

**Richard
Underwood**

Webtrees 2
Software
Step by Step

Webtrees Family Tree Manual

Webtrees Family Tree Manual

Webtrees 2 Step by Step

Richard Underwood



Fenechty Publishing

Webtrees Family Tree Manual
Webtrees 2 Step by Step

Richard Underwood

Published 2021 Fenechty Publishing

Copyright © 2021 Richard Underwood

All Rights Reserved

Fenechty Publishing Ltd
United Kingdom
<https://fenechty.com>

CONTENTS

INTRODUCTION

WEBMASTER SECTION

Hosting Requirements

Installation on cPanel

Pretty URL's

Backing up and Reinstalling

Upgrading

ADMIN SECTION

Website Admin

Family Tree Admin

User Admin

Module Admin

Media Admin

Map Admin

USER SECTION

New User Guide

Users

Top Menu

Main Menu

Main Tabs

Blocks

EDITOR SECTION

MODERATOR SECTION

MANAGER SECTION

WHAT NEXT

OTHER BOOKS BY RICHARD UNDERWOOD

INTRODUCTION

This manual is a complete administration and user guide for Webtrees, probably the most widely used **self-hosting family tree website creation software** in the world.

There are several reasons family tree enthusiasts find Webtrees so great. It is **free, well designed, configurable and easy to use**.

I have been using Webtrees software for several years so this manual covers everything you need to know whatever your current level of knowledge.

The manual is divided up into several sections:

The **Webmaster** section covers the initial installation and maintenance of the website, and this is followed by the **Administrator** section which covers the administration options available after installation

Once Webtrees has been installed and basic administration completed, the manual continues with a section for each of the different types of Webtrees users:

Site visitors who can only access the basic website, **family members** who can access their own family tree. **editors** who can access and edit their own family tree. **moderators** who approve the changes made by editors, and **managers** who can make administrative and configuration changes to their own tree.

Each of these users have their own distinct section in this manual.

WEBMASTER SECTION

HOSTING REQUIREMENTS

Webtrees is software similar to the software on your phone or computer, but with a vital difference. The information on your phone or computer is meant for your eyes only. You may make that information available to someone else, but you don't allow the whole world to view it.

Webtrees is different because the information on Webtrees is meant to be viewed by anyone, anywhere in the world. Instead of appearing on a single screen (your phone) it is **served up** to anyone who types the address into a web-browser. In the same way your phone software requires a phone, Webtrees requires a **web server to serve it up**.

There are different types of web server, but the most widely used is a shared server, database and software known as a **LAMP webserver**, and this is what this manual describes.

What is a LAMP server?

A LAMP server uses **Linux**, **Apache**, **MySQL**, and **PHP**

Linux is an operating system in the same way that Windows and Android are operating systems.

Most laptops/desktops use Windows.

Most phones use Android.

Most servers use Linux.

You can use Webtrees on other types of server but it makes sense to use a Linux server because Linux is a free operating system (which is why most servers use it) and it is easy to administer (which is again why most servers use it) and there is a lot of help online (because so many use it)

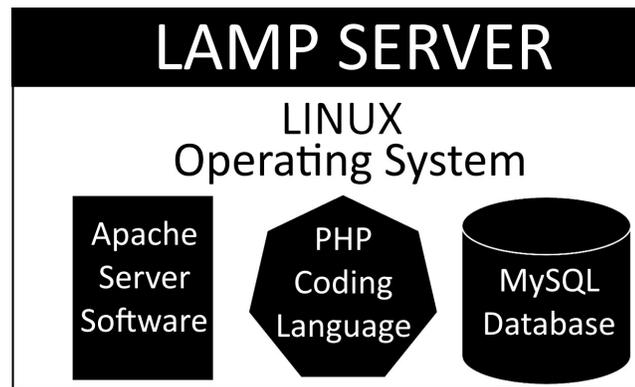
What's is **Apache**?

Windows is an operating system, but you need other programmes, for example a word processor or image viewer, in order to do anything. Android is an operating system, but you need to add apps in order to do anything. Linux is similar. Linux is an operating system, but in order to host a website you need some website hosting software on it. That's what Apache is. Apache is the world's most widely used server software. It

serves your website up, all the way from the server, to someone's browser.

What is MySQL?

Almost all servers serve up their information from a database, and Webtrees is no different. All your family tree information needs to be kept in a database and served up when that information is requested by a browser. There are many different databases, but the most widely used databases on servers are MySQL databases, or databases that are MySQL compatible. MySQL is an open-source (free) relational database management system.



(LAMP Server Image by Richard Underwood CC-BY4.0)

What is PHP?

When you view a computer or phone screen, what you see is a humanised form created by distinctly non-humanised machine code, and there are several different types of code written in several different scripting languages.

PHP is a popular general-purpose scripting language especially suited to websites using databases because it can be embedded into HTML (which is another scripting language widely used to create web pages).

In the same way your phone comprises the phone itself (hardware) and the operating system (software) Webtrees also has the following hardware and software requirements.

Server Hardware, preferably using a Linux operating system. A bare minimum of 100MB disk space is required just to create the initial website, but as you download media files, and as your database fills up, you will need substantially more than the bare minimum.

Webserver Software, preferably Apache, but NGINX and IIS are also

suitable.

A **Database**, preferably created using MySQL, but PostgreSQL, SQL-Server, and SQLite can also be used.

Scripting Language. PHP 7.x is required. This comes with various configurable modules that need to be configured to ensure your website can be served up quickly whilst using as few resources on your server as possible.

In addition to the hardware and software, you will also need a hosting company to provide all the above requirements, and a domain name (URL).

In an ideal world, you would rent a dedicated server from a hosting company and your website would be the only website on it. However, dedicated servers are very expensive and best left to large multinational businesses that run large and complicated websites. Most hobby sites, and maintaining their own family tree website is for most people a hobby, cannot afford (and don't need) a dedicated server all to themselves. Instead, they use a shared server, a much cheaper option in which several users are given a share of a large server.

As mentioned above, the most commonly used software on shared servers is called a LAMP server, and websites on a LAMP server are most commonly administered using a control panel known as **cPanel**.

cPanel is a server control panel with a graphical user interface (GUI) that makes it easier to manage your server. There are other server control panels, but cPanel is by far the most widely used. This means there is plenty of free online help available.

The domain name (URL) ideally needs to be as short as possible. You may feel something like 'SmithFamilyTree' would be fine (although probably already taken unless your surname is unusual) but it is worth considering that there will be many other surnames in your family (your mother's maiden name, and two grandmother's maiden names for example) so something like 'FamilyTree' would be more appropriate because each family would have its own folder such as 'FamilyTree/Smith'. I haven't checked, but 'FamilyTree' has almost certainly gone too, so you may have to be a bit creative.

A domain name has an ending to it too. (.com or .co.uk for example).

Your natural inclination may be to use the country ending, but you should remember your family tree may end up international, so a .com name is usually better.

It is possible to host all the above requirements at home on your own computer, but it is not usually suitable. Your computer would need to be left on 24/7, you would need to configure all the above software and your router, your broadband user probably won't like it, and even if they do, your outgoing streaming speed will undoubtedly be nowhere near as fast as your broadband streaming coming in.

In short, you need to find a website hosting company, and you need to tell them you will be using Webtrees software and ask them to confirm they meet all the necessarily requirement to host it.

INSTALLING WEBTREES ON cPANEL

There are several stages to installing Webtrees on cPanel and they are all described in these step-by-step instructions for beginners or as a reminder to experienced webmasters.

Preparations

When you first register with a hosting company that meets all the requirements for Webtrees, you will be provided with a log-on name and password, and cPanel. Adding the URL to your search engine and then adding your log-on name and password will take you to the **main cPanel menu** where there are some preliminary preparations required before installing Webtrees. These preparations include the creation of a database, creation of email addresses, making sure your website has HTTPS security, and uploading all the required Webtrees files and folders.

Creating a Database



(cPanel Database Creation Image by Richard Underwood CC-BY4.0)

The main cPanel page is divided into sections and one of those sections will be the above *'Database'* section. When you create a new database and database user it is important that you make a note of the full name of the database, full name of the database user, and also make a note of the password.

Begin by clicking on the **'MySQL databases'** link (top right on the above image). This takes you to a page with a *'Create New Database'* section into which you should type in the name of your new database. You should make the name as short as possible whilst still being meaningful to you (wtodb for example, standing for Webtrees database).

You should also note that the full database name will be *'YourLogonName'* and then a dash or underscore depending on your hosting company, then *'YourDatabaseName'*. It will look something like **joe_wtodb** or **joe-wtodb**, and it is important to remember the full database name is **both parts**, your **login name** and the **database name** you have chosen. This is important to remember.

Once you have named your database don't forget to click on the *'Create a database'* button (then on the *'Return'* link to return to the same page).

Once you have created the database you need to create a database user. Scrolling down the same page you will find an *'Add new user'* section. You need to add a username for your database together with a password.

Again, you should note that the full database user name will be *'YourLogonName'* and then a dash or underscore depending on your hosting company, then *'YourDatabaseUserName'*. It will look something like **joe_dbUserName** or **joe-dbUserName**, and it is important to remember the full database user name is **both parts**, your **login name** and the **database user name** you have chosen.

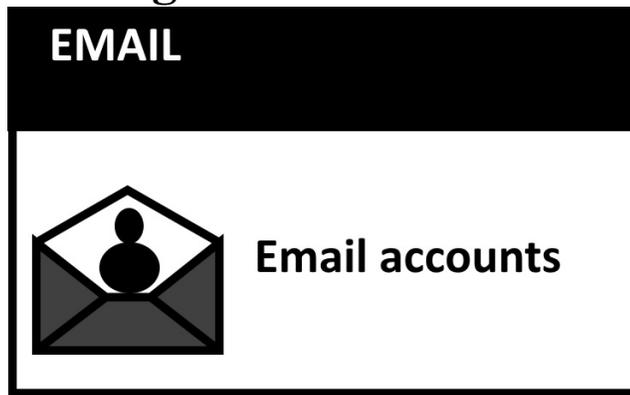
Don't forget to click on the '*create user*' button (then on the '*Return*' link to return to the same page..

Once you have created your database and database user, scroll further down the page to the '*Add a user to the database*' section. select the database and user you have just created and then click on the '*Add*' button.

You are then taken to a '*Manage user privileges*' page where you should ensure all the boxes are ticked by clicking '*All Privileges*'

Don't forget to click on the '*Make Changes*' button at the bottom.

Creating an Email Address



(cPanel Email creation Image by Richard Underwood CC-BY4.0)

You should begin on the cPanel page. One of the sections on the page will be the above Email section.

Clicking on the '**Email accounts**' link (above left) takes you to the '*Email Accounts*' page at the top of which is a '*Create*' button. This takes you to a form where you create the email by adding the first part of the email address and a password, and then by clicking on the '*Create*' button on that page.

HTTPS Security

Website addresses used to start with **http://www** and the http stands for **HyperText Transfer Protocol**. The modern equivalent is **https** which offers more secure communication and stands for **HyperText Transfer Protocol Secure**, and Google penalises sites that don't use it, so the best hosting companies provide HTTPS at no extra cost.

Uploading Files and Folders

Webtrees can be downloaded from the Webtrees Github page <https://github.com/fisharebest/Webtrees/releases> and you should select and download the latest version to your computer. The download will be in a .zip or .gz.zip format and you can download either.

Once the files have been completely downloaded to your computer, you need to open your browser and go to your cPanel page. One of the sections towards the top of the page will be a 'Files' section similar to the following image.



(cPanel File Management *Image by Richard Underwood CC-BY4.0*)

Click on the '**File manager**' icon that is usually at the top left of that section.

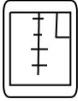
Clicking on the '*File manager*' link opens a page that looks like Windows File Explorer with a menu on the top, and folders or files in a smaller left-hand column and a larger central column. Clicking on one of the folders in the left-hand side, displays the content of that folder in the larger column.

You need to find the **public folder** in the left-hand column. This is almost always called **public_html**, but depending upon your hosting company it may be called something else. If you have any doubts, you should contact your hosting provider and ask the name of your public folder.

When you click on the public folder it will display its contents in the central section. It may be empty or just have a cgi-bin folder, but some hosting companies insert other files to display a temporary website page. You can delete any additional files by clicking on those files in the central section and then clicking on the '*remove*' item in the top menu.

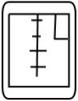
Now you have prepared your public folder it is time to upload your Webtrees files from your computer.

Double check that you are still in your **public folder**. In the top menu select the *'load'* or *'upload'* button, then the *'Select'* button to select the webtrees file on your computer and then click *'Open'* Once completed the centre column should look similar to the following image.

Name	
	cgi-bin
	webtrees-2.0.16.zip

(cPanel Webtrees Installation *Image by Richard Underwood CC-BY4.0*)

The webtrees file you have uploaded is a compressed file and needs to be uncompressed. Do this by selecting the file then click the *'Extract'* button on the top menu, then on *'Extract files'* in the pop-up window, and then on the *'Close'* button.

Name	
	cgi-bin
	webtrees
	webtrees-2.0.16.zip

(cPanel Webtrees Installation *Image by Richard Underwood CC-BY4.0*)

You now have a webtrees file (the compressed file ending with .zip or .gz.zip) and an uncompressed webtrees folder. You no longer need the compressed folder so it can be deleted by clicking on it and selecting *'Remove'* from the top menu.

All folders and files you need are in the *'webtrees'* folder but we need to move them into your *'public_html'* folder. To do this, double-click on the

'webtrees' folder. You will see the folder itself will move into the left-hand side column, but all its contents will be listed in the main column. Select every file and folder in the main column, then click on the 'Move' button from the top menu.

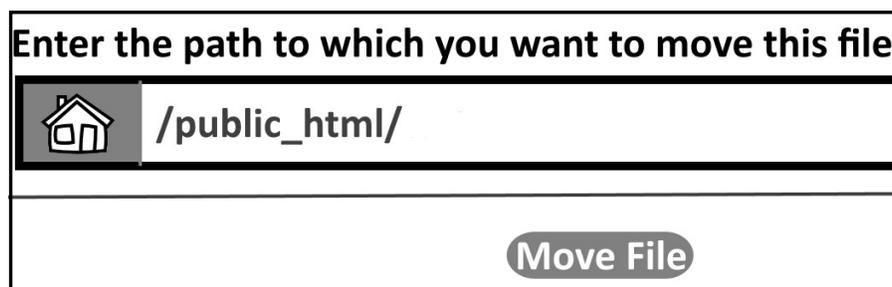
The box that appears will list all your files and folders, will ask you where you want to move things to, and will show you where they are now. The image below shows they are currently at **public_htmlwebtrees**



A screenshot of a web browser dialog box titled "Enter the path to which you want to move this file". The dialog has a text input field containing the path "/public_html/webtrees" and a home icon on the left. Below the input field is a "Move File" button.

(Webtrees Installation from path *Image by Richard Underwood CC-BY4.0*)

You need to move your files from the 'webtrees' folder and into the 'public_html' folder by clicking in the box (showing the current location of **public_htmlwebtrees**) and deleting the word 'webtrees' (so the new location would be **/public_html/**) as displayed below.



A screenshot of a web browser dialog box titled "Enter the path to which you want to move this file". The dialog has a text input field containing the path "/public_html/" and a home icon on the left. Below the input field is a "Move File" button.

(Webtrees Installation to path *Image by Richard Underwood CC-BY4.0*)

Once you are ready click on the 'Move File(s)' button. Once the move has been completed click on the 'Go up one level' link.

If you click on the **public_html** folder in the left-hand column, the central column should now contain all your Webtrees folders and files. Among these there will be the original 'webtrees' folder, which should now be empty, and it can be deleted by clicking on it and selecting 'Remove' in the top menu.

Installing Webtrees Step-by-Step

The final stage of installing webtrees is done in your browser by going

to the URL of your site, **https:// yoursite.com** for example.

The first page asks you to select your language from a drop-down menu and then click on the ‘*Next*’ button. This takes you to a page which checks the configuration is OK. If your hosting meets all the requirements for Webtrees there should be no problem.

As well as telling you the server configuration is OK, it also checks the capacity of your server to ensure there is enough capacity to host the size of family tree you need. A small website with a tree of 500 individuals takes up to 32MB and a CPU time limit up to 20 seconds. For 5,000 individuals you will need 64MB and 40 seconds, and for 50,000 individuals 128MB and 80 seconds. The display will tell you how many MB and how much CPU time your system has.

Provided everything is in order on this page you should click on the ‘*Next*’ button. You will then be asked to select the type of database you have. If the default of MySQL is correct you can click ‘*Next*’.

The next page is a form in which you need to insert your database name (both parts as mentioned above in the database creation section), database username, and database password. You will also need to insert your server name and port number. These are almost always ‘**localhost**’ and ‘**3306**’, but if these are incorrect you will need to ask your hosting company what they are.

Once you have inserted the information click on the ‘*Next*’ button.

The next page installs you as the administrator of the Webtrees site and you need to add your real name, a username, password, and email address.

Name: Your name should be your own name as you want members of your family to recognise you.

Email: The email is used to send notifications from the website so it needs to be the new email address you created earlier for the website as this allows for continuity if someone else takes over as administrator at a later date.

Once you have inserted the information click on the ‘*Next*’ button.

Your next task is to create a family tree on the site and you need to give the tree a title and URL.

Title: This should be the main surname of your tree, ‘**Smith Family**

Tree' for example.

URL: The location of the tree will already be listed so all you need to do is to add the final part of the URL, '**smith**' for example.

You have now finished installing Webtrees on cPanel. You will have landed on the Webtrees Control Panel for the family tree you have just created which you can administer or configure as described in the Administration part of the Webtrees Manual but before you do anything else you should consider the Pretty URLs section.

PRETTY URL's

What are Pretty URL's

Webtrees pretty URLs turns your URL from something like this **yoursite.com/index.php?route=%2Ftree%2Fsmith** to something like this **yoursite.com/tree/smith**

When Webtrees is first installed its URLs (the end part of the URL) will look something like this **yoursite.com/index.php?route=%2Ftree%2Fsmith**

An URL written in the above way has no effect on how your site will be viewed by search engines but it is not easy for people to remember or type and Google recommends it should be as simple to read by people as possible.

Activating **Webtrees pretty URLs** will turn the above URL into something more memorable such as **yoursite.com/tree/smith**.

Activating Your URLs

The following instructions assume Webtrees is your main site and your files are in your **public_html** folder. If that is not the case and your files are in a sub-domain at **public_htmlWebtrees** folder you need to read the sub-domain instructions that follow further on before you begin.

Activating Webtrees Pretty URLs is done from your **main cPanel page**. Click on **public_html** in the left-hand column so its contents are open in the main column.

At the top of the screen, you should click on the '**Settings**' button on the right-hand side and then click in the '**Show hidden files**' setting, and then '**Save**'.

In the top index click on the '**File**' button to create a new file.

The new file should be named **.htaccess** (don't forget the full stop at the start). Then click on the '**Create New File**' button.

Your new .htaccess file should now be visible in the central area of your cPanel page. If it isn't, click on the '**Reload**' button to reload the page.

Find your .htaccess file and click on it to select it, then click on the '**edit**' button from the top menu and open the file for editing.

Once open, type the following code into your file before saving the file.

```
RewriteEngine On
RewriteBase /
RewriteCond %{REQUEST_FILENAME} !-d
RewriteCond %{REQUEST_FILENAME} !-f
RewriteRule ^ index.php [L]
```

It should look like the following image:

1	RewriteEnging	On
2	RewriteBase	/
3	RewriteCond	%{REQUEST_FILENAME} !-d
4	RewriteCond	%{REQUEST_FILENAME} !-f
5	RewriteRule	^ index.php [L]

There is one more change you need to make and that is to the **data/config.ini.php** file

Make sure you are still in the right place by clicking on **public_html** in the left-hand column so its contents are displayed in the main column.

In the main column find the '**data**' folder and double click on it to display its contents.

Select the '**config.ini.php**' file, then the '**Edit**' button from the top menu.

At the bottom of that file you should find your website URL listed in the following format

```
base_url="https://yourWebsite.com"
```

If your URL is not listed you need to add it. Then, directly under the URL, on the next line, you need to add the following code

```
rewrite_urls="1"
```

Save the changes then open your website. Your URLs should have changed from something like this **yoursite.com/index.php?route=%2Ftree%2Fsmith** to something 'pretty' like this **yoursite.com/tree/smith**

Sub-domain Instructions

If your files are in a sub-domain at **public_htmlWebtrees** then the code you should add to your **.htaccess** file should have the 'Webtrees' folder

added to the second line as follows:

RewriteEngine On

RewriteBase Webtrees

RewriteCond %{REQUEST_FILENAME} !-d

RewriteCond %{REQUEST_FILENAME} !-f

RewriteRule ^ index.php [L]

Your base URL in your **data/config.ini.php** file would also have the same folder added as follows

base_url="https://yourWebsite.com/Webtrees"

BACKING UP AND REINSTALLING

There are several ways of creating a Webtrees backup and your hosting company may provide you with periodic backups automatically. If they don't, you can follow the following procedure.

Webtrees Backup

Log into your main cPanel page and go to the '**Files**' section and click on the '**File Manager**' link.

Make sure all your Webtrees files and folders are all contained in the large main window.

Select **all** your files and folders and click on the '**Copy**' button.

In the '**file path**' box type *public_htmlbackup* this will copy all the files into a '**backup**' folder. If you cannot see the '**backup**' folder click on the '**Reload**' button.

Select the '**backup**' folder and then click on the '**Compress**' button and select '**Gzipped Tar Archive**' then on the '**Compress File(s)**' button, then on '**Close**'. All your files and folders will now be in a single file named '**backup.tar.gz**'

Select that file then click on the '**Download**' button to save it to your computer.

Database Backup

Log into your main cPanel page and go to the '**Databases**' section and click on the '**phpMyAdmin**' link.

Click on the name of your database in the left-hand column so that its contents show below and also show in the main window.

In the main window, select '**Export**' from the top menu, then '**Go**'. After a few seconds select where you want to export it to and click on the '**Save**' button to download it to your computer.

Reinstalling Webtrees Files

Log into your main cPanel page and go to the '**Files**' section and click on the '**File Manager**' link.

Make sure all your Webtrees files and folders are all contained in the large main window.

If you feel brave at this point you could delete all your files in the main window. If not, leave them alone as you will get asked if you want to overwrite them.

In the top menu select the '**Upload**' button and then select the '**backup.tar.gz**' from your computer and move it into your main window. It can then be uncompressed and moved into your public folder in the same way your original files were moved as described on the installation section. If the original files are still in place you will be asked to confirm you want to replace them.

Reinstall Database

Log into your main cPanel page and go to the '**Databases**' section and click on the '**phpMyAdmin**' link.

Click on the name of your database in the left-hand column so that its contents show below and also show in the main window.

In the main window, select '**Import**' from the top menu, then '**Go**'. to replace the existing files with the new ones.

UPGRADING

A Webtrees upgrade of your family tree software can be done automatically or manually and both methods are described below. It is advisable to always make sure you have a current Webtrees backup before proceeding.

Webtrees checks regularly to see if there is a new version. If there is, a message is displayed when you next log in, together with a link that will automatically upgrade your version of Webtrees when you click on it.

On most occasions these updates will complete within a minute or less, but if the upgrade will not complete you will need to do the upgrade manually.

Some of the reasons for not being able to automatically upgrade include the following:

If you have been advised by your hosting company, or if you have decided yourself, to change the settings of your **/data** folder to 777, then the automatic upgrade will fail.

The upgrade requires about 130MB of disc space, so if you have less than that amount of empty space the automatic upgrade will fail.

The upgrade requires a large CPU and memory usage, so if the upgrade exceeds the CPU time limit or memory of your server it will fail.

Automatic Updates

If there is a new version of Webtrees available, a message will tell you when you log in.

Clicking on the link in that message will usually tell you the upgrade is available automatically, and clicking on the '*continue*' button will start the process.

The screen will tell you when the process has been completed, and the message ends with another '*continue*' button taking you back to your control panel and a message showing you are now using the latest version of Webtrees.

Upgrading Manually

Upgrading manually can be done in a few second in **four stages**, but before you do so I would urge you to take a backup of your site, or at the very least backup the **data/** folder which contains all your important information.

Stage One-Upload compressed file to computer

You should download the most recent version of Webtrees to your computer. It will be a compressed file but you should NOT uncompress it.

Stage Two - Transfer the compressed file to server

You do this by logging into your **cPanel** main page, go to the '**Files**' section and then click on the '**File manager**' link.

The following instructions assume all your Webtrees files are located directly into your public folder. If they are not at **public_html/** but are instead located at **public_html/Webtrees/** you will need to adjust the instructions accordingly.

Find the **public folder** in the left-hand column. This is usually called **public_html**.

When you click on the public folder in the left-hand column, it will display all your Webtrees content in the main central area.

Select the '**load**' or '**upload**' button in the top menu, then on the '**Select**' button to select the compressed Webtrees file from your computer. Then click on '**Open**' Once completed you should return to the main files section, where the centre column will should look exactly the same except there will be an additional **Webtrees.zip** file.

Stage Three – Uncompress Webtrees File on Server

The Webtrees file you have uploaded is a compressed file, so now you need to uncompress it. You do this by selecting the file and clicking on the '**Extract**' button on the top menu, then on '**Extract files**' in the pop-up window, and then (when it's finished) on the '**Close**' button. When you return to the main files section, the centre column should look the same as when you started but with the additional **Webtrees.zip** file now accompanied by an additional folder names '**Webtrees**' which contains the new uncompressed Webtrees files and folders.

You now have a compressed **Webtrees** file (the compressed file ends with .zip or gz.zip) and an **uncompressed Webtrees folder**. You no longer need the **compressed folder** so it can be deleted by clicking on it and selecting '**Remove**' from the top menu.

Stage Four – Replace Old Files/Folders with New Files/Folders

All the new folders and files you need are in the '**Webtrees**' folder but we need to move them into your '**public_html**' folder so they replace the files that are already there. To do this, **double-click** on the '**Webtrees**' folder. You will see the folder itself will move into the left-hand side column and all the contents of that folder will be listed in the main column.

Select every file and folder in the main column, then click on the '**Move**' button from the top menu.

The box that appears will list all your files and folders, and will ask you where you want to move things to, and will show you where they are now. The image below shows they are currently at *public_htmlWebtrees*



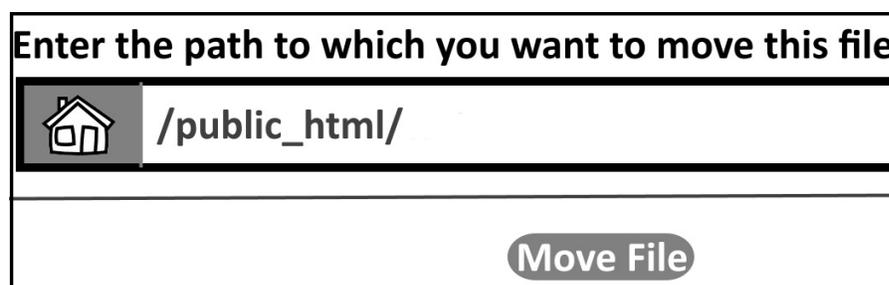
Enter the path to which you want to move this file

 /public_html/webtrees

Move File

(Webtrees Installation from path *Image* by Richard Underwood CC-BY4.0)

Your need to move your files out of the '**Webtrees**' folder and place them directly within the '**public_html**' folder. This is done by clicking in the bottom box (which shows the current location of *public_htmlWebtrees*) and delete the word '**Webtrees**' (so the new location would be *public_html*) as displayed below.



Enter the path to which you want to move this file

 /public_html/

Move File

(Webtrees Installation to path *Image* by Richard Underwood CC-BY4.0)

Once you are ready click on the '**Move File(s)**' button. You will be asked if you want to replace the files that are already there, and you **do** want to replace them.

Once the move has been completed click on the '**Go up one level**' link.

If you click on the **public_html** folder in the left hand column, the central column should now contain all your Webtrees folders and files, but still with the new '**Webtrees**' folder That folder should now be empty. It can be deleted by clicking on it and selecting '**Remove**' in the top menu.

Completion

The folder containing your family tree, media files, and configuration settings is the **data/** folder, and this is the most important folder you have. The new **data/** folder included in the upgrade only includes **.htaccess** and **index.php** files so the above procedure should only replace those files and leave everything else in the folder intact. Your upgrade should have completed without any problems (you may need to clear your browser), but if something has unfortunately gone wrong, you should only need to replace the **data/** folder with the backup of the **data/** folder you were advised to make.

If any database upgrades are required after your Webtrees upgrade, these will happen automatically when you next visit the site. For this reason, the first page may take longer than usual to be displayed.

ADMIN SECTION

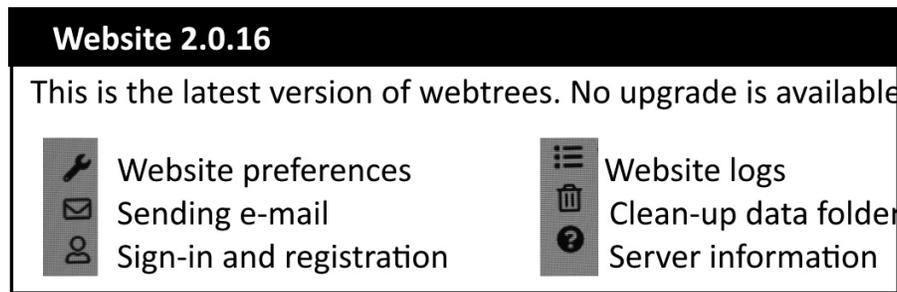
Most times, the Webtrees Webmaster. will also do the Webtrees Administration but sometimes the administrator and webmaster may be different persons.

Webtrees Administration involves knowing every setting and configuration of your site including the settings Editors, Moderators, and Managers can make.

When Webtrees Administrators click on the '**My Pages**' link in the top menu, the '**Control panel**' link takes you the Webtrees administration control panel from where you can change all the options on the whole website. Options are grouped into the following six major categories:
Website Family Trees Users

Map

WEBSITE



(Webtrees website admin *Image by Richard Underwood CC-BY-4.0*)

Website Preferences

When you click on the Website preferences link, there are five administrative options in that section.

Data folder is the first option. This is the name of the folder that will contain any data (images, sound files, video files, and GEDCOM files, etc.) uploaded onto the Webtrees site. It is the **data/ folder** by default. The folder will contain confidential details (images of the marriage certificates of living persons for example) and is protected by an Apache configuration file (the **.htaccess file**) which blocks all access to the folder. If your web-server does not support .htaccess files, and you cannot restrict access to this folder, then you can select another folder, away from your web documents. If you do select a different folder, you must also move all files (except **config.ini.php, index.php and .htaccess**) from the existing folder to the new folder. The folder can be specified in full (e.g. **homeuser_name/Webtrees_data/**) or relative to the installation folder (e.g. **../..../Webtrees_data/**).

Time zone is the second option. By default it is **UTC**, but the drop-down menu allows you to select your own time zone from the list that is in continent, then city, order.

The **Default theme** option allows you to select which of the activated themes will be the default theme for your site visitors. You may have limited the number of activated themes available to you. We look theme activation in the modules section of the manual.

The **Language option** allows you to select which of the activated languages will be the default language of your site. You may have limited

the number of activated languages available to you. We look at activation of languages in the modules section of the manual.

The **Show list of family trees** option allows you to show the list of family trees in the main menu if your Webtrees contains more than one family tree.

Sending e-mail

If the following Webtrees administration section does not make much sense to you, then you need to take this up with your webmaster or check the webmaster section of the manual.

Messages: Webtrees needs to send e-mails, such as password reminders and website notifications, and the drop-down list determines how those emails are sent from your website. You can use **sendmail** or **SMTP**.

Sender name: This name is used in the **'From'** field, when sending automatic e-mails from this server. You could insert your email in here, for example, or 'Message from ... Website' or something similar.

Server name: In most cases the default of **'localhost'** as the name of the SMTP server will be correct. If not, it will be the name of the **mail server** running on the same web server your Webtrees site is running on.

Port number: By default SMTP works on the default of 25, but some hosting companies may have changed their SMTP port number.

Use password: Most SMTP servers require a password.

Username/Password This is the username for your authentication with the SMTP server. The username will differ from server to server, but will often be your **server email address**. The password will be the password associated with the SMTP server, often the same password as your server email password.

Secure Connection: Most servers do not use secure connections, but this setting allows you to select **ssl** or **tls** if required.

Sending server name: Most mail servers require that the sending server identifies itself correctly, using a **valid domain name**. This would be the domain of your Webtrees site but without the **https://** in front. Failure to insert your server name here will usually result in emails going straight into spam folders.

DKIM Digital signature: The DKIM (Domain Keys Identified Mail) system inserts an encrypted signature into the header of emails sent from your server to prove they are legitimate. It validates that the domain sending an email is the actual sender and not a phishing attack. It is a style of email authentication mostly used by businesses rather than on sites such as a Webtrees site, but if your mail server offers DKIM you will be able to complete this section with your **domain name**, and the **Selector** and **Private Key** supplied. Fuller information about DKIM can be found on the DKIM website at www.dkim.org.

Testing and Saving: Once you have completed all the relevant options you should click in the ‘Send a test email using these settings‘ box, and then click on the ‘Save‘ button. You should receive a test email, which will confirm your setting work.

Sign-in and Registration

Welcome text on sign-in page: The drop-down menu in this section allows you to choose a message that appears on the sign-in page. The three supplied message are: 1) All users can request a user account. 2) The administrator will decide each request for a user account. 3) Only family members can request a user account. If none of the above options are appropriate, you can type your own **custom welcome text** in the box.

Allow visitors to request a new user account: You would usually want to allow visitors to request a new user account (Yes) but some family trees may want to only allow new users by invitation (No). If set to yes, then any new user would need to confirm their email address before the account is created. You, as the administrator, would be notified on creation of the account, and there is an admin setting (in the Users section of admin guide) in which you have to approve the account and select an access level before they can sign in.

Show acceptable use agreement on ‘Request a new user account‘ page: This option can be set to yes, or no. If set to yes, the acceptable use agreement is displayed as new users register.

Save: Once you have made your selection, or any time you make any

changes, don't forget to click on the '*Save*' button.

Website Logs

The Website Logs provide you with a comprehensive Webtrees Administration Log of all the important events on your website. This includes a list of every time someone has logged in or out, every time a setting or site preference has been changed, every time a user has been created or a user's status is changed, and every time there has been an error.

The log is displayed as a table that includes the time and date, the type of log, the log message itself, the IP address of the person who was logged in and took the action being logged, the name of the person who took the action, and the name of any family tree involved.

The log entries can be filtered using the filter boxes located above the log itself, and if you make a filtering selection you then need to click on the '*Search*' button to filter the display.

Filter by Date: The 'From' and 'To' dates can be changed so that when necessary you can limit the display to a single day, or a particular few days.

Filter by Type: The drop-down menu lists all the different types of log entry.

Filter by IP address: It is useful in some circumstances to find what changes are being made with users with the same IP address.

Filter by Message: If none of the filters meets your need, typing a word or phrase here will display all the log messages containing that particular word or phrase.

Filter by User: The drop-down menu lists all the members of your site, and selecting one filters the log to only display log entries for that member.

Filter by Family Tree: The drop-down menu lists all the family trees on your site, and selecting one filters the log to only display log entries for that particular family tree.

The filters can be used together. So, for example, you could look for a particular user on a particular date.

One of the most useful log entries when something goes wrong, are the '**error**' entries. If you do not understand the error, copying the first line and

pasting it into a search engine will usually find an answer.

The log entries can be ‘Downloaded’ or ‘Deleted’ using the buttons under the filter boxes.

By default, only ten log entries are displayed at a time, but if you scroll to the bottom of the entries there is a ‘Display’ option that can change the number of entries displayed.

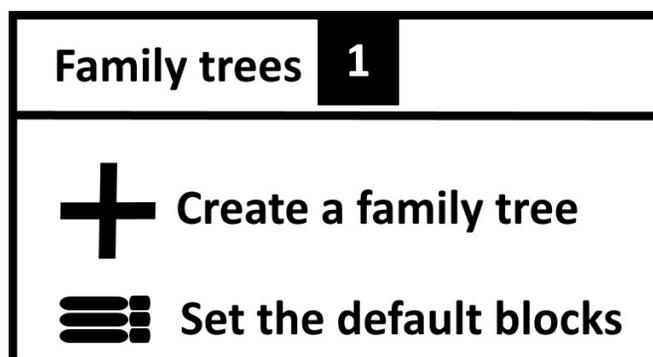
Clean-up Data Folder

Clicking on this link takes you to a Webtrees administration page displaying a list of all the folders in your data folder. Some of these folders can be deleted from time to time to get rid of accumulated rubbish that is no longer needed. There are indications on folders that can’t be cleared, but the **cache, thumbnail-cache, and tmp folders can always be cleared** out, as can any GEDCOM files that have been dealt with.

Server Information

The server information link takes you to a page displaying what version of PHP your site is using, and it lists all the current system and configuration settings. Whilst all the settings are comprehensively displayed (so you know what the settings are) none of them can actually be changed from this location, so it is for information only. The settings themselves are discussed in more depth in the Webmaster section of the Manual.

FAMILY TREES



(Webtrees family tree admin Image by Richard Underwood CC-BY-4.0)

Create a Family Tree

This link takes you to a simple form with only two fields.

Family Tree Title: This should be the name of your family tree. ‘Smith Family Tree’ for example.

URL: This will be the URL of your Webtrees site, but with the family name on the end. ‘//yoursite.com/tree/smith/’ for example.

Set Default Blocks for New Family Trees

This option allows you to select the blocks displayed on a new family tree by default. The blocks can be dragged into new positions or deleted, and new blocks can be added from those that are visible underneath. The number of blocks visible in this setting is determined by the choices made in the ‘*Modules Section*’ of the Administration Control Panel.

Family Tree Settings

Most of the family tree settings are described in the Webtrees Managers section of the manual, but one of the settings Webtrees Managers do not have access to is the Data Fixes link.

WARNING: Be very careful using data fixes, especially if you use the batch ‘**Update All**’ button. There is no UNDO facility so you should create a backup first.

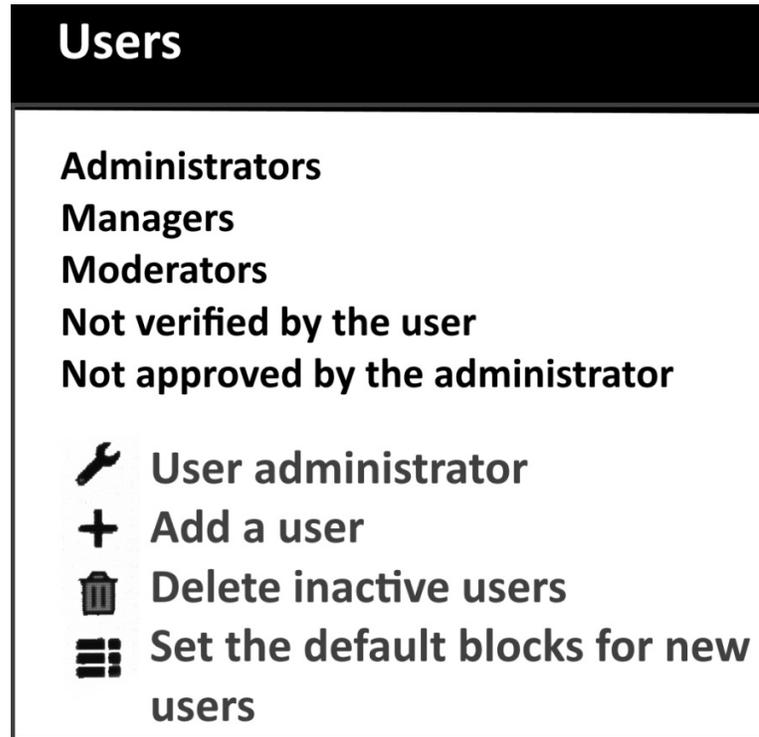
Data Fixes: In Webtrees 2 Data Fixes replaced the old batch-update module. This is most widely used to help correct any irregularities in an imported GEDCOM file. For example, you may have imported several people who are obviously dead, but who are not listed as dead because their date of death is unknown. Using the Data Fix module allows you to add an entry that they have died if they are, for example, over 100 years old.

Before telling you how this works, it is worth bearing in mind that you may want to check this data without actually marking everyone over 100 as dead. It provides you with a list of people who have obviously died, but for whom you have no record of death. Rather than simply marking them as having died, a better option would be to search archives and try to find a death record that can be added to each of the individual people listed.

Using Data Fixes: Using the drop-down menu, select '**Add missing death records**' then click on the '**Next**' button. This displays a message that 'You can speed up the privacy calculations by adding a death record to individuals whose death can be inferred from other dates, but who do not have a record of death, burial, cremation, etc.' This displays a list of everyone in your database, and alongside the ones over 100 years old without a death record there will be a '**Preview**' and an '**Update**' button. The '**Preview**' button displays the current GEDCOM file with a highlighted preview of any alteration that should be made. The alteration itself can then be made with the '**Update**' button. Instead of updating these separately, they can also all be updated in a batch by clicking on the '**Update all**' button at the top (but remember, this cannot be undone so act with caution.

Adding the new last name to a married woman if it is missing is done in a similar fashion, and other options include a full '**search and replace**', the ability to replace old-style GEDCOM tags, slashes, and spaces with the current GEDCOM standard ones.

USER ADMINISTRATION



(Webtrees user admin *Image by Richard Underwood CC-BY-4.0*)

The user section of the Control Panel gives you full control of all the users on your site.

User Administration

The ‘*User Administration*’ link takes you to a list of all registered users on your site and gives their username, email address, language, date registered, and date they last logged in. New members have to verify their email by clicking a link in the registration email sent to them, and also have to be approved by you.

Each username is preceded by a drop-down menu that allows you to delete the user, or to masquerade as the user. The masquerade is useful for you to make sure the required options are working correctly, as it enables you to view the website as a member or editor, *etc.* would view it.

The third option in this drop-down menu is the Edit option. This displays a form in which several details can be changed:

Account approval and e-mail verification. When a user registers for an account, an e-mail is sent to their e-mail address with a verification link. When they click the link you know the e-mail address is correct, and the ‘e-mail verified’ option is selected automatically. If an administrator creates a user account, the verification e-mail is not sent, and the e-mail must be verified manually. You should not approve an account unless you know the e-mail address is correct. A user will not be able to sign in until **both** ‘*e-mail verified*’ **and** ‘*approved by administrator*’ are selected.

Changes. Normally, any changes made to a family tree need to be reviewed by a moderator. This option allows an editor to make changes without needing a moderator, so the option allows you to permit this for some ‘editors’ but not others.

Access to Family Trees. This section shows you the family tree (or trees) the person belongs to and their roll in that tree. Using the ‘*Roll*’ drop-down menu you can make visitors into members, or members into editors, moderators, or managers. Using the ‘*Individual record*’ search-box allows you to select that person’s record so their own record becomes their default starting point on charts. The ‘*Restrict to immediate family*’ box allows you to permit limited access to a logged-in user’s own immediate family even if they are still living, whilst still preventing them from accessing the details of more distant relatives who are still living. The number you enter in this section limits the number of relationships the person can see.

For example, if you specify a **path length of 1**, the individual will be able to see relatives that are up to 1 step away. This would allow them to see the records of parents and records of their own children (1 step away).

Changing the **path length to 2**, would allow them to see their own parents and children, but also the records of grandchildren (2 steps away – the child of their child) and aunts/uncles (2 steps away – the sibling of their parent).

Changing the **path length to 3** would include the above plus first cousins (3 steps away-the child of their parents sibling) and great-grandchildren (3 steps away -the child of their child's child).

Important: longer path lengths require a lot of calculation, which can make your website run slowly for these users.

Administrators. Immediately above the '*access to family trees*' section, there is a box you can select if you ever want to make a user into an administrator.

Add a User

This option is similar to the form new users would use to register, but it allows you, as an administrator, to create new users yourself. You have to complete their real name, username, password, and email. If you do use this option, you also need to approve the account as described in the previous section.

Delete Inactive Users

If someone has not logged in for six months their details will appear here and you will have an option to delete them if they are no longer required. The six-month default can be extended to a longer period if needed.

Set Default Blocks for New Users

This option allows you to select the blocks to be displayed on a new user's '*My Page*' by default. The blocks can be dragged into new positions or deleted, and new blocks can be added from those that are visible underneath. The number of blocks visible in this setting is determined by the choices made in the '**Modules Section**' of the Administration Control Panel. This setting only determines the blocks seen by new users. Once users are logged in they can rearrange the blocks, or delete or add others.

Messages

There are three messaging links;

Send a message to all users opens a message box similar to how you would send an email, with a box for a title, plus another box for the body of your message. The names of all users are listed in the 'To' box.

You can send similar messages to '**users who have never signed in**' or '**users who have not signed in for 6 months**'.

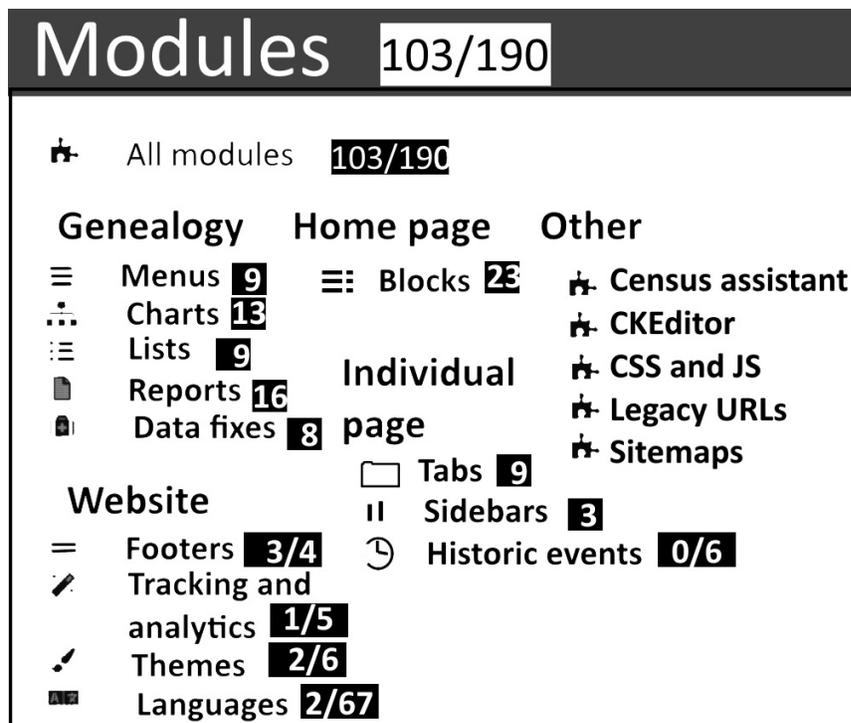
MODULES

Webtrees Module Administration is accomplished with over 180 different settings all of which will be described in some detail in this section.

All Modules

The modules are listed in five different main categories, with each category having sub-categories to make administration easier. As well as listing them in categories they are all listed in a single table in the 'All Modules' section. On the following image, the 'All Modules' section shows there are 190 different modules, 103 of which are in use.

Clicking on the 'All Modules' link takes you to a list of all 190 modules. The module name appears on the left in alphabetical order, followed by an indication as to whether they have been activated, and then a description. The icons along the top of the table indicate which group or sub-group the module is included in and the whole table enables you to have a quick view of which modules are in use and which additional modules are available to you.



(Webtrees modules admin Image by Richard Underwood CC-BY-4.0)

Genealogy Modules

Menus

Clicking on the menu link takes you to a list of all the contents that can be added to the main Webtrees menu.

Clicking on the **‘Enabled’** setting makes the menu item available or unavailable, and clicking on the **‘Move up’** or **‘Move down’** arrows not only moves the items up or down the list, but also moves the menu item left to right on the menu display.

The **‘Access level’** allows you to decide who can see each of the menu items. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members), or to everyone (Show to visitors).

Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button.

The **spanner icon** next to a name indicates there is an extra setting. For example, clicking on the FAQ spanner icon takes you to a page from where you can **‘Add an FAQ’**, Move a question up or down the list of questions, edit a question, or answer or delete a question or answer.

Charts

The chart modules page lists all the possible charts visible to your users. Clicking on the **‘Enabled’** setting makes the chart available or unavailable.

The **‘Access level’** allows you to decide who can see the chart item. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members) or to everyone (Show to visitors).

Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button.

The spanner icon next to a name indicates there is an extra setting. For example, clicking on the Relationship spanner icon takes you to a page from where you can add preferences to the **‘Relationships’** chart. The default for that chart is to do an unlimited search for any relationship, but on a large complex tree this can use up a lot of your server resources, so these preferences allow you to add limits to the search should you need to do so.

Lists

The List module page lists all the possible lists visible to your users. Clicking on the **‘Enabled’** setting makes the list available or unavailable. The **‘Access level’** allows you to decide who can see the list item. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members) or to everyone (Show to visitors).

Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button.

Reports

The reports module page lists all the possible reports visible to your users. Clicking on the **‘Enabled’** setting makes the report available or unavailable. The **‘Access level’** allows you to decide who can see the report item. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members) or to everyone (Show to visitors).

Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button.

Data Fixes

The use of Data Fixes were fully described in the family tree setting section on page 34, and the data module page lists all the available data fixes. Clicking on the **‘Enabled’** setting makes the fix available or unavailable, and you may want to restrict the options available. Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button.

Website Modules

The website modules include all the footer modules, tracking and analytics modules, and theme and language modules.

Footers Modules

Clicking on the link to the Footers Modules brings up a table of the four modules that change the display in the bottom footer area of your Webtrees site. These include a footer link to show the site is a Webtrees one, a link to your contact page, a link to your privacy policy page, and a hit counter. Hit counters are notoriously unreliable and rarely indicate how many different visitors your site gets. For example, the numbers include every time the Google bot lands on a page to index it, or an administrator lands on a page to edit it. If you really need to know how many different people (rather than robots) access your site, you would be better activating one or more of the analytics cookies described below.

Clicking on the **‘Enabled’** setting makes the module available or unavailable, and clicking on the **‘Move up’** or **‘Move down’** arrows not only moves the items up or down the list, but also moves the menu item left to right in the footer display.

Tracking and Analytics Modules

There are five different tracking and analytics modules. Clicking on the **‘Enabled’** setting makes the module available or unavailable and in most instances you would only need to activate one of these modules. Following the links will take you to the individual analytics websites, and you will need to register and log in to access their services. Most require downloading a file onto the server or making changes.

Theme Modules

Clicking on the **‘themes’** link takes you to a list of the five default themes supplied by Webtrees and clicking on the **‘Enabled’** setting makes the module available or unavailable. Each of these modules will change the display of Webtrees in various ways, and those you have enabled will be displayed from a drop-down **‘Themes’** link in the top menu.

I would encourage you to **‘Enable’** all of these modules and to check them out using a browser on a computer and on a phone to see which one suits your site best. Once you have decided, you can disable any you don’t

wish to use.

Languages Modules

The Languages modules link takes you to a list in alphabetical order of the sixty-seven languages you can use on your Webtrees site. Clicking on the '**Enabled**' setting makes the language available or unavailable, and you should only activate the ones you need.

It is worth noting the language modules only change the language in which the Webtrees software is written, the **administration pages** or the **online instructions** for example. It makes no difference to the language used on your family tree entries. For example, if a note on someone's record is written in French, and if you then change your language setting to English, **the note will still be written in French** but the printed instructions will be in English. Similarly, if a note on someone's record is written in English, and if you then change the language setting to French, the note will still be in English but the printed instructions will be in French.

Home Page Modules

Blocks

How to choose the blocks available on the home screen or 'My Page' is described elsewhere, but the choices available are determined by the blocks setting here. Clicking on the '**Enabled**' setting makes the block available or unavailable. The '**Access level**' allows you to decide who can see the block. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members) or to everyone (Show to visitors). Once you have made your selection don't forget to scroll to the bottom and click on the '**Save**' button.

Individual Page Modules

Individual Page modules determine the information displayed on individual records and include modules in three groups, tabs, sidebars, and historic events.

Tabs Module

The tabs module page lists all the possible tabs available for any individual record. Clicking on the **‘Enabled’** setting makes the tab available or unavailable, and clicking on the **‘Move up’** or **‘Move down’** arrows not only moves the items up or down the list, but also moves the tab left to right on the menu display.

The **‘Access level’** allows you to decide who can see the menu item. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members) or to everyone (Show to visitors).

Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button. The spanner icon next to a name indicates there is an extra setting.

Sidebars Module

The sidebar module page lists all the possible sidebar blocks available for any individual record. Clicking on the **‘Enabled’** setting makes the sidebar block available or unavailable, and clicking on the **‘Move up’** or **‘Move down’** arrows not only moves the items up or down the list, but also moves them up or down the sidebar display.

The **‘Access level’** allows you to decide who can see the sidebar item. By clicking on the pencil icon you can make some items only visible to you (Hide from everyone), only to you and managers (Show to managers), to everyone apart from visitors (Show to members) or to everyone (Show to visitors).

Once you have made your selection don't forget to scroll to the bottom and click on the **‘Save’** button.

Historic Events Module

Webtrees has several different lists that displays items in date order. this module adds historic events which help place those list items (such as births, weddings, or deaths) into a historical context. The different lists

include historic leaders in England, France, and the USA, and depending on your tree you may or may not need them all. Clicking on the 'Enabled' setting makes the historical events visible or invisible.

Other Modules

Other Modules are those that do not sit easily within one of the other major categories. You will find add-on modules listed here too. Add-on modules are those not provided in the core Webtrees software.

Census Assistant

The Census Assistant module has to be activated in the 'All Modules' list. It is a specialised type of shared note configured especially for census reports.

Typing out census reports for a large family can become very repetitive if you have to type the same information over and over. The Census Assistant allows you to type census information once, and then share that note with everyone listed on that census family.

CKEditor

Website pages are different to pages in word processors because web pages are produced using a code called HTML. When the internet first started every page had to be created by coders who wrote using HTML code so the page would display properly in a browser. Thankfully, for your average user, those days are gone and you can type in the same way that you would in a word processor and the pages are subsequently converted into HTML and displayed in the browser properly.

There are several software programmes, called WYSIWYG programmes or what you see is what you get programmes, which enable this to be done, and CKEditor is one of them. Using CKEditor allows you to type as normal without knowing any computer code. Your type is displayed normally on your screen as you type, but when you save the information it is automatically changed into HTML code in order to display properly in a web browser.

CSS and JS

The above module dealt with HTML, the code in which the visible pages of your Webtree site needs to be written in order to display in a browser. This module, the CSS and JS module, also concerns computer coding languages. There are whole books about these codes so they are too difficult to go into a lot of detail here but if you want to learn any of the codes you can find free information on the w3schools website, <https://www.w3schools.com> that will take you from beginner to expert.

For our purposes of describing the modules, it is enough to say that (provided it has been activated in the 'All modules' list) clicking on the '**CSS and JS**' link opens two text boxes into which you can add your own CSS or JS code, one box adds code at the end of the <head> element and the other adds code to the end of the <body> element.

The latest versions are HTML5 and CSS3, and they are intended to be used as follows.

HTML should only be used to describe the structure of a website page. The code indicates where the start and end of your headings are, where the start and end of your paragraphs are, where the header or footer start and end, *etc.*

CSS should only be used to describe the appearance of a website page. The code indicates what size type your headings or paragraphs have, the colour of the different backgrounds or text, how links and lists look, *etc.*

JS (an abbreviation of JavaScript) allows you to modify the content of a web page whilst it is being viewed in a browser, so it makes the web page feel interactive by responding to what the user does.

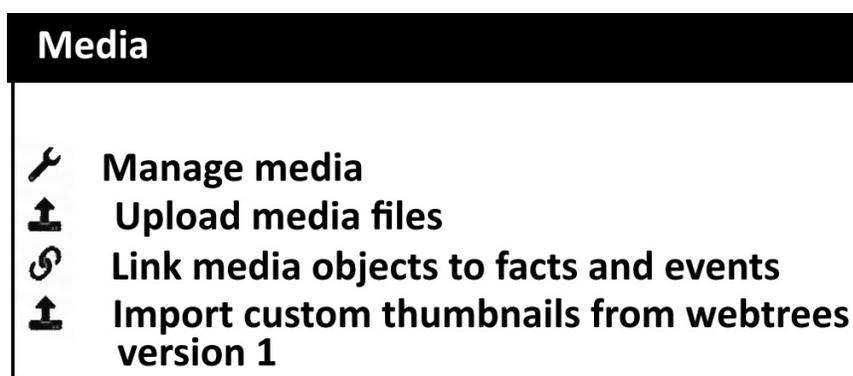
Sitemaps

There is little point undertaking in-depth Webtrees module administration if none of the search engines can find your website. Sitemaps are an index of your whole site written in a style understood by search engines such as Google. Having a sitemap automatically updating as new pages are added, and letting search engines know where it is so they can easily find every page on your site, obviously increases the chance of your

pages being listed.

Clicking on the sitemaps link displays a page where you can click in a box to indicate which of your family trees should be included in the sitemap, and there are also links to enable you to tell major search engines where your sitemap is. You should note that sitemaps are built as an **.xml file**. They are not built to look good to human eyes. They are built to impress search engine bots.

MEDIA



(Webtrees media admin *Image by Richard Underwood CC-BY-4.0*)

Manage Media

The ‘Manage Media’ link takes you to a table which lists all your media. The location of your media folder is displayed above the table, and if you have sub-folders your table can be filtered by means of the drop-down menu. For example, on my own site my media folder contains a births folder, marriage folder, etc., so using the drop-down menu to select data/media/birth filters the media to birth records.

The other filter at the top of the table enables you to filter any media files that have not been allocated to any individuals on your tree (Unused files), or to any images that are not on your own server but on someone else’s website (external files)

The media table itself displays the title of your media file (Media file column), a thumbnail of image files (Media column), and the description and link to any individual record where the image is being displayed (Media object column).

Upload Media Files

The ‘Upload Media Files’ link takes you to a page from where you can upload media files from your local computer. Media files can be pictures, video, audio or other formats. Before you upload media files you should read the ‘**Reducing Media Sizes**’ section which is below this ‘Upload Media Files’ section.

Click on the ‘**Choose File**’ button and select the file on your local computer. You can leave the name as it is, or you can use the ‘**Filename on Server**’ box to give it a more meaningful name. You can select the folder on the server to which the file will be uploaded.

The Webtrees administration control panel allows you to upload several files at one time as long as all the files are within the servers maximum upload size. When you have finished don’t forget to scroll to the bottom of the page and click on the ‘**Upload**’ button.

Reducing Media Sizes

Media files can take up a lot of space on the server. More importantly, it can reduce the speed at which your site loads in a browser, and increase data use when viewed on a mobile phone. What may be imperceptible to you (milliseconds) is important to search engines such as Google which penalises slow websites. administration of media needs to take this into account.

Image files should be in .jpg format and reduced to 70% quality. Images displayed on a screen (as opposed to being printed on paper) appear the same at 70% quality as they do at 100% so high quality is not needed and makes no difference to the viewing experience.

Video and Audio Media Files should be edited to be as short as possible with all unnecessary footage cut-out, and they should not run automatically.

Link Media Objects to Facts and Events

Clicking on the ‘Link Media Objects to Facts and Events’ link takes you to a table that lists media that is linked to individuals without being linked

to an event. Sometimes this will be correct. For example, you may have an image of someone that is unconnected with any particular event. Other times this will be incorrect. For example, if you have an image of a birth certificate linked to a person, that image should also be linked to the entry recording their birth.

The table displays the name of the family tree, the name and title of the media object, and the name of the individual the object is linked to. The final column displays buttons for all the facts and events listed for that person.

How this works in practice is best illustrated with an example using the filter at the top of the page. Adding '**Birth**' into the filter will display all the images linked to an individual where that individual also has a birth record. Where the image is of a birth certificate, clicking on the '**Birth**' button will ensure the image is linked to the birth record of the person concerned. You will be asked to confirm the move, and once confirmed the entry will be removed from the table. Once you have linked all the birth certificate images to the birth records you could do the same for marriages, deaths, *etc.*

Import Custom Thumbnails from Webtrees 1

In Webtrees version 1, you could add custom thumbnails to media objects by creating files in the '**thumbs**' folders.

The Webtrees administration in version 2 is different, and custom thumbnails are stored as a second media file in the same media object. Because of this, if the thumbnail image is the same as the original image, it is no longer needed. **If you have upgraded from Webtrees version 1 to Webtrees version 2** the 'Import custom thumbnails' setting allows you to delete any thumbnails no longer required or move any custom thumbnail images that are required. This is a simple housekeeping setting that will improve the performance of your site.

Clicking on the '**Import custom thumbnails from Webtrees version 1**' link takes you to a table listing all your thumbnails alongside an image of the main media file. The '**Comparison**' column tells you whether both files are identical or nearly identical (100% or 99% for example) in which case the thumbnail can be deleted using the '**Delete**' button.

If they are different, then you need to click on the **'Add'** button.

MAP

There are various places on Webtrees where maps are displayed (the pedigree map for example is a chart on which birth locations are displayed).

Map Provider

Clicking on the '*Map provider*' link takes you to a page from where you can turn this option off and on and lists the available map providers. There is also an option to use the **GeoNames database** to help autocomplete as you enter places. The GeoNames database is a large database of place names but to use the database you need to register for a free GeoNames account and provide the username used for that account.

Geographic Data

Clicking on the 'Geographic Data' link will take you to a table of all the countries listed in your family tree.

Clicking on the country takes you to a table of all the counties or states in that country.

Clicking on the county or state, takes you to a table of all the towns listed in that county.

Clicking on the town takes you to a page where a map of the location is displayed, together with the name of the place and the latitude and longitude, all of which can be edited. The flag on the map can be moved to a specific location (a particular area, street, or building).

Clicking on the pencil icon at any stage allows you to edit the entry of that stage.

USER SECTION

NEW USER GUIDE

The first thing new users should be aware of is that no two Webtrees sites are the same. Almost every aspect of the site can be made visible or invisible by the site administrator. Don't worry if you see things listed in this guide that you can't see on your own Webtrees site.

The second thing you should be aware of is that members of the family who have registered, and who are logged into a site, will be able to view different things to users who are not registered and logged in. We have split this Webtrees New User Guide into two sections. The first section is for **site visitors** who are merely visiting, the second section is for **members** who are registered and logged in.

The third thing you should be aware of is that Webtrees fully complies with the GEDCOM standard. GEDCOM is the internationally recognised format for family tree creation.

Site Visitors

There are two main sources of information about your own Webtrees Family Tree site.

In the menu at the top of the page, you may find a question mark or another indication that there is a FAQ (Frequently Asked Questions) page.

At the bottom of your Webtrees Family Tree site, you may find a link to the contact form for the site administrator.

Navigation

The main Webtrees Menu will differ from site to site, but the two most important menu items for new users are '**Charts**' and '**Lists**'.

Charts

The Manager or Administrator of the family tree will have chosen the **default individual** for your family tree, and it will be the chart of this default individual which will be visible to you.

The **descendants chart** shows the default person, and their children, grandchildren, *etc.* The **ancestors chart** shows the default person, their parents, grandparent, *etc.* The **fan chart** shows the default person, their children, grandchildren, parents and grandparents, *etc.* You will only see people who have died, and will not be able to see information about anyone still alive.

Clicking on the name of anyone listed on any of these charts takes you to the page for that individual.

Lists

The most useful lists for new users are the **Individual List** and **families list**. You will only see people who have died, and will not be able to see information about anyone still alive.

Clicking on the **Individuals List** displays letters of the alphabet, and clicking on the letter displays the surname of any individual on the family tree whose last name commences with that letter. Clicking on the surname displays a list of every individual with that surname, and clicking on the name of an individual takes you to their individual record.

Clicking on the **Families List** item displays letters of the alphabet, and clicking on a letter displays the surname of anyone on the website whose last name commences with that letter. Clicking on the surname displays a list of every family with that surname and clicking on the name on any person takes you to their individual record.

Individual Records

Individual records have several tabs at the top of the record, and the Manager or Administrator of your family tree will have chosen which tab opens by default, and which tabs are visible or invisible to you. The most useful tabs for new users are probably the '**Facts and Events**' tab and the '**Families**' tab.

The **Facts and Events** page provides a list of all the facts known about

the individual, and this may include where and when they were born, where and when they were married, where and when they died, *etc.*

The **Families tab** displays the parents of the individual, and any brothers or sisters (first family). If the individual has been married it will then show their spouse, and any children (second family). If their spouse dies, or if the couple divorces, the individual may remarry. If so, their new spouse and any children will also be displayed (subsequent families), *etc.*

When you are viewing the record of an individual and then click on the main menu, the charts and lists will then be the charts and lists of the person you are viewing, not the default person.

Family Members

Family members who have **registered and logged in** find the default charts and lists have changed from the default chosen by the manager or administrator, and will show the charts and lists most relevant to themselves. In addition, on the top menu, there will be an additional ‘**My pages**’ link taking them to their own individual record and their own page of useful information.

Family members are able to progress to become Editors (which allows them to add or edit records), Moderators, Managers or Administrators of the website.

USERS

There are several categories of Webtrees users, and their use will differ from person to person depending upon what type of Webtrees user you are, and what settings the Webtrees administrator has made.

Visitors

Anyone can visit a Webtrees site, but what they see will differ from site to site depending on the settings made by the site administrator.

Access to some sites may be restricted to family members only, so unless you have registered and logged in you will not see anything described in this Webtrees Manual apart from a home page and a link to a registration/login page.

Alternatively, some sites may give full access to absolutely everything described in the manual apart from information about persons still living.

Most sites allow site visitors to access something mid-way between the above two extremes. Enough to whet your appetite to want to register and log in. Visitors who have registered on the site are known as members because in almost all cases they will be members of that family tree.

The manual has sections for each of the different types of members.

Members

The Webtrees Members can access everything a site visitor can access, and more. How much more will totally depend upon the setting made by the site administrator, and again this will differ from site to site. On almost all Webtrees sites membership is usually restricted to members of the family, and members may be eligible to become editors.

Editors

Webtrees Editors can access all areas of the family tree that members can access, but they can also edit details on the family tree. They can add

information, delete information, or change information.

On a few Webtrees sites their additions, deletions, or changes may be automatically accepted and published as soon as they are made, but it is more usual for the changes not to be published until reviewed by a moderator. The decision whether or not to automatically accept changes is made by the site administrator.

Moderator

The Webtrees Moderators have all the permissions of members and editors, but they also have authority to accept, deny, or alter, any entries made by Editors.

Managers

Each Webtrees website can host several different family trees. A Webtrees Manager has the same permissions of Moderators, but in addition, they may also have permission to change some of the settings or configurations in their own particular tree.

Administrator

The Webtrees Administrator has all the permissions of the Editors, Moderators, and Managers, but they can also change every setting or configuration of the whole website, approve users and user settings, and install additional modules.

The Webtrees Administrator will also be the Webtrees Webmaster in most cases, but occasionally on larger sites the Administrator and Webmaster may be different persons.

Webmaster

Webtrees software is designed to display a family tree, but instead of residing on your computer, the Webtrees software resides on a hard drive (known as a host) in a data-centre with software (known as server software) that can serve it up to the internet when someone makes a request in their browser. The webmaster is the person who pays for a host and looks after the server software. In most cases this person will also be the administrator,

but they don't have to be. Where the rolls are split, the administrator looks after the Webtrees software, and the webmaster looks after the server software.

TOP MENU

The Webtrees Top menu is usually found in the top left hand corner and includes a link to the sign in page, theme and language settings. The site administrator may prevent some of the links appearing. For example, they may only activate a single theme, in which case no theme link will be visible.

Provided the site administrator has activated them, there may be a **'Search box'** enabling you to search for an individual or place, a **'Theme link'** provides a drop down menu that will allow you to select different themes to change the colour scheme or layout of the site, and a **'Language link'** providing a drop down menu to select different display languages, and a **'Sign in link'** taking you to a login form. There is also a link on that form to **'Request a new user account'** if you do not already have one.

Once you have logged in there will also be a **'My Pages Link'** in the top menu.

Language Link

Provided they have been activated by the administrator there can be up to sixty-seven languages made available. In most cases the administrator will have selected a default language when the website was first installed (my own Webtrees website only displays English for example). Where additional languages are supplied it should remember that the drop down menu only changes the Webtrees language, and not necessarily the language in which information has been submitted. For example: information about ancestors on my Webtrees site is all added in English. Changing the language on the drop down menu to French would change all the instructions and menus into French, but it would not change the information already added in English.

Sign In Link

When you click on the Sign In Link, if you are a registered user, it pulls up a box in which you simply add your username and password, and then click on the **‘Sign in’** button.

If you are a new user, at the bottom of the form there is a **‘Request a new user account’** link which takes you to a registration form. This form asks you to insert your ‘Real Name’, your ‘Email address’, a ‘Username’ and ‘Password’. There is also a ‘Comments block’. Once completed, you click on the ‘Continue’ button.

On my own site I have added a note at the top of the form making clear we only accept registrations from members of the family, and they have to use the ‘Comments’ box to explain who they are related to, and how they are related to them.

The default setting is for two more things to occur before a new account is created.

Firstly, the new user’s **email address must be verified** by the user clicking on a link in the email sent to them.

Secondly, once the email has been verified, **the administrator has to approve the application.**

My Page Link

Once the new user has verified their email address, and once the administrator has physically approved their application, The user will see a new '**My Page**' link taking them to a landing page which contains various boxes of information. It may differ from site to site depending upon choices made by the administrator.

There is invariably a 'Welcome' box containing a link to **your own record** on the family tree, **your own default chart**, and **your own account details**.

There are many boxes the site administrator may (or may not) have activated, some of these include:

Personal messages from other family tree members or administrators, a **slide show** of random images, **events** taking place this day in history, **upcoming birthdays** or anniversaries, and family tree **statistics**.

MAIN MENU

The main Webtrees menu is customisable by the administrator and some menu items may be visible to visitors, to registered members, or only to managers and administrators. Alternatively, the administrator may disable some parts of the menu, and hide them from everyone.

It is worth knowing that Webtrees comes with six templates, so different sites may look different depending on the template chosen by the administrator. For example the menu on a site using the **default template** will look different from the menu on a site using the **Couds template**. (second image). The images may look different, but the actual menu content will be the same. It is also worth mentioning that the list of menu items can be rearranged into any order, so they may not be in the order described below.

Other items may be added to the core menu by various add-ons not part of the official release and not maintained by the Webtrees team.

Core Menu

The following menu items are included as part of the official Webtrees release:

Family Trees: My own website only contains one family tree, but some Webtrees sites contain more than one. Clicking on the 'Family trees' icon displays the name of every tree listed on the site, and clicking on the name takes you to that particular tree.

Charts: Webtrees can display family tree information on several different charts and with several different layouts. All the charts are described later.

Clippings cart: Disabled on my site, but if the administrator has enabled this it allows you to save a small section of the family tree, one person or one nuclear family for example, and to download that information as a gedcom file. Further information about the clippings cart can be found later.

Lists: Webtrees can display several lists of different family tree information. Each list item is described later.

Stories: The stories module allows registered and signed in users to add their own stories and make them visible on their own record. Stories are described in greater detail later.

Calendar: Disabled on my site, but it displays historical family tree information occurring on a certain date, or a certain month, or a certain year. Further information about the calendar can be found later.

FAQ: If the administrator has activated this menu item, clicking on the question mark will display a list of Frequently Asked Questions and their answers.

Reports: Webtrees can display many reports in different formats. Each

report item is described later.

Search: The search box has its own drop-down menu which allows you to choose a general search of the whole site, a phonetic search, an advanced search. It also allows those with editing rights to do a ‘search and replace’. There are further details about searches later.

Charts

Webtrees Charts are one of the easiest ways of moving around the website. Clicking on someone's name on a chart takes you to the entry for that person.

There are thirteen different charts available by default, although they may not have been available to everyone. Administrators may have limited access to some site visitors, or limited access to some registered users. They may also be displayed in a different order or with different icons depending on the template used.

Ancestors Chart: The Ancestors Charts may show ancestors of the default person (chosen by the site administrator) or if you are registered and logged in it may display your own ancestors. Alternatively, you may be able to type a name or use the drop down 'individual' menu to find an individual ancestor.

By default the chart will show four generations of ancestors of the chosen person in the form of a simple tree, but the number of generations can be changed. The layout can also be changed. Clicking in the 'Individuals' circle (and then on the view button) changes the layout from a tree to a table listing every individual, and clicking in the 'Families' circle changes the layout to another table that lists husbands alongside their wives, and date and place of marriage.

Compact Tree Chart: This displays similar information to the above, but in a stylised tree that in my opinion is harder to understand. There are, though, arrows to help you navigate the tree, and the drop down menu allows you to insert the name of any ancestor.

Descendants Chart: These are the direct opposite of the Ancestors Chart. Instead of displaying information backward to ancestors it displays information forwards to descendants. The chart has the same tree, descendants, and families settings. It is worth remembering that if you choose someone whose descendants are still alive, then you won't see any information about them.

Family Book Chart: This begins with the default person (or yourself if you are logged in, or anyone else you choose) and displays that person's parents and children.

It then lists each child, alongside their parents and children, followed by listing their children alongside their parents and children. What you end up with is a complete chart of every generation. The number of generations can be increased. For example, changing the generations from the default of 2 to 4 would start the chart with four generations in either directions, so would show the starting person alongside, their parents, their grandparents, and great-grandparents, and also alongside their children, grandchildren and great-grandchildren. That would be considered the starting generation, and you can then choose how many generations are displayed under the starting generation.

Fan Chart: The Fan Chart displays descendants in a half-circle, three-quarters of a circle, or a full circle, and is easiest described using a circle. On the circle chart the starting person is displayed in the central bullseye. Their parents each take up half of the following circle, and their grandparents each take up a quarter of the following circle, and great-grandparents take up an eighth of the following circle, and so on. The number of generations displayed can be increased, but larger number of generations will necessitate smaller print. If the print becomes too small there is a zoom control to enable you to zoom into any individual part of the chart.

Hourglass Chart: The Hourglass Chart places the target person in the centre of the page, their parents and grandparents on the right, and their children and grandchildren on the left (although the administrator may have changed the options and may display things right to left, top to bottom, etc). There is also a setting to display more (or fewer) generations.

Interactive Tree Chart: This displays similar information to the hourglass chart, but only displays the central part of it (main person). The

interaction part means that you can move the tree sideways to see additional ancestors or additional descendants.

Lifespans Chart: The Lifespans Chart displays a bar chart showing the years in which someone was born and died. You can display a chart for any individual. Typing in the name of a town displays the same information for everyone who has been born at that location, and typing in a start and end year displays the same information for everyone who was born, or who died, between those two dates.

Pedigree Chart: Displays information similar to the Ancestors Chart, but is a bit more flexible and displays differently. For example, there are settings at the top to display the tree left to right, right to left, top to bottom, or bottom to top.

Pedigree Map Chart: Displays the location on a map of someone's birthplace, and the birthplace of their parents, grandparents, great-grandparents. The starting person will usually be a default person chosen by the site administrator, or yourself if you are registered and logged in. The starting person can be changed, and the number of generations can be increased or decreased from the default of four.

Relationships Chart: The Relationships Chart allows you to list two different individuals from the family tree, and displays a chart showing how they are related.

Statistics Chart: The Statistics Chart is really a series of statistical charts showing such things as the total number of people on the tree, total men and total women, the oldest and youngest people, the number of different surnames or first names, and several other sets of interesting statistics.

Timeline Chart: The Timeline Chart displays a timeline of someone's life, from birth to death. The starting person will usually be a default person

chosen by the site administrator, or yourself if you are registered and logged in. The starting person can be changed. If you select a new person and then click on the 'Reset' button, a timeline for the new person is displayed. If you click on the 'Add' button, the timeline is displayed alongside the originally displayed timeline so you can see more than one timeline at a time.

Clippings Cart

Webtrees Clippings cart allows you to save a section of the family tree and to download that information as a gedcom file.

Webtrees enables families to hosts their family tree on a website, but you may sometime want to use one of the many proprietary family tree programmes on your own laptop or phone. Gedcom is the file type used by all the different family tree software, so saving part of the Webtrees website into a gedcom file enables you to then install that file into your own software.

Using the Clippings Cart

Provided the administrator has activated the clippings cart, if you click on it when you are viewing someone's family tree record, you will be able to add that record to the cart.

You will be presented with the choice of saving details of the person alone, or with his parents and siblings, his spouse and children, his ancestors, his ancestors and their families, or his spouses and descendants.

If you see someone on the Webtrees site who is not in the software on your own computer, you can download details of that single person, or any combination of his descendants or ancestors.

Once you have made your selection and clicked on the '**Continue**' button, the next time you click on the Webtrees clippings cart you can **add another person's** record, **empty the cart**, or **download what you have saved**. If you select the download option there is a final window which applies privacy settings. Managers have the option to download all the details (including details of people who are still living). Other registered users may be restricted to those who have died. The file itself is downloaded as a condensed zip file. Unzipping the file reveals a gedcom file and (if there are any) a media folder containing any images, all of which can be added to your own genealogical software.

Lists

The lists menu provides a drop-down list of nine family tree items, but the administrator may not have made them all available and they may be in a different order to those described below.

Branches List: The first item on the lists menu is Branches. Adding a name in the ‘Surname’ box, and then clicking on the ‘View’ button reveals a list of every branch of the family with that surname.

Families List: Clicking on the Families Lists item displays letters of the alphabet, and clicking on a letter displays the surname of anyone on the website whose last name commences with that letter. Clicking on the surname displays a list of every family with that surname and their marriage details. These include the name of their spouse, how old each of them were when they married, and where and when they married. The list is interactive, so you can click on the name on any person to see their individual record, or on a date to display a list of other items (if any) occurring on the same date, or on a place to find others who lived in the same town or city. Clicking on the arrows at the top of the list allows you to change the order (date order, town order, etc.)

Individuals List: Clicking on the Individuals link displays letters of the alphabet, and clicking on the letter displays the surname of any individual on the Webtrees website whose last name commences with that letter. Clicking on the surname itself displays a list of every individual with that surname, and clicking on the name of an individual takes you to their individual record.

Media Objects List: When you click on the Media list there are several choices to make depending on how media items are stored on the server. On my own family tree website I have placed images in folders (images of birth certificates in a ‘birth’ folder, death certificates in a ‘death’ folder, images of people in a ‘people’ folder, etc.). So your first option is to use the drop down menu to select the correct folder. If you click on the ‘Search’ button

at this stage you will be presented with a list of every media item in your selected folder (all media items in the 'births' folder for example). The next drop down menu allows you to select what type of media you want listing. For example you may want a listing of all the 'Certificates', or all the 'Maps', or all the 'Video'. If your particular Webtrees site is very large you may want to use both filters (for example, selecting 'wedding' as the folder and 'video for the media would give you a list of all weddings that have had their video uploaded to the site (if any).

Place Hierarchy List: The place hierarchy should provide you with a list of everywhere listed on the website (in theory). For example, when you first access the place Hierarchy you should be faced with a list of countries, clicking on a country should give you a list of regions or counties within that country, and clicking on a region should give you a list of towns or cities in that region, and clicking on a town or city should give you a list of all the people who have been born, died or got married at that location. That's the theory. In practice, many Webtrees site owners seem to neglect the hierarchy, and when you click on the first list you may be faced with a mixture of countries, counties and towns in a single list (which somewhat defeats the object!)

Shared Notes List: There are times when the same information refers to several people (for example a single census note may list a large family). A shared note allows you to type information once, and then attach that single note to all the individuals mentioned in it. Clicking on the Shared Note section of the Webtrees Lists menu displays a list of all shared notes.

Sources List: This provides a list of all the sources which support the information on the Webtrees site. There are lots of family trees listed online that do not display sources, but for anyone serious about genealogy, that should never happen and you should only list things you can prove. That means for every fact listed there should be a source. If a marriage has been listed, for example, there should be a source. In the UK that may be because you attended the wedding (so you should be listed as the source), or because

you have a copy of the marriage certificate (in which case the certificate is the source), or because the marriage is listed in the UK Marriage Index (in which case the Index is the source), or because they are listed as married in a UK Census (in which case the Census is the source), or because your Great Uncle Bulgaria attended the wedding (in which case Great Uncle Bulgaria is the source). You can of course say, you ‘think’ someone may be married but are not sure, but even in that case you should list the source that makes you ‘think’ that may be the case. See also ‘Repositories’ below.

Repositories List: Repositories is a list of places where ‘Sources’ can be found. For example, in the UK the source of a death may be the ‘Burial Register at St John’s Church, Some-Town’, but the register itself may be in the National Archives. So the ‘Source’ would be the ‘Burial Register’, but the ‘Repository’ would be the ‘National Archives’.

Submitters: Everyone who adds information to someone’s record is known as a ‘Submitter’. These will usually be Managers or Administrators.

Stories

Webtrees Stories allows registered and signed in users to add a large amount of information that would not necessarily fit easily in the family tree. For example, you may want to add a fifty page biography, and or even a longer story of some family member's life or some significant part of their life.

On my own site I prefer all information inserted in the 'Notes' tab, however, if the administrator has activated the Stories module you will find a 'Stories' tab on your own record. Clicking on that tab displays any current stories. Registered and logged in users who click on that link will also see an 'Add a story' link, and this opens a page on which they can type as large a document as they like in order to tell their own story.

Calendar

Clicking the Calendar Menu item presents you with a choice of selecting a day, a month, or a year to display historical family information.

The calendar is an anniversary calendar, so it will give you a list of all the anniversaries on a given day, on a given month, or on a given year. These anniversaries may be individual anniversaries or family anniversaries, and like most menu items in Webtrees clicking on any of the individual names or family names takes you directly to that person or family record.

The settings for each of the day, month and year drop-down menus are similar, and you can jump from one to the other, so there are three different ways of finding records.

Views

Day view displays all your family tree events that took place on THAT day of the month in any year.

Month view displays all your family tree events that took place on ANY day of that month in any year.

Year view displays all your family tree events that took place on ANY day of that year.

Options

The ‘**All individuals**’ option has a drop-down menu which allows you to display only ‘Living individuals’ or only the ‘last 100 years’ and the icons alongside allow you to select only men or only women.

The ‘**Vital records**’ option has a drop-down menu which allows you to display only births, only baptisms, marriages, divorces, deaths, burials, emigrations, *etc.*

By default, the calendar displays the **Gregorian calendar**, but it can also be displayed as a Julian Calendar, a Jewish, Hijri or Jalali calendars. The different calendars have different rules and this may mean some dates in one calendar has no absolute equivalent date in one of the other calendars. In those cases, the day or date may only be an approximation.

Reports

The Reports Menu is a drop-down menu offering links to fifteen different reports about your Webtrees Family Tree. Some may not have been activated by the site administrator or may have restricted access to them depending on whether you are logged in, or a manager or administrator.

When a drop-down menu asks for a location, it is sometimes useful to start by selecting a country or county, and then afterwards drill down to smaller locations such as towns or villages.

Ancestors Report provides an in-depth report about the chosen person's ancestors. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name.

You have the options of choosing the number of generations of ancestors you want to print out, and whether you also want to print details of the resources, notes, occupations, residences, and children of the ancestors.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Births Report provides an in-depth report about members of your family tree who were born at a given place or time.

You have the options of choosing a surname or a place of birth, together with a range of dates, as explained in the following three examples.

Inserting '**Smith**' as the name, and the years 1800 to 1900 produces a list of all the Smith's in your family tree, wherever they were born, who were born between those two dates.

Inserting '**London**' as the place of birth, and the years 1800 to 1900 produces a list of all the people in your family tree, whatever their names, who were born in London between those dates.

Inserting both '**Smith**' and '**London**' and the years 1800 to 1900

produces a list of all the people in your family tree named Smith who were born in London between those dates.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Burials Report provides an in-depth report about members of your family tree who were buried at a given location.

The list can be sorted in name order or by date of death. In the case of married women, who would have been buried in a different last name to their birth name, there is also a useful drop-down menu that allows you to print their husband’s name under the wife’s name.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Changes Report provides a report listing all recent changes, including pending changes.

When visiting the family tree, it may be useful for you to know what has changed since your last visit. Some changes may have to be approved before publication by a manager or site administrator, and some users will also have access to these unapproved ‘pending’ changes too.

Options include all changes between a starting and ending date, and they can be sorted in the name or date of birth of the person whose record was changed, or by the date the change was made. There is also an option to include or exclude pending changes that have not yet been approved.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Deaths Report provides an in-depth report about members of your family tree who died at a given place or time.

You have the options of choosing a surname or a place of death, together with a range of dates, as explained in the following three examples.

Inserting **'Smith'** as the name, and the years 1800 to 1900 produces a list of all the Smith's in your family tree, wherever they died, who died between those dates.

Inserting **'London'** as the place of birth, and the years 1800 to 1900 produces a list of all the people in your family tree, whatever their names, who died in London between those dates.

Inserting both **'Smith' and 'London'** and the years 1800 to 1900 produces a list of all the people in your family tree named Smith who died in London between those dates.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Descendants Report provides an in-depth report about the chosen person's descendants. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name, but you should remember it will not list any descendants who may still be living.

You have the options of choosing the number of generations of descendants you want to print out, and whether you also want to print details of the resources.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Family Report provides an in-depth report about the chosen people's family. By default, the chosen people will either be a default couple chosen by the website administrator, or your own information if you are registered and logged in. You can change the family by typing in the names of both parents.

You have the options of choosing the number of generations of ancestors you want to print out, and whether you also want to print details of the resources, notes, and photographs. There is also an option to list a

blank entry where there is no information, and to use colours to differentiate sexes.

By default, the report will display the husband's full details, followed by the wife's full details, followed by full details of each of their children.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Individual Report provides an in-depth report about any chosen individual. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name, but you should remember it will not list any descendants who may still be living.

You have the options of choosing whether you also want to print details of the resources, notes and photographs, and whether you want to use colours. The report will include the person's parents, wife, and children, so using colours helps you distinguish male and females.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Marriages Report provides an in-depth report about members of your family tree who married at a given place or time.

You have the options of choosing a surname or a place of marriage, together with a range of dates, as explained in the following three examples.

Inserting '**Smith**' as the name, and the years 1800 to 1900 produces a list of all the Smith's in your family tree, wherever they married, who married between those dates.

Inserting '**London**' as the place of marriage, and the years 1800 to 1900 produces a list of all the people in your family tree, whatever their names, who married in London between those dates.

Inserting both '**Smith**' and '**London**' and the years 1800 to 1900 produces a list of all the people in your family tree named Smith who

married in London between those dates.

There is an option to sort the list by name, or by date of marriage.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Missing Data Report provides an in-depth report of information that is missing for a chosen individual and their relatives. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name, but you should remember it will not list any descendants who may still be living.

The first, '**Choose Relatives**' option, allows you to create a report about missing information about the named person, and every relative of that person (which could include hundreds of people!). There is a drop-down list to limit the report to descendants, to direct line ancestors, to the person and their spouse and children, or the person and their parents and siblings.

The next, '**Generation**' option, allows you to reduce your list further by limiting the number of generations.

The above options are followed by a whole range of click boxes which allow you to restrict your list further. You can limit your list to missing sources, missing births, missing baptisms, and so on through a whole list of events. You can limit your list to any single event, any group of events, or even all the events.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Occupations Report provides an in-depth report of everyone on your family tree with a particular occupation. There is no default. You type the occupation into the box and have the option of listing everyone with that occupation in name order or date of birth order.

You need to remember that the names of occupations may have changed through the years.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Pedigree Report provides a family tree of the chosen person’s ancestors, so it’s more like a chart than a report. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name.

You have the options of choosing whether not to include spouses, and whether to print the chart in portrait or landscape mode.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Related Families Report provides an in-depth report about all family relationships of a chosen individual. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name, but you should remember it will not list any descendants who may still be living.

You would be advised NOT to select the ‘All’ options in the ‘Choose relatives’ and ‘generations’ boxes. Doing so uses a lot of computing power on your server.

You have the options of choosing whether you want to list ‘all’ related families (not recommended) on the family tree, or limit the list to ‘**descendants**’ to ‘**direct ancestors**’ to ‘**direct ancestors and their families**’ to ‘**spouses and children**’ or to ‘**parents and siblings**’.

Your list can be sorted by name or by date of birth, and you can choose to include sources, notes and photographs. You can also choose whether to include colours which will help you differentiate between men and women on the report

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your

computer or phone.

Related Individuals Report provides an in-depth report about all relatives of a chosen individual. By default, the chosen person will either be a default person chosen by the website administrator, or your own information if you are registered and logged in. You can change the person by typing in another name, but you should remember it will not list any descendants who may still be living.

You have the options of choosing whether you want to list ‘all’ related individuals on the family tree (which could be a large list and is not recommended), or limit the list to ‘**descendants**’ to ‘**direct ancestors**’ to ‘**direct ancestors and their families**’ to ‘**spouses and children**’ or to ‘**parents and siblings**’.

Your list can be sorted by name, by date of birth, or by date of death.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Source Report provides a list of people who have certain sources of information.

For example, typing ‘Birth’ in the ‘Find a source’ box, will display a drop-down list of all the sources that include the word birth. Select one of those sources, and then select ‘Records’ in the ‘Source type’ box. This will display a list of everyone who has that source listed for them, and the list can be displayed in name or date of birth order.

The final options allow you to choose whether to ‘view’ the information in a browser, or as a pdf file, or whether to ‘download’ the report to your computer or phone.

Vital Records Report provides an in-depth report about vital records (births, marriages, and deaths) for a given place or time.

You have the options of choosing a surname or place, together with a range of dates (births or deaths, or both, as explained in the following examples.

Inserting '**Smith**' as the name, and the **birth years** 1800 to 1900, produces a list of all the Smith's in your family tree, wherever they lived, who were born between those dates.

Inserting '**Smith**' as the name, and the **death years** 1800 to 1900, produces a list of all the Smith's in your family tree, wherever they lived, who died between those dates.

Inserting '**London**' as the place, and the **birth years** 1800 to 1900, produces a list of all the people in your family tree, wherever they died, who were either born, married, or died at London between those dates.

Inserting both '**Smith**' and '**London**' produces a list of all the people in your family tree named Smith who were either born, married, or died in London at any time.

There is an option to sort the list by name, or by date of birth or date of death.

The final options allow you to choose whether to 'view' the information in a browser, or as a pdf file, or whether to 'download' the report to your computer or phone.

Search

Clicking on the search icon in the main menu displays a drop-down menu with links to a **general, phonetic, and advanced search**, or a link to a **search and replace** facility. It is likely the search and replace facility will only be visible to managers or administrators.

General Search displays a single search box in which you can type anything at all, a name, a place, a church; anything. If you were foolish enough to search for the main family tree surname, the search result may display every page of your family tree, so you need to be selective and you need some way of filtering the results.

The results can be filtered with the options immediately below the search box, which allow you to filter the results to individual records, family records, sources, repositories or shared notes.

Phonetic Search allows you to search phonetically for any first name, last name, or place name. This can be handy for finding names that have been misspelt. For example, a phonetic search for 'Smithy' would display people named 'Smithy' and Smythy'.

Advanced Search has all the options you could possibly need to find someone elusive.

The first option allows you to search for a **first name**, either exactly as you type it, or beginning with the letters you type, or containing the letters you type, or sounding like the letters you type.

There are similar options if you search for a **last name** (exact, starts with, contains, sounds like).

The **date of birth** option includes an exact date, or within two, five or ten years of the date given.

There are similar options for many of the search boxes, and as well as searching for the first name, last name, or date of birth, there are boxes allowing you to search for a place of birth, date or place of marriage, date or place of death, and the first names or surnames of the person's mother or father.

If all the above is not enough, there is an ‘Add more fields’ box with a drop-down list of **over fifty other** options.

Search and Replace may not be visible to you, as it’s use will almost certainly be restricted to editors, managers, or administrators. It comprises two boxes. The word or phrase you want to search for is placed in the top box, and the word or phrase you want to replace it with is placed in the second box.

For example: If you have incorrectly given someone the last name of ‘Smith’ and you then discover the correct spelling is ‘Smythe’, you can change one to the other.

WARNING: The search and replace changes are done without any further warning. When using the search and replace facility in a word processor, each word is usually highlighted and you are given the option of changing every word, or only changing some of them. This is NOT the way the search and replace option works in Webtrees. There is no chance to review changes before they take place, and **clicking the ‘Replace’ button immediately makes all the changes.**

MAIN TABS

The nine Webtrees Tabs can be found on every person's page unless they have been hidden by the administrator.. There will be different tabs visible depending on whether you are logged in or not, and whether you are a manager or administrator.

Tab Order

Tabs include Notes, Families, Facts and events, Interactive tree, Album, Sources, Stories, Media, and Places. As well as being able to make some visible or invisible, the Administrator can change their order. For instance, my own Family Tree is different to most, with individual records opening on the 'Notes' tab. Most other sites I've seen tend to have 'Facts and Events' or 'Families' as the first tabs.

Facts and events Where they have been entered, on this tab you will find all the main events of someone's life. The person's date of birth and place of birth or the date and place of death, *etc.* If they have been completed properly (they may not have been) there should also be a source listed for every event listed.

Those with editing rights also have access to a drop-down menu from which they can select an event and add any missing details. Forty different events are listed alphabetically in the drop-down list, but they will not all be used. For example, it would be unusual for someone to have both a bar mitzvar and a first communion. If forty events are not enough, there are options at the bottom of the list to add custom facts or custom events.

The comprehensive list includes all the following in alphabetical order:

Adoption

Adult Christening Ancestral File Number Associate

Baptism

Bar Mitzvar Bat Mitzvar Birth

Blessing

Burial

Census
Confirmation Cremation
Death
Degree
Description Education
Emigration
First Communion Graduation
Military
Military Service Name
Nationality Naturalisation Number of Children Number of Marriages
Occupation
Ordination
Probate
Property
Religion
Research Task Residence
Restriction Retirement
Shared Note Social Security Number Title
Will
Custom Fact Custom Event

Families

An individual may be a member of several families. For example, a child will be a member of their parent's family, but once they leave home and get married, they form part of a new family. If their partner dies and they get remarried, they form another family, and so on. The Families Tab reflects those changes where the information is known.

The first entry will show the individual with their parents, and with any brothers or sisters.

If either of their parents got remarried, the next entries will show details of those marriages and will list details of the step-mother or step-father, together with any step-brothers or step-families.

If the individual has been married it will show details of their husband or wife, together with any children of the marriage.

If they have been married more than once, similar information will

continue in the date order of each marriage.

Notes Anything can be written under the notes tab. There may be a single large note, or several small ones,

On my own site I use one large note to add the person's full biography (which is why we have the 'notes' tab as our default) but different family trees may use notes for any purpose whatsoever.

Interactive tree

The interactive tree tab displays the interactive tree for the individual being viewed. It opens with the individual in the centre, but it can be scrolled one way to view the person's ancestors and the other way to view their descendants.

Album

Clicking on the album tab displays thumbnail images of any images attached to the person being viewed. That may be images of the person themselves or images of any documents or places associated with that person.

Clicking on the thumbnail will display the full size image.

Sources

The sources tab displays all the sources listed for the person being viewed. There should be a source listed for every fact listed in the 'Facts and events' tab, because whoever listed those facts must have got their information from somewhere.

These sources may be state birth records, church baptism records, *etc.* so this tab will immediately tell you if there are sources missing that should really be listed.

Stories

The stories tab will display any stories that have been added for the individual being viewed.

Stories can be added for any individual, but are particularly useful for adding longer pieces of information that cannot easily be accommodated anywhere else. For example, a story could be used to add half a dozen pages describing several events, or even a full five-hundred-page biography.

Media

The media tab display similar information to the Album tab, but it also displays thumbnails or links to other media items attached to the individual being viewed. These may include, where available, things like audio or video files.

Places

The places tab, if it has been activated, displays a map showing the locations in the life of the person being viewed.

For example, it could show where the person was born or died, where they worked, or where they were married. Clicking on any of the clusters on the map should reveal further information about the event taking place at that location.

BLOCKS

The **home page** of any Webtrees family tree website is made up of blocks. The **‘My page’** of any registered and logged in member is also made up of various blocks of information. Like most of Webtrees, the blocks you see depends on what blocks the site administrator allows you to see. Some may be visible to visitors, some only to members, and some only to managers.

Charts

On ‘My page’ this block displays a chart showing your own pedigree tree.

Favourites

The Favourites box allows you to select a favourite object from the family tree so that you can easily find something you may want to look at frequently.

On ‘My page’ the favourites box contains an ‘Add a favourite’ link. Clicking on that link takes you to drop-down menus that allow you to select an individual, a family, a media object, a source, a repository, or a link.

Home Page

When Webtrees software is first installed on a server the blocks on the front page are blocks of information most useful to persons who are setting up the website. Once that has been done the administrator of the site can select the blocks that will be displayed on the home page of each family tree. Different administrators may add different blocks so no two home pages will be the same.

HTML

A HTML page may have been added to the Home Page or your ‘My Page’ by the site administrator. This is a page in which the administrator

may have typed any information, but they may also have used one of three default HTML pages, the keyword examples page, the narrative description page, or the statistics page.

Keyword Examples Page: This default page adds a large block with a large amount of information including differences in ages between spouses, the average number of children, average lifespan, most common first names and last names, number of persons being born or having died or having been married at commonly listed places, number of persons who have lived at commonly listed countries, the earliest listed person and the latest listed person, *etc.*

Narrative Description Page: This default page provides a single paragraph of information that includes when the tree was last updated and the earliest and most recent events listed on the tree. The administrator, of course, may have added any amount of other textual information under the default information.

Statistics Page: This default page is probably the one most usually found on a Home page or on a My Page. It displays a table that includes the number of people on the tree, number of males, number of females, number of surnames, number of families, number of sources, number of media objects, number of repositories, number of listed events, and number of users. It continues by listing the earliest and latest births, the earliest and latest deaths, the individual who lived the longest, the average age at death, the family with the most children, the average number of children per family, and the most common surnames.

Journal

A journal item is a word-processed page you can use to write a journal of research you are currently undertaking, or which the administrator can use to display a news item.

Messages

The Webtrees Messages block allows you to select any other member of your family tree site, and to send them a message. It also makes you aware of any messages sent to you.

Most Viewed Pages

Lists the pages on your family tree that have been viewed the most.

My Page

The my page block is a default block on your own page. It has a welcome message, a link to your default chart, a link to your own individual record on the family tree, and a link to your account details

News

This is a block used by the administrator to display news items to users.

On This Day

The on this day block lets you know if any historical events on your family tree occurred on that day of the year. If there are no events on that day it will say so, but if there are events on that day you can click on them to see the details.

Pending Changes

Editors are allowed to make changes to the family tree, but their changes have to be approved by a moderator. This block lists the changes that have been made which are pending approval, so it is usually not visible to anyone with less access than an editor.

Recent Changes

This block displays a list of any changes made during the past seven days, so it helps you catch up if you've not visited for a while.

Research Tasks

The research tasks block displays a list of research tasks that have not yet been completed. They are displayed as a table, and alongside a person's name it lists what further research is needed.

Sign In

There is a sign-in sign-out link at the top of the page, but the sign-in block provides an alternative way of logging in or out from the body of the home page. On my own family tree site I only use the top link and don't use the sign-in block.

Slide Show

The slide show block displays random images from your family tree, but there are several optional settings. You can choose to display images attached to individuals, images attached to facts or events, or all images.

Additional settings allow you to include or exclude different types of images, video, sound, whether or not to display slide show controls, or whether or not to automatically start the slide show on page load.

Statistics

The statistics block displays a table of information including the number of people on the tree, number of males, number of females, number of surnames, number of families, number of sources, number of media objects, number of repositories, number of listed events, and number of users. It continues by listing the earliest and latest births, the earliest and latest deaths, the individual who lived the longest, the average age at death, the family with the most children, the average number of children per family, and the most common surnames. The administrator may include or exclude any of those categories.

Themes

If the administrator has activated the theme block it has a drop-down menu which lists the available themes (or the themes the administrator has allowed). Each theme will change the layout or colour of the family tree in some way.

Top Given Names

By default, the given names block lists the ten most frequently listed male and female first names. Although the default can be changed to display a different number, the default is usually left at ten.

The names may be displayed in a list or in a table. If displayed in a list, the list is in numerical order with the most frequent name at the top. If displayed in a table, the table can be in alphabetical order of name or numerical order of frequency.

Top Surnames

By default, the surnames block lists the ten most frequently listed last names. Although the default can be changed to display a different number, the default is usually left at ten.

The names may be displayed in a list, in a table, or in a tag cloud. If displayed in a list, the list is in numerical order with the most frequent name at the top. If displayed in a table, the table can be in alphabetical order of name or numerical order of frequency.

Upcoming Events

The upcoming events block displays anniversaries of any births, deaths or marriages on the family tree occurring within the next seven days. Some of these defaults can be changed. You can change the 7 days up to a maximum of 30 days, or you can choose not to display births, or marriages, or deaths.

By default, the events are displayed in a table sorted by name, but the events can also be displayed as a list, and sorted by date. Additional settings will allow you to only display anniversaries of living people (in which case you will see no deaths listed!) or anyone, living or dead.

Who Is Online

The who is online block displays a list of all family tree members who are currently online.

Yahrzeiten

The yahrzeiten Webtrees blocks display a list of Hebrew death anniversaries occurring in the near future. By default, it displays the anniversaries occurring in the next 7 days, but this can be changed up to a maximum of 30 days.

The anniversaries can be displayed as a list or a table, and the calendar can be changed from Jewish (default) to the Gregorian calendar.

EDITOR SECTION

Webtrees Editors can edit several parts of the family tree, but the changes usually have to be approved by a moderator before publication. The administrator may allow an editor's changes to be immediately published, but it is more usual for moderators to have to approve them first.

Editing Facts and Events

Editors who have signed into the site using their username and password can edit the record of any individual on the family tree.

On the 'Facts and Events' tab of any individual person an editor will see several icons of a pencil, and clicking on any of the pencil icons allows you to edit that particular entry.

Scrolling to the bottom of the 'Facts and Events' tab takes you to a box that also allows editors to add any fact or event that is missing. The most commonly used facts are listed underneath the box, and those facts can be quickly added by clicking on one of those links. Alternatively, clicking in the box itself brings up a list of all the possible facts, and scrolling through the list and selecting any particular item allows you to enter that particular fact.

Media Objects

At the top of the 'Facts and Events' tab, clicking on the 'Add a media object' link takes you to a box from where you can type in the name of any previously downloaded media file (image, video, sound file, etc). Alternatively, clicking on the white cross in the dark box allows you to download media files from your own computer or laptop. Once you have taken one of the above two actions, just select the 'Save' button.

Editing Notes

Editing notes is similar to editing the Facts and Events. In anyone's family tree entry, when you are on the 'Notes' tab you will see a pencil icon. Clicking on that icon allows you to make changes, and they are saved by clicking on the 'Save' button.

At the bottom of the 'Notes' tab page there is an 'Add a note' link. Clicking on that link opens a text box in which you can type your note, then click on the 'Save' button.

Editing Shared Notes

When a shared note is created there is a box under the note where the creator can add a 'Privacy restriction' and restrict the display of the note to managers, members, or visitors.

There is also an 'Editing restriction' box which, if activated, limits editing to managers. Provided editing has not been restricted to managers, editors and above can edit shared notes in a similar way to ordinary notes. On the 'Notes' tab find the shared note you want to edit, and you will see a pencil icon. Clicking on that icon displays part of the note followed by a text box. Typing in the text box brings up a display of all linked notes. Click on the correct one to open it for editing and once finished click on the 'Save' button to save the edit.

Markdown

When you type information into 'Notes' (for example) that information will be typed in basic text.

If the administrator has activated it, you may be able to format the text using a system called '**Markdown**'.

There are several Markdown guides if you do an internet search, and it is quite easy to transform family tree notes with only a few tags. One of the main guides is at <https://www.markdownguide.org> but here are a few markdown examples:

Markdown Examples:

If you add stars each side of a word, or words, it makes them bold. ****These words would be bold**** for example.

Putting a line at the start of a line creates an unordered list

Adding a line at the start of a line creates an unordered list item similar to the following example.

- First list item
- Second list item
- Third list item

If you've never used Markdown before, try writing a note for someone using the above tags. If it isn't allowed, or if you get it wrong, just delete the tags and no harm is done.

Editing Families

The Families Tab displays a table comprising the person's family with their parents, followed by the person's family with any spouse. Webtrees Editors can add new individuals to any of the families listed.

If you scroll to the bottom of the table listing the person's family with their parents, you will see links to '**Add a brother**' or '**Add a sister**'.

Clicking on any of those links opens up a form. Using a drop-down list, you have to choose what **relationship the new person is to the parents** (birth, adopted, fostered, etc.). There are further boxes for adding their first names (given names) nicknames, married name (if already married), their sex, their place and date of birth, baptism, death, and burial. There are also options for adding sources and notes. By default, living persons can be added but are not visible to visitors. However, there may be times when you want to restrict access to members or managers, and the final setting allows you to do that.

Once you have added as much information as you can, don't forget to click on the '**Save**' button.

The above describes how to add new members to the person's family with their parents, but if the person is an adult who has been married you can scroll further down the page to their family with their spouse. The bottom of that table displays links similar to the above, where you can **add a son or add a daughter**.

The very bottom part of the families table provides links from where you can **add a wife or husband**, and you can choose to select a spouse from an individual who already exists on your tree or to create a new person.

Approval

Once editors have finished editing and clicked on the 'Save' button, they get an onscreen message to remind them the changes need to be reviewed by a moderator.

When you add, edit or delete information, the changes are not saved immediately. Instead, they are kept in a 'pending' area. These pending changes need to be reviewed by a moderator before they are accepted.

This process allows the site's owner to ensure that the new information follows the site's standards and conventions, has proper source attributions, *etc.*

Pending changes are only shown when your account has permission to edit. When you sign out, you will no longer be able to see them. Also, pending changes are only shown on certain pages. For example, they are not shown in lists, reports or search results.

When a moderator next logs in, at the top of their page they will see a message telling them there are 'Pending Changes'. Once they have reviewed the changes, they have the options of 'Accepting' or 'Rejecting' them, and of sending you a message. Politeness should ensure they send you a message either way.

When you log in after your changes have been accepted or rejected you should find a message from the moderator in your onscreen inbox.

MODERATOR SECTION

Webtrees Moderators can edit various parts of the family tree, and their changes will be instantly approved and published. They also have the authority to approve, deny, or alter changes made by Webtrees Editors.

Pending Changes

Once Webtrees Moderators have logged in, they will see an additional **‘Pending Changes’** link in the top menu at the top of the page if there are any changes needing moderation that have been made by editors.

Clicking on the **‘Pending Changes’** link takes you to a block listing all pending changes.

The block will display the name of the family tree that contains changes, the name of the person whose record has been changed, the part of that person’s record that has been added or edited, the name of the person who made the changes, and the time and date the change was made.

Checking Edits

You need to go to the record of the person whose details have been changed, check the changes and do one of the following three things:

Leave them alone if you are going to accept them as they are.

Edit them if you are going to accept them after your own edit or correction.

Delete them if you are going to reject them.

Once you have done one of the above things, then you should **return to the list** of pending changes again.

Acceptance or Rejection

After checking the edits, all pending changes should be accepted or rejected by clicking on the **‘Accept’** or **‘Reject’** button. If there are several pending changes, they can be accepted or rejected in bulk using the **‘Accept all changes’** or **‘Reject all changes’** button.

Finally, you should be courteous to the editors you moderate, and send them a message to let them know you have moderated their changes. This is done by clicking the user name of the person who completed the edit. This opens a message box.

If you approved their edit, you should thank them, and tell them their edit has now been published.

If you rejected their edit, you should still thank them, but tell them why you have been unable to approve their edit, and suggest (gently and kindly) any ways in which their edits may be improved.

MANAGER SECTION

Each Webtrees website can host several different family trees, and Webtrees Managers can administer each individual family tree. They have the same permissions of Moderators, but in addition, they also have permission to change some of the settings or configurations in their own particular tree.

Logged in Webtrees Managers will find an extra ‘**Control panel**’ link under the top menu ‘**My pages**’ link. In the case of an administrator, this link provides access to the complete control panel, but Webtrees Managers only have access to control panel options relating to their own individual family tree.

Control Panel

Manage family trees			
Name of tree			
Family tree	Genealogy data	Add unlinked records	GEDCOM file
 Home page	 Find duplicates	 Individual	 Export
 Preferences	 Merge records	 Source	 Import
 Privacy	 Check for errors	 Repository	
 Data fixes	 Find unrelated individuals	 Media object	
	 Renumber	 Shared note	
	 Changes log	 Submitter	

(Webtrees Tree Manager admin *Image by Richard Underwood CC-BY-4.0*)

The above image shows the control panel for a manager of one tree, and the only options available are the ones currently visible. The options are grouped into four sections, Family tree, Genealogy data, Add unlinked records, and Gedcom file.

Family Tree

Home Page Link

The Webtrees Managers of a family tree may have several editing options on the home page depending upon which blocks are being displayed by the administrator. Any blocks with options are indicated by an ‘**Edit**’

link.

A **'News' block** has three links, 'Edit', 'Delete' and 'Add a news article'. A news block opens with a text box with controls at the top similar to most word processors. Highlighting text and clicking on the **'B'** makes text **bold**, clicking on the **'I'** makes it **italic**, and so on. New news items can be created by adding whatever message you want and then clicking on the **'Save'** button. Old news items can be deleted.

Preferences

Each family tree can be displayed with various options and the Webtrees managers of the tree can change all of them. The options include the various facts that are displayed by default for each individual or family, how text is formatted, and how forms and charts are displayed.

There are so many **manager's preferences** that they have been given their own section later in this manual.

Privacy

The privacy settings can be different for each family tree, and the manager of each tree can administer those settings through the 'Privacy' link.

The first option is whether to show the family tree to site visitors, or only show the tree to members who have registered and logged in. If you select **'Show to visitors'** in the drop-down menu, visitors will be able to see details of anyone on the family tree who has already died. If you select **'Show to members'** visitors will only be able to access the home page unless they are family members and log-in.

The second **'show dead individuals'** setting is similar to the first setting, but refers only to dead individuals.

There may be individuals in your family who were born 150 years ago, but for whom you haven't been able to find a death record. Unless a date of death is entered the software would assume the person is still alive and nobody would be able to access their records. The **'age at which to assume an individual is dead'** setting tells the software to assume the person has died after a certain number of years. For example, placing the number 100

in this setting will assume anyone born over 100 years ago has now died, and those records will be made visible.

The '**show living individuals**' setting has a drop-down setting allowing visitors to view details of living individuals (not a good idea and probably illegal in most countries). Exceptions when this settings may be used would be, for example, in the case of the British Royal Family, when the births and parentage are already public knowledge.

The '**extend privacy to dead individuals**' setting is useful in countries where privacy laws extend to persons who have recently died. For example, if you wanted to assume persons over 100 years old were dead, but the privacy laws in your country prohibited information being published on persons until they had been dead for at least 10 years, the settings in these boxes would be 100 in the first box and 10 in the second box.

The details of any living person is private, but this sometimes causes problems in charts where one person is alive, but their child has died as it removes the link between the dead child and their grandparents on the chart. The '**show names of private individuals**' setting allows you to overcome that difficulty by showing the name (but no other information) of the private individual. This setting allows the name to be shown to visitors, or only shown to members or managers.

The '**show private relationships**' is similar to the above setting and allows you to display a link on family charts containing a mixture of private and public information. The charts would contain a '**private**' box where the information would otherwise be.

The final privacy restrictions section lists some things that are restricted, but the section allows you to restrict items that would otherwise no be restricted by clicking on the large '**Add**' button near the top. To give you an example, on my own family tree I have the record of someone who has died (so their record would usually be visible to visitors) but whose parents and some of their grandparents are still alive. This section has allowed me to overwrite the defaults and make that person's record private.

Clicking on the '**Add**' button adds a top row to the table from where the first drop-down box allows you to select the 'record' (of an individual, or a family, or some other record, etc.). The '**Fact or event**' drop-down box

allows you to filter down to an individual fact, (a note, their marital status, date of birth, etc.). The final drop-down box allows you to hide that information from everyone, or to only show it to visitors, members, or managers.

Data Fixes

The Data Fixes link may be available to you, but the setting itself is restricted to administrators only.

Genealogy Data

Find Duplicates. Clicking on this link displays a list of records on your family tree that may refer to the same record. This is useful information but should be treated with caution. There could, for example, be cousins of the same age and similar names, so you need to make sure duplicates are not different people. If there are duplicates, the name will be listed together with the two record numbers, for example X104 and X47. You need to click on each record in turn and be absolutely sure they are the same person. If they are the same person, clicking the '**Merge**' link displayed the two records side by side. In many cases, some of the information on one of the records will be wrong or incomplete. Click in the box beside each record to indicate the correct information, and then click on the '**Merge records**' button.

Merge Records

This link is similar to the above, but it takes you straight to the final section where you can select whichever two individuals, or two records, you wish to merge.

Check for Errors

With a bit of luck, clicking on this link will display a **No errors have been found** message. If not, then you would need to read the error and follow any advice in order to correct it.

Find Unrelated Individuals

You are managing your own family tree, so it seems reasonable to assume everyone listed will be related to you, however distantly, but that may not always be the case. If you do acquire some ‘strays’ the **find unrelated individuals** link will list them, and this will give you the opportunity of checking their details, deleting them, or adding a note explaining how they got there! Also see below ‘**Add unlinked records**’ sections.

Renumber

In every family tree, each record has an internal reference number called an XREF number. For example a family may have an XREF number of F2, and a record may have an XREF number of R2. These are best left alone unless you know what you are doing, but there may be rare occasions when you want to renumber everything. This link allows you to do so, but it can take a long time and uses a lot of resources on the website.

Changes Log

The changes log provides a table displaying every change made on your family tree, so it is a great resource for troubleshooting, or for discovering who has done what, and when. The filters at the top of the table allow you to filter entries to between certain dates, or to certain types of record, or to changes made by a certain user. Once filtered, the record can be downloaded.

Add Unlinked Records

You don’t want anyone adding a load of unconnected persons to your family tree, so the usual way of adding a record would be to add it to an already existing record. For example, a new individual would usually be added to existing parents, or as the parent of an existing child. That is the only way editors and moderators can add records.

Webtrees Managers may occasionally have different needs necessitating them to add an unlinked record. This is best explained with an example. In the 1700’s I have a family in my family tree living in a very small village where they are the only family with that name. Three miles away there is

another very small village where almost all the residents have the same last name as the person in the first village. It seems reasonable to assume the family from the first village is related to the families in the second village, but I have been unable to find documentary evidence to definitively link them. On my family tree I have connections to the single family from the first village, but have been unable to make any connections or link the many families from the second village.

The add unlinked records link allowed me to add all the people from the second village, and to list the sources, repositories, and images of church records, *etc.* I can't link them to my tree yet, but I'm pretty sure I will be able to in the future, and adding them now makes sure I know where to find their records when I need them.

Gedcom File

Many people research their family trees, and there are numerous different family tree software resources. Left to their own devices, everyone would list information differently, and family tree software would be able to display their own trees, but not trees created with different software. All those difficulties have been overcome by using an internationally accepted format called the GEDCOM format, and Webtrees uses that format.

What this means (**in theory**) is that you should be able to download the information from a Webtrees site and use it in any other family tree software, and you should be able to upload information from other family tree software and add it to Webtrees.

The (**in theory**) tag above is due to the fact that the theory is not always reflected in practice. Most family tree software creators decide there is at least one change they need to make to improve the GEDCOM format. Whilst the additional tag may be only small, the changes can sometimes ensure merges do not happen in the way you would expect.

The '**Export**' link in this section is great for **creating a backup**. You can 'Export' a GEDCOM file from your Webtrees family tree to your computer (or to a zip drive, etc) on a regular basis. If anything goes completely wrong with your Webtrees site (the server company goes broke for example), all you need to do is to create a brand new Webtrees site and

‘Import’ the GEDCOM file.

WARNING: These links are NOT meant to be used to ‘Import’ a file from different family tree software. There are **no** bulk ‘merge’ facilities on Webtrees. Importing a new GEDCOM file replaces what is already there and **destroys the existing file**, it **does not** merge new information into the existing GEDCOM. **This is deliberate.** Merging GEDCOM files is allowed on some family tree software, but **it rarely takes place without a hitch**, and sometimes goes **horribly wrong**, and destroys years of hard work. The **‘Export’** facility is designed as a **backup**. You should only **‘Import’** that backup when you are creating a **new site** or **re-creating an old site**. You should **never** use the import facility to merge a GEDCOM from other software onto your Webtrees site. It will destroy your site.

Webtrees is not designed to import a gedcom file into an existing tree. It is designed in such a way that you should add new people individually.

Managing Preferences

A Webtrees Manager can set the preferences for their own family tree, and there are many of them all of which are described in this section of the manual. The **initial settings** are for the name of the family tree (usually a surname), and for the url to that family tree (the url would usually be the url for Webtrees, plus the surname of the family).

Language Preference

The Language setting provides a drop-down menu for the default language that will be used. The choices are dictated by the administrator, so if the administrator has deselected all the non-English languages the only options here will be the different versions of English (British or American for example).

Default Individual Preference

This allows you to select a default individual using the drop-down list. When members log in and view a chart or report, the chart or report will open at their own entry, but when a site visitor who has not logged in views a chart or report it will open on the entry of the default individual.

It is a personal choice, but my own opinion is that the default person is best taken from the middle years of your family tree rather than either end. For example, if you chose the youngest person no chart would show if they were still alive or their parents were still alive. If you chose the earliest record and someone viewed a chart showing that person's ancestors then there would be nothing to see. A person in the middle years of your tree has both **descendants** and **ancestors**.

Calendar Preference

Dates should always be recorded using the calendar in which the event was originally recorded, but that may be different to the calendar in use now, so you can specify a conversion to show the dates in accordance with the present-day calendar.

If you currently use the '**Gregorian**' calendar and most of your historical records will be in the 'Gregorian' calendar, you would insert '**Gregorian**' in the first box and '**No Calendar Conversion**' in the second box.

If you currently use the **Gregorian** calendar but some of your historical records will be in the **Julian** calendar, you would insert '**Gregorian**' in the first box and '**Julian**' in the second box. Any dates inserted during the time the Julian calendar was in force will be converted and displayed in the Gregorian equivalent.

Unique Identifier Preferences

If you use different family tree software or have your family tree on different online family tree websites, each individual and each family will be given a unique identifier that will differ from software to software. If you want to add a unique identifier so the same identifier is used in all the different software then this setting should be set to 'Yes'. If you only view your family tree on Webtrees the setting can be 'No'.

Contact Preferences

You want long-lost cousins who find your family tree to be able to contact you, and there are contact links displayed at the bottom of each page

for that purpose. The **Genealogy contact** should be the person who knows most about the family tree. That will usually be you, the manager of the tree, so select your own name from the drop-down list of family members.

The **Technical help contact** may also be you, but it may also be the Webtrees Administrator.

Website Preferences

These settings help you get found by search engines.

Add **TITLE header tag**: An earlier setting displayed the name of the family tree, usually a surname. (Smith for example). The setting in this section allows you to add a little more (**Smith Family Tree** for example). This gives search engines a better idea of what your site is about, and the same words are displayed at top of browsers and on bookmarks.

Description meta tag: The description meta tag is not visible publicly but is used to describe your family tree in greater detail to search engines like Google (**Smith Family Tree and genealogy of John Smith born 1747 London** for example). The first phrase should be the phrase people are most likely going to search for (**Smith Family Tree**) the second phrase should be another phrase someone may search for (**John Smith born 1747**). As much as possible you should avoid words Google ignores (the, it, on, a, etc.)

Media Folder Preference

By default Wordtrees places images, videos, and sound files in a **yoursite/data/media** folder. I can't think of a reason why you would want to change the default, but if you do you need to name it here. If you have downloaded media files they will already be in the media folder, so if you change the folder name here you will also need to move the existing files from the media folder to the new folder.

Media File Preferences

Who can upload new media files: To maintain control of images on your family tree, you can limit the number of people permitted to add images. The first drop-down menu enables you to stop anyone uploading images, or to only allow members to upload images, or to only allow

managers to upload images. The recommended option would be to only allow managers to upload images, but on some sites you may want to allow other members to do so too.

Show a download link in the media viewer: When people view images in the image viewer there is a link for additional images to be uploaded. The link can be made invisible and only shown to certain categories of person. The setting in this section is best to be the same as the above setting. If they are not allowed to upload new media files it's best not to let them even see the link to do so.

Image Size: Whilst we're thinking about images, it's worth mentioning that when you print an image out, the higher resolution the better, but the same does not apply when viewing images online. Large images and high resolution are not needed. They use a lot of space on a server and a lot of bandwidth with no benefit. To the naked eye, images reduced to 70% of their resolution look exactly the same as images saved at 100% resolution (even high-resolution screens), so there is no downside to saving images in jpg format and reducing the resolution to 70%. The image will look exactly the same but will use fewer resources on the server. The same can be said about the size of the image. There is little point, and some harm, if your image is larger than the size of a desktop screen.

Thumbnail Image Preferences

Charts can be shown with or without images. Displaying images improves the look of the chart but increases the bandwidth used on your server. I hide the thumbnail images, but that's a personal choice. If you want to display them you need to click in the **show** box.

Charts are coloured in such a way that different sexes are easily distinguishable. However, if you have set the above setting to show, and the person does not have a default image, you can choose to show a thumbnail of a man or a woman.

List Preferences

Surnames Style: Your family tree has several lists, and this drop-down box allows you to choose how surnames are displayed, as a **list**, as a **table**,

and as a **tag cloud**. Personal choice will differ, so you can check each of these options to see which works best for your own family tree.

Maximum Number of Surnames: If you have thousands of names in your family tree you will probably not want to have a single list, table, or tag cloud of all the thousands of names, so this option allows you to break the list down into smaller segments. As above, there is no correct answer and different trees will be of different sizes and have different needs, so experiment to see which works best for your own tree.

Estimated Dates: Dates of birth or death are usually displayed on lists where they are known. Where one or the other are not known, you can choose to show or hide estimated dates.

Date and Time of Last Update: The date and time are recorded whenever a record is edited, and you can choose to show or hide the date and time of the last update. It's a matter of personal choice.

Chart Preferences

You need some information on charts, but if you have too much information the charts will look cluttered. In order to make sense of a chart you need the minimum of someone's name and their date of birth but the options in this section allow you to add other information should you wish to do so.

Age of Parents: In family records you may want to display the age of the parents when the child was born as that can help to find errors in your tree, if the mother is listed as sixty or six for example. If the parents are listed as aged thirteen or fourteen, it may also explain why they are not married!

Other Facts: Webtrees charts have the facility to display many other options (but you should use this facility with caution, if at all). The options are a comma or space-separated list of any of the fact tags defined in GEDCOM 5.5.1. For example, if you wanted to list occupations you would add OCCU in this field (not a good idea. If someone has several occupations there would be no room to display them all in a small chart). A list of the GEDCOM Fact Tags can be downloaded from the bottom of the page at <https://www.familysearch.org/developers/docs/guides/gedcom>.

Individual Page Preferences

Whilst the **layout and size of charts** has the practical effect of reducing the number of facts worth adding to them, the same is not true of individual pages that can easily carry a lot of information.

Showing events of close relatives on an individual's page: This option provides a long list of facts that can be added or remove by clicking in the appropriate boxes. It is a matter of taste and every family tree will be different, but on my own family tree I have all these options ticked without pages looking cluttered.

Fact Icons: This option allows you to show or hide icons on the 'Facts and events' tab if your theme allows them.

Automatically expand notes: Numerous notes can be added to individual's pages, and this option controls whether those notes are initially automatically displayed expanded (yes) or condensed (no).

Automatically expand sources: Numerous sources can be added to individual's pages, and this option controls whether those sources are initially automatically displayed expanded (yes) or condensed (no).

Places Preferences

Abbreviate Place Names: An individual's record may record the town, county, and country of birth, death or marriage, but there would not be enough space on a chart to display long addresses. This option allows you to limit the length of the place to a certain number of letters. If the town or village is the most important part of the address to you, you can use the drop-down lists to select the 'first' '9' letters (for example), but if the county or country is the most important part of the address you want to see on a chart you would select the 'last' '9' letters.

Text Preferences

When you type information (into 'Notes' for example) that information will be typed in basic text. You may want to format that text and Webtrees uses a system called '**Markdown**'. This option allows you to choose whether to limit text to **basic text** (none) or whether to allow **formatted**

text (Markdown).

There are several Markdown guides if you do an internet search, and it is quite easy to transform family tree notes with only a few tags.

Markdown Examples:

If you add a double dotted line below text, it creates larger text that can be used as a **heading**. If you add a single dotted line below text, it creates a **sub-heading**. If you put two stars ** each side of a word or phrase, it makes that word or phrase stand out in **bold** type.

If you've never used Markdown before, try writing a note for someone using the above tags. If you get it wrong just delete them and no harm is done. The above few tags may provide enough formatting for you. If not, just do an internet search for 'Markdown' and try some more.

General Preferences

Allow users to see raw GEDCOM records: Your family tree is written in Gedcom Format, but you wouldn't know it from viewing your family tree on the screen because the GEDCOM tags are converted into English. This setting allows visitors to see a separate window displaying the raw GEDCOM data in addition to the usual window. You would not generally need to display the underlying GEDCOM data permanently, but it may occasionally be useful to see it and this option allows you to view it.

GEDCOM errors: Many genealogy programs create GEDCOM files with custom tags, and Webtrees will understand many of them. However, if unrecognised tags are found, this option lets you choose whether to ignore them or display a warning message.

Hit Counters: Some pages can display the number of times they have been visited, and this option allows you to show or hide the hit counter.

Individual Record Facts Preferences

All Individual Facts: This box contains a list of all the possible GEDCOM facts that can be recorded by your users on the entry of an individual. Clicking on the cross beside each entry will remove the option, but you can also add additional facts to the box using appropriate GEDCOM tags. Any facts listed here cannot also be included in the

following 'Unique Individual Facts' section.

Unique Individual Facts: This is the list of GEDCOM facts that your users can only add once to individuals. For example, if BIRT (the GEDCOM tag for a birth record) is in this list, users will not be able to add more than one BIRT record to an individual. As people are only ever born once, you may think this would be a good idea, but this entry is probably best left blank. To give you an example, I have someone in my own family tree who has two different birth certificates, each slightly different. Born to a soldier serving overseas, their birth was registered once by the overseas authorities, and once by the military authorities. If you do add a fact to this list you must also remove it from the above 'All individual facts' list.

Facts for New Individuals: When you create a new individual, you may only have one or two facts about them, so you probably don't want the clutter of all the available different fact boxes. This configuration, by default, creates new individuals with boxes for adding birth, baptism, burial, and death locations and dates. You could reduce this further by retaining just the birth and death dates, or you could increase it by adding a marriage, but remember this setting only affects the creation of the individual. Once the individual has been created there will be options to add all the other facts.

Quick Individual Facts: When members go to the 'Fact or event' tab to add a new fact or event, at the bottom of the table they can click on the 'Select' box to display the very long list of the many facts or events that can be added. Some facts will be added more often than others, and it can be frustrating to go through the whole long list to find them. To make it easier, there are links to these more frequent facts under the box. This setting allows you to change the list of quick facts if you want to add or reduce things to the list.

Family Record Facts Preferences

All Family Facts: This box contains a list of all the possible GEDCOM facts that can be recorded by your users on the entry of a family. Clicking on the cross beside each entry will remove the option to enter those facts from the families forms, but you can also add additional facts to the box

using appropriate GEDCOM tabs. Any facts listed here cannot also be included in the following 'Unique Family Facts' section.

Unique Family Facts: This is the list of GEDCOM facts that your users can only add once to families. For example, if MARR (the GEDCOM tag for a marriage record) is in this list, users will not be able to add more than one MARR record to any family. A family will only have one marriage for example. When a couple marries, then divorces, and then remarries, they are treated as having created two distinct families. The first family exists from the date of the first marriage to the date of the divorce (after which there may be two individuals, or one individual and one unmarried family). The second family exists from the date of the second marriage. Each family will have different start and end dates, and may have different children, so a marriage would be a unique act that could only occur once within any given family. If you add a fact in this list, you must also remove it from the above 'All family facts' list.

Facts for New Families: When you create a new family, you may only have one or two facts about them (date of marriage for example) so you probably don't want the clutter of boxes of all the other available facts. This configuration, by default, creates new families with boxes for adding whether they are a married family or unmarried family, and whether they subsequently divorced, together with dates and places. You could reduce this further by retaining just the marriage date, or you could increase it by adding any of the other marriage facts. Remember, this setting only affects the family creation page. Once the family has been created there will be options to add all the other facts.

Quick Family Facts: When members go to the 'Families' tab and scroll down to the bottom, there is a link to 'Add a wife' or 'Add a husband'. That opens a link to a form which creates a new family. By default, after selecting the individual partner, the only options are the date and place of marriage, and a box to indicate whether this is a 'marriage' or an 'unmarried' family couple. Those facts are all you need to initially create a family, but you can add additional facts to the family creation boxes by adding them to the 'Quick Family Facts' box.

Source Record Facts Preferences

All Source Facts: This box contains a list of all the possible GEDCOM facts that can be recorded by your users as a source. Clicking on the cross beside each entry will remove the option, but you can also add additional facts to the box using appropriate GEDCOM tags. Any facts listed here cannot also be included in the following ‘Unique Source Facts’ section.

Unique Source Facts: This is the list of GEDCOM facts that your users can only add once to a source. For example, if TITL (the GEDCOM tag for a source title) is in this list, users will not be able to add more than one TITL to any single source (which is probably what you want). If you add a fact in this list, you must also remove it from the above ‘All Source Facts’ list.

Quick Source Facts:

This box lists the most common source facts separately so they can be added more easily and quickly

Repository Record Facts Preferences

Repositories are the places where sources are stored. For example, when you record someone’s date and place of birth the source may be a birth certificate, but those reading about the person may want to know where they can see that birth certificate. The repository is the location where the certificate is kept or where a copy can be obtained.

All Repository Facts:

This is the list of GEDCOM facts that your users can add to repositories. You can modify this list by removing or adding fact names, even custom ones, as necessary. Fact names that appear in this list must not also appear in the ‘Unique repository facts’ list.

Unique Repository Facts:

This is the list of GEDCOM facts that your users can only add once to repositories. For example, if NAME is in this list, users will not be able to add more than one NAME record to a repository. Fact names that appear in this list must not also appear in the ‘All repository facts’ list.

Quick Repository Facts:

Your most commonly used repository facts can be listed separately here

so that they can be added more easily.

Advanced Fact Preferences

Advanced Name Facts: is a comma-separated list of GEDCOM fact tags that will be shown on the add/edit name form.

Advanced Place Name Facts: is a comma-separated list of GEDCOM fact tags that will be shown when you add or edit place names.

Other Preferences

Surname Tradition: Different cultures list names differently (for example, in England children take their father's last name, but in Spain children take one surname from their father and one surname from their mother). This setting allows you to set the default way in which surnames will be added by default.

Use Full Source Citations: Source citations can include fields to record the quality of the data (primary, secondary, etc.) and the date the event was recorded in the source (YES). If you don't use these fields, you can disable them when creating new source citations (NO).

Source Type: When adding new close relatives, you can add source citations to the records (individual and family) or to the facts and events (birth, marriage and death). This option controls whether records or facts will be selected by default.

Keep The Existing 'Last Change' Information: When a record is edited, the user and timestamp are recorded. Sometimes it is desirable to keep the existing 'last change' information, for example when making minor corrections to someone else's data. This option controls whether this feature is selected by default.

WHAT NEXT

Creating a family tree is a fascinating pastime, and completely time consuming. Your family tree will never end. New births, marriages and deaths will need to be constantly added, and new facts about distant ancestors will be constantly discovered.

If you began your family tree with yourself and worked backwards, I heartedly recommend going as far back as you can and then coming forwards. Families one or two hundred years ago tended to be much larger, and I've got an early member of my own family tree who married three times and had fifteen children. Following each of those children has been much more challenging than going backwards, but much more rewarding too. I discovered distant cousins I never knew I had, living in distant countries I never knew existed.

The most sobering aspect of family tree creation is that you never know where you are going to end up. Many of the most ardent nationalists assume they have always been from whatever nation they are living in, but have no idea who their great-grandparents were. Once you start finding out, you often find your family originated from somewhere else than the place you always thought they originated from.

Good luck with your quest. I hope you have an equally exciting time as I have had with my family. There have been murders, robberies, social movement in all directions, changes of occupations and nationalities. The truth is out there, and often more exciting than fiction.

If this manual has helped in any small way to facilitate your search, it will have done its job. The rest is up to you.

OTHER BOOKS BY RICHARD UNDERWOOD

Richard can be contacted via his own website at:

<https://richard-underwood.com>

Software Manuals

Joomla Manual: Joomla 3 Step by Step

step-by-step instructions for anyone wanting to create a stand-alone website using the free Joomla 3 website creation software.

Zen Cart Manual: Zen Cart 1.5 Step by Step

Step-by-step instructions for anyone wanting to create a stand-alone online store using the free Zen Cart 1.5 store creation software.

Popular Science

A Brief History of Life: From the Origin of Life to the End of the Universe

Explores the scientific basis for believing life continues when the body dies.

Novels

Fake Witness

A pulsating thriller with a unique twist.

Autobiographical

Overcoming: The Salvation Army

Salvation Army history in the United Kingdom during the 1970s and 1980s.

Self-Help Books

Reading and Writing Help for Adults

Help for adults who cannot read and write. Suitable for complete beginners.

Health After Bereavement

An ideal companion for anyone who is bereaved, and an ideal gift to give to anyone suffering from bereavement.