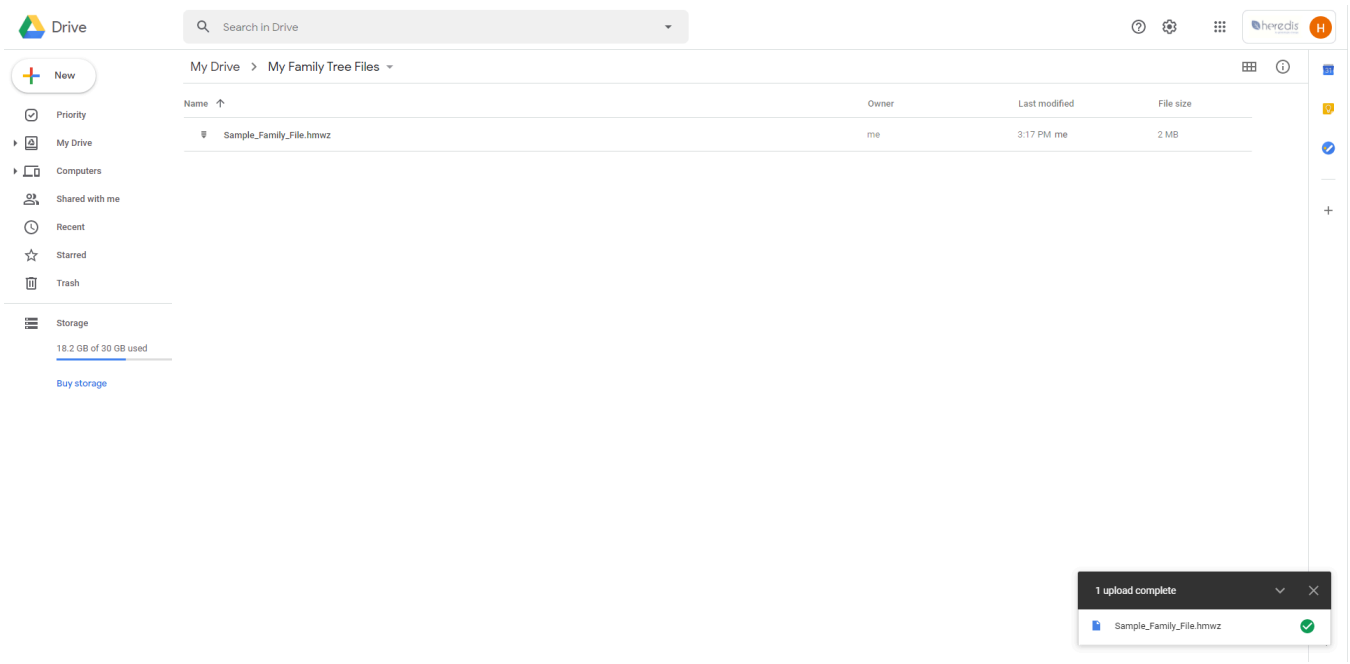
Once in the **Download** folder, right-click and select **Paste**.

How to use this method depends on your phone. Consult your mobile device's technical support if the above method does not work. If your mobile device allows the use of mobile data (4G, 3G etc.), then you can use a cloud (see below).

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 *.hmwz* extension) from the (**Windows**) 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.

Heredis Online

What is Heredis Online?

Heredis Online gathers all data published by Heredis users. It can be consulted freely, anywhere in the world, from an internet browser.

What is Heredis Online for?

With Heredis Online publish your genealogy easily and free of charge to share with family members or other genealogists around the world.

For more details, see also: Publishing with Heredis Online (see page 854), Manage your Heredis Online account (see page 845), Browse a Heredis Online tree (see page 870), Search on Heredis Online (see page 883), Change theme or language in Heredis Online (see page 851).

Requirements to view the Heredis Online website

Heredis Online is optimized for Chrome/Firefox/Edge/Safari browsers => current version
Heredis Online is optimized for Heredis' software from Heredis 2022 version.

If you have display problems, check that you have a compatible browser and make sure it is up-to-date.

Manage or create your Heredis Online account

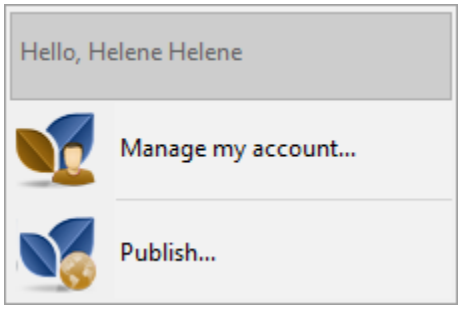
Heredis Online is a free online service that allows you to search through the millions of online data of Heredis Online from your software (from the Search Wizard (see page 357)).

It also allows you to publish your genealogy on Heredis Online's servers for free.

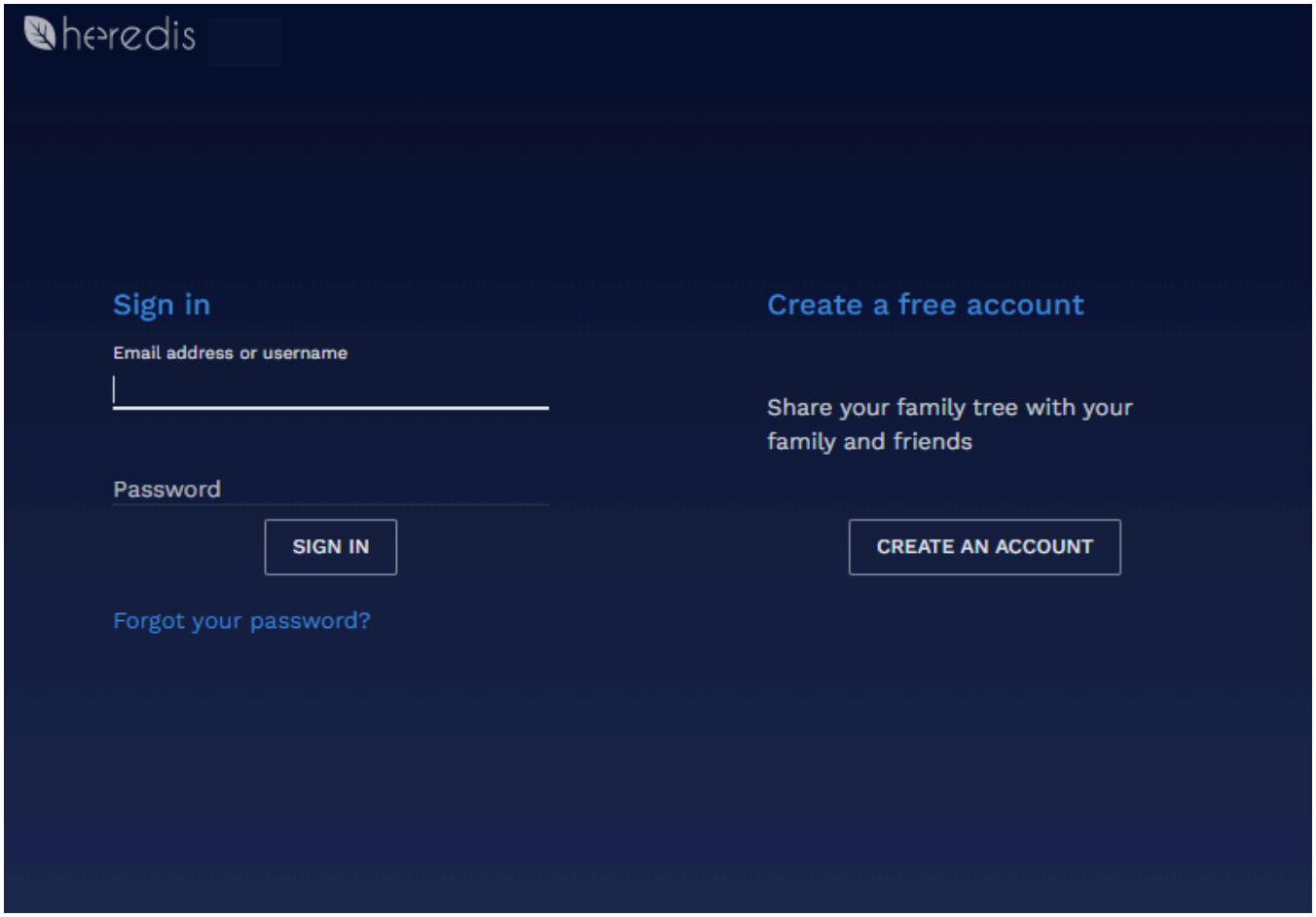
From the home page of the software, go directly to your Heredis Online account. You can then manage your account, set up the confidentiality of your online tree, access it …

Once logged into your account (this is the same one that allowed you to buy Heredis), you can manage it from your Heredis software. Once your file, open on Heredis, you'll be able to publish.

Heredis Online



Heredis Online Homepage



Create a Heredis Online account

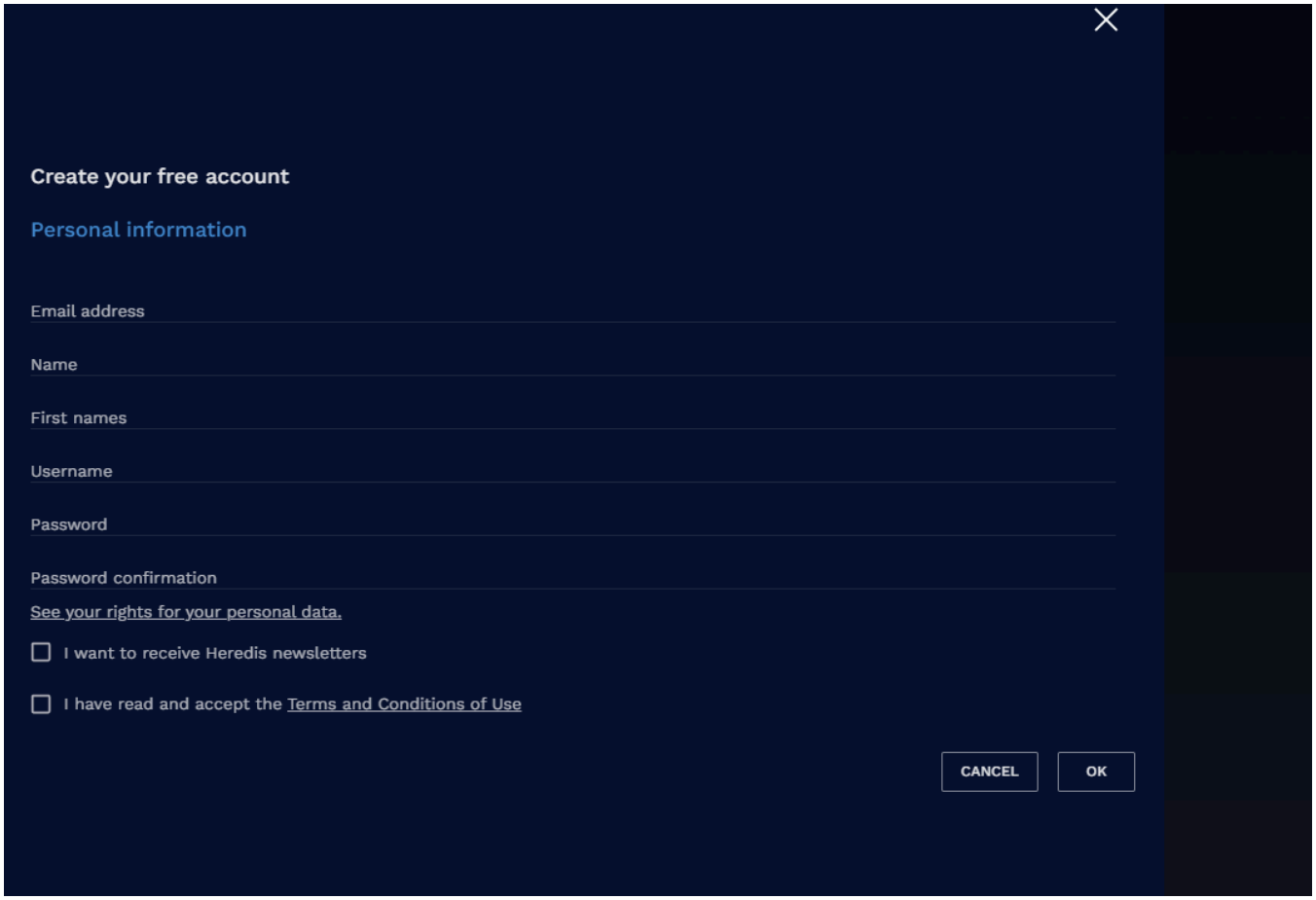
Have you bought a Heredis product?

If you have the Heredis software on Heredis'Shop, you must have an account.
The ID corresponds to the email address you bought Heredis with. If you forgot the password, click on **Forgot your password?** You will receive an email to reset it. This reset email is valid only once. Don't try to click more than once on the reset button. Remember to check your spam box if you don't see it in the inbox.

You have a trial version limited to 50 persons?

In this case, you do not have an account, if you want to publish, you must create one before publishing your genealogy.

1. Choose the **File** menu > **Heredis Online > Manage my account** or click the Heredis Online button on the toolbar.
2. Click the **Create Account** button.
3. Enter your email address, username, password. Fill in the credentials and consult the conditions of use of the Heredis Online site then check the box to validate the general conditions of use (you can read them by clicking on the link). Check the box "I want to receive Heredis newsletters" if you wish to receive our newsletters.



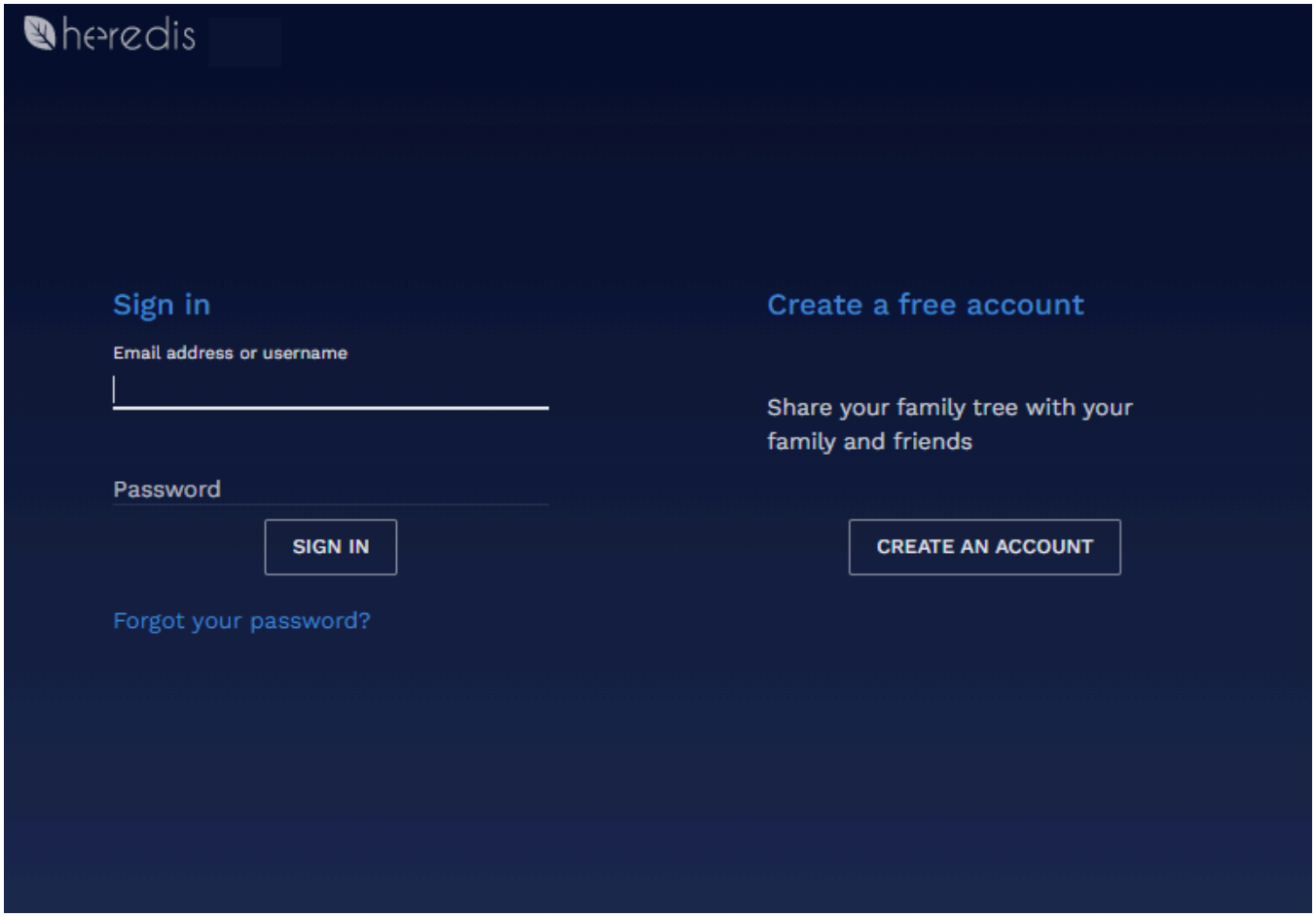
4. Click **OK**.
5. You must validate your email address. An email is sent to you to verify your email address. Check your emails (remember to check in spam or junk mail if necessary). Click the button inside the email to validate your address. Your account is created! You can now publish.
6. Proceed as before by clicking on Heredis Online in the Heredis software and log in.

Then, once in a Heredis file, click the **Publish** button.

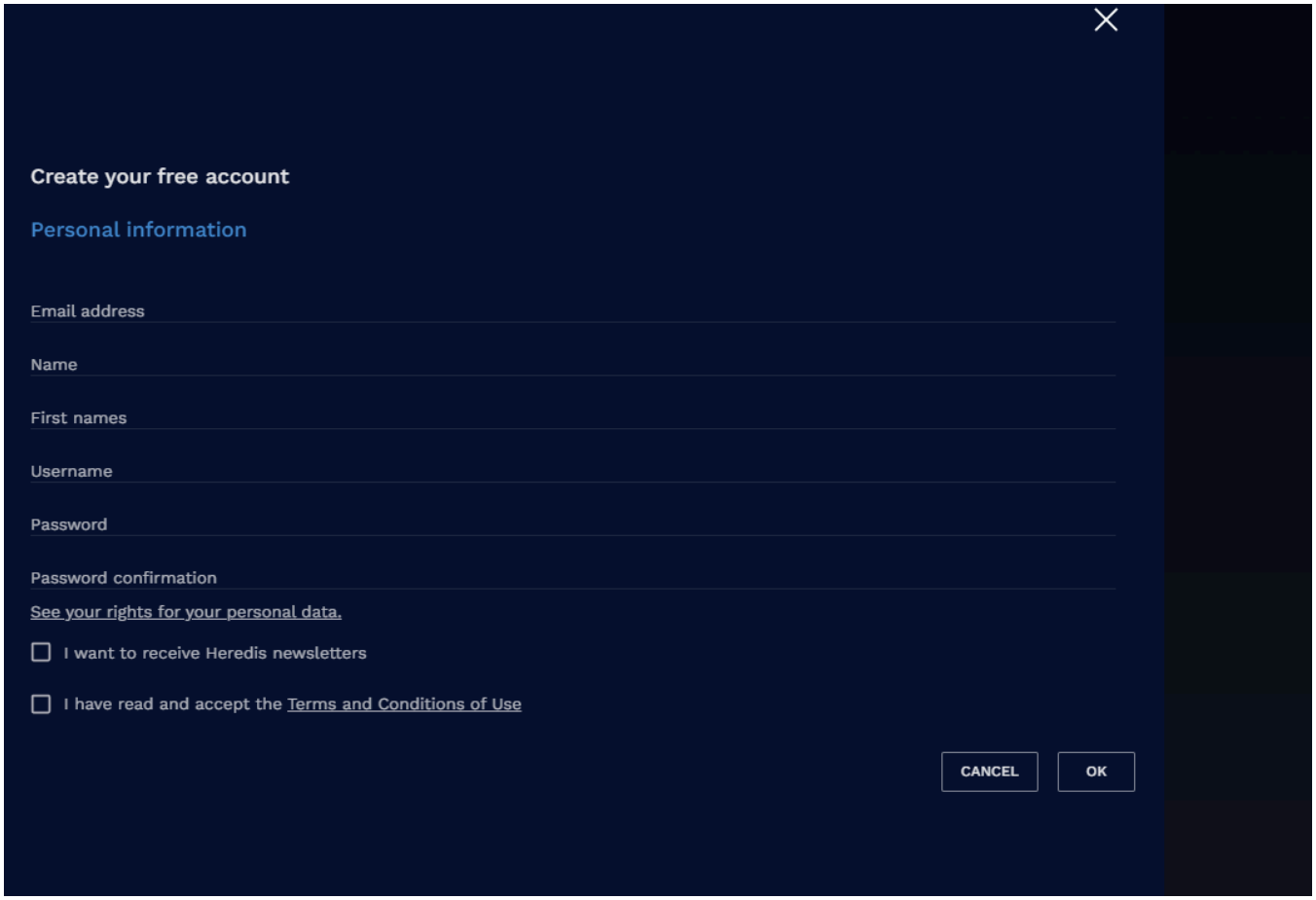
<u>You want to view a publication but don't have Heredis products?</u>

If your family members want to view your online tree, they need to create an account. It is free and mandatory for a security issue.

1. Go to online.heredis.com/en
2. Click **Register/Log In**
3. Click **Create Account.**



4. Enter your email address, username, password. Fill in the credentials and consult the conditions of use of the Heredis Online site then check the box to validate the general conditions of use (you can read them by clicking on the link). Check the box “I want to receive Heredis newsletters” if you wish to receive our newsletters.

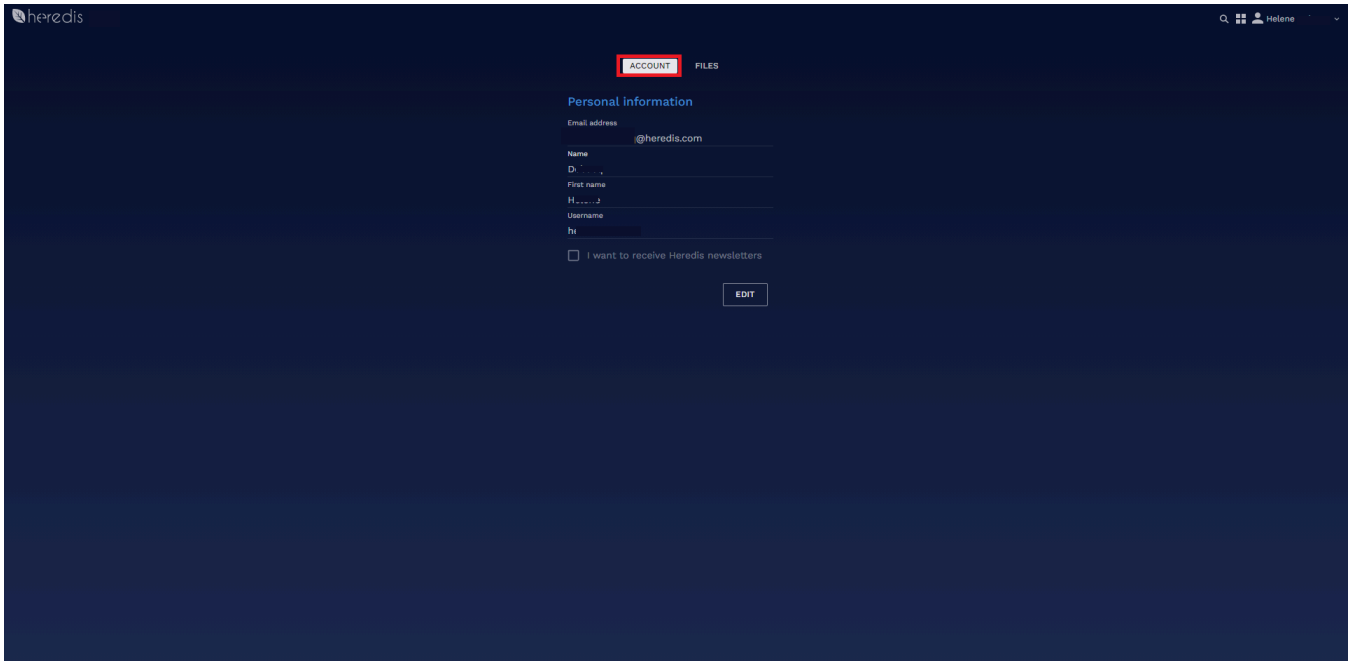


5. Click **OK**. You must validate your email address. An email is sent to you to verify your email address. Check your emails (remember to check in spam or junk mail if necessary). Click the button to validate your address. Your account is created!
6. Go back to the online tree you want to view and log in.

Manage account information

From the Heredis software:

- Click the Heredis Online button.
- Identify yourself by filling in your email address and password.
- Click the **Account** tab to access the account information.



The account management window allows you to change your login information, email address, name, first name, username. It also allows you to subscribe or unsubscribe from Heredis newsletters.

- Click the **Edit** buttons to be able to edit your personal data.

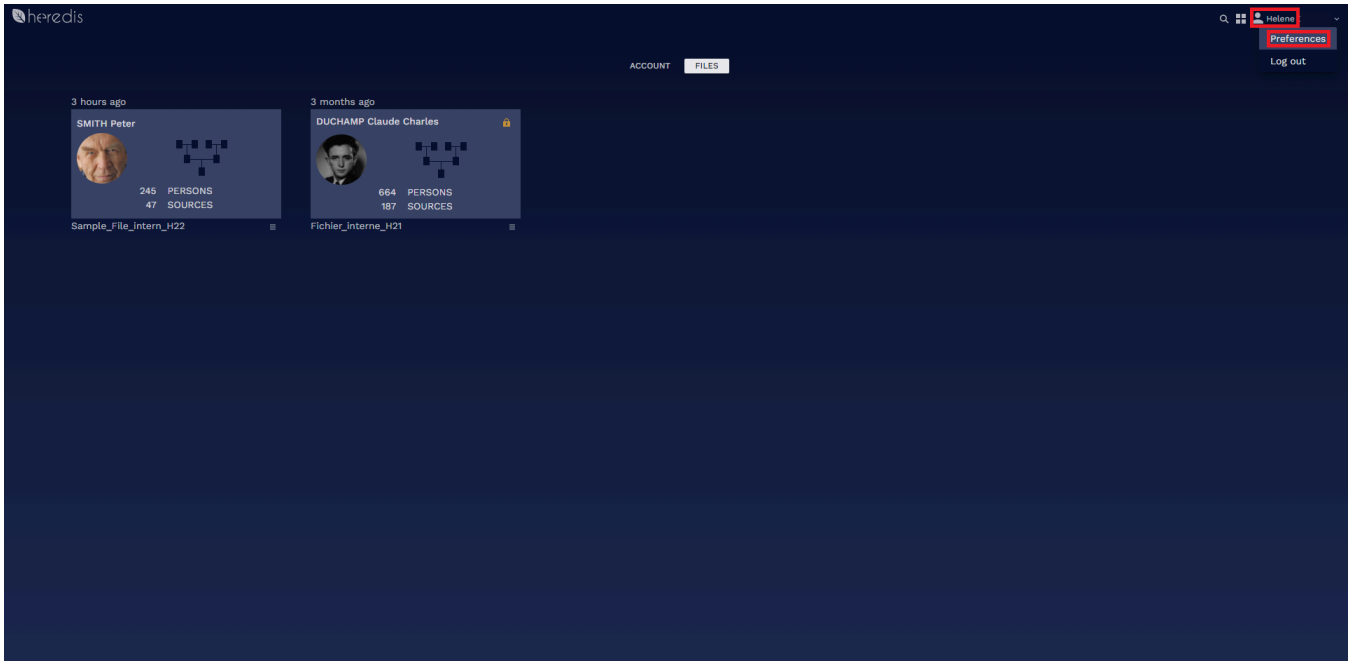
Change theme or language in Heredis Online

Change theme

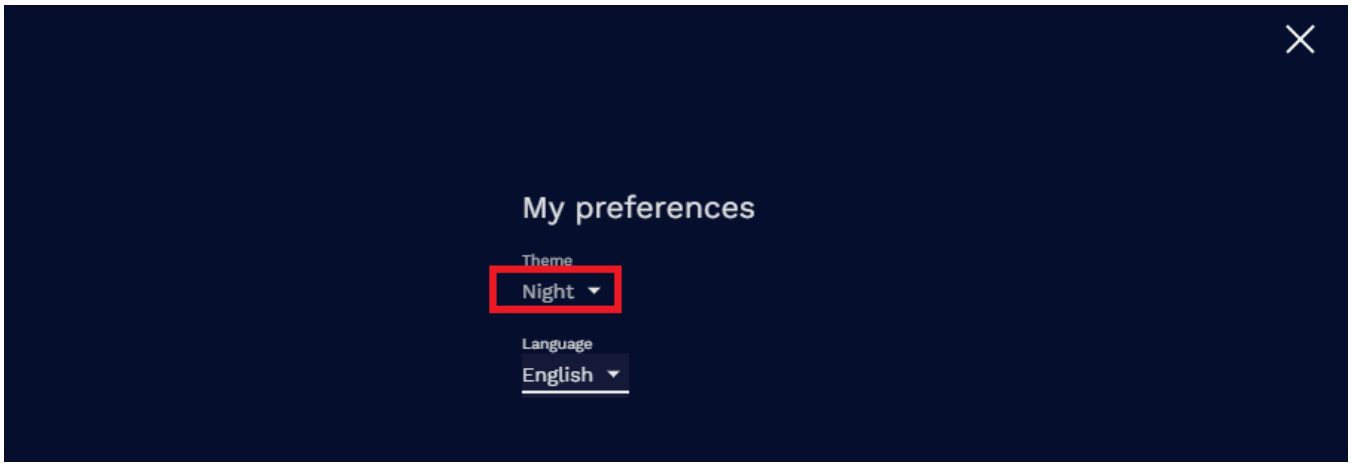
White and bright colors are aggressive to the eye, your eyes force and get tired faster. That's why with the new Heredis Online we have provided a night mode by default.

However, this mode may not be suitable for you either. So you have the option to change and switch to day mode.

From the online.heredis.com/en site or from the Heredis software, after clicking on the **Heredis Online** button or or and **Manage my account** from the toolbar, log in to your Heredis account.
Once logged in, click on your name at the top right. Choose **Preferences** from the drop-down menu.

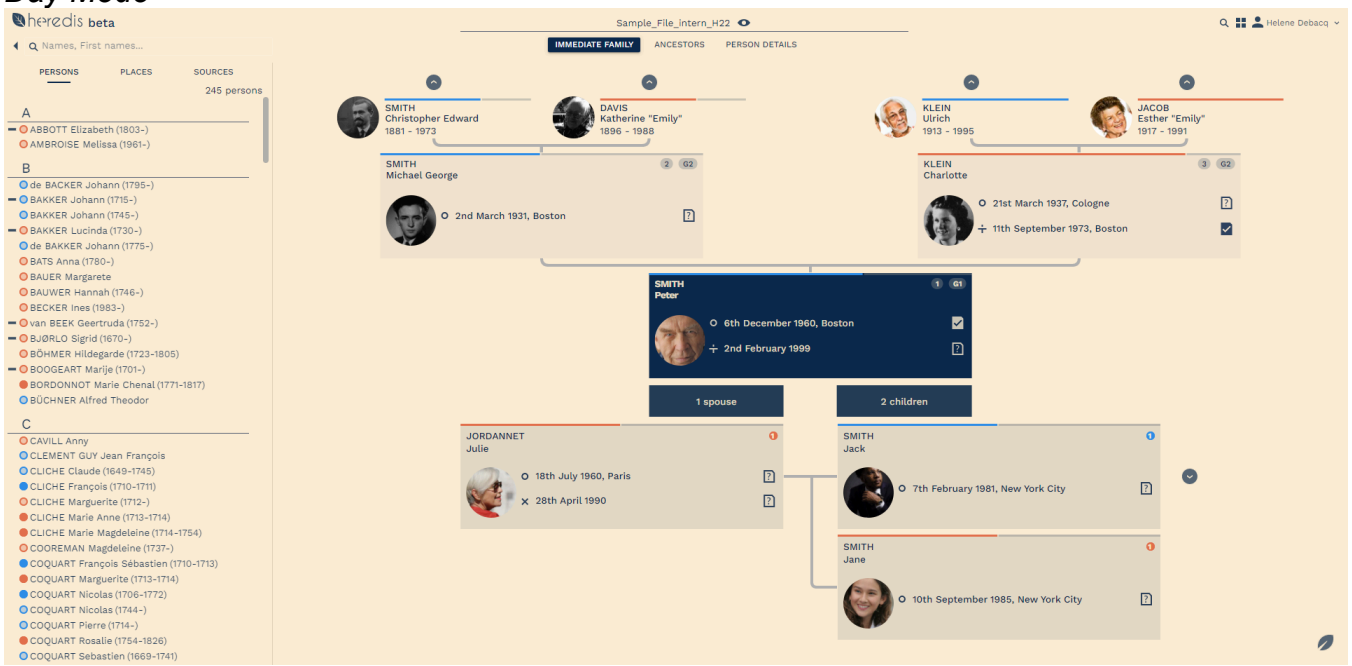


Click on the theme's drop-down menu and choose from the proposed themes.



Close the window by clicking on the cross.

Day Mode

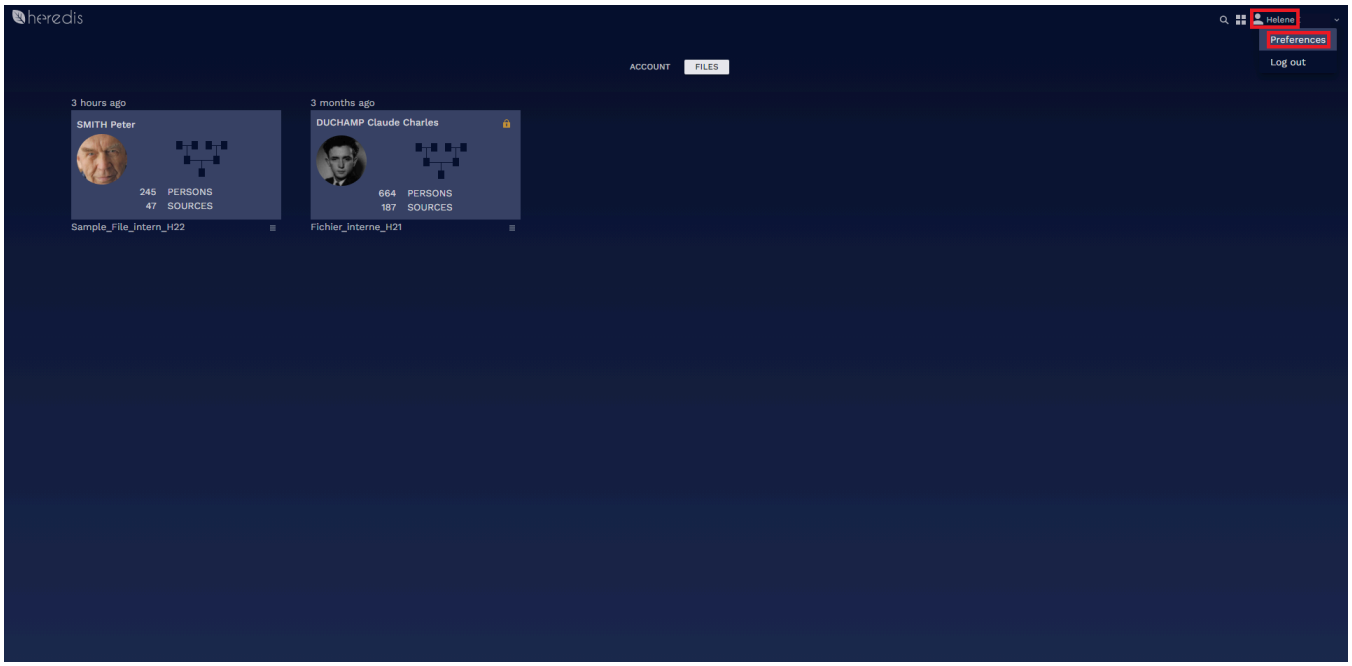


Change language

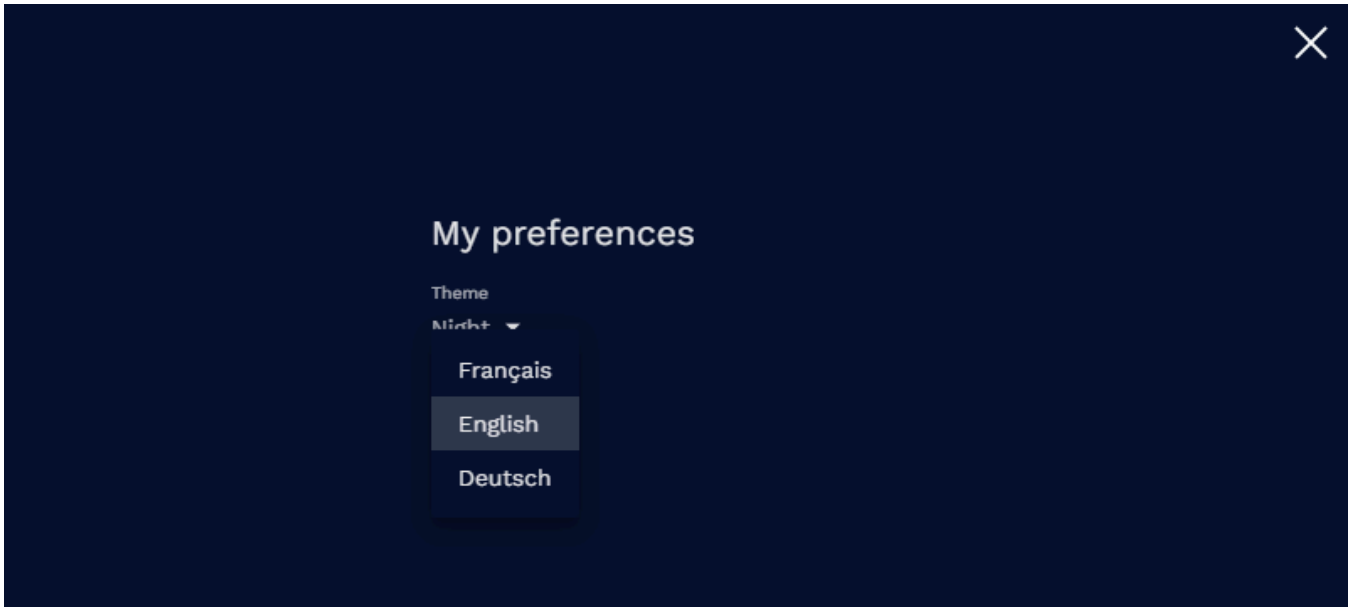
Prefer to see your site in French or German? This setting can be done by a member of your family directly in their browser. You don’t need to change your online tree for this. Heredis Online recognizes the language of the account. If you have an English account, Heredis Online trees will appear in English. If a member of your family has a German or French account, then Heredis Online will be displayed in German or French, even if the online tree was made in English.

From the online.heredis.com/en site or from the Heredis software, after clicking on the **Heredis Online** or or and **Manage my account** button from the toolbar, log in to your Heredis account. Once logged in, click on your name at the top right. Choose

Preferences from the drop-down menu.



Click the language drop-down menu. Choose the language that suits you from the proposals.



The Heredis software only exists in French, English and German, which is why the other languages are not available.

Close the window by clicking on the cross.

Publish with Heredis Online

Publishing on Heredis Online allows you to create a website highlighting your searches. You can share it with all genealogists or only with your family members by adding a password.

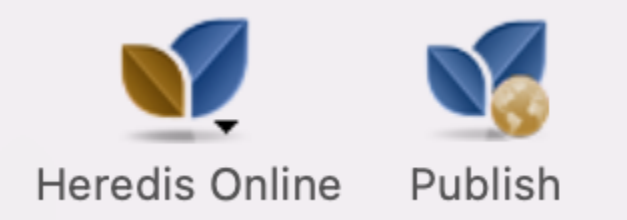
Publish on Heredis Online

Open your Heredis software and choose the genealogy you want to publish.
Click the **Heredis Online** button in the toolbar of Heredis (optimized for Heredis 2021 and above).

If you are not logged in, the icon is gray and blue .

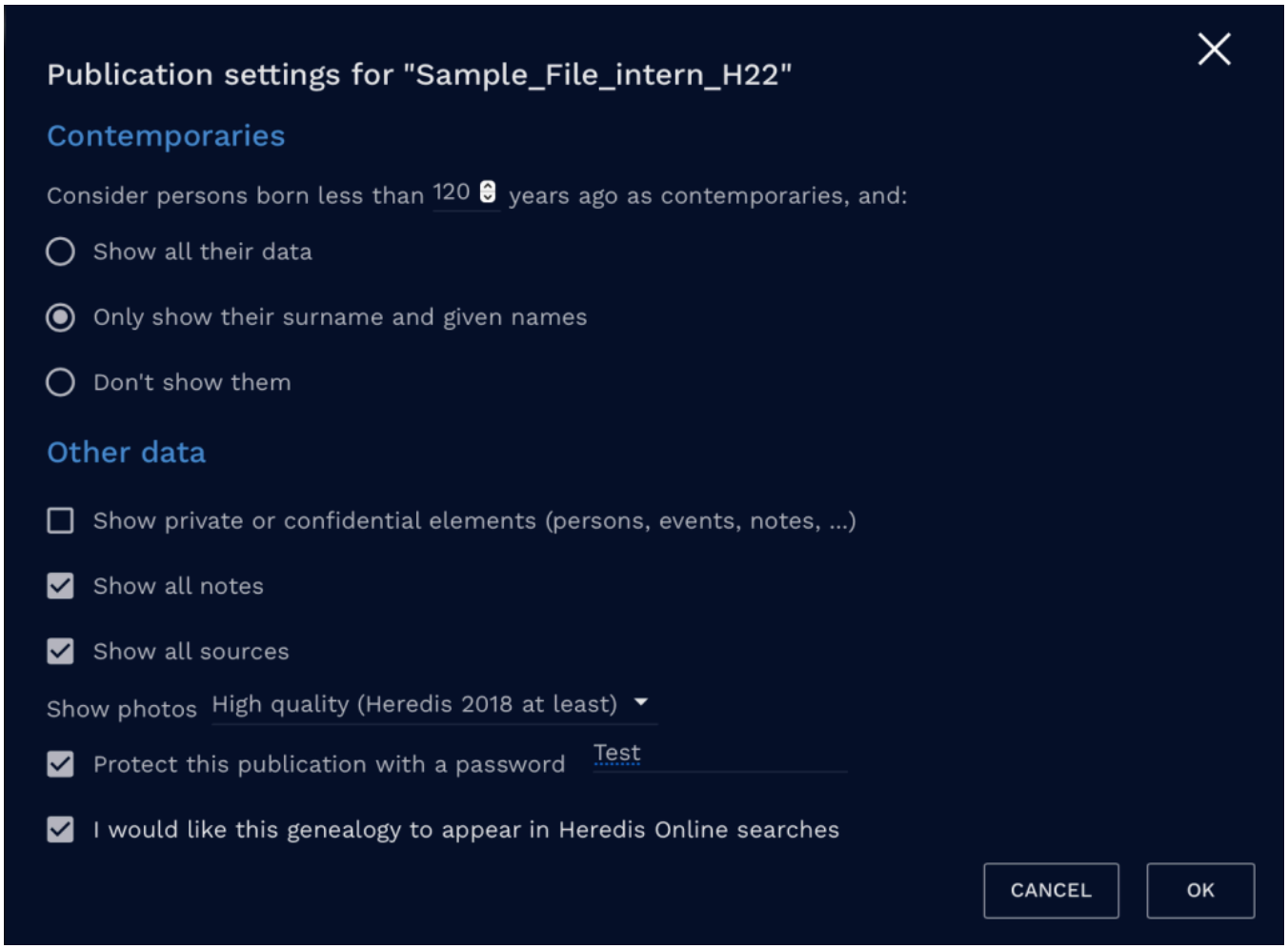
If you are logged in, the icon is blue and gold .

Log in to your Heredis account (this is the same one that allowed you to purchase the software) by clicking on the Heredis Online icon.



Click **Publish** to publish your file to Heredis Online.

Set up the **Privacy** options.



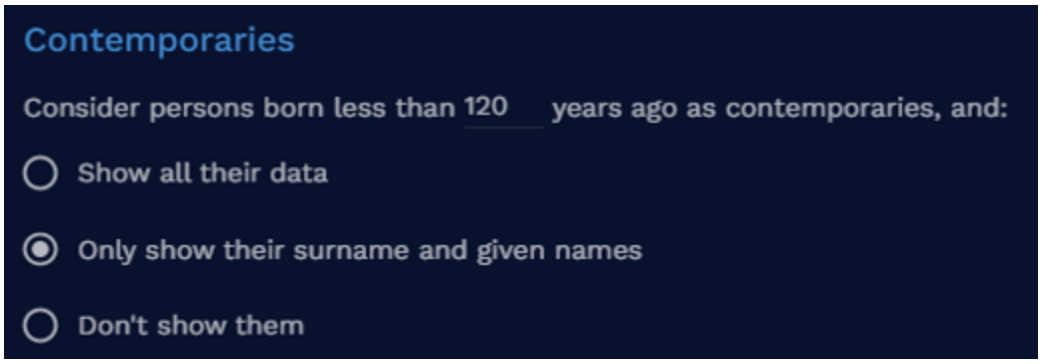
Reminder: The legislation prohibits the publication of personal data less than 120 years in most countries, somethimes less.

Set up contemporaries

In the **Contemporaries** section, indicate to **Consider persons born less than 120 years ago** as contemporaries.

You can choose to show all or part of the data or don’t show them.
If your publication is not privatized, we advise you not to show them.

Important! This setting is valid on persons with a birthdate. If your close cousins do not have birthdates, their data may be displayed.

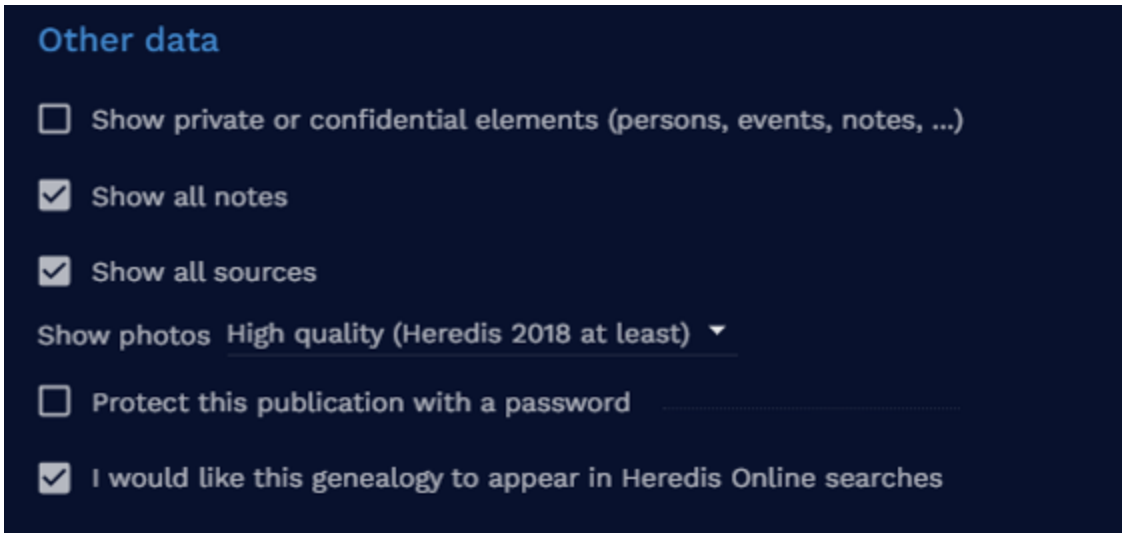


In this case, use the "Confidential" tag in the Heredis **Personal Data** to make the persons concerned confidential. If you have a lot to label as confidential, use Smart Search. Check out Smart Search (see page 371) article for more details.

Set up other data

In the **Other data** section, choose

- **Show private or confidential elements**: everywhere in Heredis, you have ticked "Private" boxes, for an event, a media, a source, a note…
  If you check the box "Show private or confidential elements", this data will be public and in full view.
  If you uncheck it, all data that has the "Private" box checked, or all persons that have the Confidential tag checked, will be hidden. No one will see this data except you.
- **Show all notes**: if the box is checked, all your notes (except the private ones if you unchecked the previous category) will be published and visible to all.
- **Show all sources**: If the box is checked, all your sources (except the private ones if you have unchecked the private or confidential items category) will be published and visible to all. The sources allow you to validate your work, they allow other genealogists to find the original document.
- Show **photos:** choose between **Do not show**, **Thumbnail size**, or **High quality (from Heredis 2018).**
  If your photos have the Private box checked in Heredis and you have unchecked the Private or Confidential elements category, the photos will not appear.



Protect your online tree with a password. So you can display all the information on your online tree. Only people with the password will be able to access your online tree. It's up to you to regulate who accesses or not your online tree.

Select the checkbox and enter the password in the empty field that appears.

The option "I would like this genealogy to appear in Heredis Online searches" allows you to really privatize your site. Only people with your online tree URL address and password will be able to access it. If the box is checked, other genealogists will be able to know that you have information about a person they are looking for, but if there is a password to your online tree, they will not be able to access it without having the password.

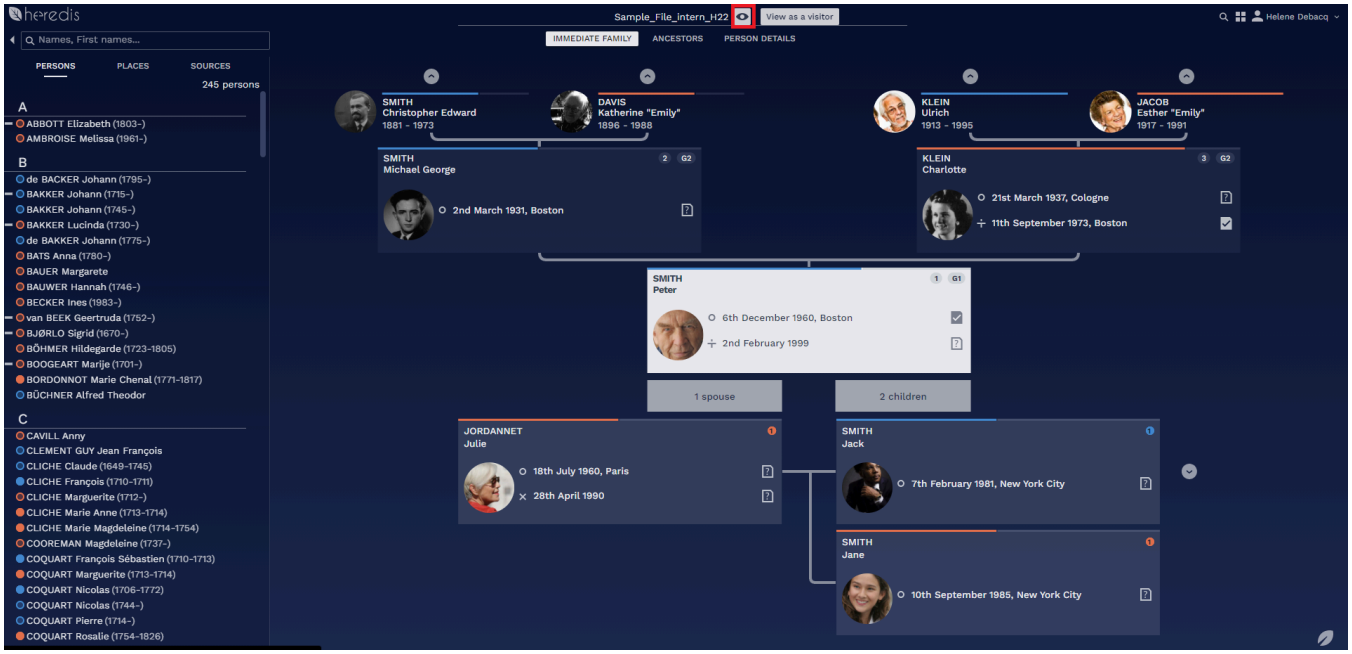
Publication of your Online Tree

Once everything is set up, click **OK.**

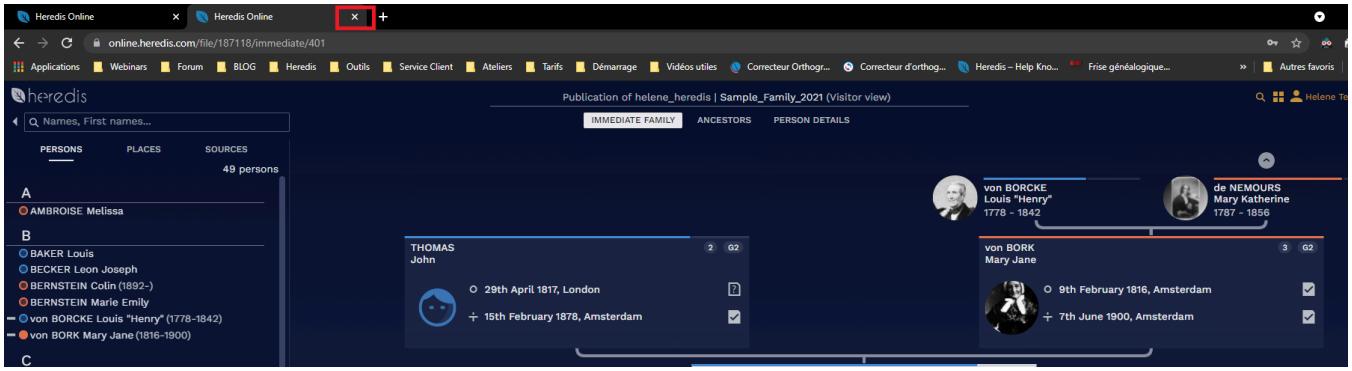
The progress wheel indicates the pace of publication of your online tree. When the transfer is complete, click the file to open it. Your genealogy website is online!

Heredis Online creates for you a free hosted website to present your genealogy. In a few clicks you will get a pleasant site to consult by the whole family. **You remain the owner of your data.** You can therefore manage your Heredis Online account directly in your software or in your Internet browser. Change the view of your online genealogy by clicking the burger button below the file, delete it, or set privacy differently.

You can make sure the confidentiality of your online tree is well set by using the Visitor Mode.

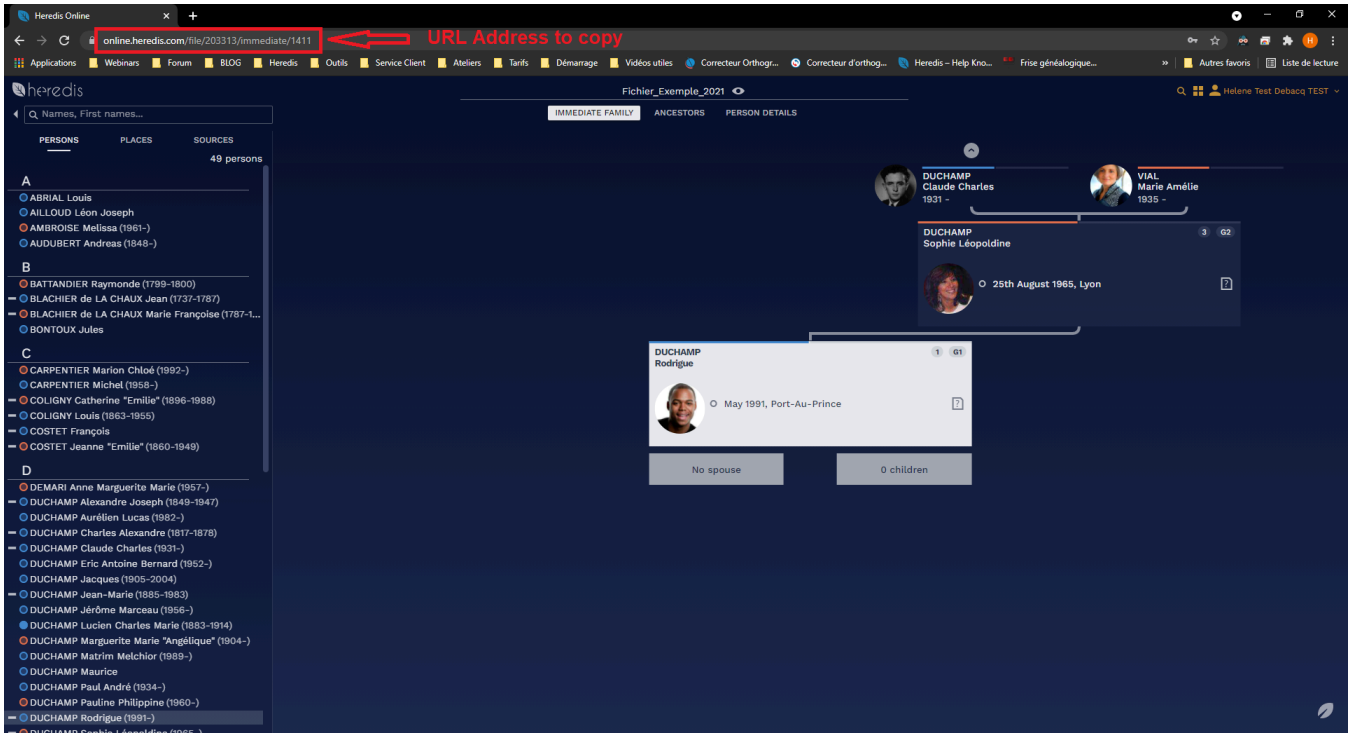


Visitor mode opens a new tab on your browser. Close this tab to get back to your online family tree owner view. The procedure to close a tab might vary from a browser to another.



Share your online family tree

Share your online family tree with family members by sending them the URL address of your personal website.
For that, select the URL address and make a right click on your mouse and choose copy to copy the address.



Open your mail box. Create a new message and make a right click with the mouse to paste the URL address.
Don’t forget to give your family members the password if you privatized your online family tree.

Members of your family will have to create a free Heredis account in order to consult your online family tree. If they have one, they’ll have to connect to their account. See Manage your Heredis Online (see page 845) account for all details.

Delete or modify the confidentiality of your family online tree

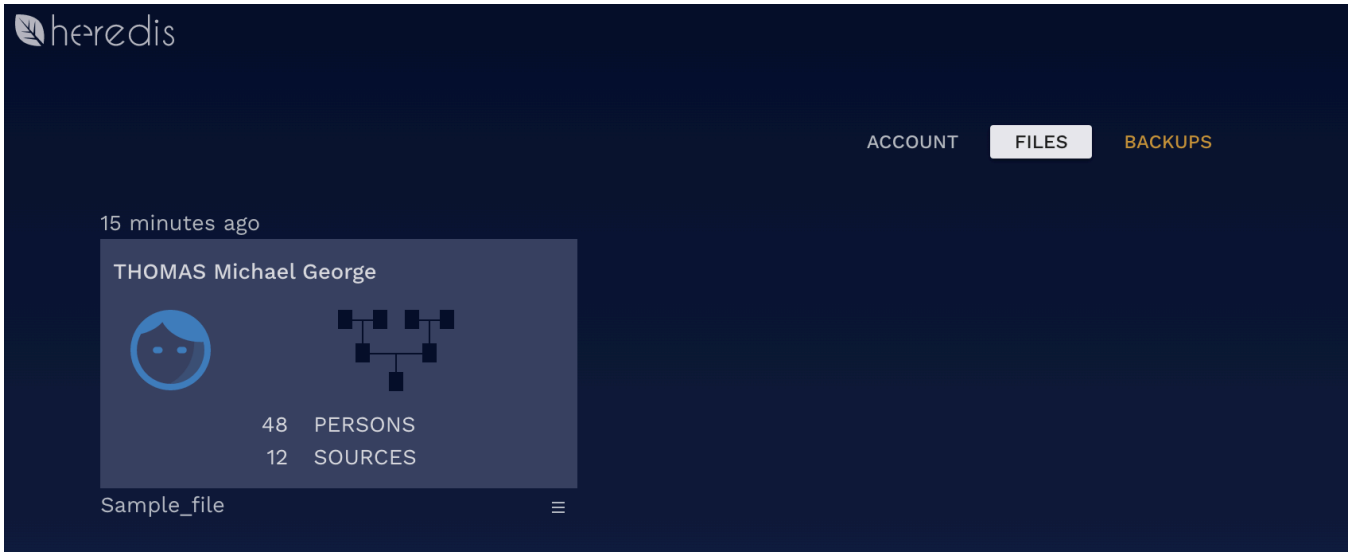
You can delete anytime your online family tree or modify the setting of your online family tree from dashbord by clicking on the burger button.

To learn more, see the articles Heredis Online (see page 844), Manage your Heredis Online account (see page 845), Search on Heredis Online (see page 883), Change theme or language in Heredis Online (see page 851), Browse a Heredis Online tree (see page 870).

How to present your genealogy on Heredis Online?

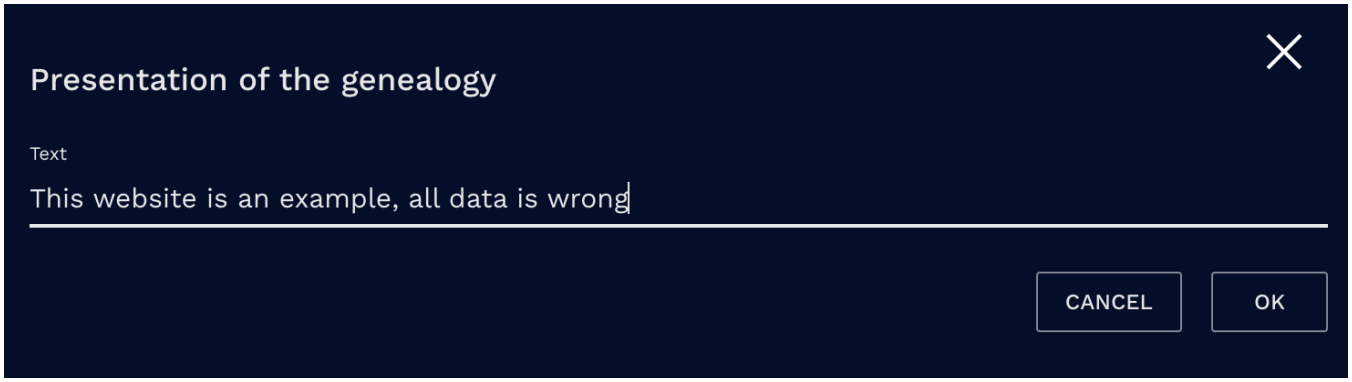
You can add a presentation to a genealogy you have published on Heredis Online.

- Publish your genealogy following the instructions detailed in the article Publish with Heredis Online (see page 854).
- If you have already published it, there is no need to do it again.
- From Heredis, click the **Heredis Online "Manage My account"** button (or in the pulldown menu select **File > Heredis Online > Manage my account**).
- Click on the thumbnail (the rectangle with the genealogy information) of the published file.



- To write a presentation, a description of your genealogy, click on the icon located to the right of the genealogy title.

- In the open window, type in the descriptive text of your choice.



- Click **OK** to finish and to validate the text you have just typed in.

You can modify your presentation text at any time by clicking on the button .

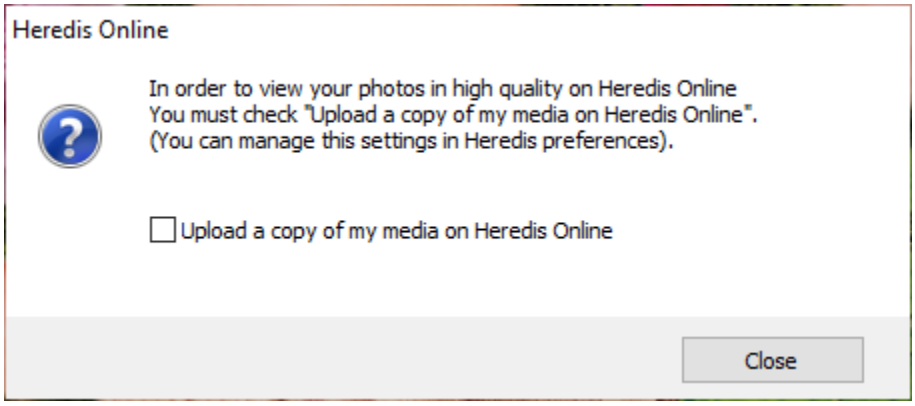
To delete a presentation, edit the text by clicking on the button, delete the text using the delete key on your keyboard, and validate by clicking **OK**.

High quality photos on Heredis Online

When you first log in to your Heredis Online account, from Heredis 2018 or higher, a message informs you that your photos are displayed in high quality in your online trees on Heredis Online. Check the box before validating if you want to view your photos on Heredis Online.

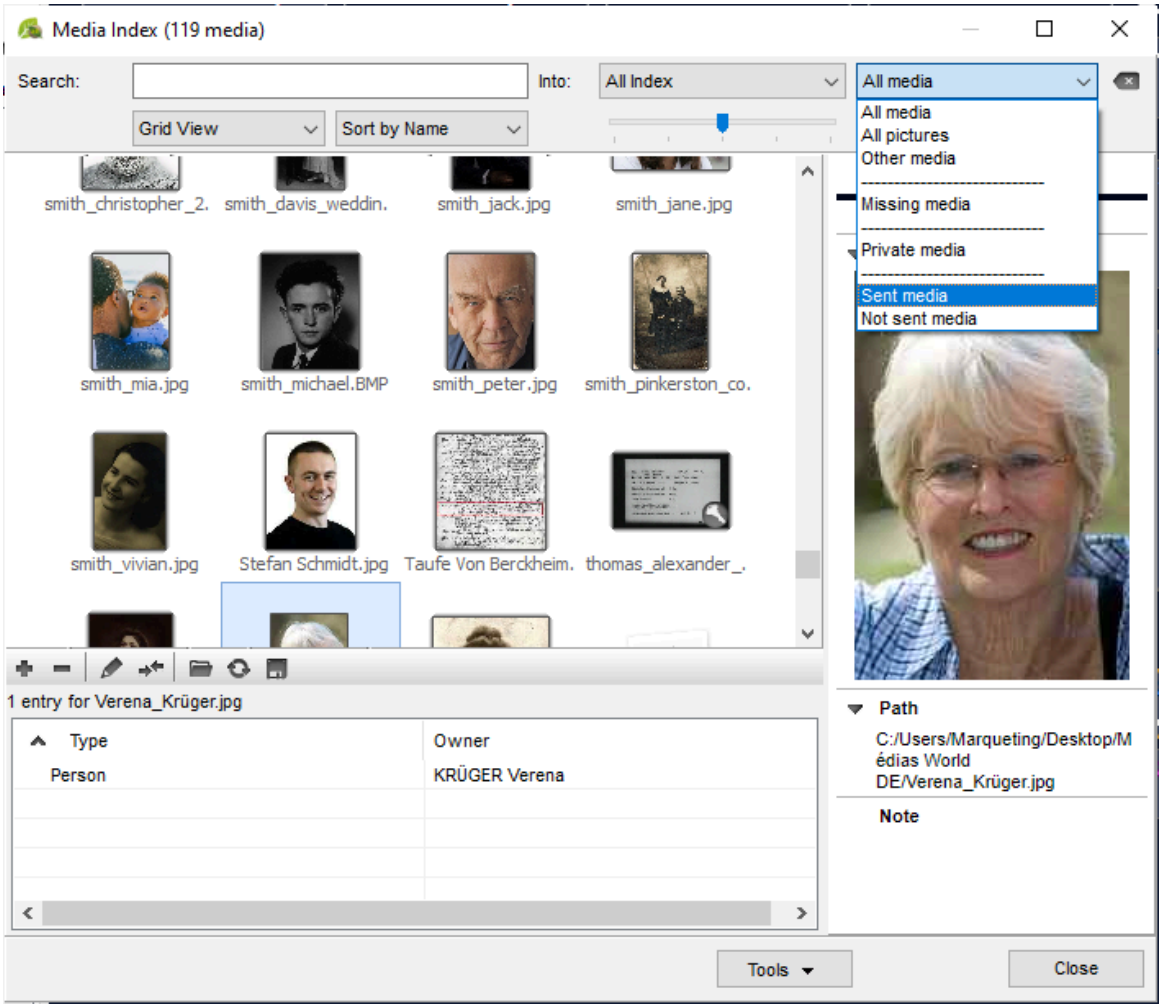
(Mac)

(Windows)

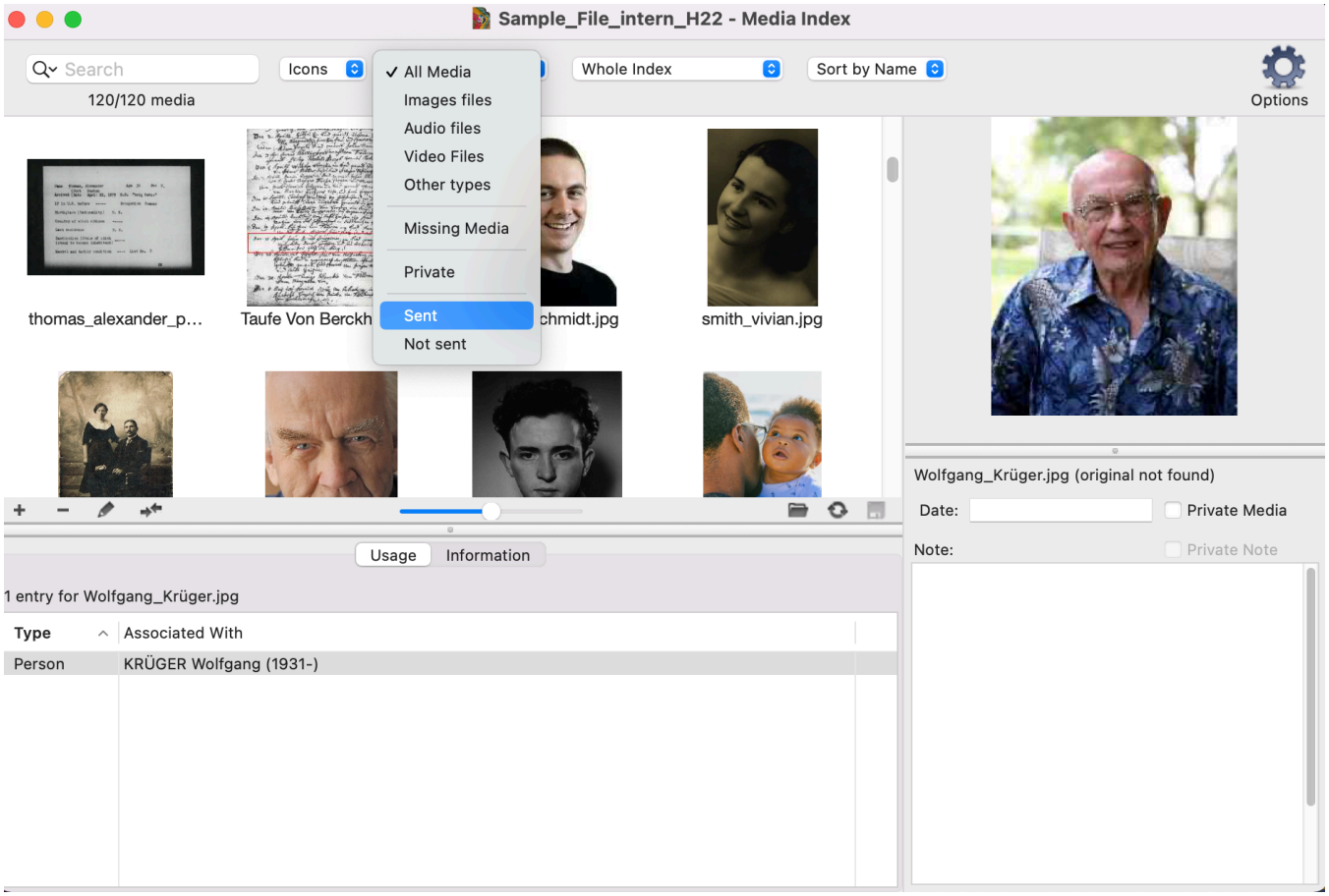


In the Media Index, the **Sent, Not sent,** and media status filters displayed on the **Information** tab on Mac and in the **summary** on Windows, allow you to list media that is online or not.

(Windows) Media Index / Filter Sent or Not sent media



(Mac) Media Index / Filter Sent or Not sent media

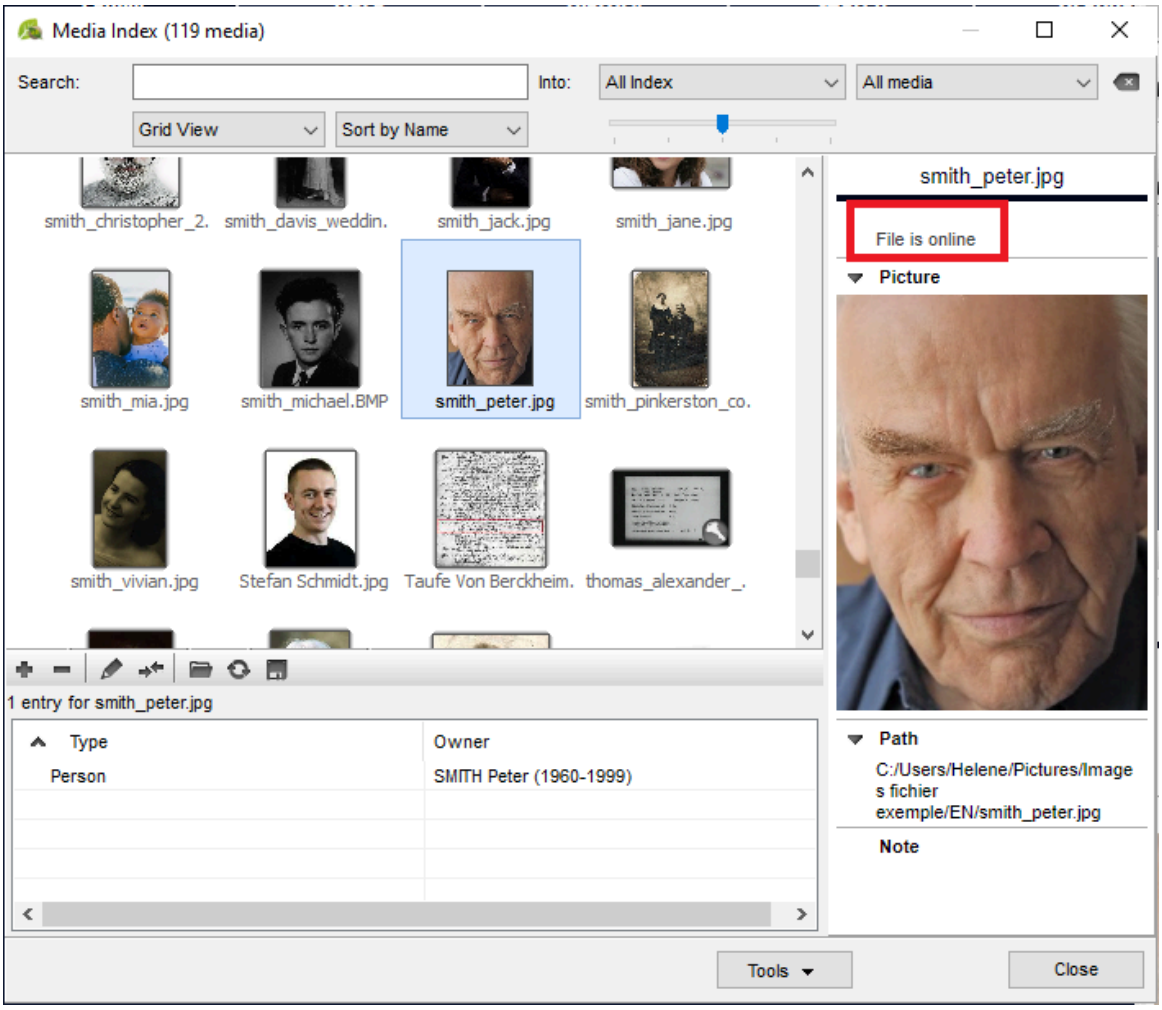


Each media of an online tree on Heredis Online has a status that allows you to clearly identify its status: File is online / File is too large / File error / File waiting to be sent / Unauthorized file format / Missing file / File being sent / Unverified file.

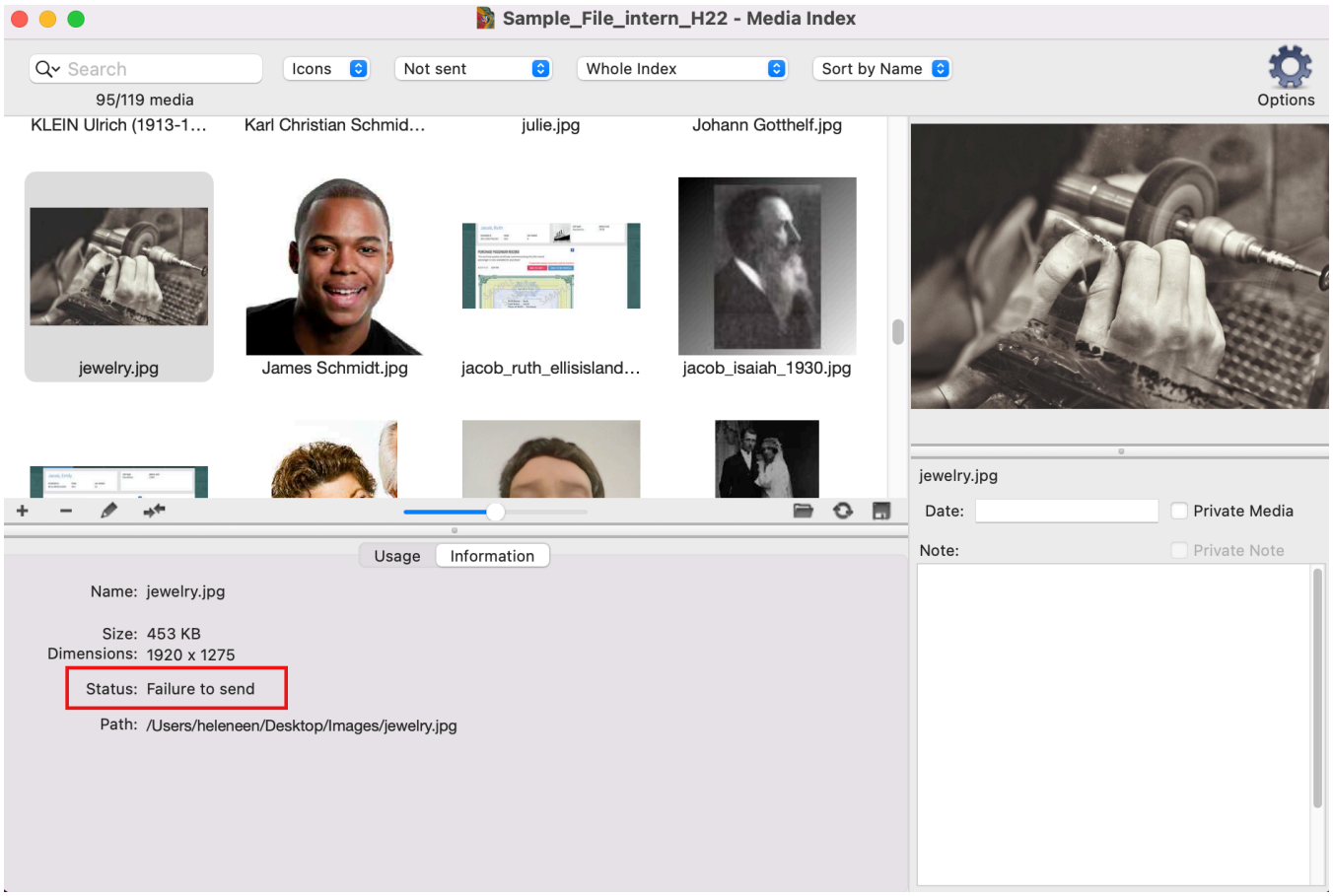
(**Windows**) This status is visible in the media summary that appears in the media index.

(**Mac**) The media status is available in the Media Information tab in the Media Index.

Media Status on Heredis Windows

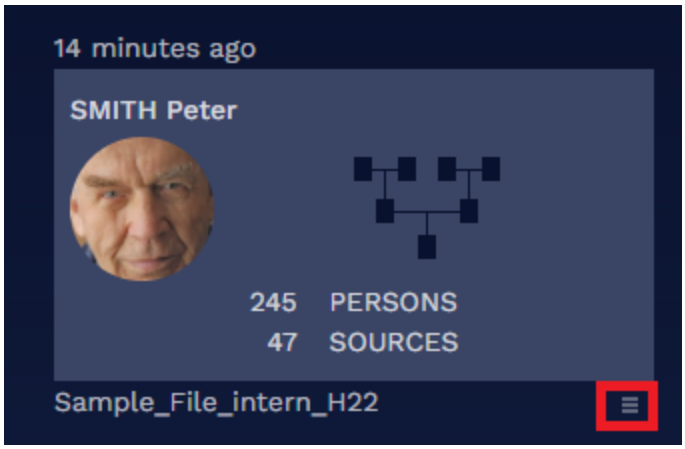


Media Status on Heredis Mac



Notes:
• From the software preferences, **(Windows) Tools** menu **> Preferences > Heredis Preferences > Advanced; (Mac) Heredis 20xx > Preferences > Advanced** you can choose whether or not to send your media.
You can also modulate the sending of these media in relation to your internet connection. By default, the sending is based on an ADSL connection used at 50%. These settings can be modified and customized at any time, however they will only take effect after restarting your software.

• From your Heredis Online account:
You can choose how to display your media in a online tree, click the burger button at the bottom right below the online tree file (see screenshot below) and then click **Configure**, section **View photos**, select the option that suits you.



• From the media index, check if your media has been sent. Filter on **Not sent** media**,** select a media, and view the sending status in the **summary (Windows)** or the **Information** tab **(Mac)** of each media. If you find that the sending process is blocked and some media retains as a status “File in error” or “File not verified”, you can force their return by clicking, from the media index, on (Windows) **Tools**; **(Mac)** the cogwheel and then selecting the option **Reset sending of online media.** You must leave and then restart Heredis for the sending of media to resume.

The following are excluded from the shipment:

- files with the following extensions: “exe”, “app”, “bin”, “zip”, “rar”, “sit”, “cab”, “ace”, “arj”, “lha”, “lzh”, “lzx”, “zoo”, “arc”, “ice”, “ics”, “7z”, “tar”, “gz”, “gzip”, “tgz”, “z”, “bz”, “bz2”, “hqx”, “sit”, “sea”, “uue”, “apk”, “dmg”, “bat”, “sh”, “asp”, “php”, “js”, “jse”, “iso”, “iss”, “msi”, “jar”, “war”, “bak”, “sav”, “old”, “log”, “pif”, “py”, “pyw”, “rb”, “ged”, “heredis”, “mdb”, “sqlite”

- files larger than 4294967295 bytes (~4.2 GB)

Browse a Heredis Online tree

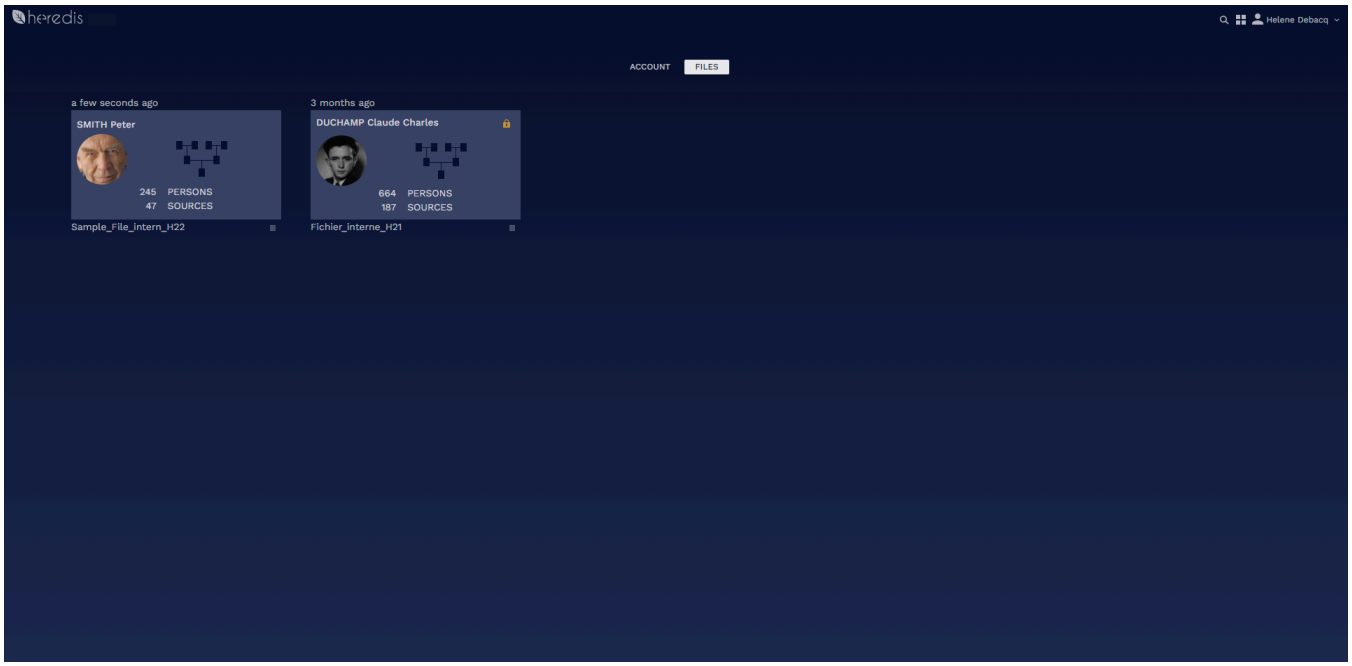
You have published your personal website with Heredis Online or you want to view a family member’s website or an online tree found as a result of a search on Heredis Online.

Here we will see how to navigate an online tree.
Please note that, to visit a personal Heredis Online tree, you must be logged into your Heredis account.

Access your online tree

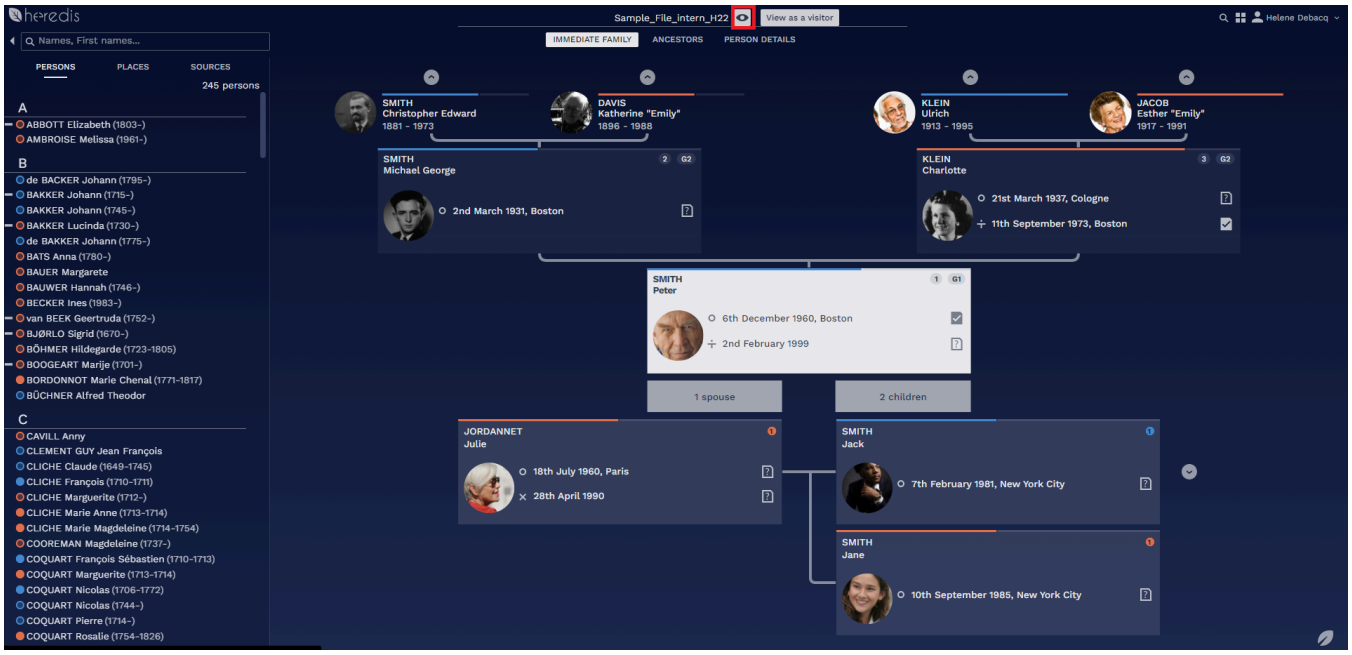
You clicked **Publish** button, so you published your work. To open your personal website and view your online trees, click the **Heredis Online** **or** **or** **> Manage My Account** button.
If you are not logged in, log in.

By default, you arrive directly on the **Files** tab which corresponds to the different online trees you have been able to make.
Indeed, you can publish your genealogy with yourself as a root person, but also other genealogies that you have created, as for your daughter-in-law for example.



We remind you that it is necessary to setup privacy in order not to publish personal data less than 120 years old. See Publishing with Heredis Online (see page 854) for more details.

Click on the rectangle corresponding to the online tree you wish to consult. Since you are the owner, you see everything, even if there are privacy restrictions. You have a “Visitor” mode, click on the eye, to see your online tree as an average visitor.



A new tab opens and you can browse the online tree with restrictions. We will see how to navigate in the paragraph below **Navigating in a Heredis online tree**.

View someone else's online tree

- Have you received a link from a cousin to visit his Heredis online tree?
  Click the link to go to the online tree and, if you are not already logged in, log in to your account.
- Have you searched Heredis Online and would like to consult the online tree of one of the results?

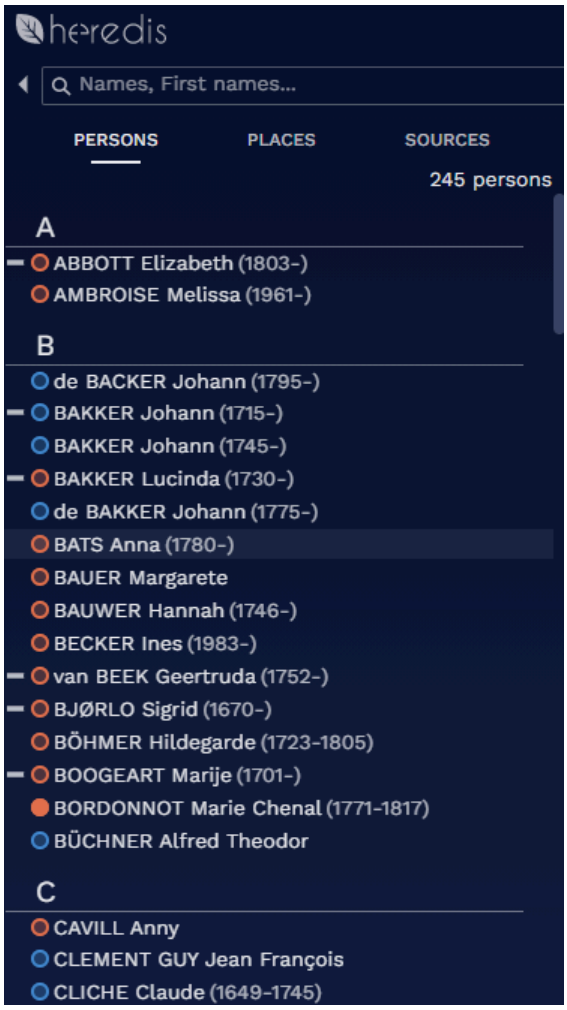
  Click the family tree button to access the online tree. Log in to your account if you are not logged in. If the author has put a password, a padlock is visible, you will not be able to access the online tree without having the password. See also Search on Heredis Online. (see page 883)

Navigating in a Heredis online tree

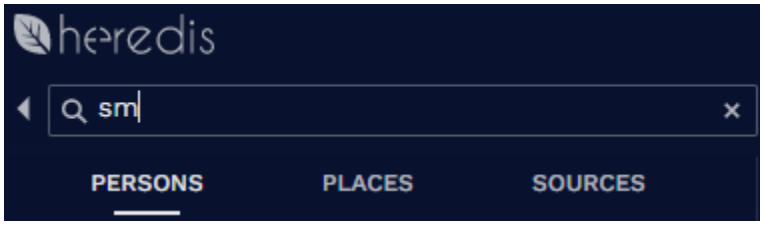
The night blue theme does not suit you. See Change theme or language on Heredis Online. (see page 851)

The panel on the left

The panel on the left gives you access to the list of persons, places and sources of the online tree.



The search box is used to search these lists.
Select the list you are interested in by clicking on its title, then type all or part of a name or word and press the Enter key on your keyboard.



To clear a search, click the cross at the end of the search field. If there is nothing indicated in the search box, the cross does not appear.

To save space, you can fold the panel by clicking on the arrow to the left of the search box. Click this arrow again to show it again.

The list of persons provides you with several pieces of information at first glance.

- The sex of the person: represented by a blue circle for men, orange for women, grey if the sex is not determined.
- Belonging to the direct line of the root person (Ahn. lineage): if the person is part of the direct lineage of the root person, a line appears in front of the colored circle.

Whatever the list, if the name is too long to appear in full, hover over the relevant line to bring up a tooltip with all the text.

The central screen

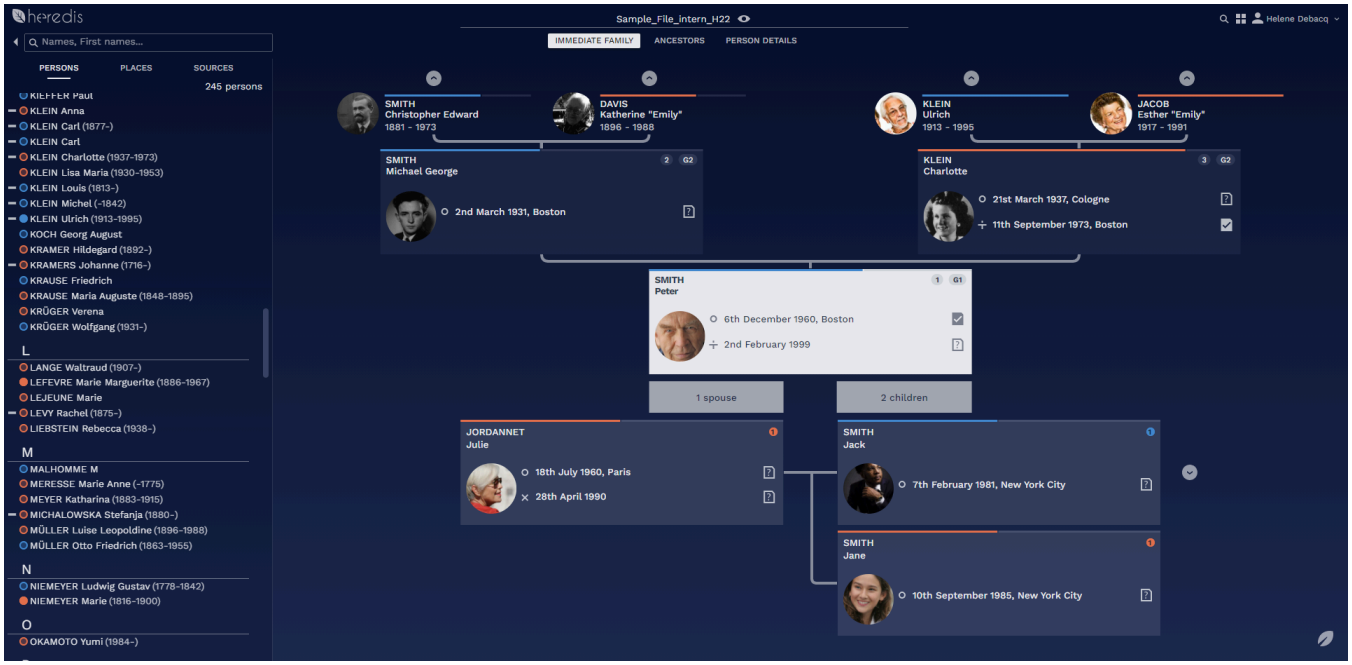
In the center of the screen, you can access different views.
Heredis Online uses the same navigation codes as the Heredis software. As a reminder, the primary person is the person whose box is in the center of the screen. Its box is white for the night theme and blue for the day theme.

- The **Immediate family** shows you the relatives of the primary person: parents, grandparents, spouses and children. You will find the blue, orange and gray color codes according to the sex. The colored bar indicates the level of completeness of major events.
  Each box contains:
  - the main profile picture (if iyou don’t see it fully, hover over it to see it in full),
  - name
  - fisrt names

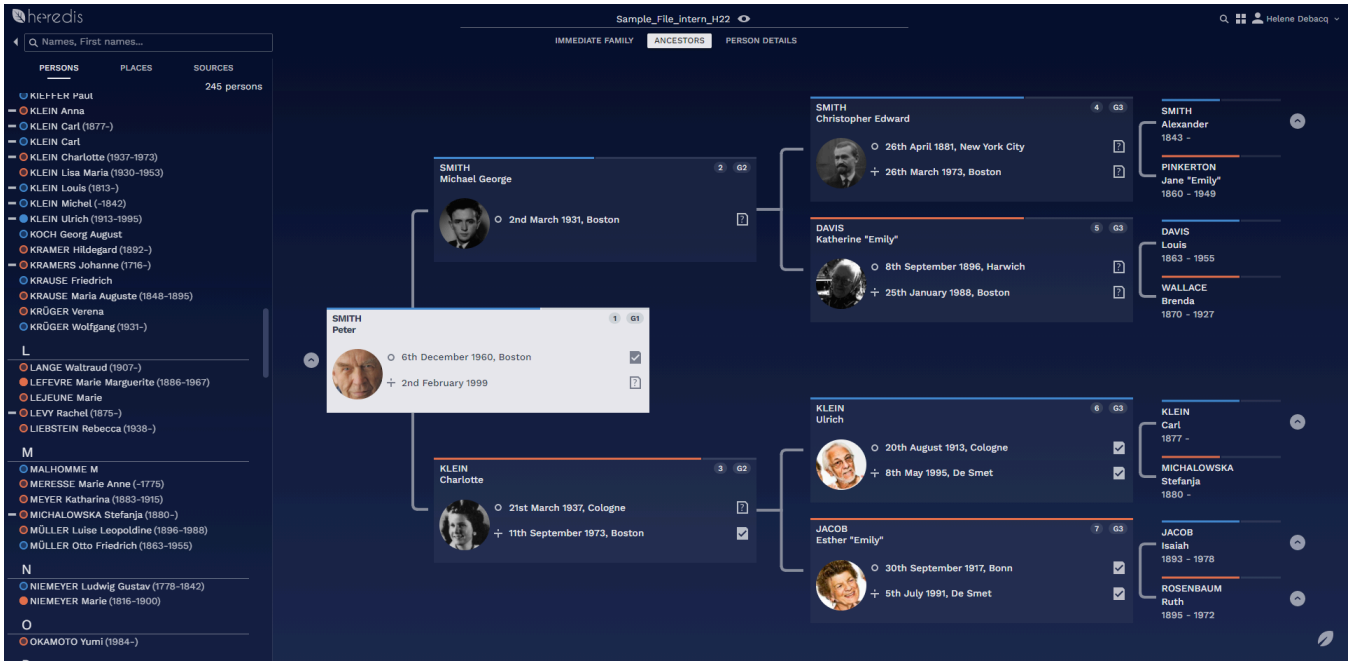
- Ahnentafel number and generation (if the person is part of the direct lineage),
- date and place of birth or baptism,
- date and place of death or burial.
- an icon indicating whether or not a source is present.

The orange (for women) and blue (for men) bar above the person's box indicates the level of completeness of the person's major events. For it to be full, it is necessary that the three major events (birth/baptism, union, death/burial) have a complete place, a precise date, an attached source whose proof is direct and the search status is NOT "Search Record". If one of the criteria is not met then the progress bar will be incomplete.

- The spouses boxes also contain the date and place of union and a bed number placed in front of the Ahnentafel number, if the person is part of the direct lineage.
  This bed number is carried over to the children of this union.
- Finally, if an arrow is present to the right of the children's list or above the grandparents, it means that you have additional generations. A click on this arrow changes the primary person and goes up or down a generation.



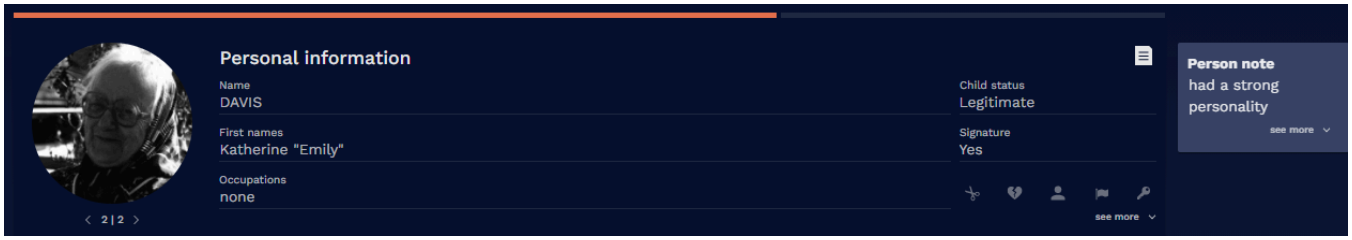
- **Ancestors** displays ascending generations up to great-grandparents. This view presents the same information as mentioned above in the boxes of the **Immediate Family** view. The generation of great-grandparents contains less information due to lack of space.
  As before, a click on the arrow to the right of the great-grandparents or to the left of the primary person (box located on the left at the base of the tree) allows you to go up or down a generation.



Whether in the I**mmediate family** view or in the **Ancestors** view, to change the primary person, double-click on the box of a person.
You can also drag and drop a box. For example, select the paternal grandfather's box and drag it in place of the primary person. The grandfather is displayed as a primary person.

To return to the root person (the one at the base of the genealogy), click on the leaf always present at the bottom right of the screen.

- The **Person details** view gives you access to detailed information about the primary person. It can be very long, remember to use the wheel of your mouse or the elevator on the right to scroll on the page. It contains, in particular:
  - the colored bar for the completeness of major events,
  - personal information with name, first names, occupations,… Click on **See more** for more details.
  - profile pictures, you can click on the arrow below the image if there are several. As in **Immediate Family** and **Ancestors** view, the main profile picture is the same as the main photo displayed in the Heredis software. If it doesn't appear fully, hover over it to see it in full.
  - person or union notes. Click the note icon to read it and click **See More** to read it in full. A window opens with the entire note. Click the cross to close.

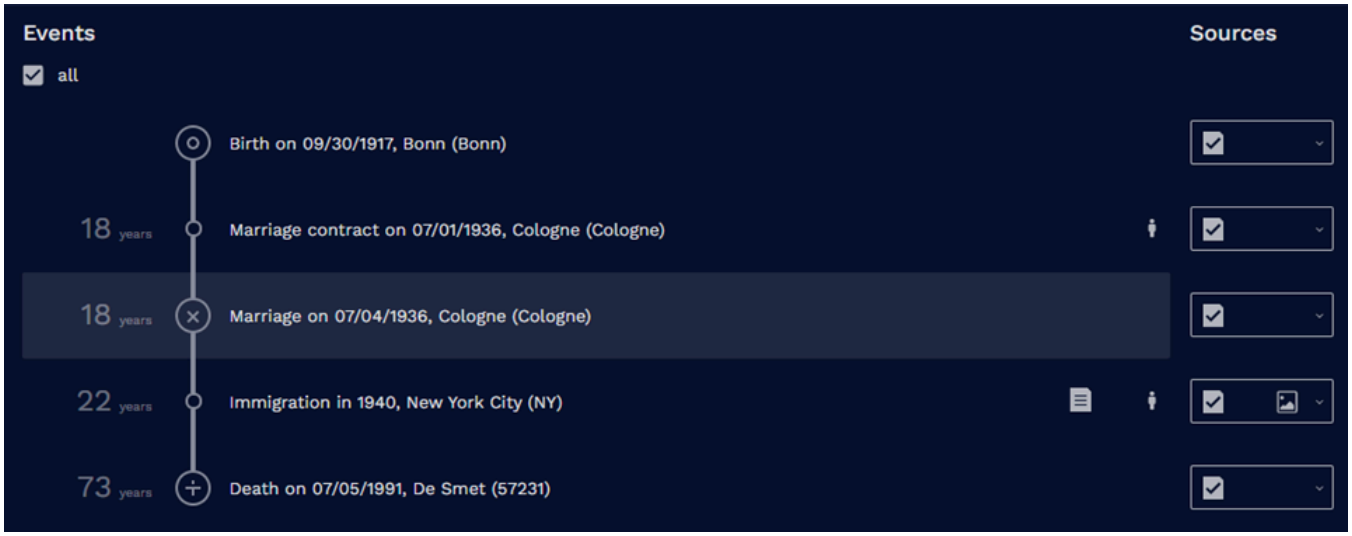


  - facts with an icon system indicating the presence of a source or not ,

note and/or source media . Click the rectangle containing the source icons to display the name of the source. To view the details of this source, click on the name of the source.

- Relationships: parents, spouses, children and by clicking **See More**, siblings, aunts and uncles and other sundry links. A simple click on a person displays him/her as the primary person.

- Major events displayed as a timeline. An age is displayed if the person has a known birth or baptism. For each event, you will find icons indicating the presence of note , media or witness and icons already presented for sources (source, note, media) .
  Check the **All** box if you want also to display the minor events of the person (residence, will …).

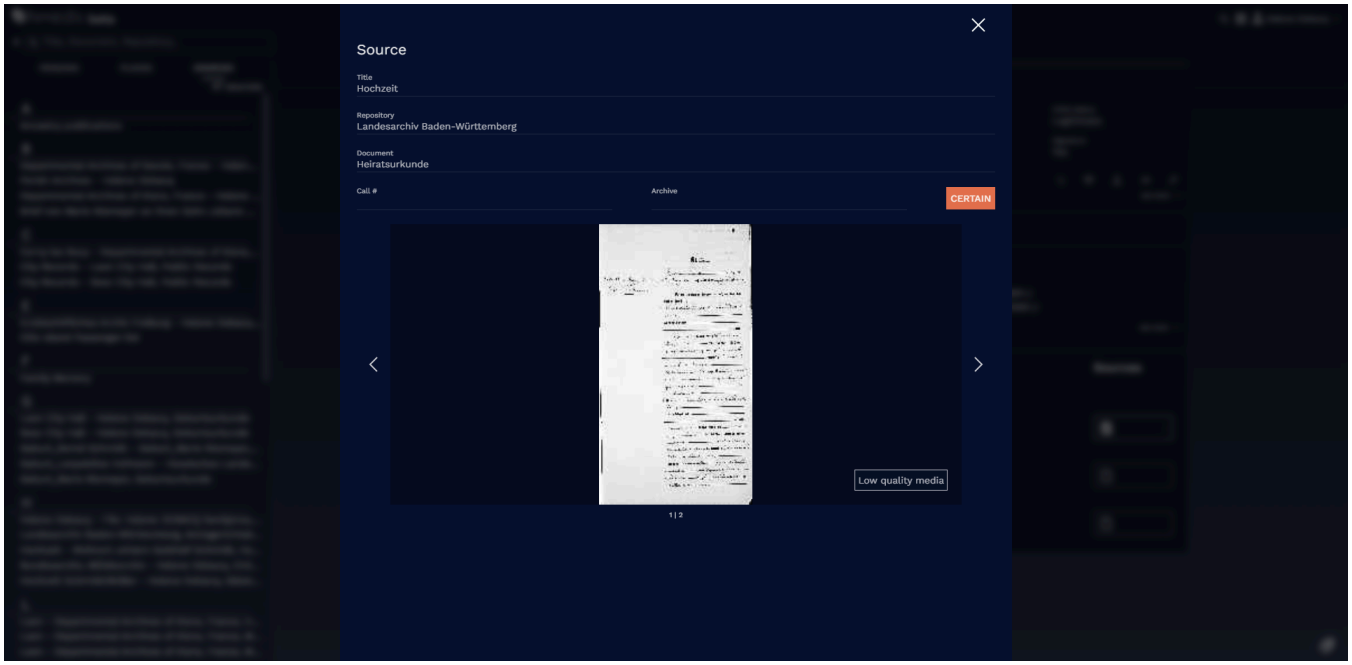


Finally, be aware that by clicking on a source or on one of the note, media or witness icons of the event, you display a window with the details of the source or event.

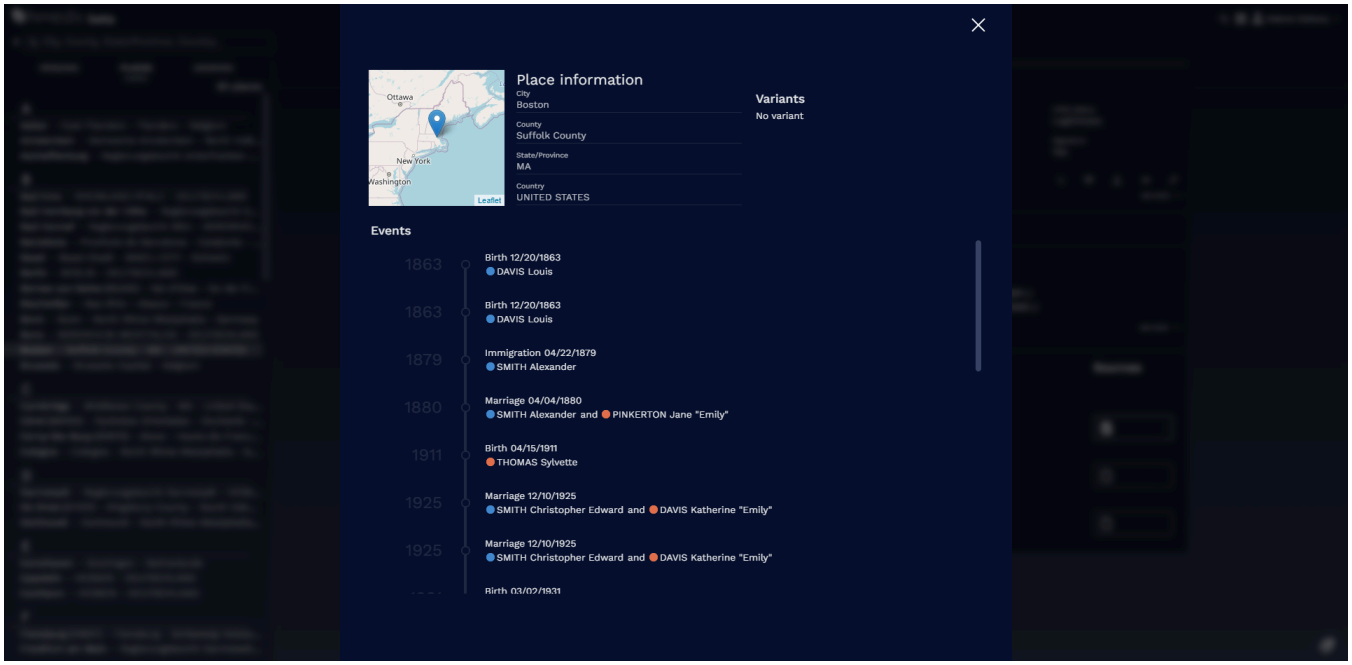
Similarly, if you click from the list of a source or location, a window opens to show you detailed

information about that source or location. Click the window cross ✕ to close it.

Source window



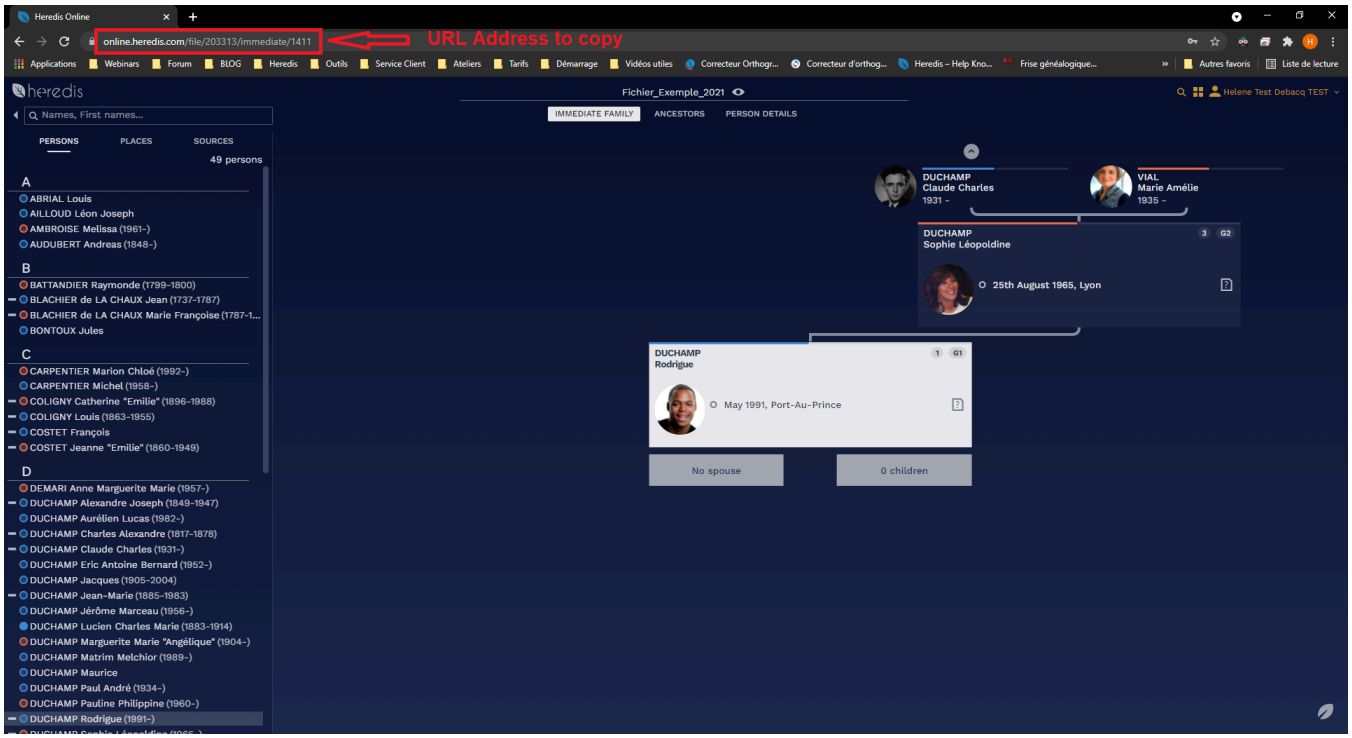
Location window



How do I share a Heredis Online website?

Share your website with your family members by sending them your site's URL.

To do this, select the entire URL, right-click on your mouse and click **Copy**.



Open your mailbox. Create a new message and right-click with your mouse to **paste** the URL.

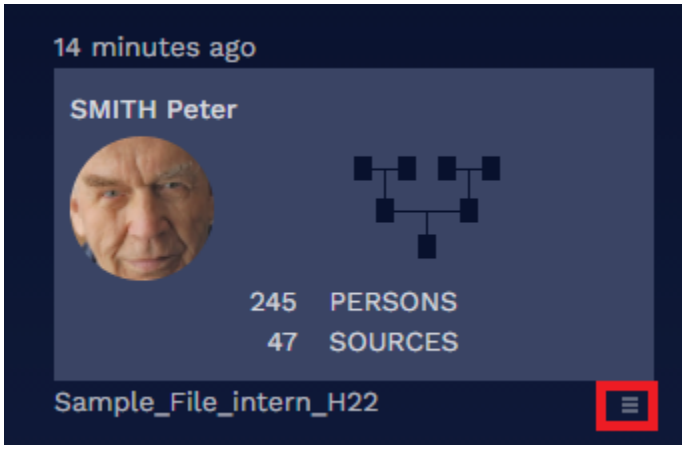
Remember to provide the password if you have privatized your genealogy.

Your family members will need to create a free account on Heredis Online if they don't already have one. Refer to the article Manage or create your Heredis Online account (see page 845) to learn more.

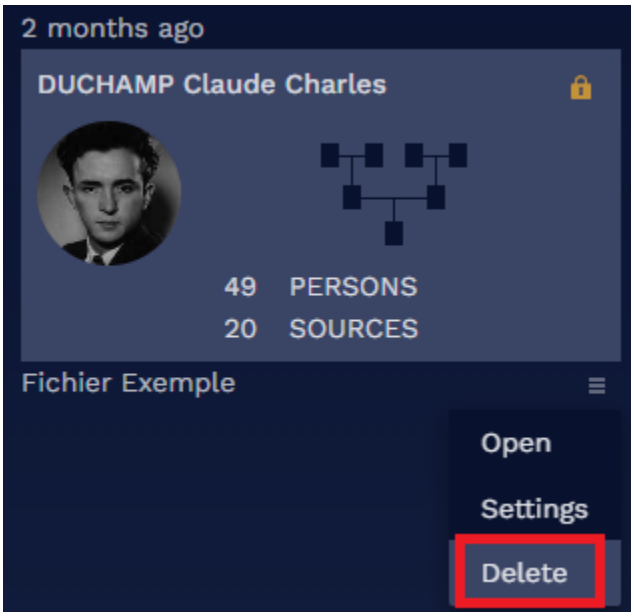
How do I delete a Heredis Online website?

Have you published your genealogy on Heredis Online and want to delete it?

- Log in to your Heredis Online account on your browser or from the Heredis software (Heredis Online > Manage My Account).
- On the **Files** tab, click the burger button below the thumbnail of the published file.



- Click **Delete**.



Once deleted, if you want to have this website again, you will have to publish again from the Heredis software.

Heredis Online will treat the file as a new file.

The URL of the site will change. If you had shared it with your family, consider giving them the

new site address.

See How do I share a Heredis Online website? (see page 878)

Contact the author of a publication on Heredis Online

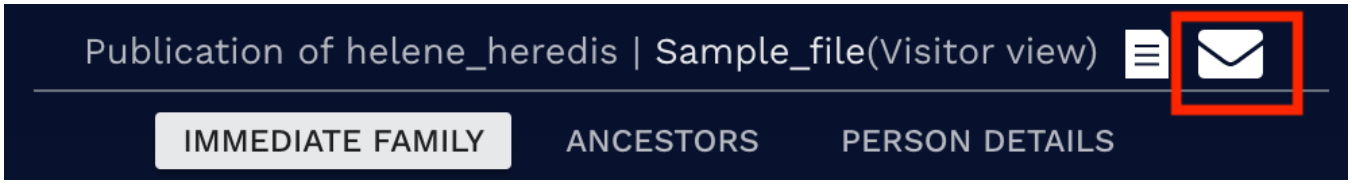
Are you looking to get more information on a publication, to contact a potential cousin, or simply to ask the author of a publication to remove or hide your personal data?

Well, you can contact the author of a publication directly from Heredis Online.

Log in to your Heredis Online account.

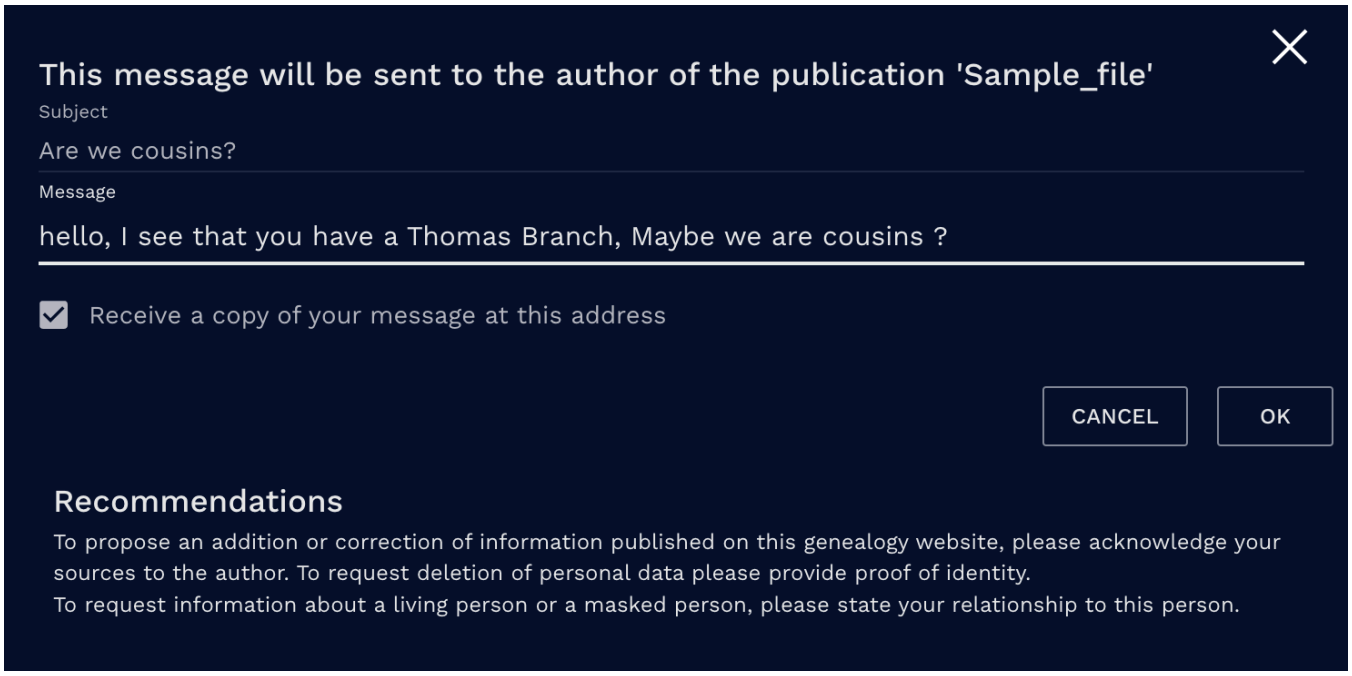
Go to the publication you are interested in.

Click on the envelope located in the banner showing the name of the family tree.



Click in the **Subject** field to specify the reason for your message, keeping it short as you have the entire Message field at your disposal to elaborate.

Click in the **Message** field to type in the reason why you are contacting this person.



Check or uncheck the box “Receive a copy of your message at this address” depending on whether you would like to get a copy of the message you are about to send or not. Which can

be very useful if you are contacting several persons during the same time period. This way you are keeping track of your request(s).

Click **OK** to send the message.

The author will receive an email with your message and the email address used for your Heredis account. He can then respond to you directly to your personal email address.

Search on Heredis Online

Heredis Online allows you to search for free among genealogies published by other users.

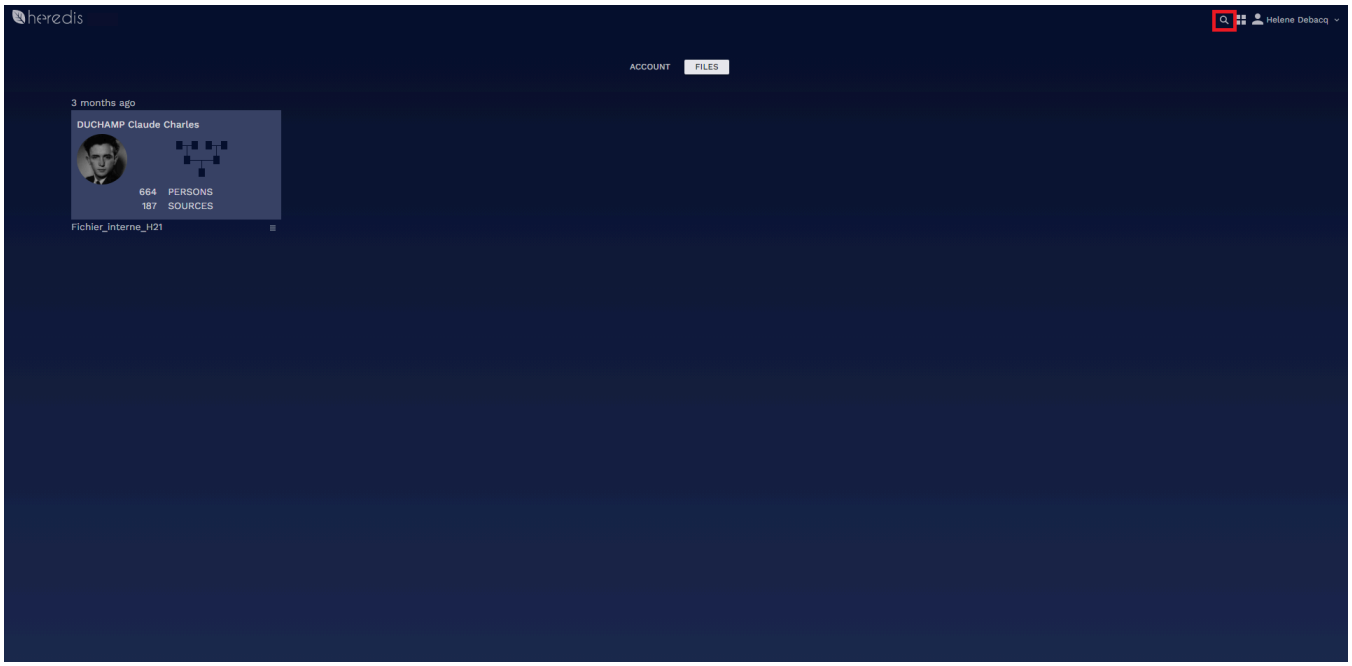
Each genealogy published on Heredis Online appears, unless the author has unchecked the box “I would like this genealogy to appear in Heredis Online searches.”
In this case, indeed, the publication can not be found by research, it is the author who will spread his website URL address.

You can change the night theme if needed. See Change theme or language in Heredis Online (see page 851).

Access Heredis Online searches

Access searches from:

- the website online.heredis.com/en in Chrome, Firefox, Safari or Edge browsers current version.
- Heredis’ Search Wizard. See Search Wizard (see page 357) article
- the **Heredis Online** toolbar button or or then **Manage my account** then by clicking on the magnifying glass to the left of your name after logging in.



Start a search

Fill in the desired fields:

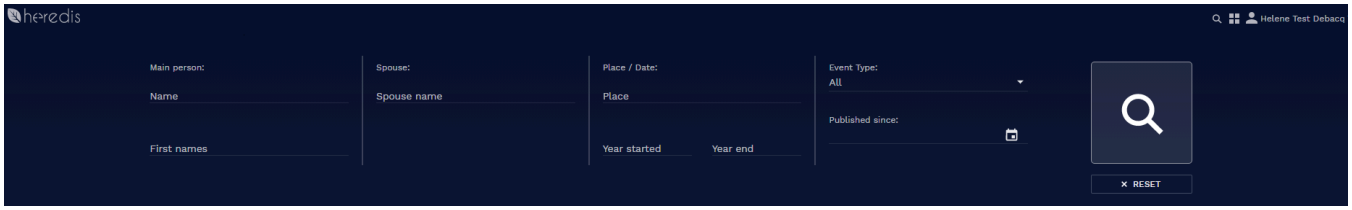
– **Name** of the person to search for. This field is required.
– **First names**. One or more first names are possible.

– **Name of spouse**.

– **Location,** if you want to restrict to a geographical area. It can be a city, a county, a state or a country.
– **Date**. You can restrict over a period of time. Indicate a year of start to have all persons with an event after that date. Put a date of end to have all persons having an event before that date. You can also put a year of start and a year of end to have persons with an event in that period.

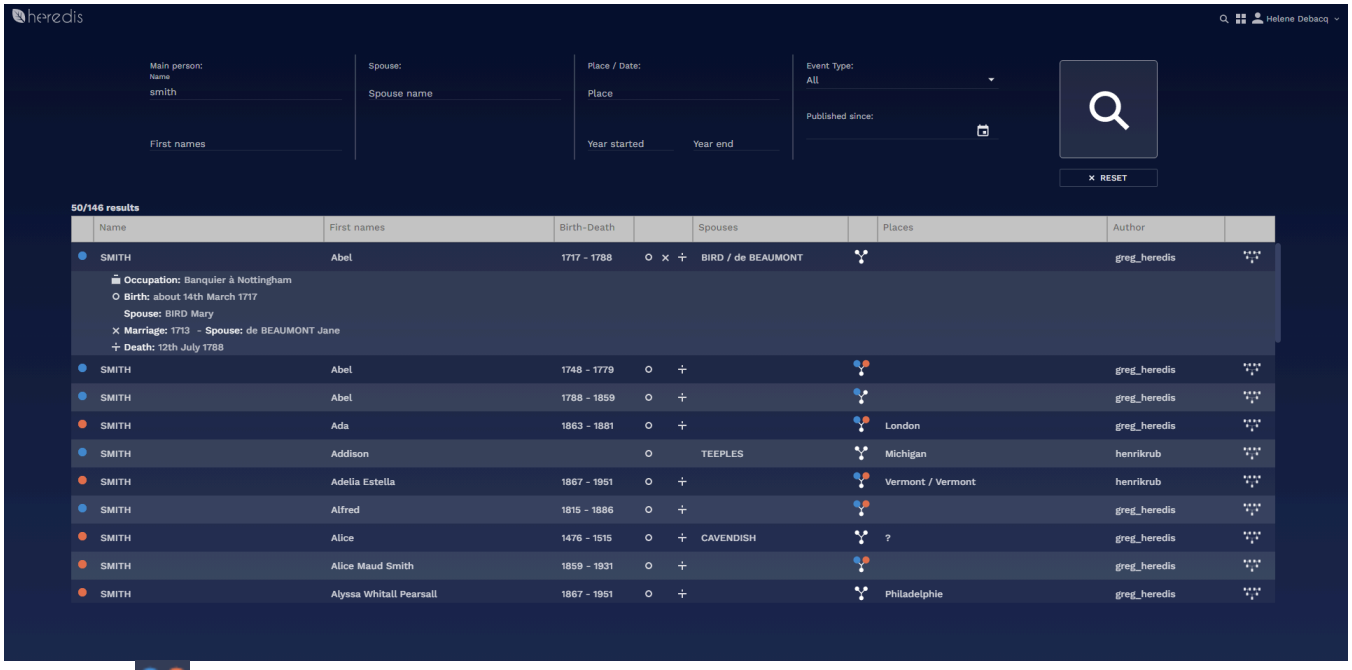
– **Events**. Choose to restrict to one type of event from Birth/Baptism, Union, or Death/Burial.
– **Published since**. If you have already done this search and run it again, you can limit it so that you do not have all the results already consulted but only those that have been published since the day you carried out this search.

Click the magnifying glass button to start the search.



View search results

The results appear in the table below the search form.
Each row corresponds to a person in a publication. To know the events of the person, click on the line.
You will then have, if they are informed, occupation, major events and spouses.



The icon allows you to know if his parents are inputted.

Click the family tree icon to visit the publication's website.

Mobile versions

Send/Receive a Heredis file from iOS or Android to another device

Your genealogy is on your tablet or smartphone.

From iOS (iPad or iPhone)

- you are sending to your computer for use on Heredis Mac or Windows, see the articles: Export a Heredis genealogy from iOS (see page 927)
- you are sending the file to your computer for use on a software/site other than Heredis, see the article: Export a GEDCOM from Heredis iOS (see page 932)
- you are sending the file to a friend or family member using the same version of Heredis as you, see Export a Heredis genealogy from iOS (see page 927)
- you are sending the file to a friend or family member and they are using a different software or an earlier version of Heredis than you are, see the article Export a GEDCOM from Heredis iOS (see page 932).

From Android (tablet or smartphone)

- you are sending the file to your computer for use on Heredis Mac or Windows, see the articles: Export a Heredis genealogy from Android (see page 961)
- you are sending the file to a friend or family member using the same version of Heredis as you, see the article Export a Heredis genealogy from Android (see page 961)

Receive a file on iOS or Android

- receive the exported file from your mailbox or your cloud.
- download the file to your mobile device
- open the Heredis application
- click on **Open a Heredis file** in the home page of the Heredis application on your mobile device.

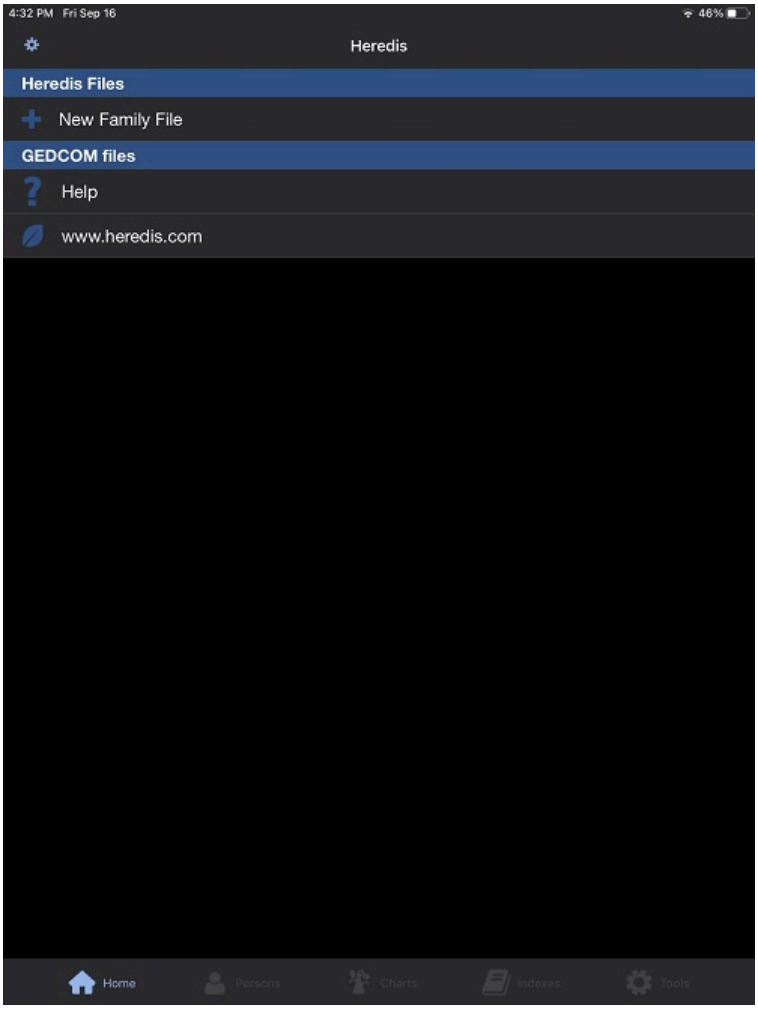
See Open a genealogy on Heredis iOS created on another device (see page 891), or Open a genealogy on Heredis Android created on another device (see page 937).

Heredis iOS Homepage

Important: Since Heredis 2020, the Heredis iOS app changes with each new version of Heredis for Windows or Mac. If you have Heredis 2020, you need to have the Heredis 2020 app for iOS to be able to communicate with Heredis for Mac or Heredis for Windows.

The Heredis homepage allows you

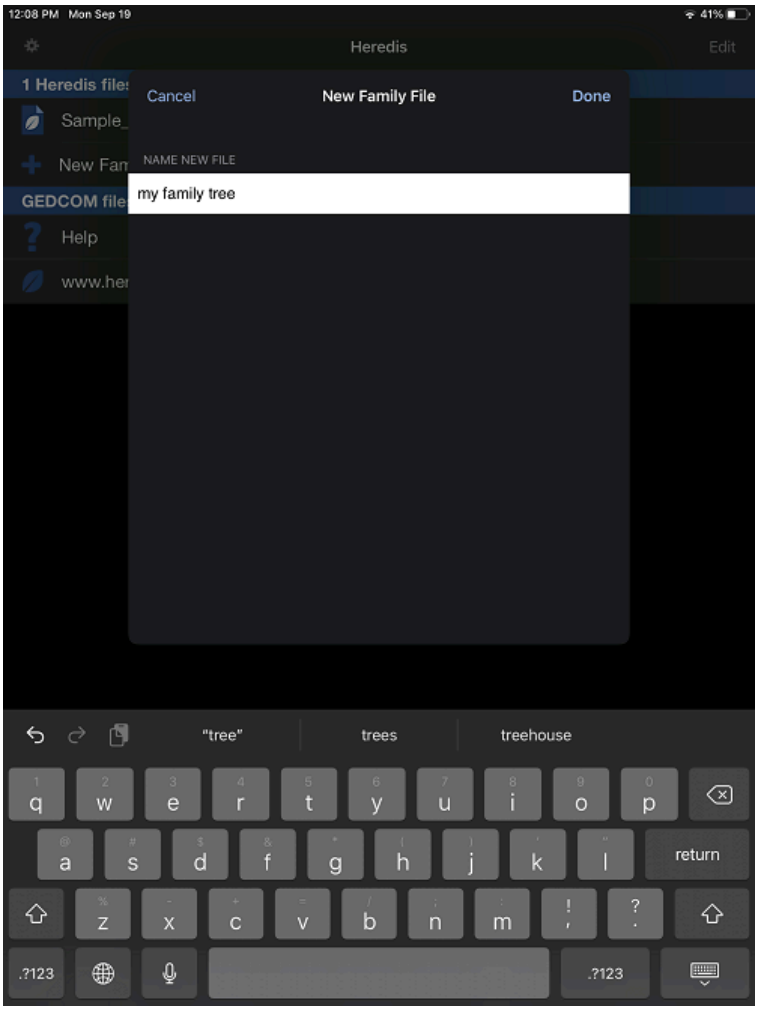
- to create a new genealogy,
- to open genealogies already in use
- to remove them from your device,
- to consult the online help
- to navigate to the www.heredis.com site



See also the articles Create a new genealogy on Heredis iOS (see page 890), Send/Receive a file with Heredis iOS, Create persons on Heredis iOS (see page 899), Navigate on Heredis iOS (see page 909), Illustrate your genealogy on Heredis iOS, Search on Heredis iOS, Create tree charts with Heredis iOS, .

Create a new genealogy on Heredis iOS

Tap **New Genealogy** from the Heredis **File** menu.
Give the genealogy a name using the virtual keyboard and validate by pressing **OK**.



You can add persons to this new genealogy file. See Create Persons on Heredis iOS.

See also Open a genealogy on Heredis iOS created on another device.

Open a genealogy on Heredis iOS created on another device

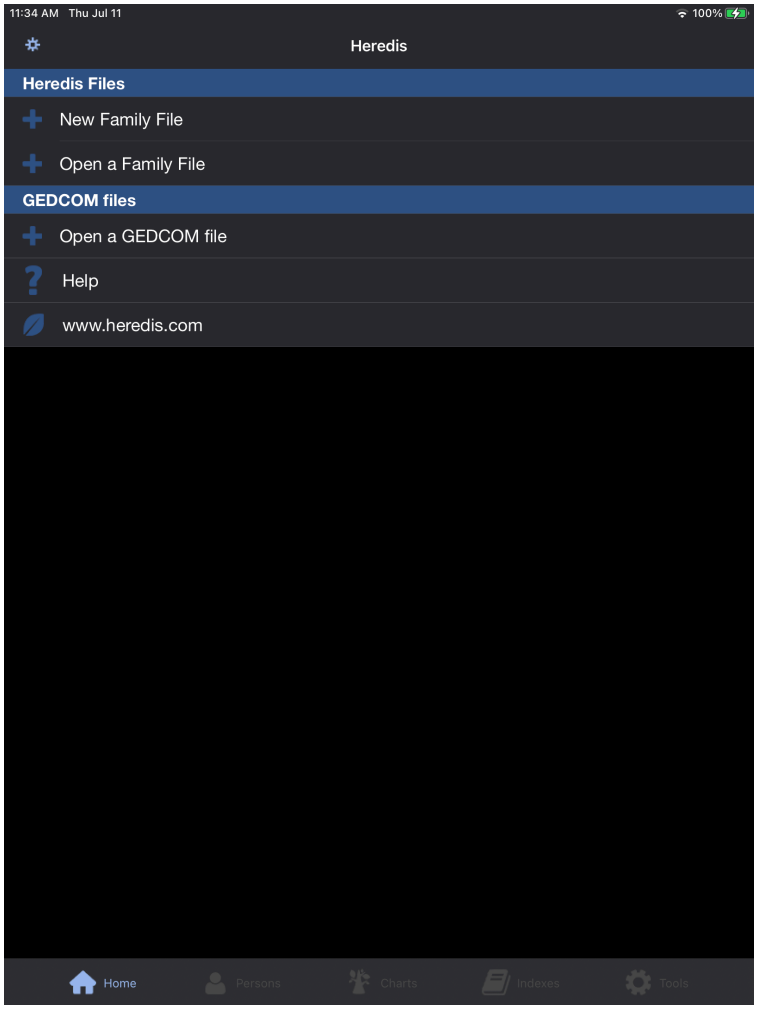
See the article Send/Receive a file with Heredis iOS or Android.

If you used Share on local network, the file opens once it has been received on the iOS device.

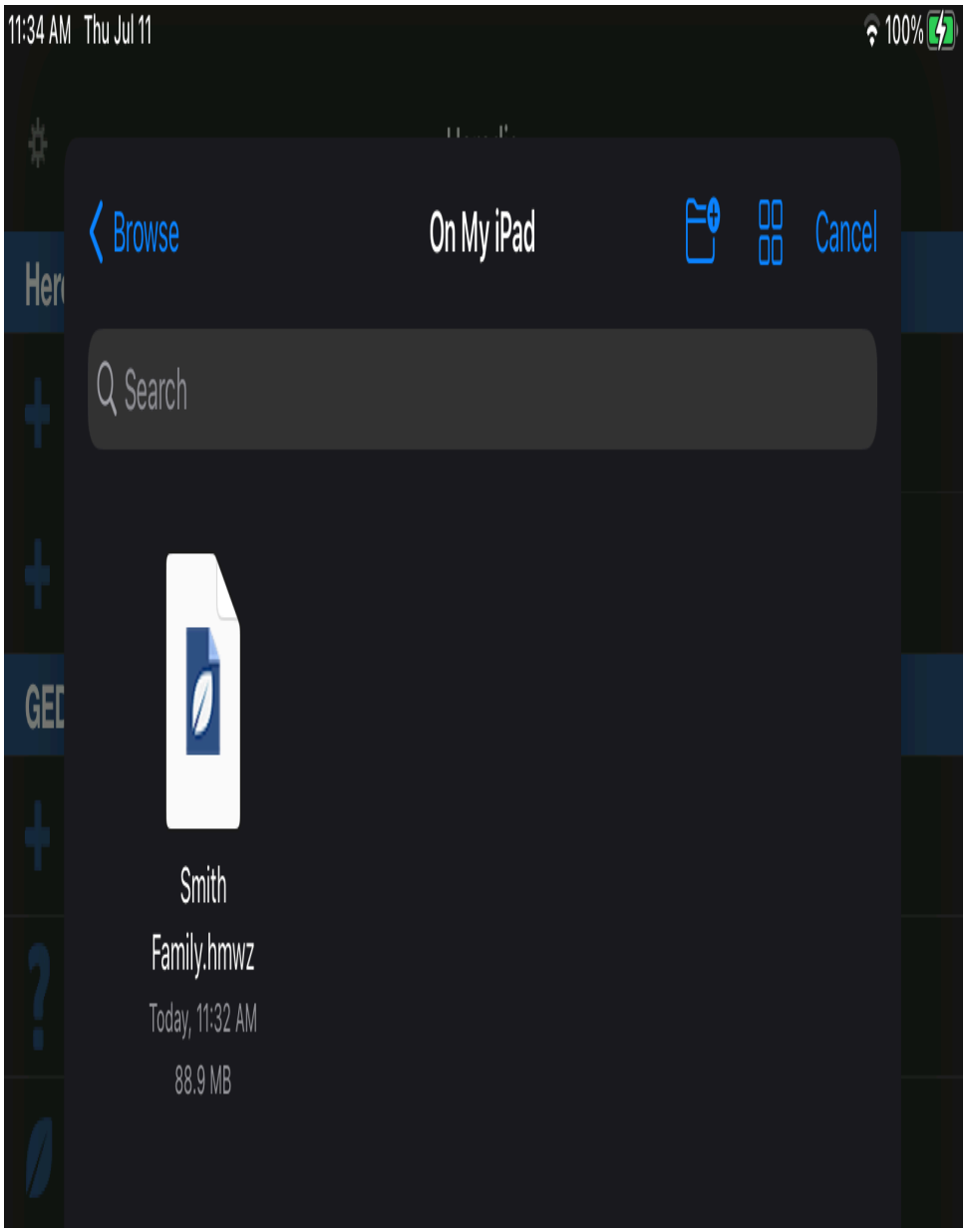
If you've sent your file via your mailbox or a cloud, download the file to the iOS device's hard drive.
After downloading the file to the tablet or smartphone, open the folder where the file was downloaded.

2 ways to do so.

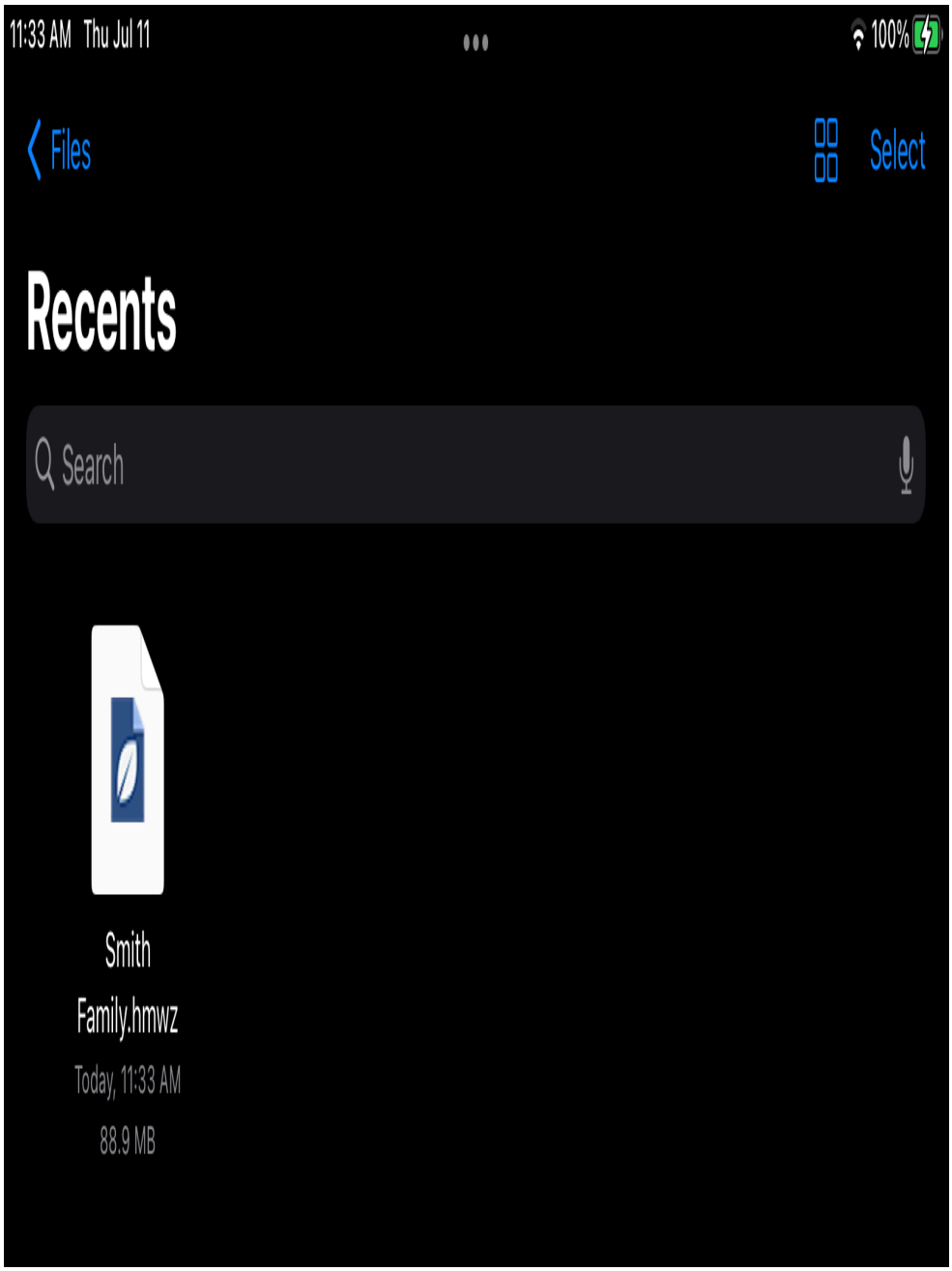
- Starting with Heredis 2025, you can Open a file directly from the app.
  - Open Heredis
  - Tap on **Home** menu
  - Tap on **Open a Family File** for a Heredis format file



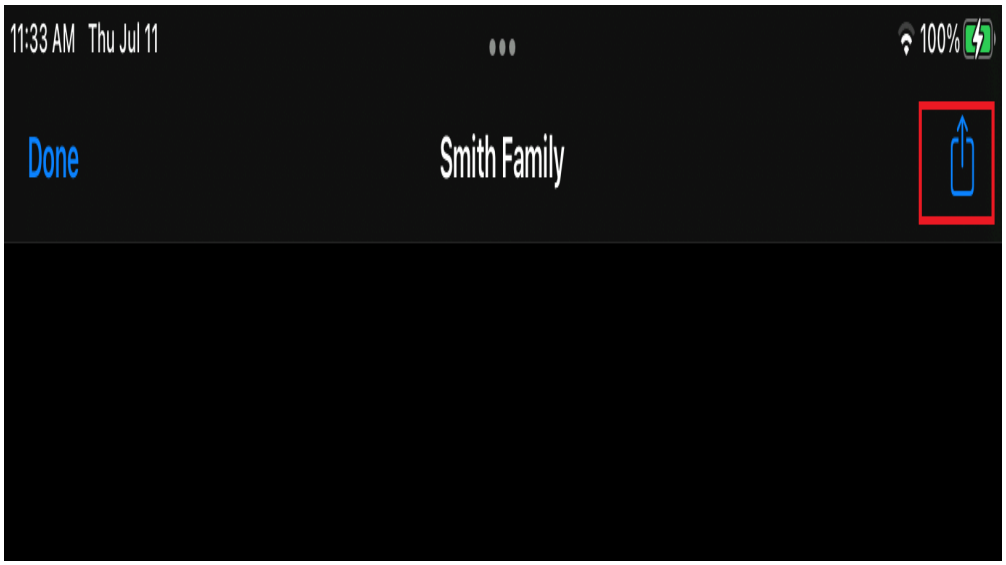
    - Select the downloaded file on the device



    - The file will open.
- If you sent the file through a cloud
    - Open the Download folder of the device
    - Select the file



- Tap on the button on top-right corner.



- The file will open.

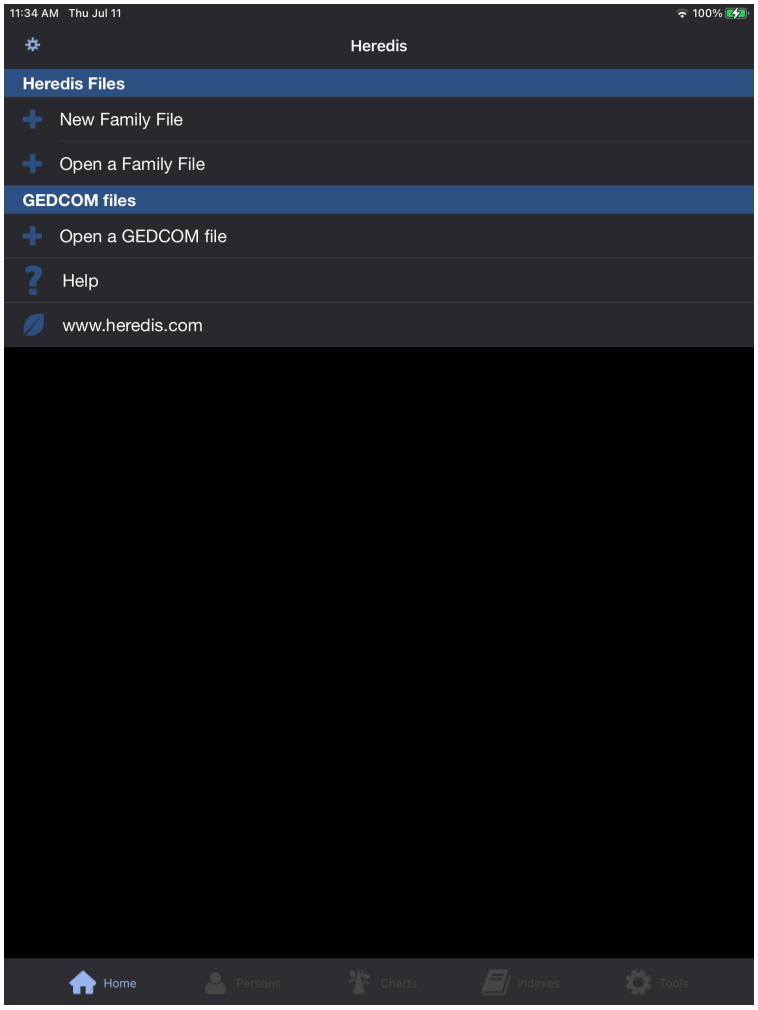
See also the articles Create a new genealogy on Heredis iOS (see page 890), Heredis iOS homepage. (see page 889) If the file is a GEDCOM format, see article Open a gedcom file with Heredis iOS (see page 895).

Open a GEDCOM file with Heredis iOS

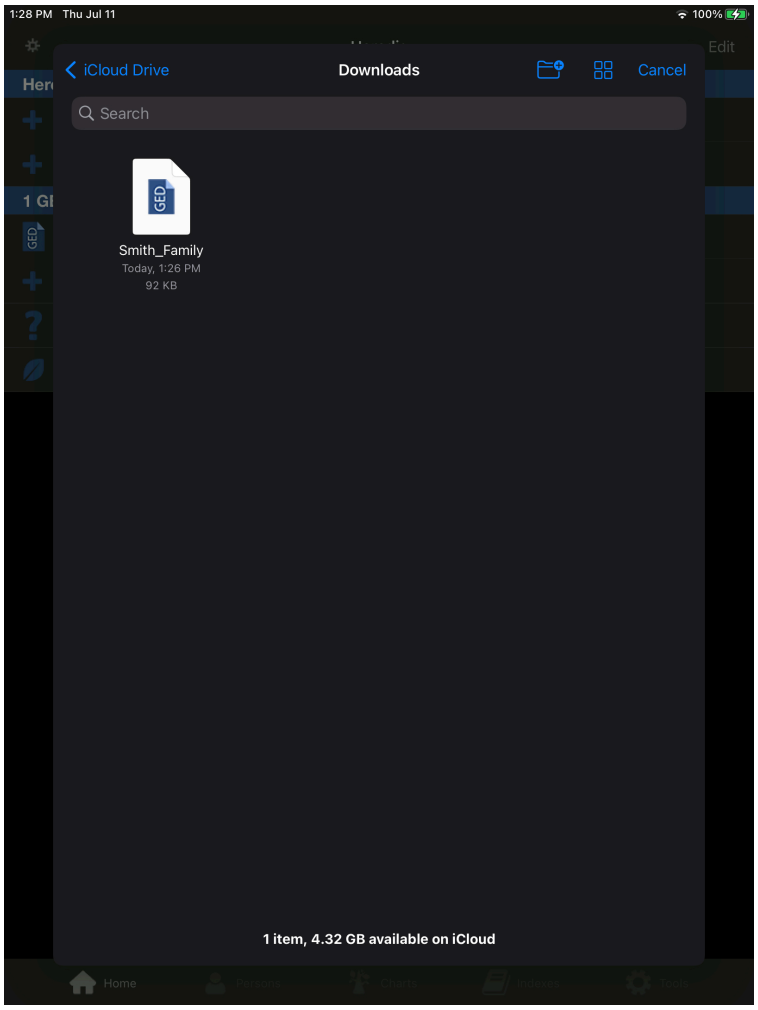
You can open a GEDCOM file from Heredis iOS.

To do this, send the file to your mobile device, by email or via the cloud.

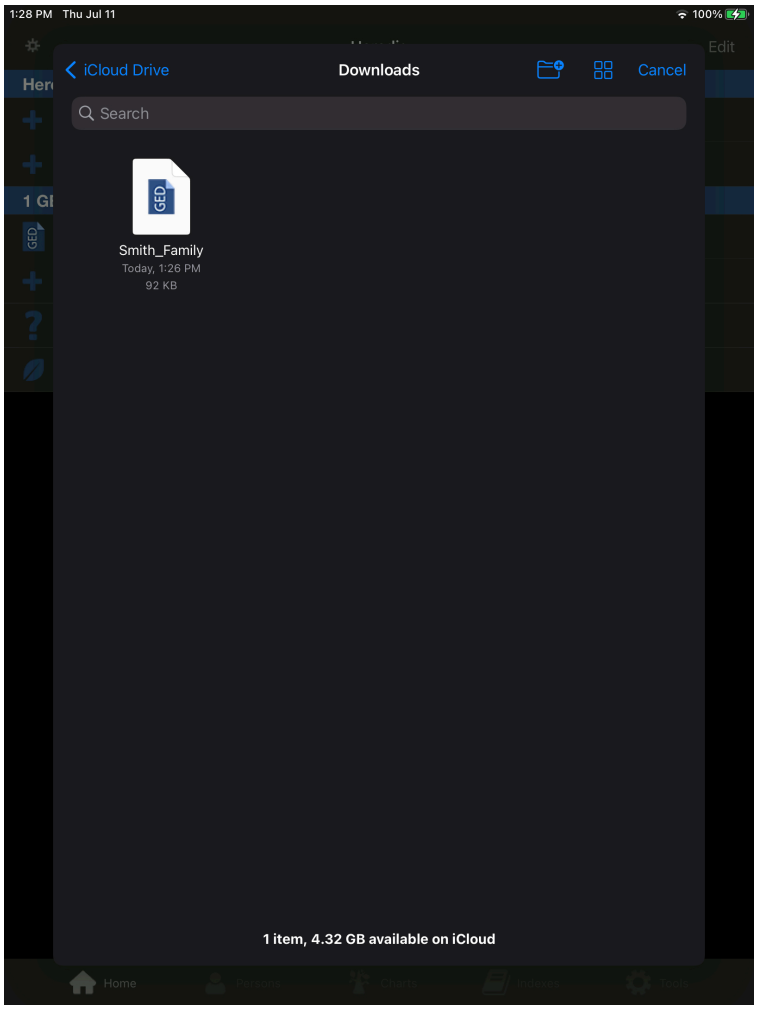
- Upload the file to your mobile device's internal storage.
- Launch the Heredis application.
- Tap on **Home**
- Tap on **Open GEDCOM**



- Select the .ged or .gdz downloaded file.



- Give it a name and click **OK** to confirm.



Heredis will convert the file to Heredis iOS format. Let the process run. Your file will open once the conversion is complete.

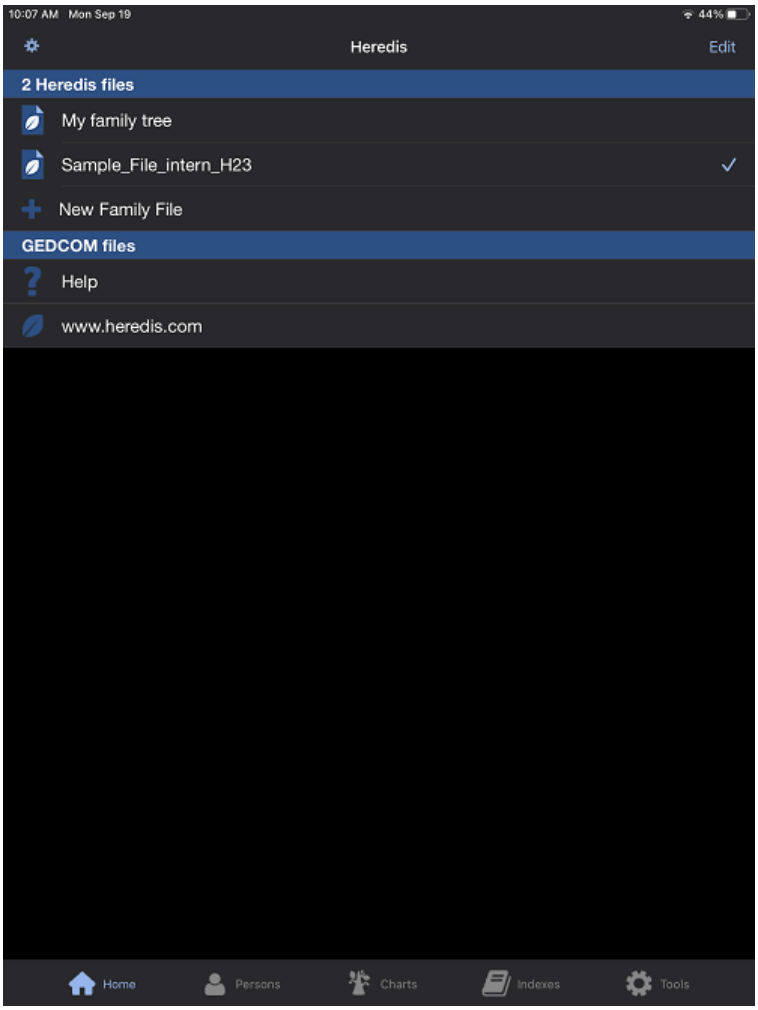
If you're trying to open a file in Heredis format, see the article Open a genealogy on Heredis iOS created on another device (see page 891).

Switch from one genealogy to another on Heredis iOS

You can have several genealogies as Heredis iOS, just like on Heredis Windows or Mac.

After you create the new file or receive the file from your computer, to move from one file to another

- press the
- tap the file name at the very top
- select the genealogy to open.



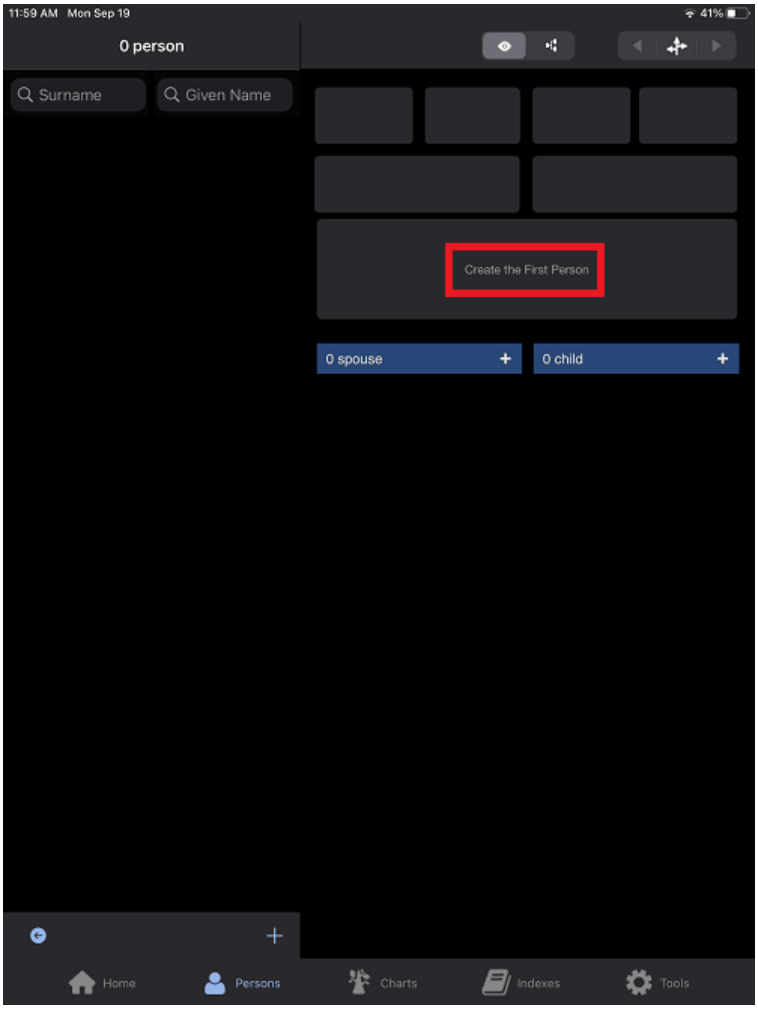
Create persons on Heredis iOS

Heredis for iOS allows you to have your genealogy always with you.
Convenient when you go into the family and want to add genealogical information to your file.

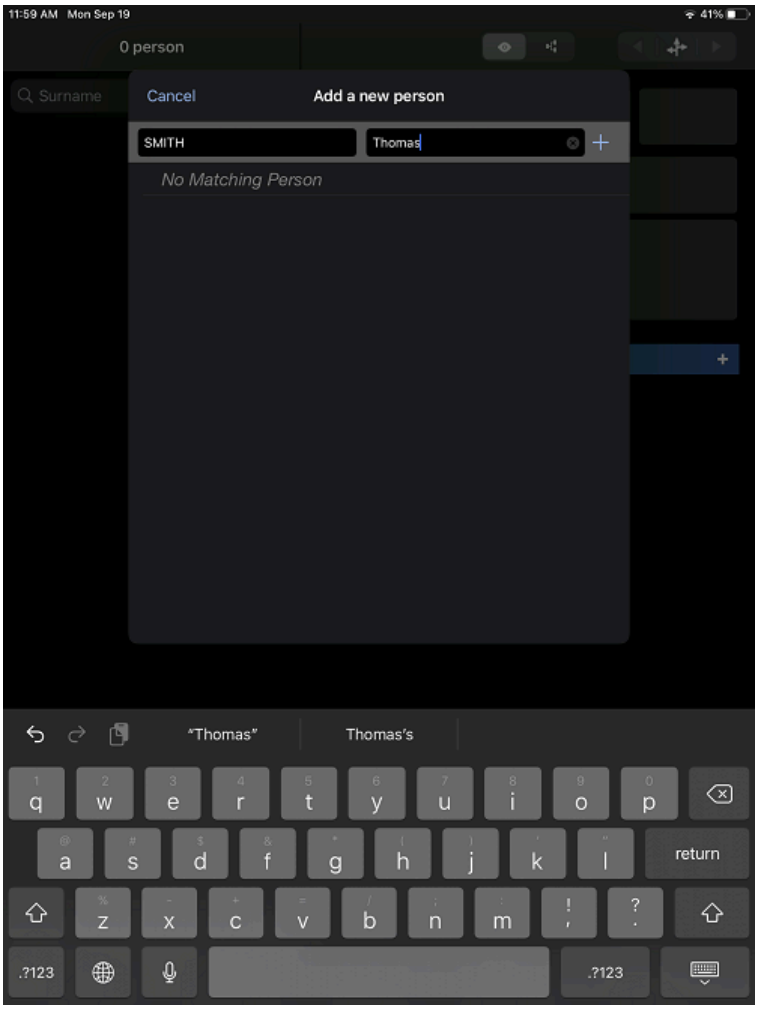
See also Create a new genealogy on Heredis iOS (see page 890) and Open a genealogy on Heredis iOS created on another device.

Create the first person

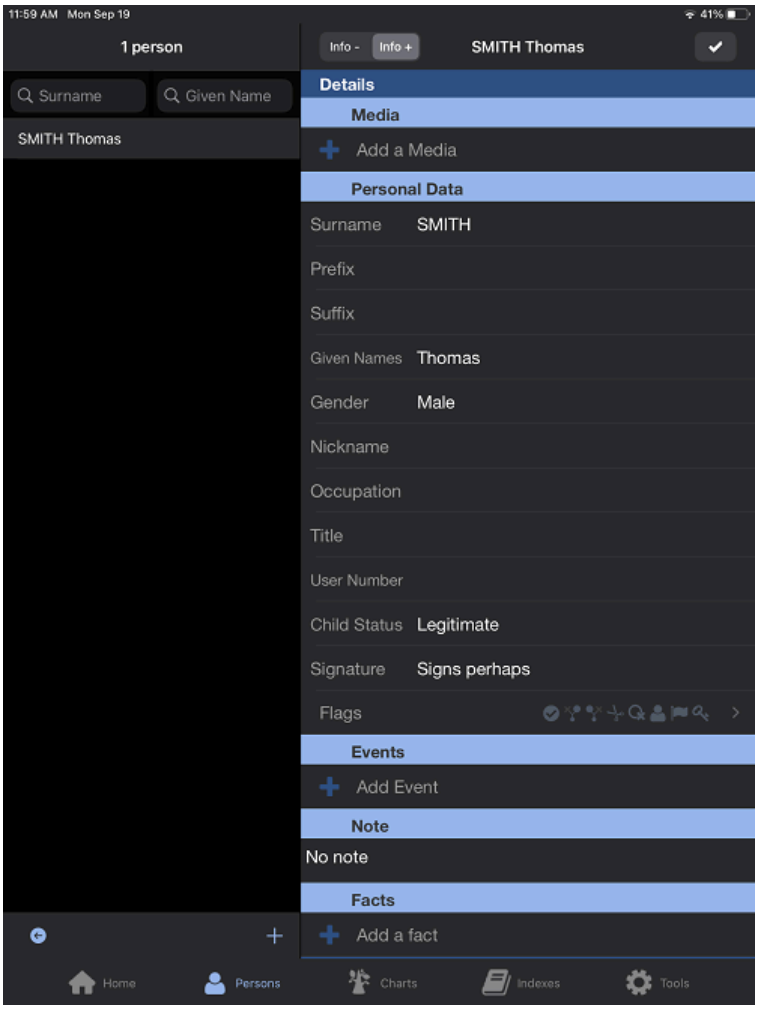
After creating a new genealogy, you need to create the first person. He/She will be the root person, that is, at the base of the tree.
Tap **Create First Person**.



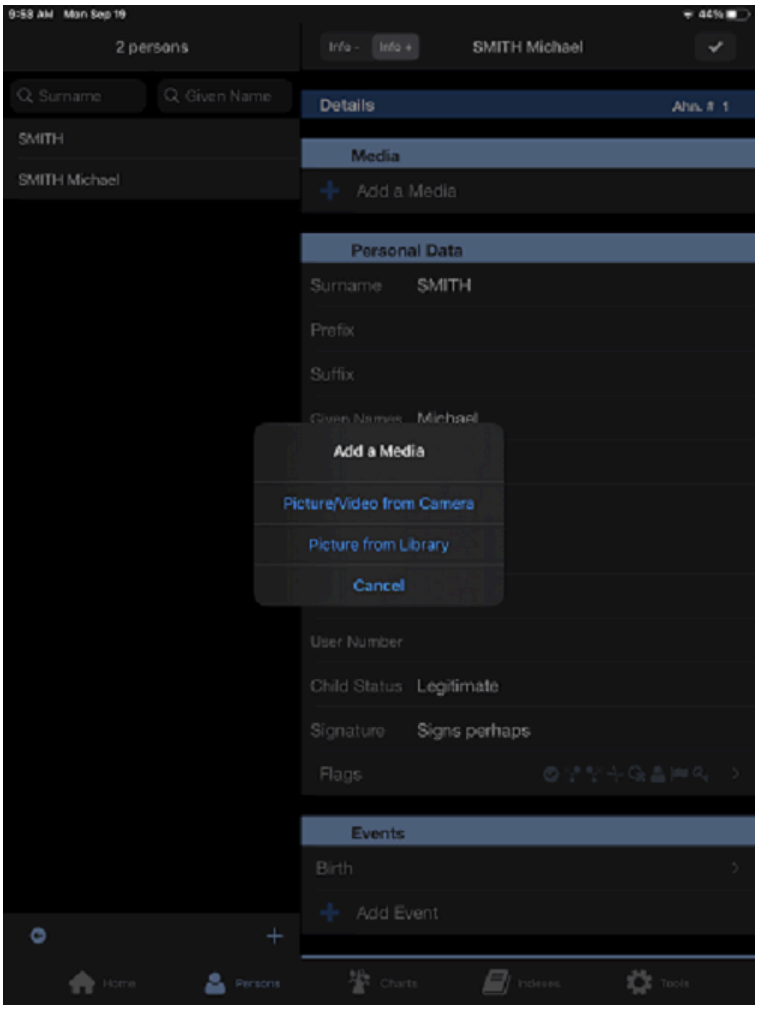
Indicate their surname and given names.



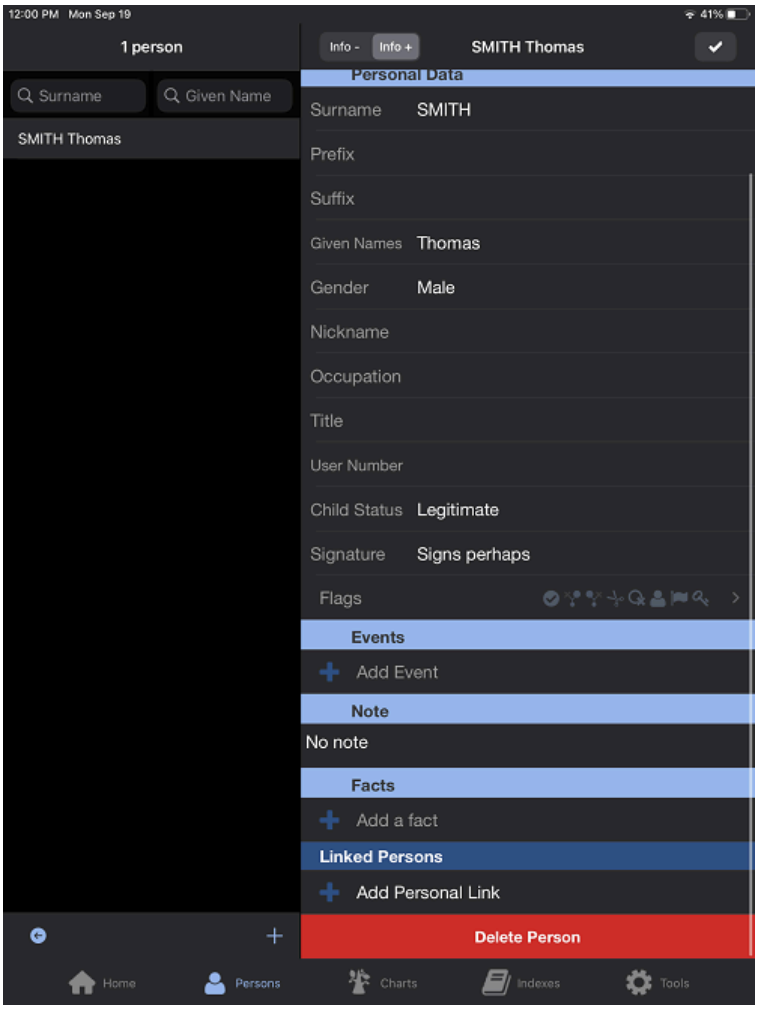
Tap the + to add information.



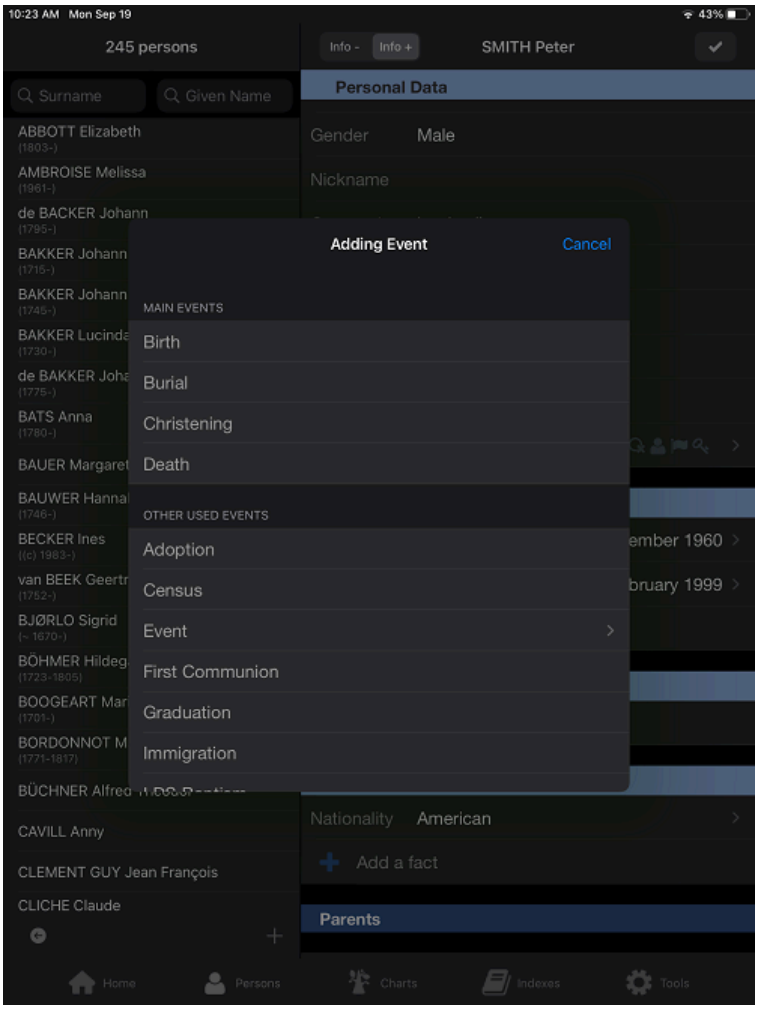
Fill in the information you have.
Tap **Add Media** to put the person's photo. Choose the photo from your phone or take a photo with your device's camera.



Swipe from the bottom to the top to see the additional topics available in the person sheet.



Tap **Add Event** to add a birth, death, and more.

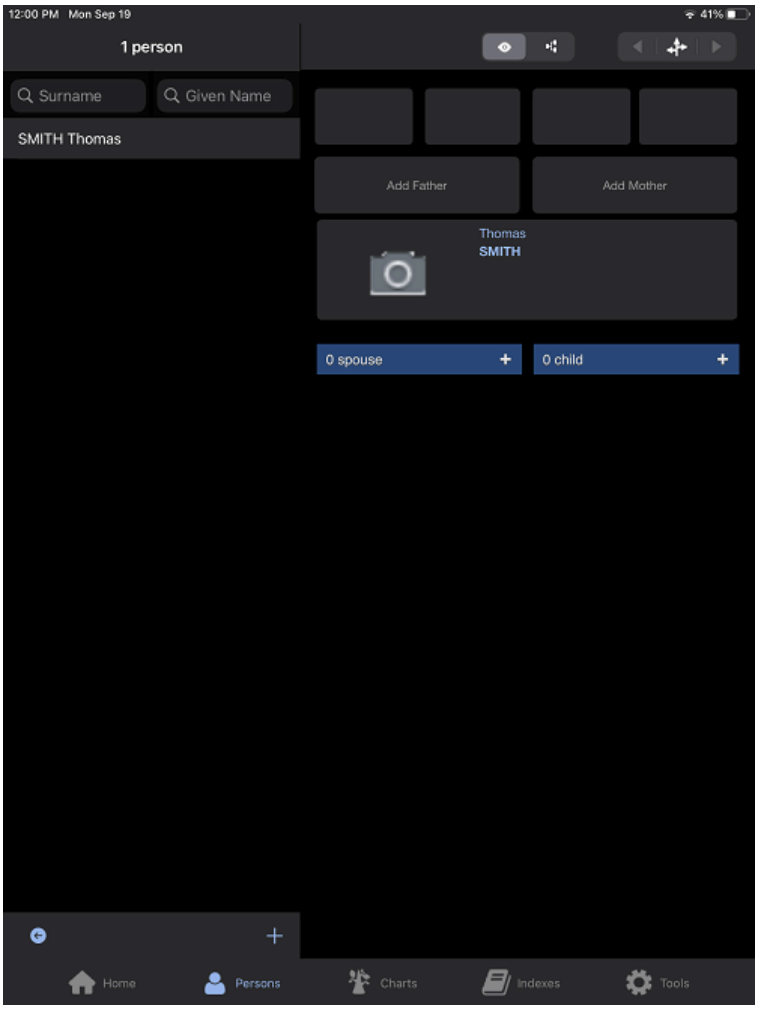


Tap **Add Facts** to enter information that is not an event such as health information, religion etc.
Tap **Add Personal Link** to link 2 people whose blood link isn't quite known or has no blood ties. For example, a servant or a cousin present at the wedding but you do not know to what degree or branch this cousin is from.

The validation button at the top right allows you to return to the reading of the person's sheet.
To edit the sheet, tap the person to bring up their sheet and tap the pencil.

Create parents, spouse and children

From the **Family** **Core**, tap **Add Father** or **Add Mother** or the **+** button to add a **spouse** or **child**.



As before, fill in the information about the person: Surname, Given name and press the + to add the other information.

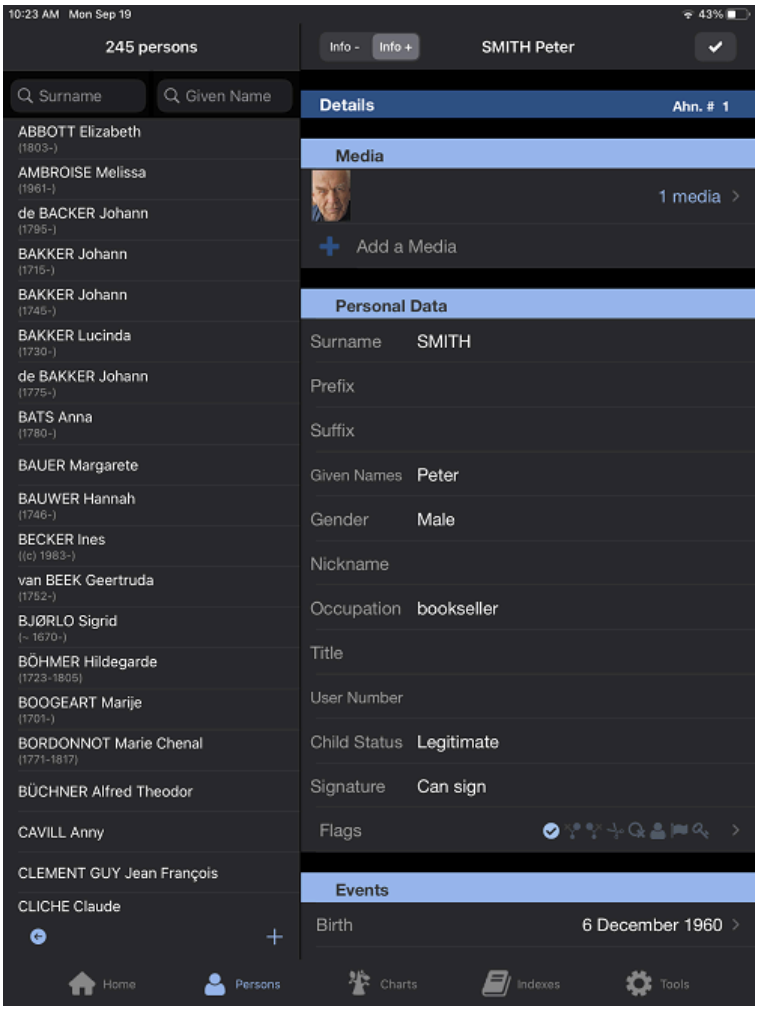
Note : If the person to whom you are trying to add a spouse does not have a specified gender, you will not be able to add the spouse to them. By default, Heredis adds the opposite sex when adding a spouse. However, you can change it in the person's sheet to have a same-sex marriage.

Edit a person on Heredis iOS

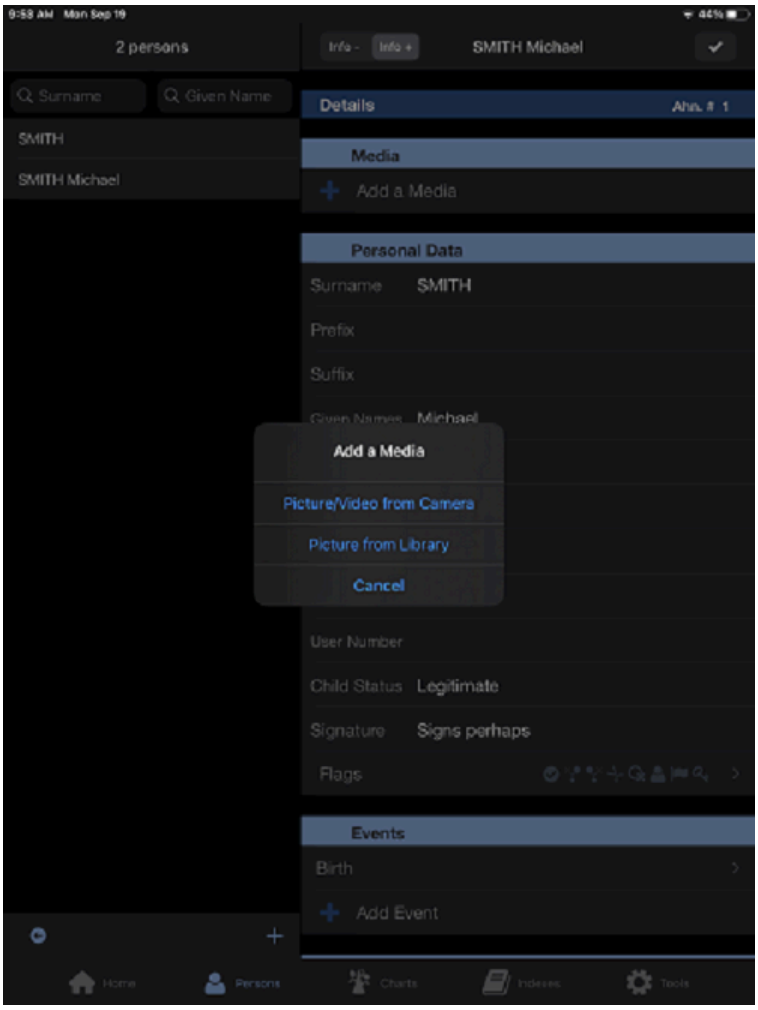
See also Create a new genealogy on Heredis iOS (see page 890).

Your genealogy is on your iOS device, you want to modify an existing person record.

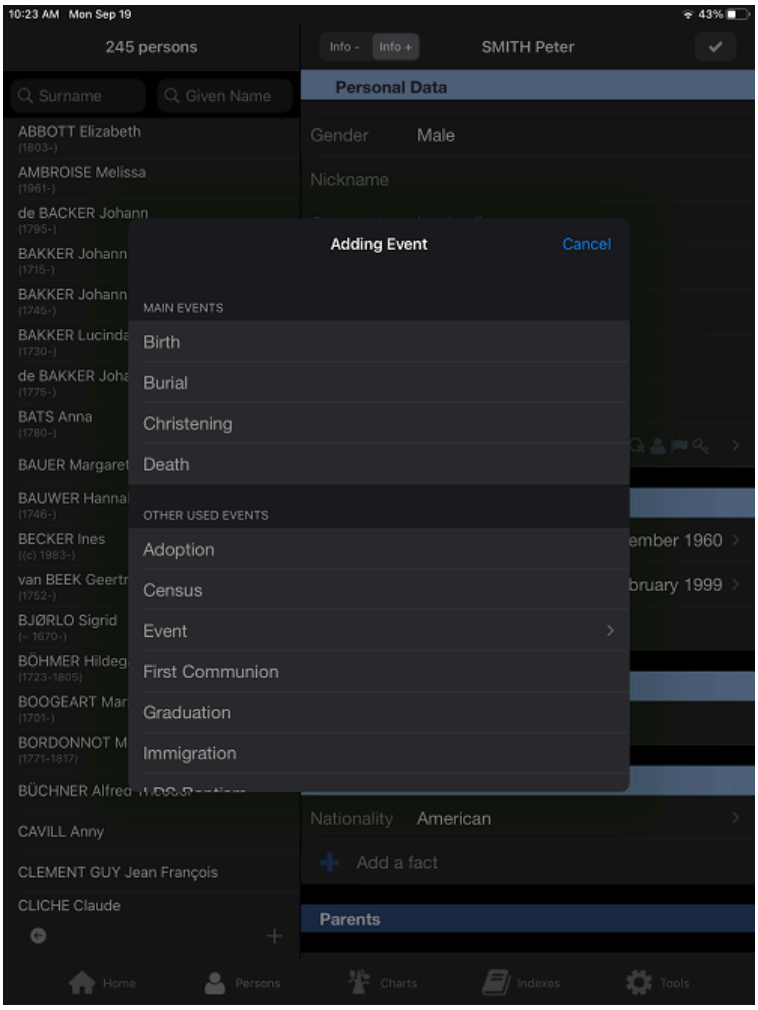
Navigate to the person you want to edit. See Navigate/Search for a person in a genealogy on Heredis iOS (see page 909).
Tap the person's box in the **Immediate Family**.
Tap the **pencil** at the top right to switch to edit mode.
Add the information you want.



Tap **Add Media** to put the person's photo. Choose the photo from your phone or take a photo with your camera's device.
Swipe down and down to see what additional topics are available.



Tap **Add Event** to add a birth, death, and more.



Tap **Add Facts** to enter information that is not an event such as health information, religion etc.

Tap **Add Personal Link** to link 2 people whose blood link isn't quite known or has no blood ties. For example, a servant or a cousin present at the wedding but you do not know to what degree or branch this cousin is from.

The button ✔ allows you to return to the reading of the person's sheet.

See also Delete a person on Heredis iOS (see page 924), Create a person on Heredis iOS (see page 899).

Navigate/Search in Heredis iOS

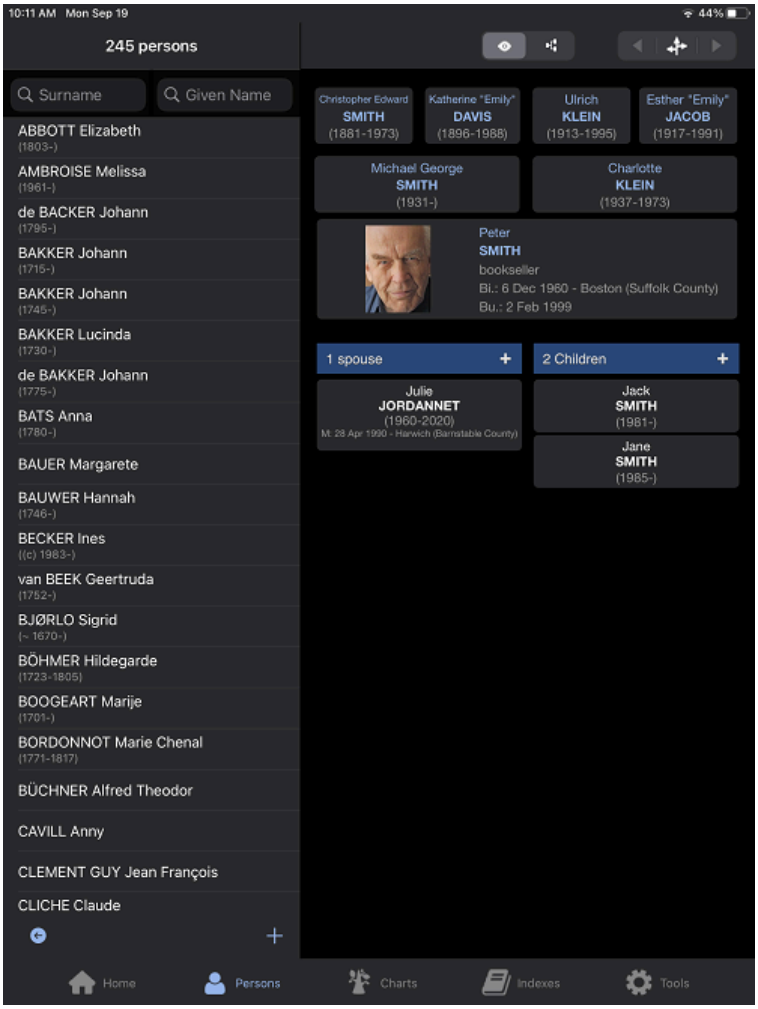
Heredis for iOS allows you to enter and view genealogical information contained in a file.

Select the genealogy to view or edit. See Switch from one genealogy to another on Heredis iOS (see page 898) if you have multiple genealogy files in your app.

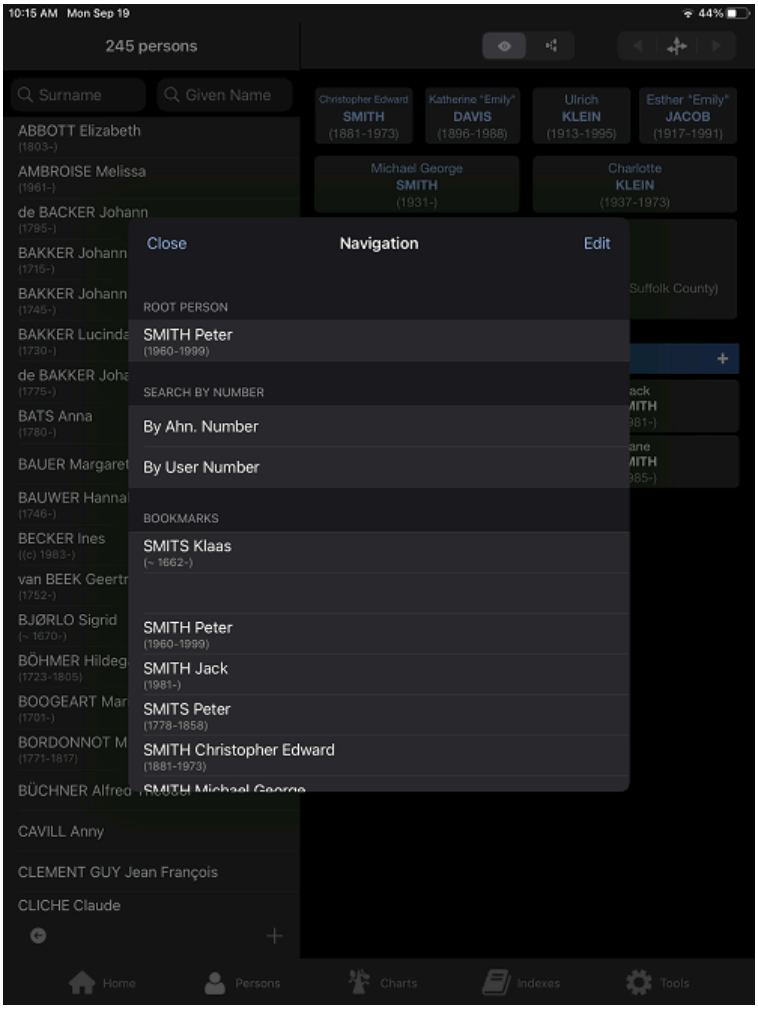
Display the person of your choice as a primary person (in the center of the screen) to be able to modify it or simply consult its information.

For this, you have several solutions:

- select it from the list of persons in the file in the **Persons** tab in the bottom bar of the application.
- search by surname or given name. On the **Persons** tab, tap in the **Surname** box and enter the surname or first letters, do the same for the **Given name** if necessary. The list automatically updates.



- switch between persons in the **Immediate Family** view or the **Ascendance** view if you know exactly where it is in the tree. For example, if you want to display the paternal great-grandfather of the root person, press the box of the paternal grandfather in the immediate family and then press the box of his father.
- search **by Ahnentafel number** or **User number** (if you have a personal numbering system). Press the button at the top right. Choose the numbering you want to use for the search and indicate the number of the person you want. Tap the corresponding person.



Place the person in the middle, pressing his name.

Consult its detailed sheet by pressing its box in the **Immediate Family** .

To change the content of the individual record, see Edit a person on Heredis iOS (see page 906).

Sources on Heredis iOS

From your Heredis iOS application you can add sources for:

- an event
- a fact
- a person (from Heredis 2025)

It works the same way wherever you add a source.

You can create or use an existing source either

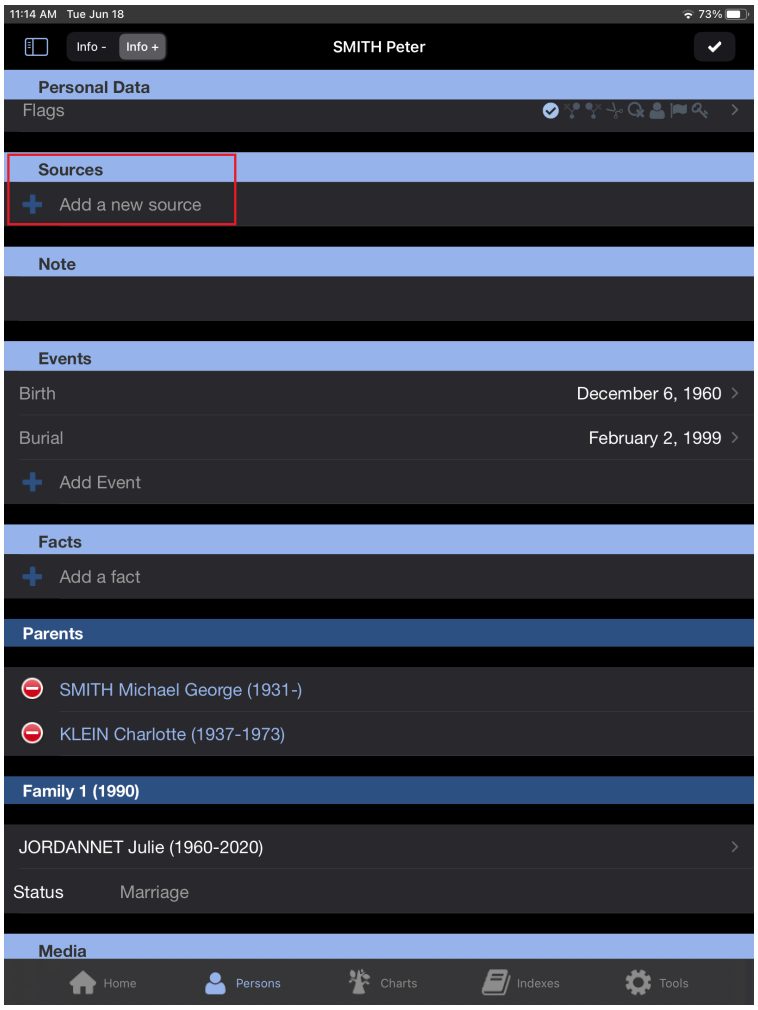
- from the source index
- from the person’s details, by tapping on the Add a source button.

Create a new source

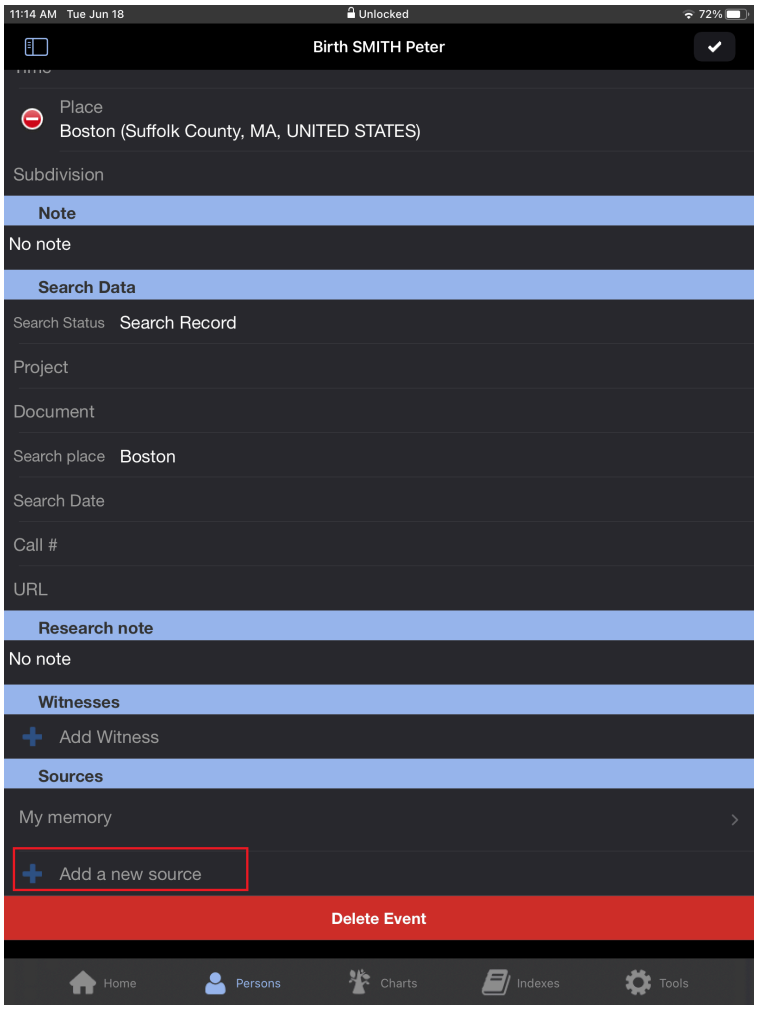
From person’s details

Tap on the person to whom you wish to add a source.
Tap on the pencil to edit the person’s details.
Drag your finger across the data to find the item to which you wish to add a source.

For Person sources, available since Heredis 2025, tap on **Add a source** under the **Sources** heading.

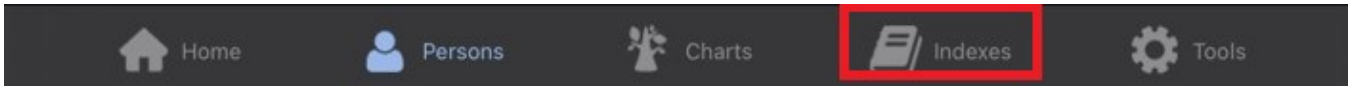


From the event or fact sources, tap on the event or fact you wish to edit. Then slide your finger to find the **Sources** heading. Tap on **Add a new source**.

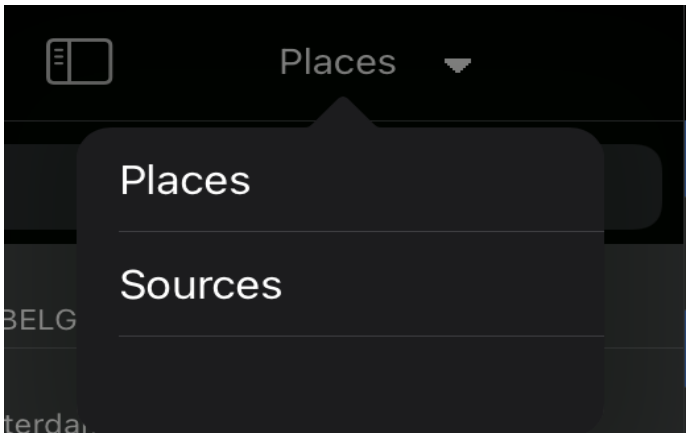


From Sources index

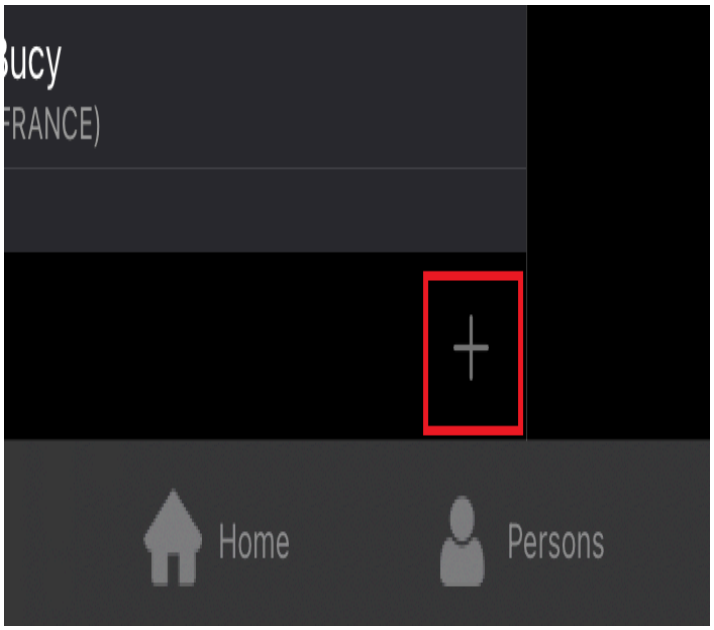
Tap on **Indexes** at the bottom of the screen.



From the left panel, select the **Sources** index from the drop-down menu.



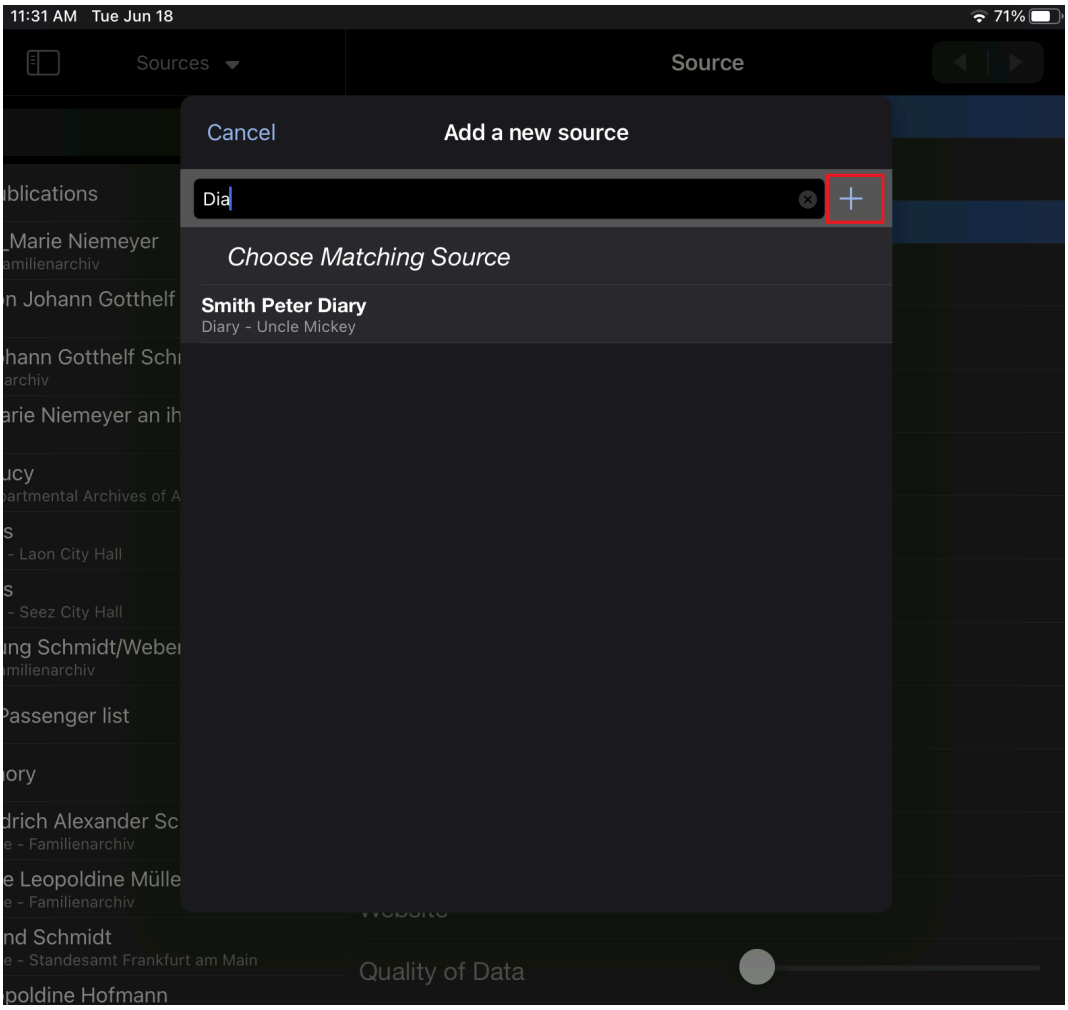
Tap on + at the bottom of the panel.



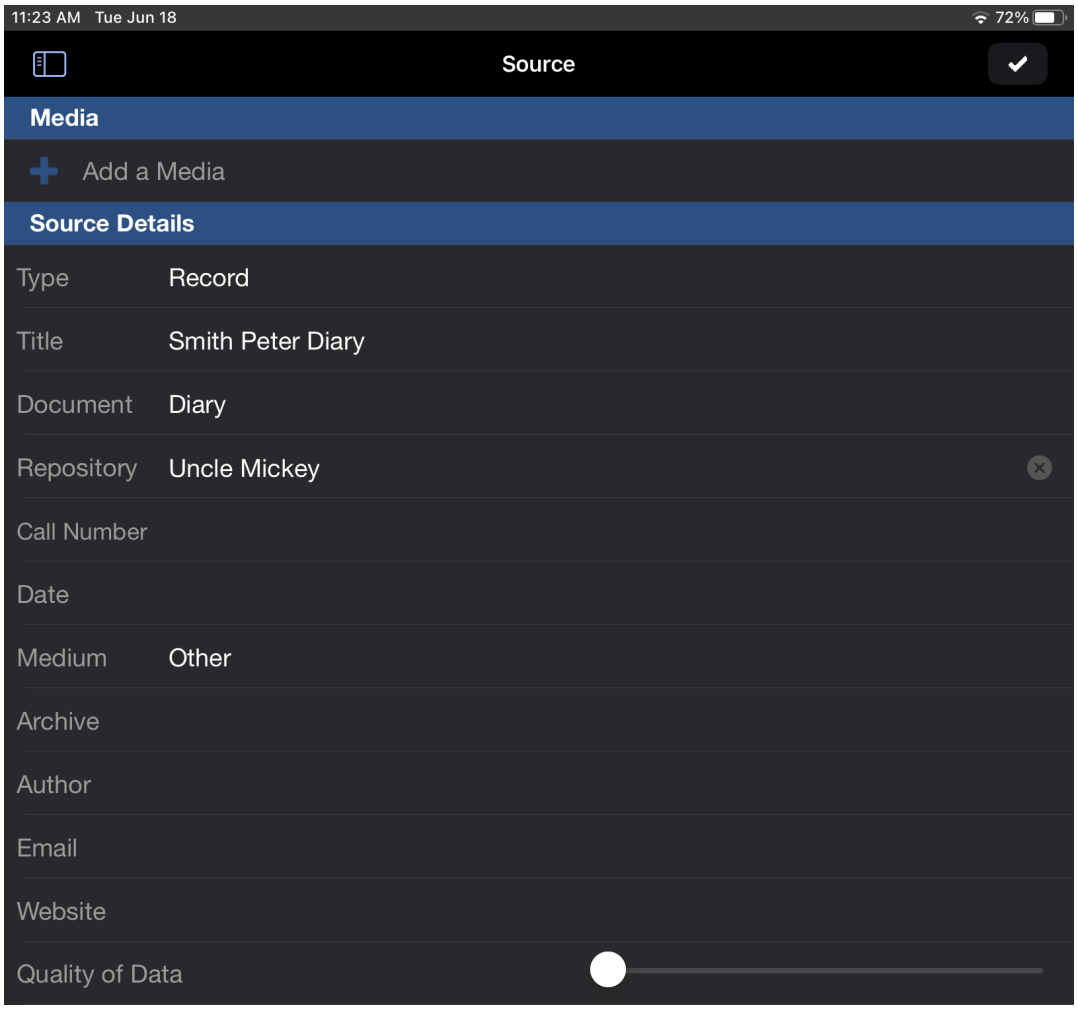
The operation is the same wherever the source is added or created.

A source search window opens.
To create a new source, enter the title of the source to be created. Check that the source does not already exist by consulting the list of results.

Tap on the + to the right of the search bar.



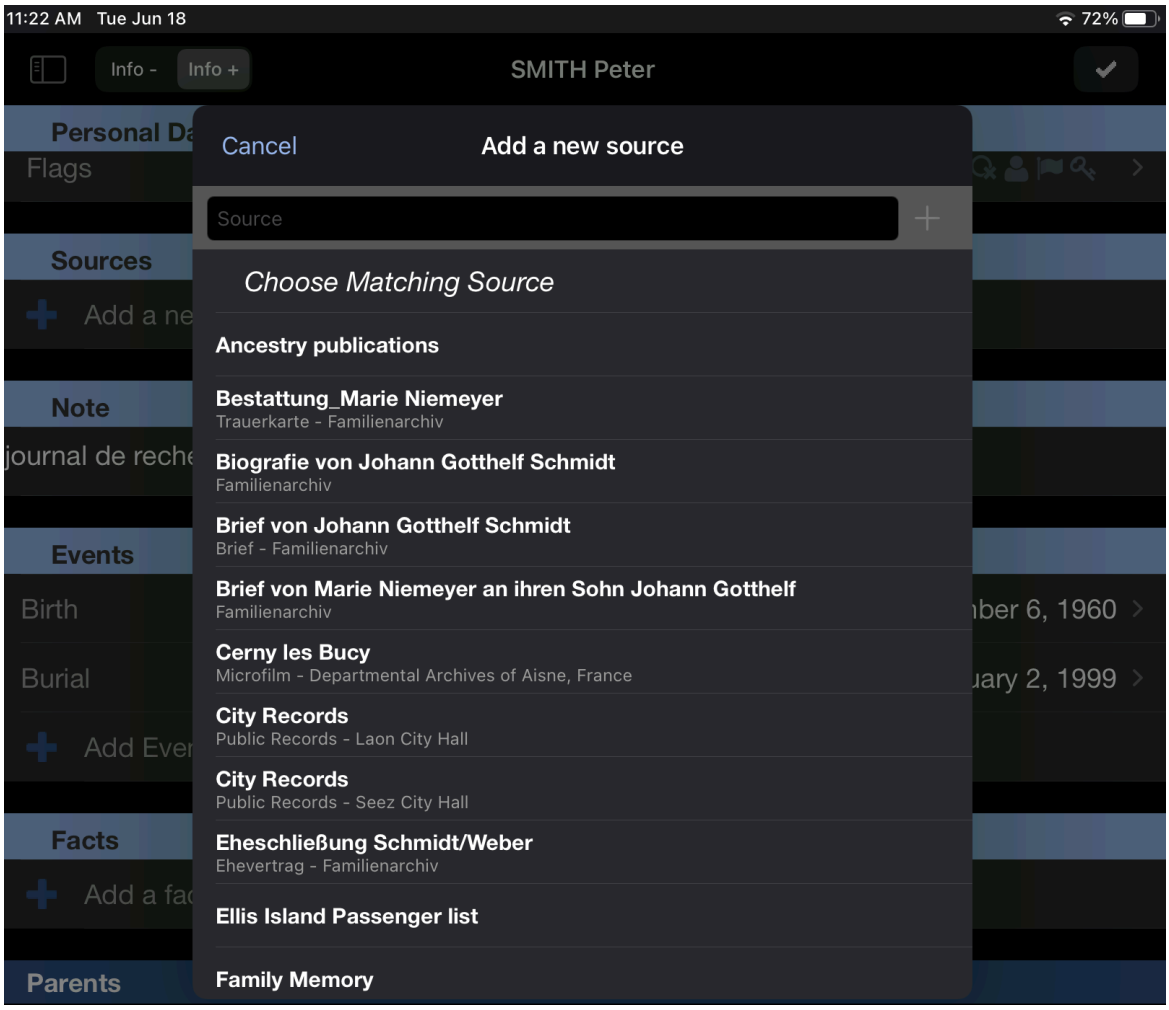
Fill in the known information for this source.
Tap on **Add media** to add the document photo.



Tap on the validation button in the top right-hand corner to validate source creation.

Use an existing source

As previously, edit the person's details and choose the area to add a source (person's details, event or fact).
Then, when the source search window opens, enter the first few letters of the source's title.
Consult the list of results.



Tap on the source to be used.

If you are adding or creating a source for an event, a fact or a person's source, tap on the validation button ✔ in the person's details to finalize the modification.

Searching in Heredis iOS

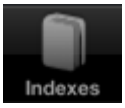
Searching for persons

On iPhone or iPod touch, tap the **Index** button on the top toolbar to display a list of all persons in the file. Scroll down the list or enter a surname and/or a given name to research a specific person. Tap the name in the results list to view the **Immediate Family** of the person.

On the IPad, the list of persons is displayed on the left of the **Immediate Family** screen. To hide the list, tap the arrow icon at the bottom of the list. Tap the same icon to redisplay the list.

You can also search for people by their number on the **Direct Access** screen. Tap the **Direct Access** icon on the top toolbar of the **Immediate Family** screen to see a list of bookmarked persons, the root person, and search by number. Select the search method to find a person by his numbered place in the genealogy (with the Ahnenthafel number), or by the personal number that you assigned to the person.

Searching for Places

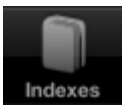
Tap the **Indexes** 

icon at the bottom of the screen and select the **Places** menu.

Scroll down the list of all locations in the file or enter a place name in the Search panel. Tap the location in the resulting list to display all known information about this place: administrative areas, notes, media.

Consult the list of assignments for the place to browse the persons linked to this location. Tap the **Indexes** icon on the bottom toolbar to return to the list of information about the place.

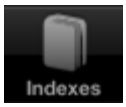
Searching for Sources

Tap the **Indexes** 

icon at the bottom of the screen and select the **Sources** menu.

Scroll down the list of all sources on the file or type a word contained in the source title, the document or the repository place of the source. Tap the source in the resulting list to display the known information about this source: call number, date, type of source, author, etc…

Consult the list of assignments for the source to browse the persons who are linked to this

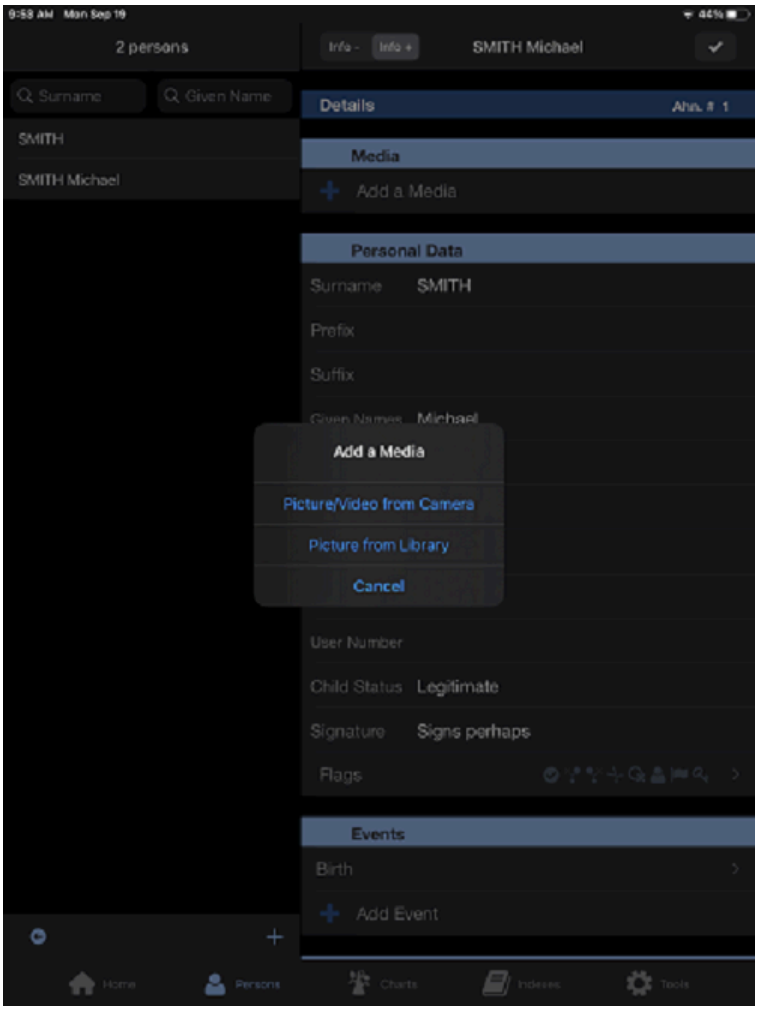
source. Tap the **Indexes** 

icon in the bottom toolbar to return to the list of information about the source.

Illustrating your genealogy in Heredis iOS

Every item of data may be illustrated with media. Tap the camera button or on the photo displayed in the box of the primary person of the **Immediate Family** screen to take a photo or select a photo from the media library. The selected media will illustrate the person in printouts and in trees.

To illustrate an event, a source or place on the data input screens, tap **Add Media**.



To see all the media associated with your data, tap the **Media** area of the **Data** screen. The media are displayed as thumbnail pictures. The thumbnails are arranged by type of media: images, sounds and videos, and other file types (documents prepared with a word processor, a spreadsheet, PDF, etc.).

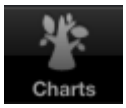
Tap the pictures, sounds or videos for display in the appropriate viewer. When several images are associated with the person or the data, drag them to see them all. Tap **Media** to return to the thumbnail view.

Tap any other media to launch the application to view them: Heredis will display the list of

applications on your device which allow reading of the type of media file.

Tap **Edit** to remove media: tap the red minus sign shown opposite each item to delete.
Tap **Done** to return to the media consultation screen.

Creating Family Tree Charts with Heredis iOS

Tap the **Charts** 

icon at the bottom of the screen to produce a graphic display of the ancestry of the root person.

Changing Themes

Tap **Themes** in the top toolbar to select other possible displays. You can create illustrated trees or simple working trees, showing 4 to 6 generations according to the different themes.

The proposed tree charts are designed to be displayed and printed on one page only. Tap the theme of your choice to display the tree with a new look.

Zoom into the tree by sliding thumb and finger apart to view the contents of the boxes or double-tap. Slide on the chart to see other enlarged boxes.

Changing Persons

With your iPhone or iPod touch, tap **Index** on the top toolbar to see a list of all persons in the file. Scroll down the list or enter a surname and/or a given name to find a specific person. Tap the name in the resulting list to display that person's tree chart in the theme you have chosen

With the iPad, the list of persons is displayed to the left of the chart. To hide the list, tap the arrow icon at the bottom of the list. Tap the same button to redisplay the list.

Sharing a tree chart

Once you have shown the tree to your loved ones, send it to them by email or print it for them. Tap the **Share** icon on the top toolbar and choose the method of sharing.

Print chart will launch the printing of the page to any Airprint printer on the network. Select the printer. Indicate the number of copies to be printed by tapping **+** or **–** and then print by tapping **Print**.

Tap **Cancel** to return to the tree displayed without printing.

Send by Email in PDF format will open your email application. You only have to complete the email by adding the addressee(s). The PDF file can be opened on any type of device.

Delete a person on Heredis iOS

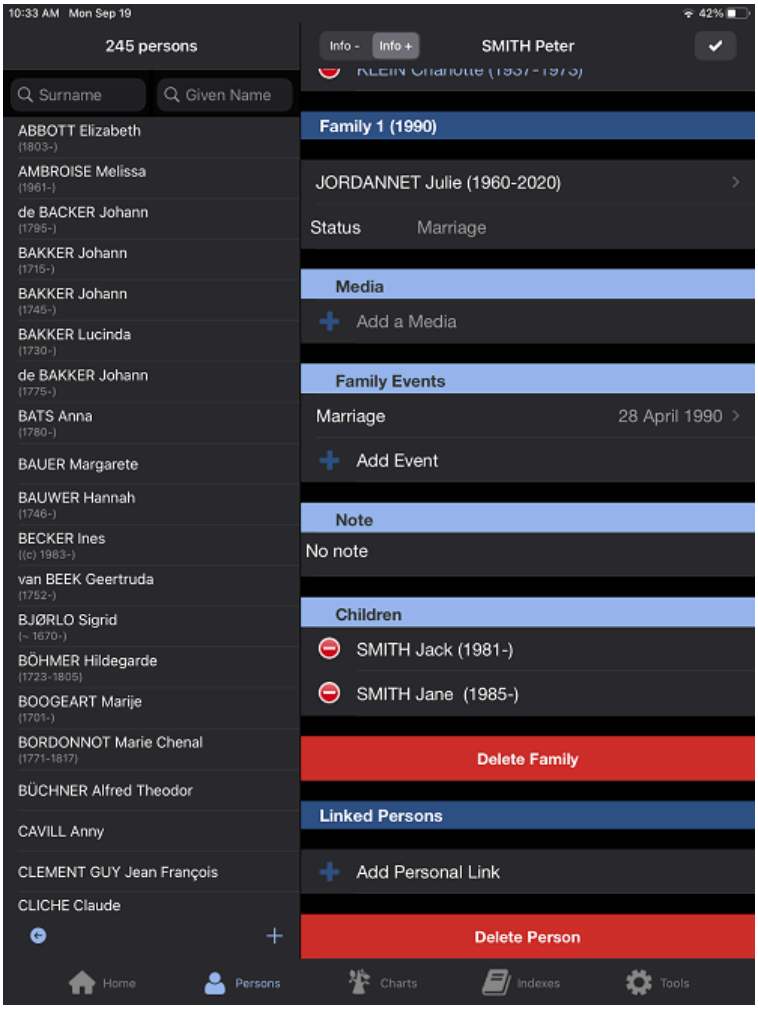
You have made a mistake and want to remove a person from your genealogy on Heredis iOS?

Navigate to the person you want to edit.
Tap the person's box in the **Immediate Family**.
Press the **pencil** to enter edit mode.

Swipe down and down to see what additional topics are available.

Press the **Delete Person** button.

Note : The root person, at the base of the tree, cannot be deleted. To be able to delete it, you must first change the root person.

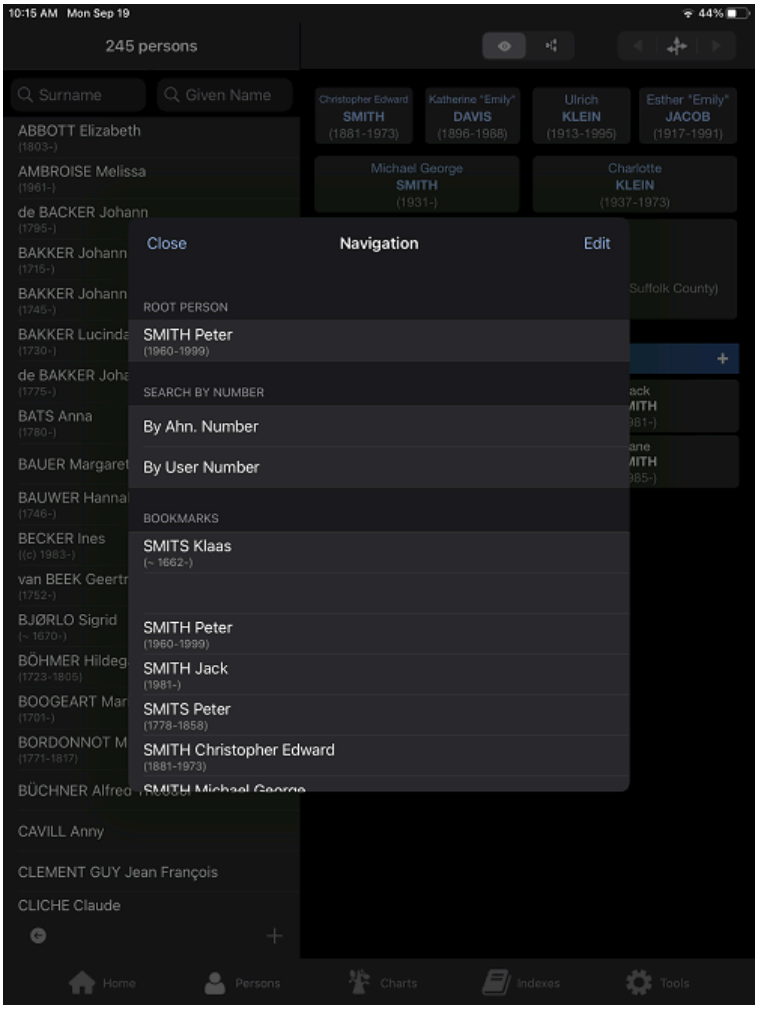


Change root person on Heredis iOS

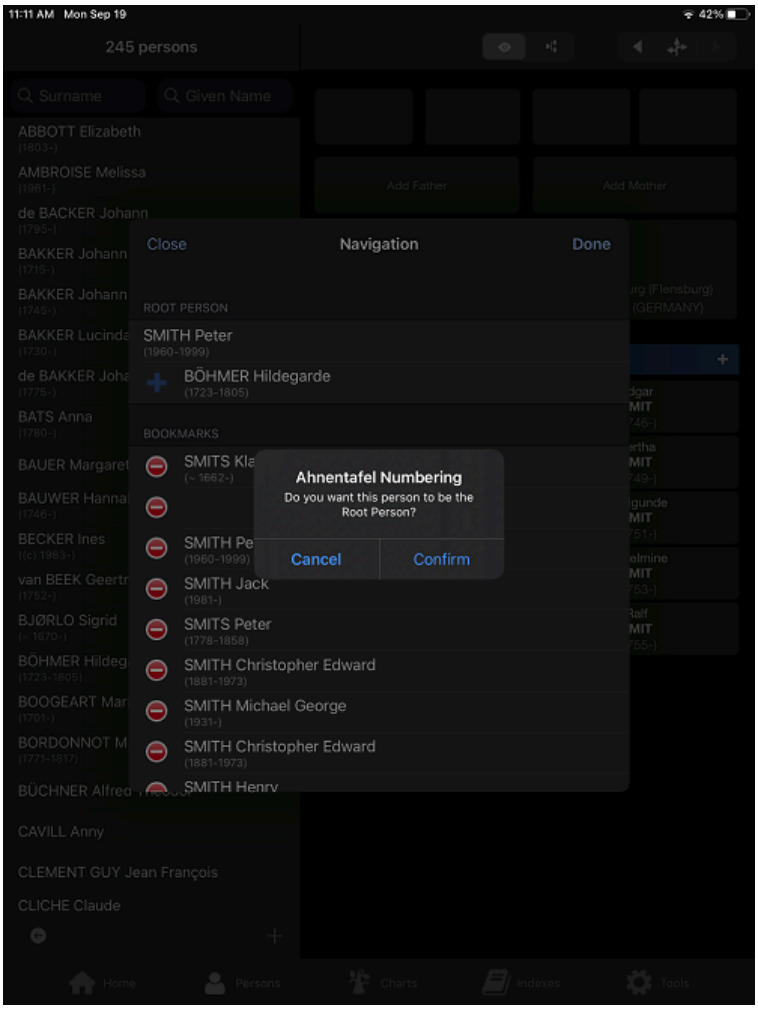
By default, the root person is the person entered first. It bears the Ahnentafel number 1.
You can edit the root person from the Heredis iOS app.

In the **Persons** tab, choose the person to place as a primary person.

Press the button at the top right.
Tap **Edit.**



Select from the list of proposed persons the one who will be the new root person.
Confirm your choice by pressing the **Confirm** button.


11:11 AM Mon Sep 19
42%
245 persons
Surname
Given Name
ABBOTT Elizabeth
AMBROISE Melissa
de BACKER Johann
BAKKER Johann
BAKKER Johann
BAKKER Lucinda
de BAKKER Joha
BATS Anna
BAUER Margaret
BAUWER Hanna
BECKER Ines
van BEEK Geertr
BJØRLO Sigrid
BÖHMER Hildeg
BOOGEART Mar
BORDONNOT M
BÜCHNER Alfred
CAVILL Anny
CLEMENT GUY Jean François
CLICHE Claude
Add Father
Add Mother
Close
Navigation
Done
ROOT PERSON
SMITH Peter
(1960-1999)
BÖHMER Hildegarde
(1723-1805)
BOOKMARKS
SMITS Kla
(~ 1662-)
SMITH Pe
(1960-1999)
SMITH Jack
(1981-)
SMITS Peter
(1778-1858)
SMITH Christopher Edward
(1881-1973)
SMITH Michael George
(1931-)
SMITH Christopher Edward
(1881-1973)
SMITH Henry
Ahnentafel Numbering
Do you want this person to be the Root Person?
Cancel
Confirm
Home
Persons
Charts
Indexes
Tools

Export a Heredis genealogy from Heredis iOS

You can export your genealogy from Heredis iOS if your file is on your tablet or smartphone.

You can then send it to a friend using Heredis, or retrieve it to keep on your computer.

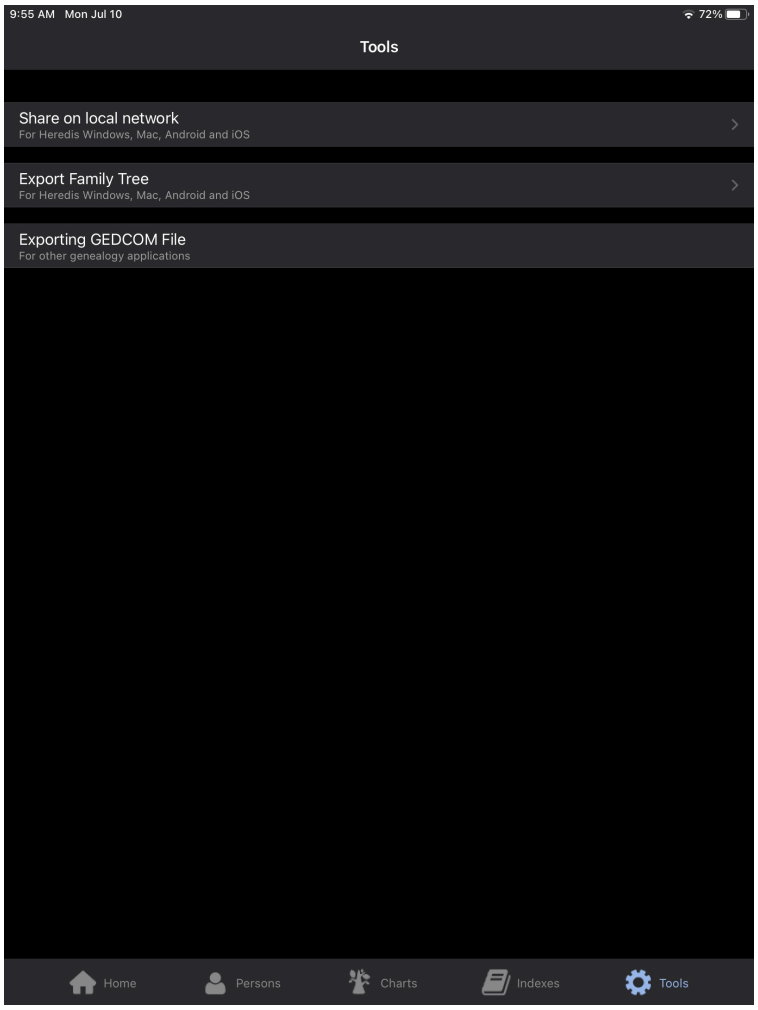
If you or your friend/family member wish to open the file with another software program, you will need to export in a GEDCOM format. See the article Export a GEDCOM from Heredis iOS (see page 932).

There are 2 methods:

Method 1: Export Family Tree

On iPad or iPhone,

- Launch the Heredis application.
- Open the file you want to share.
- Press **Tools.**
- Press **Export Family Tree**. Read the detailed article:



Choose to send by email

- Open your mailbox, write an e-mail with the file attached.
- From your remote device (computer, tablet or smartphone), open your e-mail.
- Download the attachment and place the file on the remote device, NOT in a cloud.

- or choose to send via a cloud
  - Place this file in a cloud (Google Drive, OneDrive, iCloud, Dropbox etc.).
  - From the remote device (computer, tablet or smartphone), connect to your cloud.
  - Download the file and place it **in the device**. Handling depends on the cloud. Ask your chosen cloud support for more information.

Method 2: Share on the local network

This lets you send files from your tablet or smartphone via the private network of your Internet box.

Important requirements

- Deactivate mobile data on the mobile device.
- Activate WiFi on mobile device(s). If you're sending to a computer, it can be connected to the local network via an ethernet cable without any problem, as long as it's the same network as the one for WiFi.
- Connect the receiving and sending devices to your Internet network.
- If you are sending to a computer, make sure that the computer's antivirus or firewall software does not block Heredis. If necessary, ask the firewall/antivirus vendor to help you with the settings.
- Authorize access to media and photos on the mobile application, and above all on the local network. See Installing a Heredis mobile application if you need to.

First sharing

On iPad or iPhone,

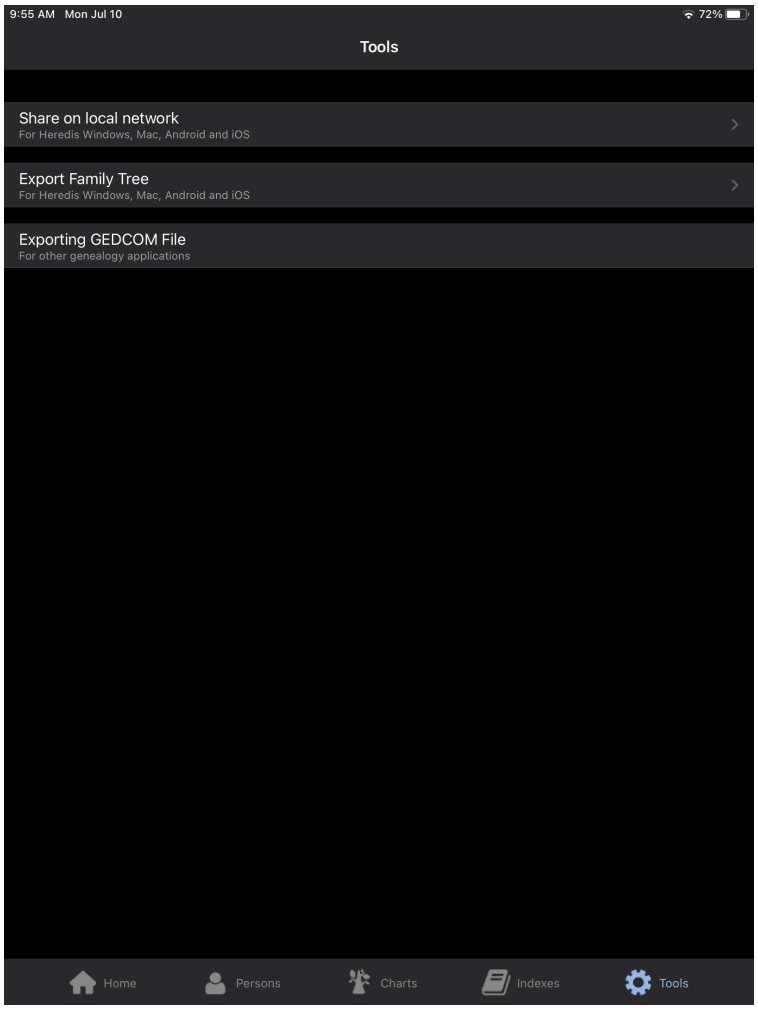
- Launch the Heredis application.
- Open the file you want to share.

On the computer or other mobile device,

- Launch the Heredis application.

On iPad or iPhone,

- Press **Tools.**
- Press **Share on local network**.

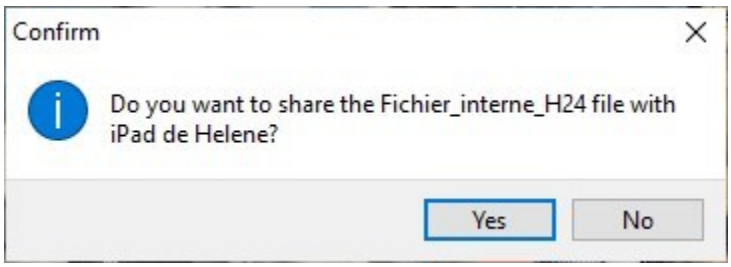


- Select the device to which you wish to send the file.
- Press **Share the file**.

On the computer or other mobile device,

- A message appears to acknowledge receipt of the file.
- Click on **Yes**.

Reception by Heredis Windows or Mac



Update after first share

Important! Heredis keeps the latest version (chronologically speaking) of the file. So be sure

to update the file on the various devices before making any changes. Follow the instructions below,

On iPad or iPhone,

- Launch the Heredis application.
- Open the file you want to share.

On the computer or other mobile device,

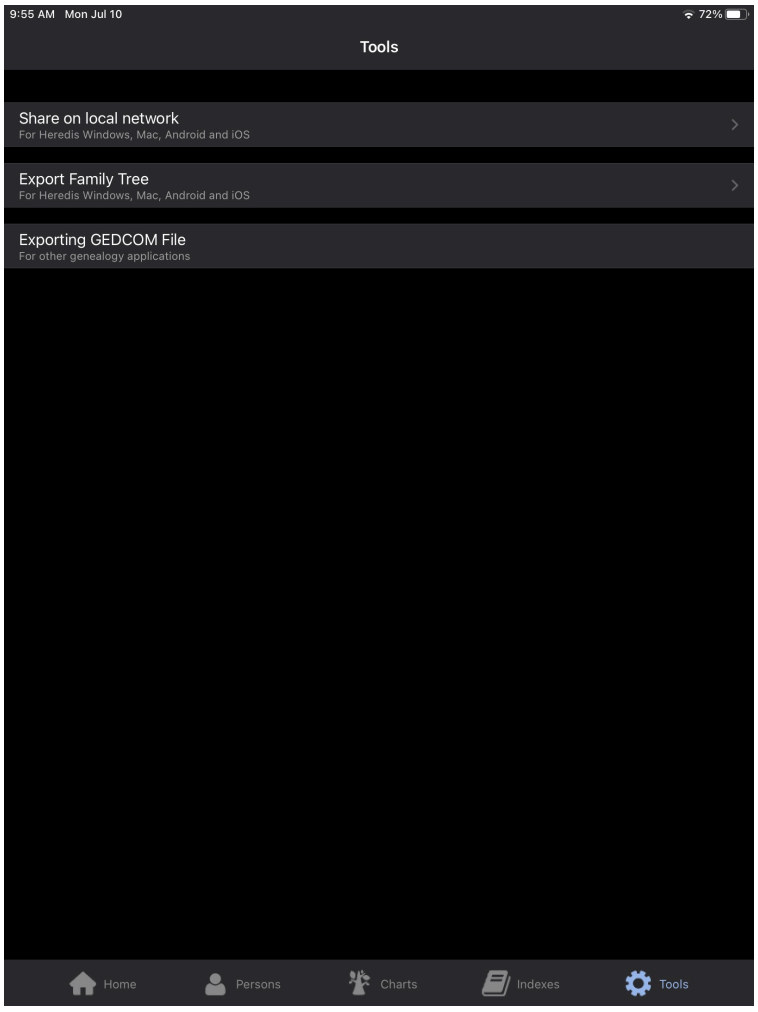
- Launch the Heredis application.
- Open the file you want to share.

Heredis detects which of the two is the most recent and suggests that you update. Confirm the message.

Export a GEDCOM from Heredis iOS

Use this function to send your file from Heredis iOS to another solfware you own, or to someone using a solfware other than Heredis.

- Launch Heredis on your iOS device.
- Open the genealogy to be exported.
- Click on the **Tools** button.
- Choose **Export GEDCOM File**.
- Choose to send by email.



To open this file with Heredis Mac or Windows, see the articles Create a new genealogy from a GEDCOM 5.5 (see page 786).1 or Import a GEDCOM 5.5.1 into an existing file.

To open this file with Heredis iOS or Android, see Open a genealogy on Heredis Android created on another device (see page 937) or Open a genealogy on Heredis iOS created on another device (see page 891).

Set up Heredis Android

Press the menu button to access the settings of the Heredis Android app.

Tap to apply your choice to:

- **Automatic formatting of names**: Uppercase or only the first letter in uppercase.
- the order of the **dates** : Day Month Year or Month, Day, Year. In order for the modification to appear, close and reopen the Heredis App.
- the default **signature**. That is, when adding a person, the default choice will be applied. Choose from Yes (he/she can sign), No (he/she can not sign), or ? (you don't know if he/she sign).

Finally, swipe down from the bottom to the top to access the rest of the available settings.

Change the theme of the Heredis app if the default theme doesn't suit you. Tap on the choice of **Light** or **Dark** theme or stay on the default theme in your device's system.

Heredis Android homepage

Important: The Heredis Android app changes with each new version of Heredis for Windows or Mac. You must have the Heredis application for Android corresponding to the Heredis of your computer to be able to make them communicate.

From the PlayStore or GoogleStore on your Android device, search for Heredis and download it. See Install a Heredis mobile app for more details.

After installation, launch Heredis on your Android device.

The Heredis homepage allows you, from the button

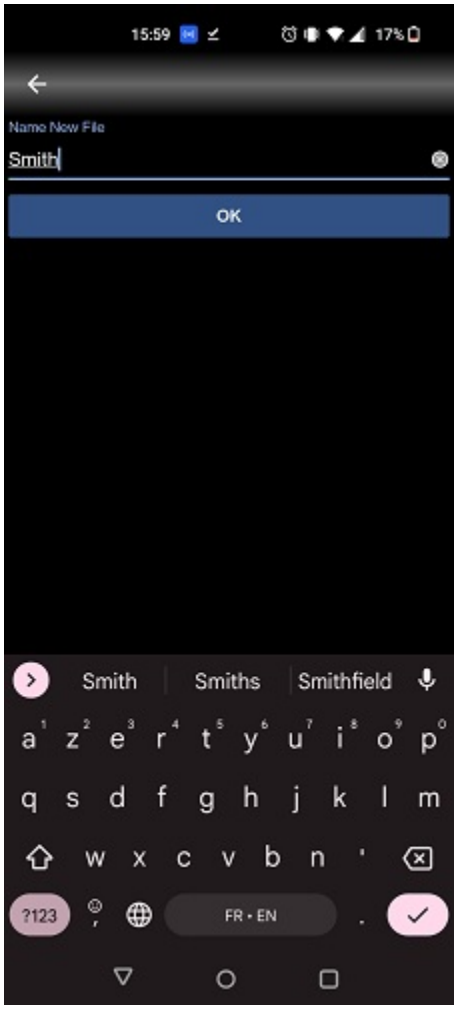
- to create a new genealogy,
- to open genealogies already in use
- to remove them from your device,
- to see the GEDCOM files to be converted,
- to navigate to the online help site

Heredis Android homepage

See the articles Open a genealogy on Heredis Android created on another device (see page 937) ; Create a new genealogy on Heredis Android (see page 936) ; Create persons on Heredis Android (see page 940)

Create a new genealogy on Heredis Android

Press the menu button at the top left.
Tap **New Genealogy**.
Give the genealogy a name using the virtual keyboard and validate by pressing **OK**.



Heredis asks you to allow him to take photos and record videos. Accept in order to add media in your file. Choose between **When you use the app** and **Only this time**.
If you refuse, you will not be able to take photos or videos and add them immediately.
If you choose **Only this time,** you will have the message every time you use it.

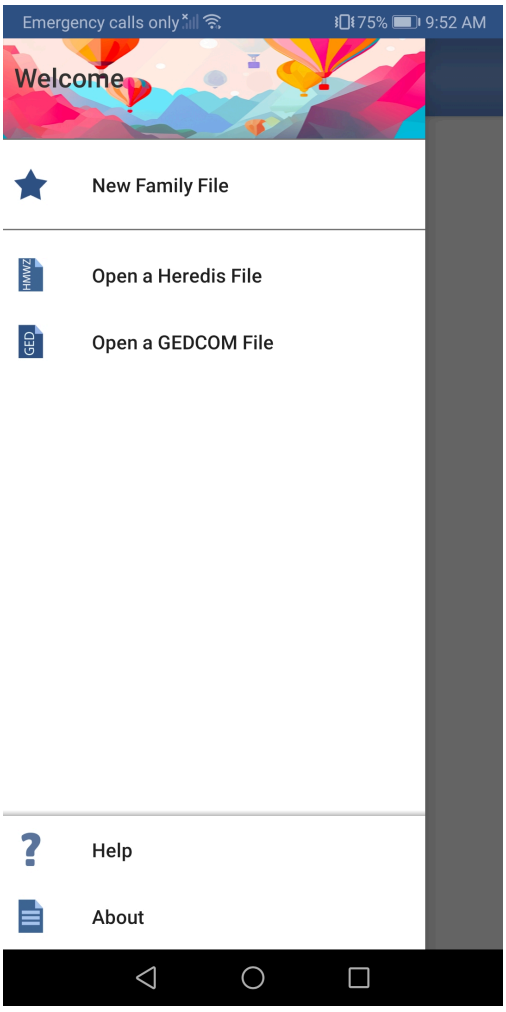
You can add persons to this new genealogy file. See Create Persons on Heredis Android. (see page 940)

See also Open a genealogy on Heredis Android created on another device. (see page 937)

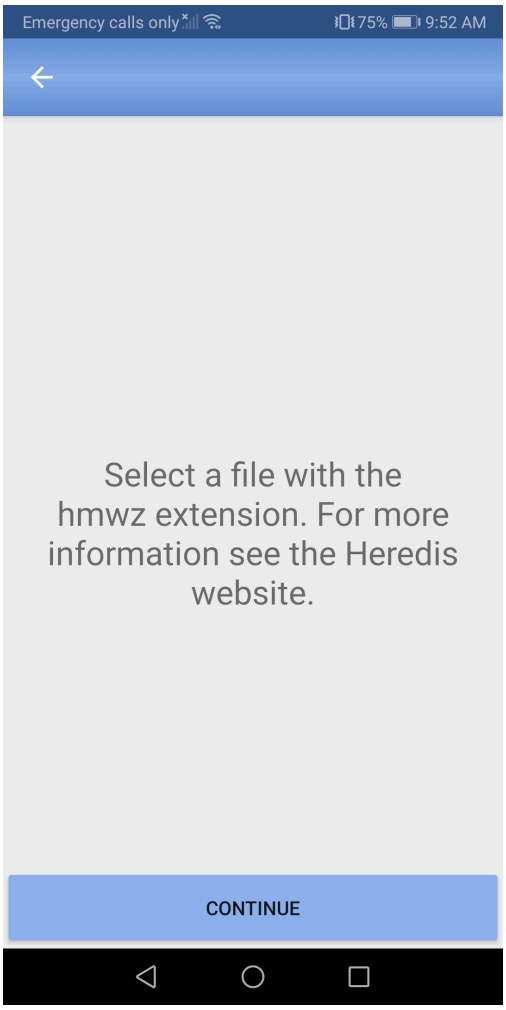
Open a genealogy on Heredis Android created on another device.

See the article Send/Receive a file with Heredis iOS or Android.

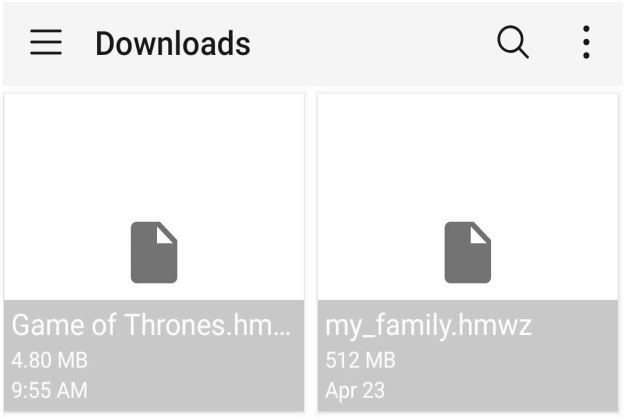
If you used Share on local network, the file opens once it has been received on the Android device.
If you sent your file via your mailbox or a cloud, download the file to the Android device's hard drive.
Once the file has been downloaded to the tablet or smartphone, tap on **Open a Heredis file**.



Tap on **Continue**.



Select the downloaded file with .hmwz extension.



Let the conversion run. The file opens at the end of the process.

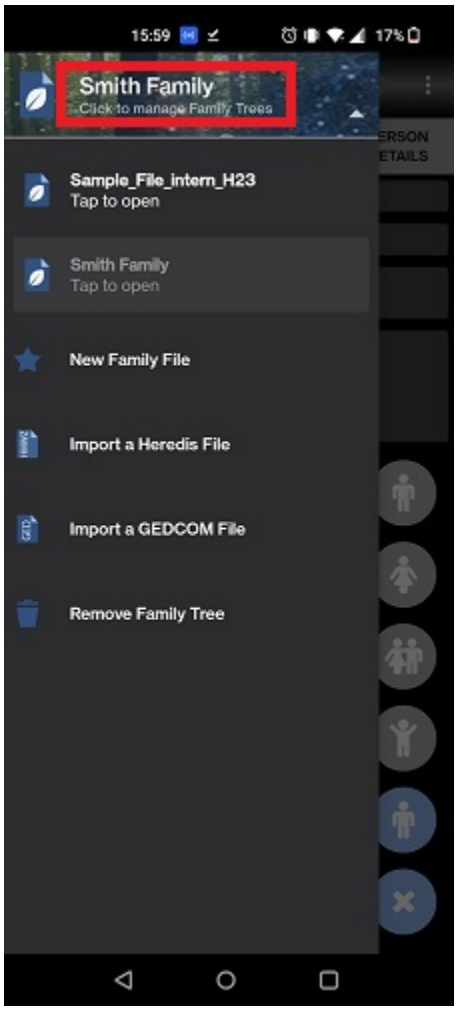
See also the articles Create a new genealogy on Heredis Android (see page 936), Heredis Android homepage. (see page 934)

Switch from one genealogy to another on Heredis Android

You can have several genealogies than Heredis Android, just like on Heredis Windows or Mac.

After you create the new file or receive the file from your computer, to move from one file to another

- press the
- tap the file name at the very top
- select the genealogy to open.



Create persons on Heredis Android

Heredis for Android allows you to have your genealogy always with you.
Create or take your genealogy to your Android device, so you can complete it. Convenient when you go into the family and want to add genealogical information to your file.

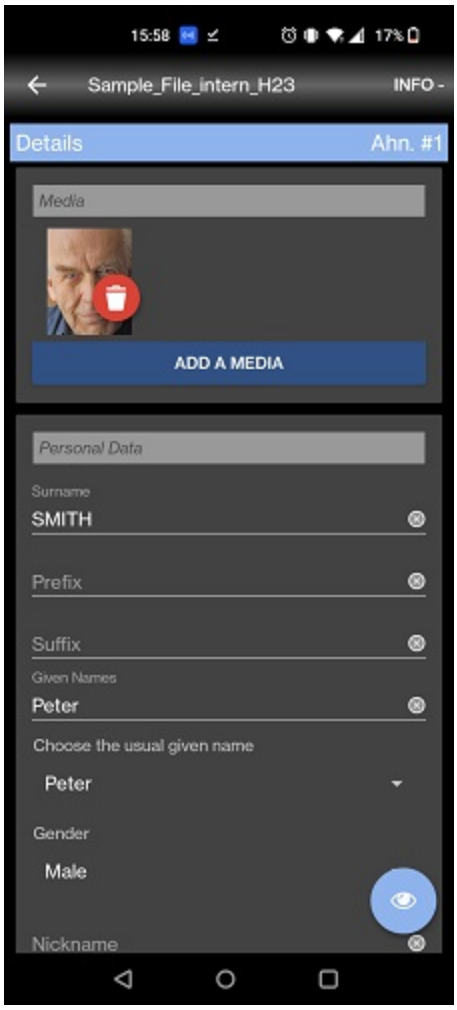
See also the articles Create a new genealogy on Heredis Android (see page 936) and Open a genealogy on Heredis Android created on another device. (see page 937)

Create the first person

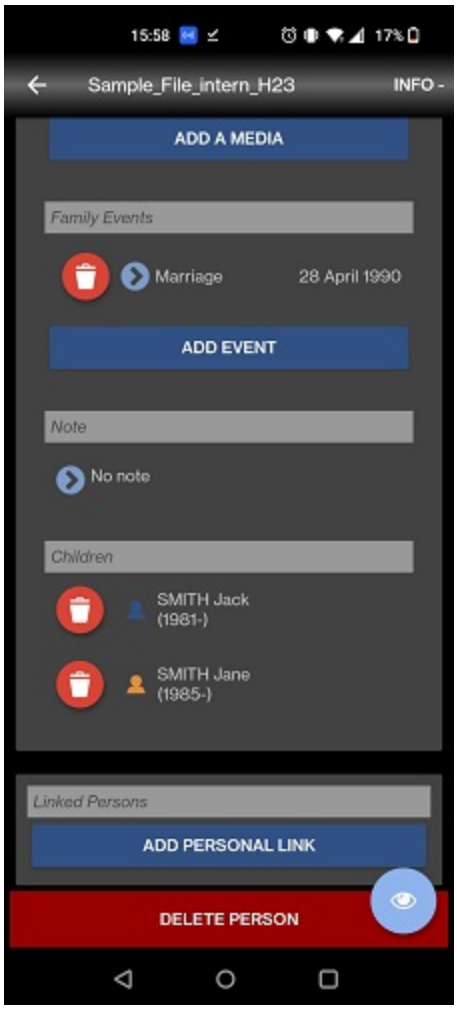
After creating a new genealogy, you need to create the first person. He/She will be the root person, that is, at the base of the tree.
Tap **Create First Person**.

Indicate their surname and given names.
Tap the + to add information.

Fill in the information you have.
Tap **Add Media** to put the person’s photo. Choose the photo in your phone or take a photo with the camera of your Android device.



Swipe down and down to see what additional topics are available.



Tap **Add Event** to add a birth, death, and more.
Tap **Add Facts** to enter information that is not an event such as health information, religion etc.
Tap **Add Personal Link** to link 2 people whose blood link isn't quite known or has no blood ties. For example, a servant or a cousin present at the wedding but you do not know to what degree or branch this cousin is from.

The eye button allows you to return to the reading of the person's sheet.
To edit the sheet, press the pencil.

Create parents, spouse and children

From the **Immediate Family** tab, tap the + to add the father, mother, spouse, or child.

As before, fill in the information about the person: Surname, Given name and press the + to add the other information.

Note: If the person to whom you are trying to add a spouse does not have a specified gender, you will not be able to add the spouse to them. By default, Heredis adds the opposite sex when adding a spouse. You can, however, change it in the person's gender to have a same-sex marriage.

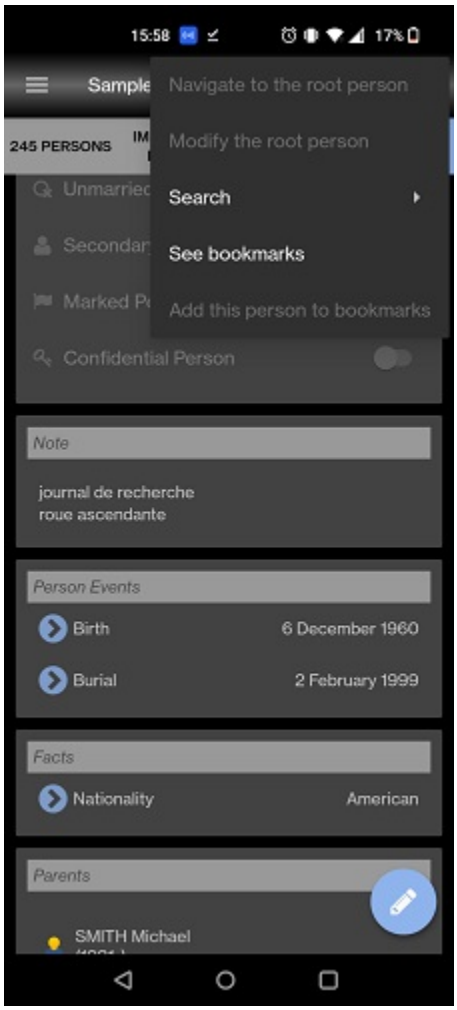
You can also add the father, mother, spouse or child by tapping the Add Father, Add Mother link, or the + next to the number of spouses and children.

Change root person on Heredis Android

By default, the root person is the person entered first. It bears the Ahnentafel number 1.
You can edit the root person from the Heredis Android app.

Place as a primary person (in the center of the screen) the person you want to have as the root of the genealogy.

Press the button at the top right.
Choose **Modify Root Person**.

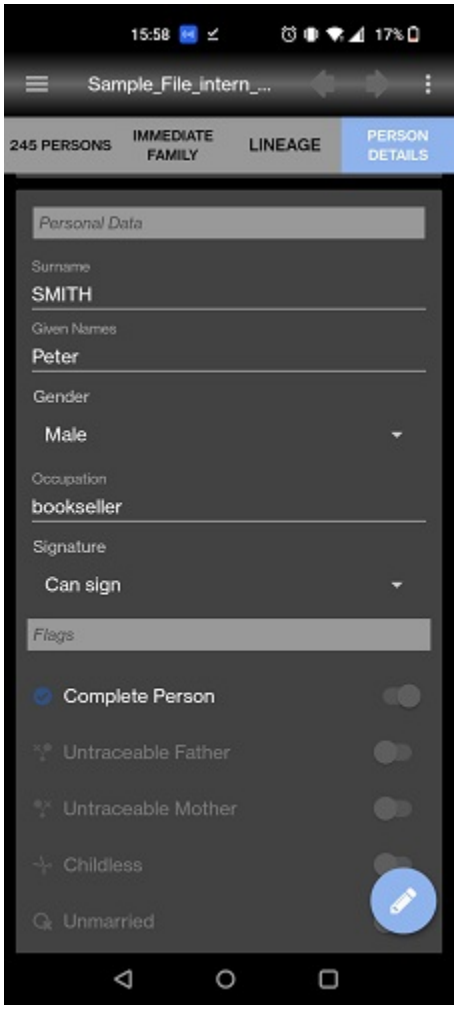


Edit a person on Heredis Android

See also Create persons on Heredis Android (see page 940).

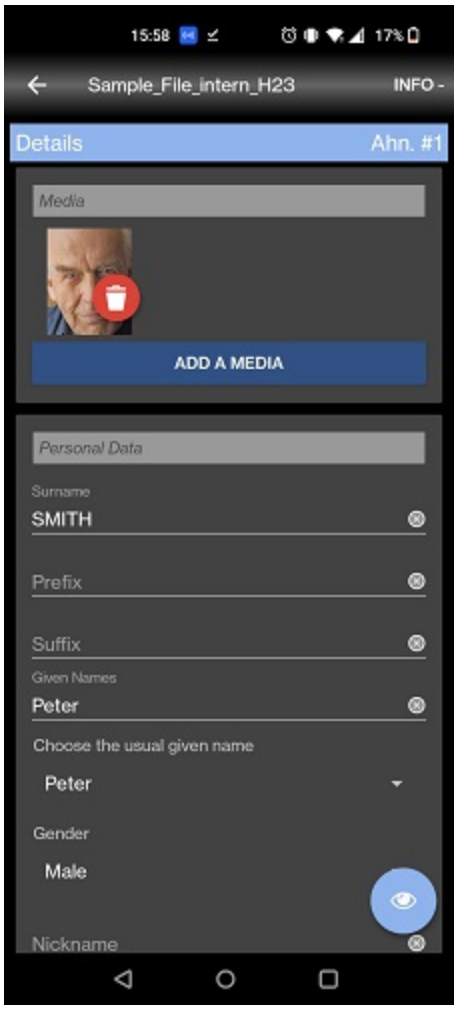
Your genealogy is on your Android device, you want to modify an existing person sheet.

Navigate to the person you want to edit.
Tap the person's box in the **Immediate Family** or the **Person Details** tab.
Press the **pencil** to enter edit mode.
Add the information you want.

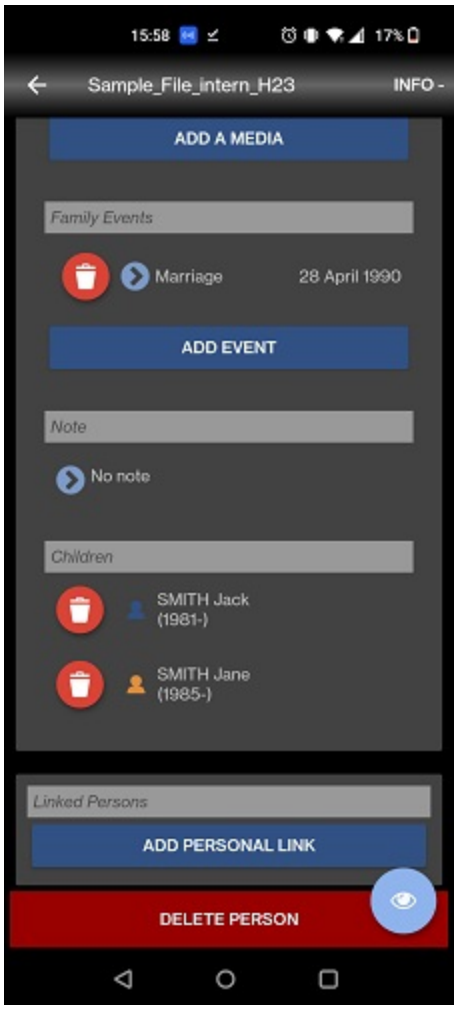


Tap **Add Media** to put the person's photo. Choose the photo from your phone or take a photo with the camera on your mobile device.

Swipe down and down to see what additional topics are available.



Tap **Add Event** to add a birth, death, and more.
Tap **Add Facts** to enter information that is not an event such as health information, religion etc.
Tap **Add Personal Link** to link 2 people whose blood link isn't quite known or has no blood ties. For example, a servant or a cousin present at the wedding but you do not know to what degree or branch this cousin is from.



The eye button allows you to return to the reading of the person’s sheet.

See also Delete a person on Heredis Android (see page 960), Create persons on Heredis Android (see page 940).

Navigate/search for a person in a genealogy on Heredis Android

Heredis for Android allows you to enter and consult genealogical information contained in a file.

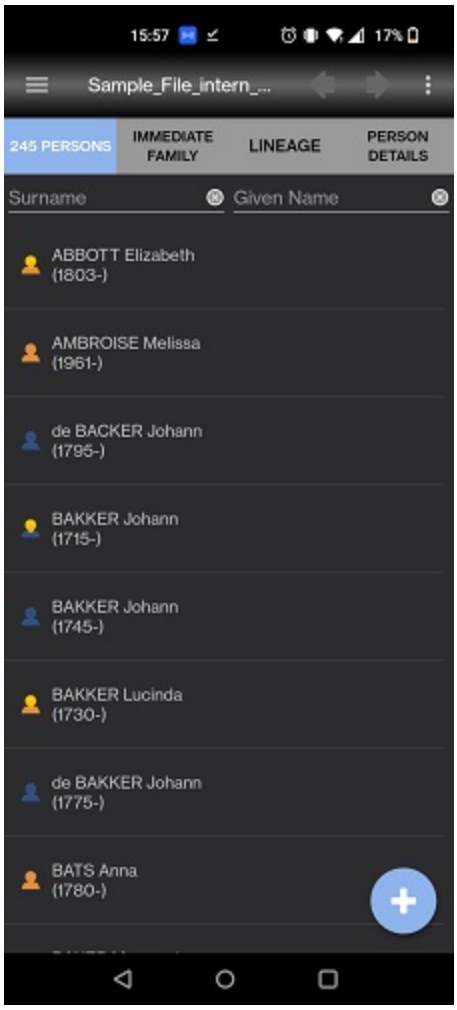
Select the genealogy to view or edit. See the article Switch from one genealogy to another on Heredis Android (see page 939) if you have multiple genealogy files in your app.

Navigate to a person

Display the person of your choice as a primary person (in the center of the screen) so that you can edit him/her or simply consult his/her information.

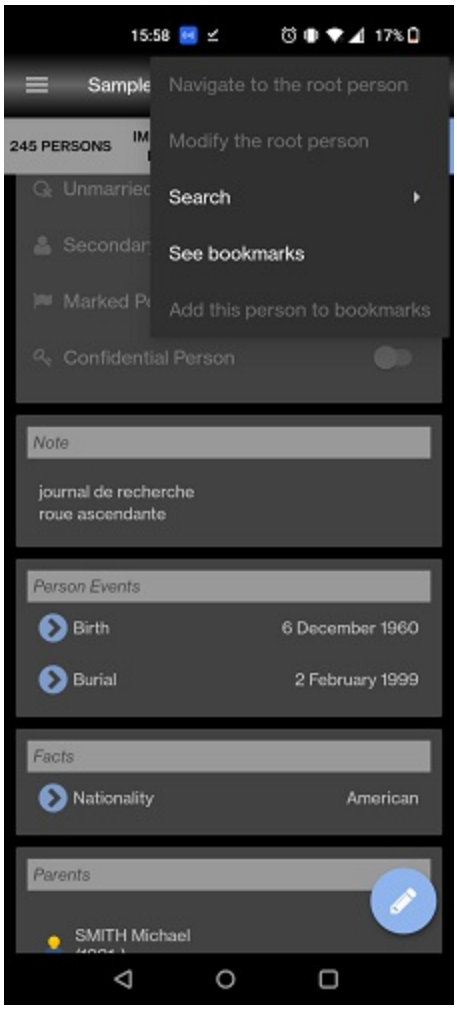
For this, you have several solutions:

- select it from the list of persons in the file in the **Persons** tab preceded by the number of persons contained in the genealogy.



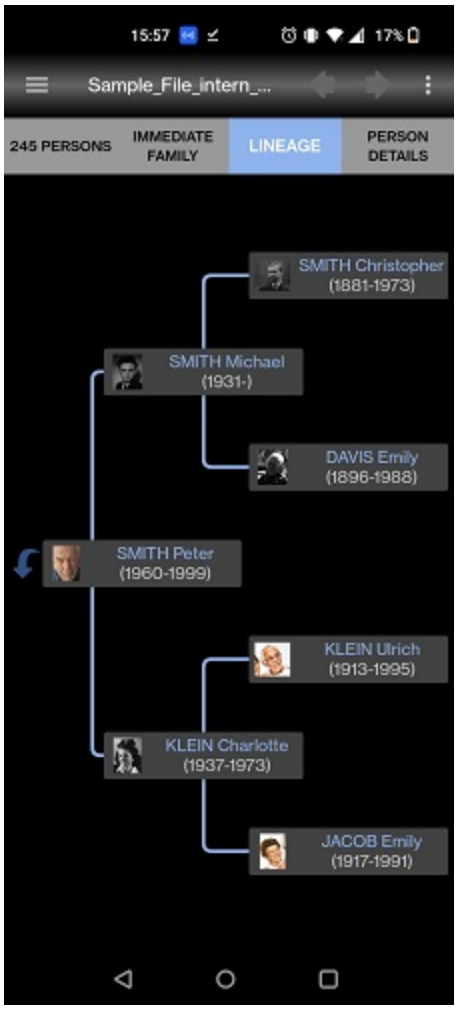
- move from one person to another in the **Immediate Family** if you know where it is located exactly. For example, if you want to display the paternal great-grandfather of the root person, tap the paternal grandfather's box in the immediate family and then tap his father's box.

- search by Ahnentafel number or user number (if you use a personal numbering) in the search menu. Tap the button at the top right and tap **Search**. Choose the numbering you want to use for the search and indicate the number of the person you are looking for. Validate with the magnifying glass or OK (depending on the devices) on your numeric keypad.



- search by surname or given name. On the **Persons** tab, tap in the Surname box and indicate the surname or its first letters, do the same for the given name if necessary. The list refreshes automatically.

Consult the person sheet from the **Person Details** tab, his/her close family from the **Immediate Family** tab, the dynamic tree of ancestry over 3 generations from the **Lineage** tab.



To edit the content of the person’s sheet, see Edit a person on Heredis Android.

Sources on Heredis Android

From your Heredis Android application you can add sources for:

- an event
- a fact
- a person (from Heredis 2025)

It works the same way wherever you add a source.

You can create or use an existing source, either

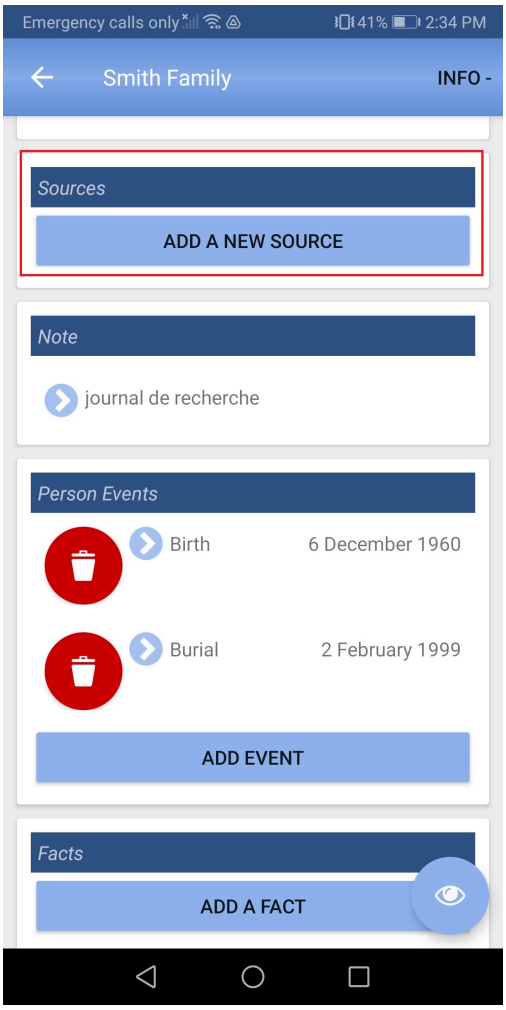
- from the source index
- from the person's details, by tapping on the **Add a source** button.

Create a new source

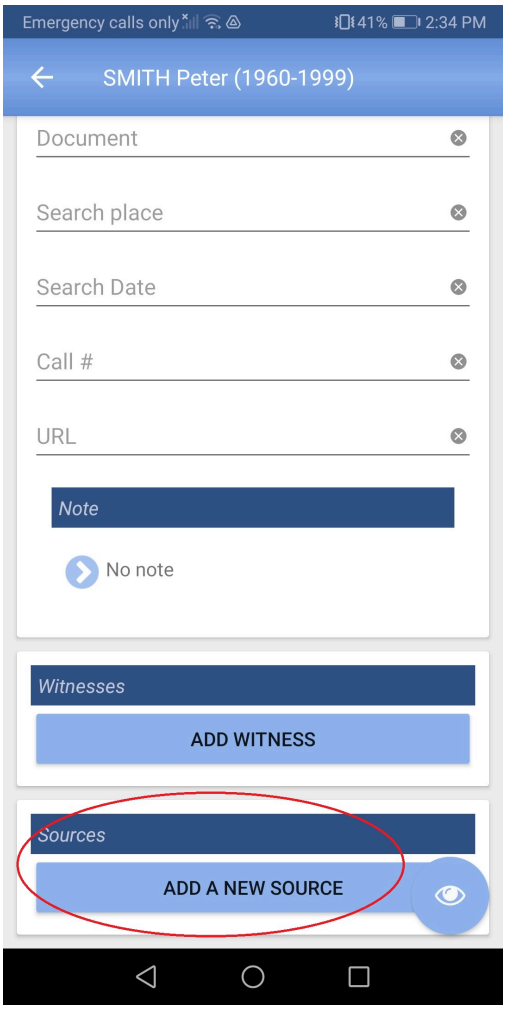
From person's details

Tap on the person to whom you wish to add a source.
Tap on the pencil to edit the person's details.
Drag your finger across the data to find the item to which you wish to add a source.

For Person sources, available since Heredis 2025, tap on **Add a source** under the **Sources** heading.

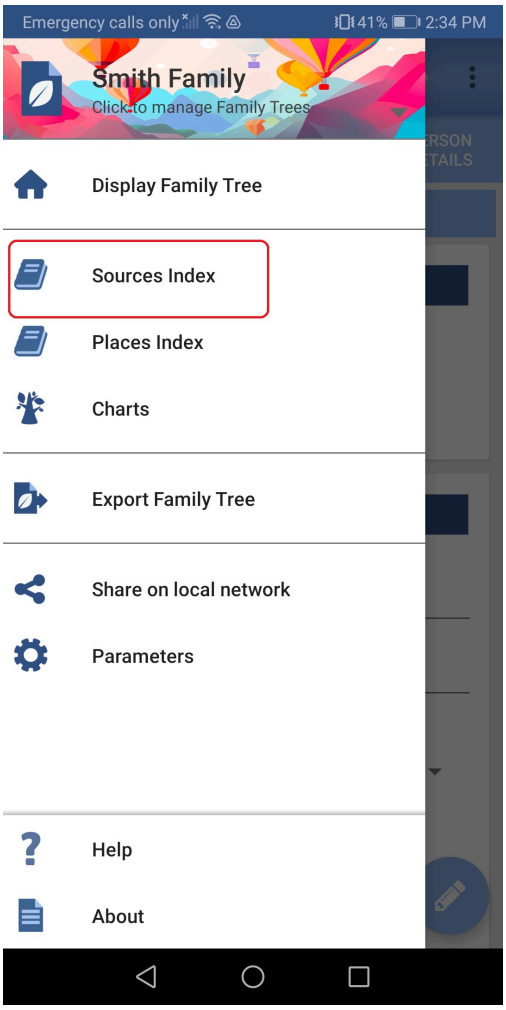


From the event or fact sources, tap on the event or fact you wish to edit. Then slide your finger to find the Sources heading. Tap on **Add a new source.**



From Sources index

Tap on the burger button to access the menu.
Tap on **Sources index**.

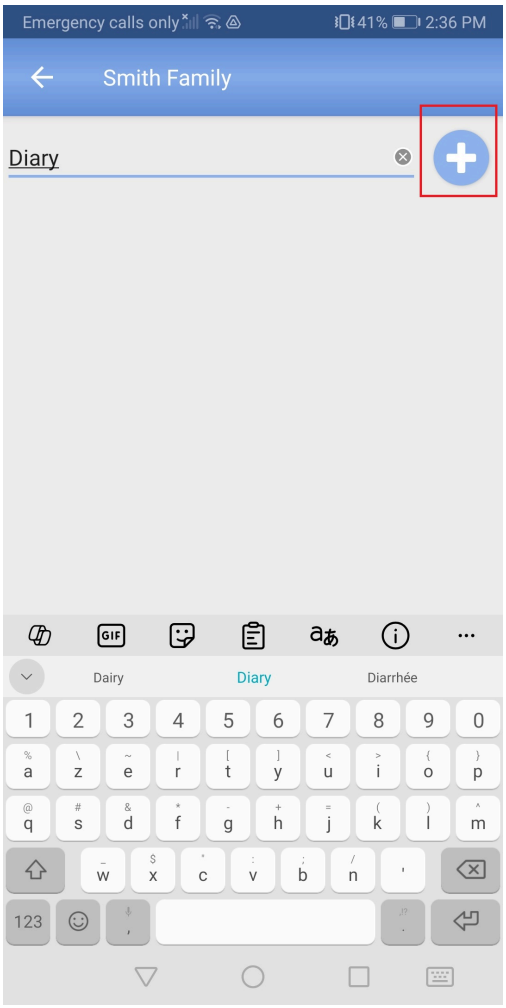


Tap on + at the bottom of the panel.

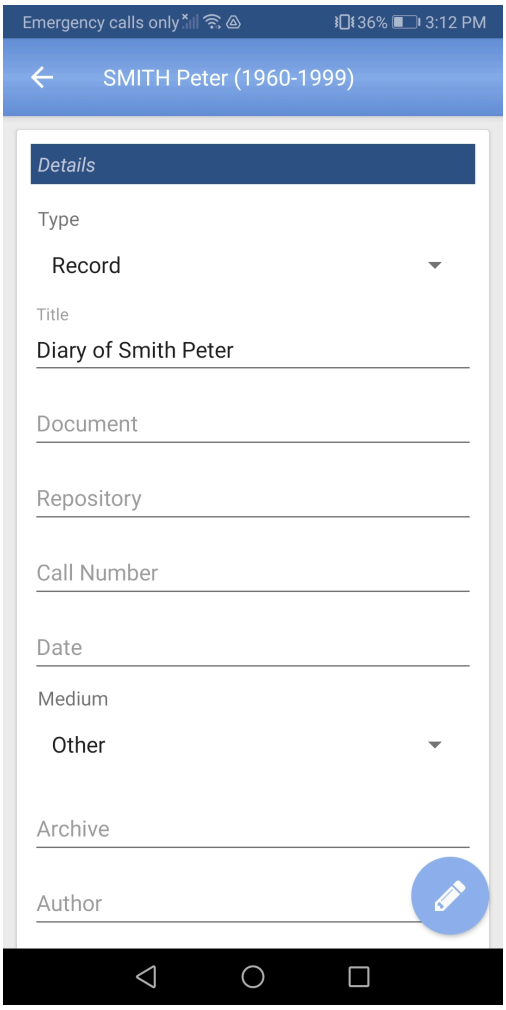
The operation is the same wherever the source is added or created.

A source search window opens.
To create a new source, enter the title of the source to be created. Check that the source does not already exist by consulting the list of results. Close the keyboard and tap on + at the bottom right of the screen.

Tap on the + to the right of the search bar.



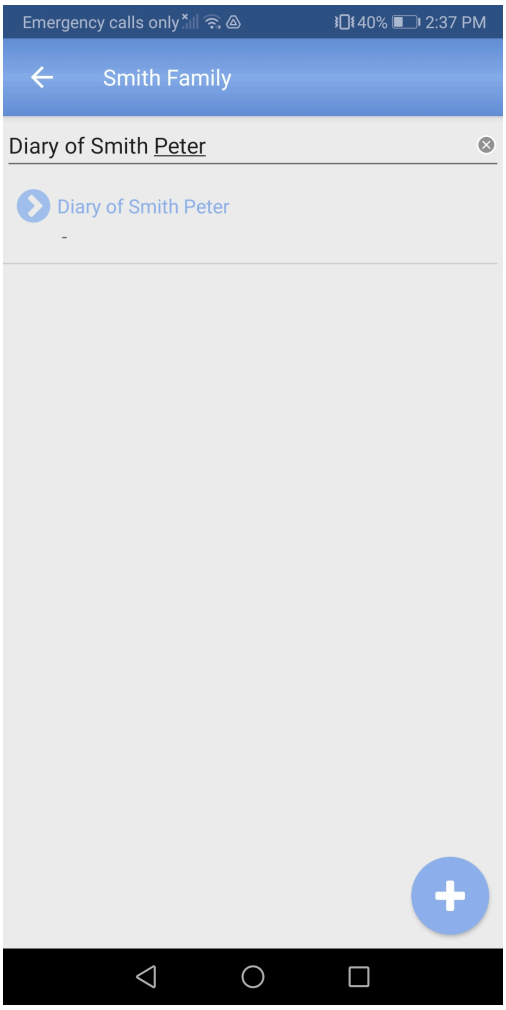
Select the source and tap on the pencil button. Fill in the known information for this source. Tap on **Add media** to add the document photo.



Tap on the eye button at the bottom right to validate source creation.

Use an existing source

As previously, edit the person's details and choose the area to add a source (person's details, event or fact).
Then, when the source search window opens, enter the first few letters of the source's title.
Consult the list of results.



Tap on the source to be used. It is added at the desired location.

If you are adding or creating a source for an event, a fact or a person’s source, tap on the eye button to finalize the modification.

Delete a person on Heredis Android

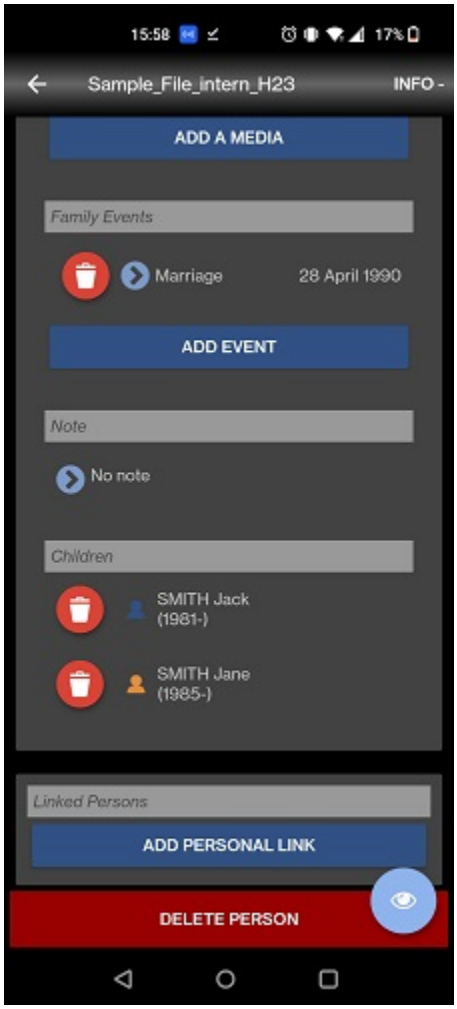
You have made a mistake and want to remove a person from your genealogy on Heredis Android?

Navigate to the person you want to edit.
Tap the person's box in the **Immediate Family** or the **Person Details** tab.
Press the **pencil** to enter edit mode.

Swipe down and down to see what additional topics are available.

Press the **Delete Person** button.

Note: The root person, at the base of the tree, cannot be deleted. To be able to delete it, you must first change the root person. See also Change root person on Heredis Android (see page 944).

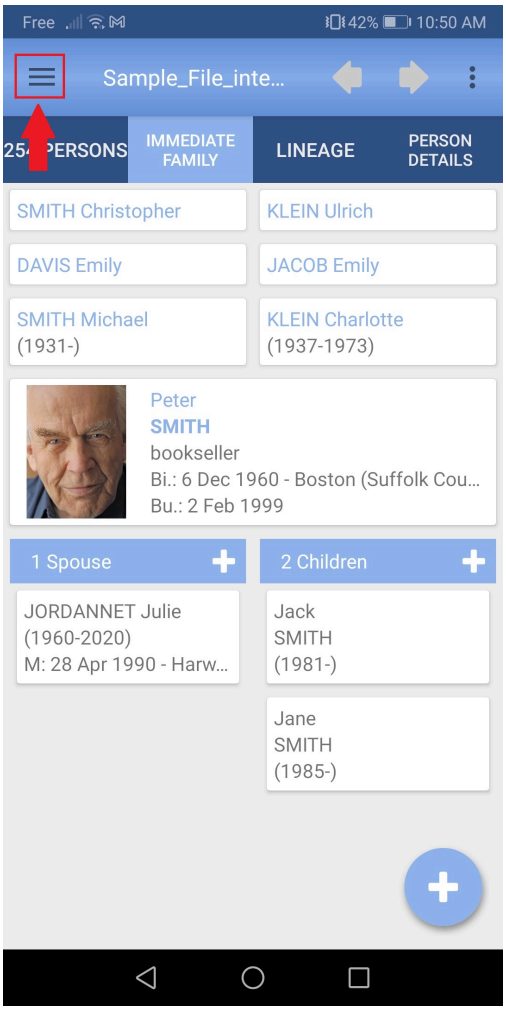


Export a Heredis genealogy from Heredis Android

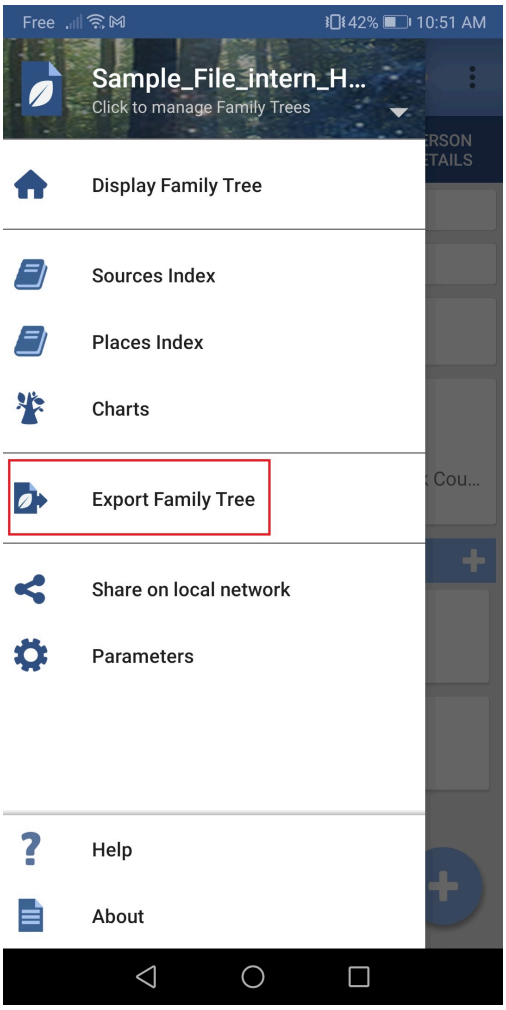
To send a genealogy file in Heredis format by e-mail, follow the steps below.
This method is used to send your genealogy in Heredis format to another Windows or Mac computer or another iOS or Android mobile device that has the same or an earlier version of Heredis as you do.

Step 1: Export the file

Open the application on your mobile device.
Select the burger menu (the three horizontal lines):



Select **Export Family Tree**:



Step 2: Send the file by email

Open your mailbox (Gmail, Hotmail, Apple, etc.). Write your e-mail, include the recipient's e-mail address and attach the .hmwz file.

Step 3: Open the file in Heredis

The recipient will then have to go to their mailbox and download the attachment.

If downloading to a mobile device, the .hmwz file must be placed in the **Download** folder on the mobile device. Once this is done, open the Heredis application. The file will be displayed on the home page.

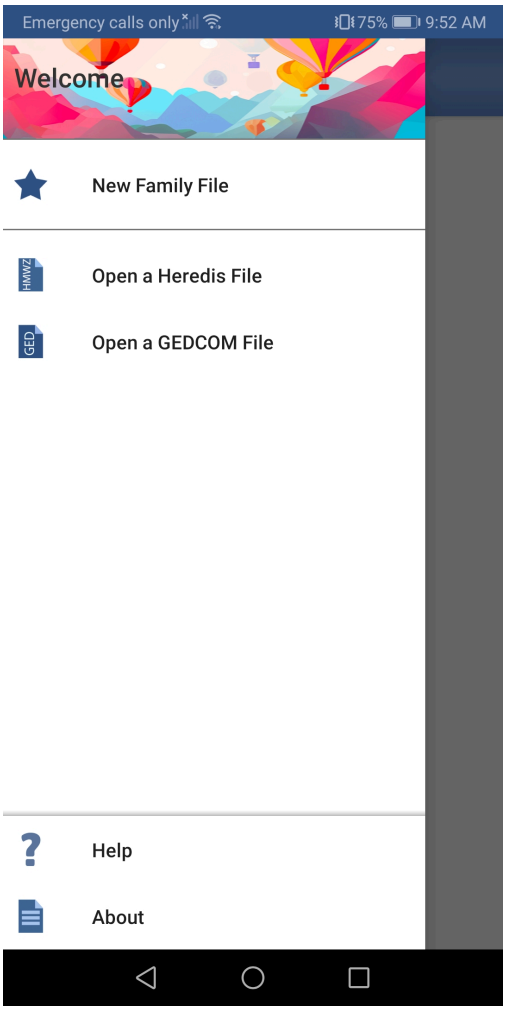
If downloading to a computer, choose the location where you wish to save the file. Drag the .hmwz file directly onto the Heredis software icon to open it in the software.

Open a GEDCOM from Heredis Android

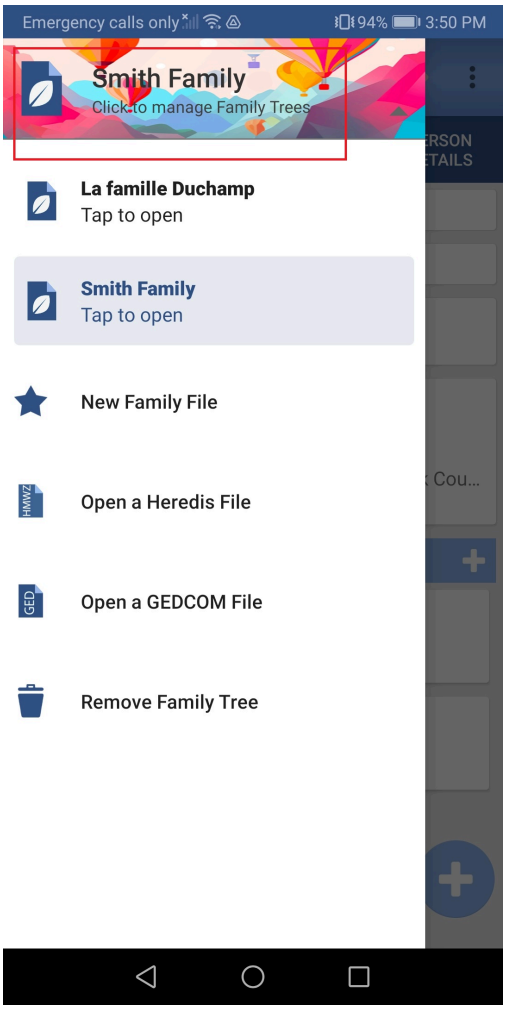
You can open a GEDCOM file from within Heredis Android.

To do this, send the file to your mobile device, by email or via the cloud.

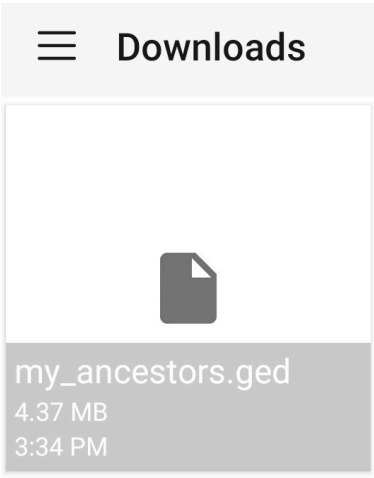
- Download the file to the mobile device's internal storage.
- Launch the Heredis application.
- Press the menu button
- If you don't have a file open, press **Open a GEDCOM file**.



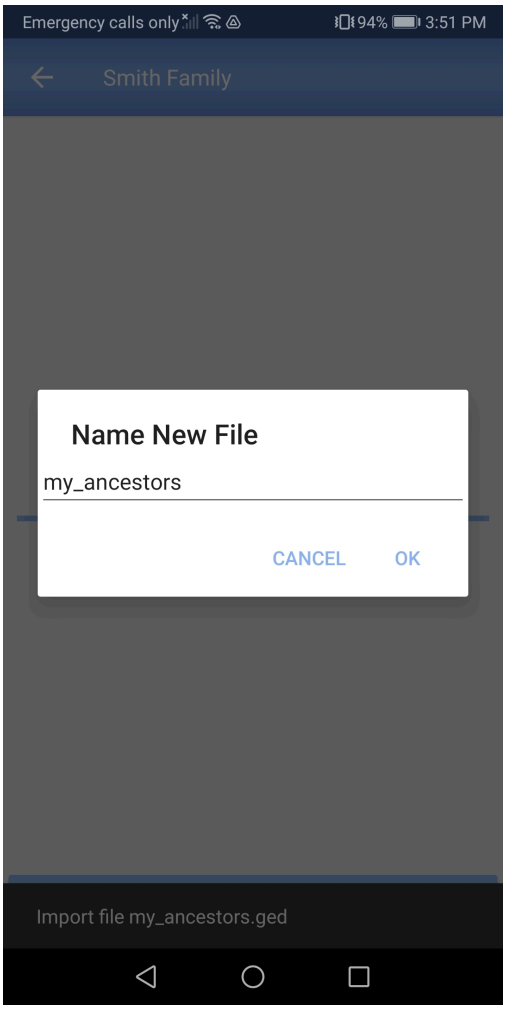
- If you have a file already open, tap on the file name at the top of the colored banner. You will then see the home page menus. Then press **Open a GEDCOM file.**



- Press **Continue**.
- Select the downloaded .ged or .gdz file.



- Give it a name and click **OK** to confirm.



- Heredis will convert the file to Heredis Android format. Let the process run its course. Your file will open once the conversion is complete.