

User Guide: Getting Started with Updating the Family Tree

Users occasionally approach me concerned that they are unfamiliar with using a web-site to update information on the Internet. Do not think of this site as being some special unfamiliar entity. It is simply an application, like a word processor, that runs on your computer, or tablet, or smart phone, and accesses and manipulates information held on a server, rather than on the disk of your computer. It is no different from accessing your e-mail or using Google Docs to edit office documents. Working with information which is stored on the Web instead of on your own computer hard-drive is simply a new metaphor for providing application services called “cloud computing” which simplifies your life by eliminating the need for you to purchase, install, and maintain software, like Microsoft® Office or Family Tree Maker®, on your computer. This new metaphor provides the ability to easily share the results of your research and cooperate with friends and family in collectively organizing your research.

The first step after you sign on before you can see the private details on your family or update the family tree is to identify a common ancestor of the family you wish to contribute to. On that page go to the bottom and click on the “contact author” link at the bottom of the page.

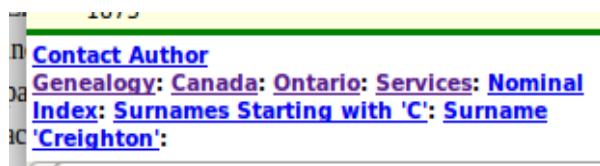


Illustration 1: Contact Author Link at Bottom of Any Page

Clicking on this link opens a dialog that permits you to send a message to the site administrators and to each current owner of the individual. This implementation avoids revealing the e-mail addresses of contributors to casual visitors to the site.

A screenshot of a web dialog box. The title bar is yellow and contains the text 'Contact Author About: [Family Tree] James Cathcart Creighton (19 May 1863-1946): IDIR=23794' in black. There is a small blue link '? Help' in the top right corner. The main area is white and contains the text 'About: [Family Tree] James Cathcart Creighton (19 May 1863-1946): IDIR=23794' in black. Below this text is a large empty white box. At the bottom left is a grey button labeled 'Send'.

Illustration 2: Contact Author Dialog

Explain in this note that you wish to be granted shared ownership of the individual on the page, that individual's ancestors, and that individual's descendants, and your reasons for requesting access, in particular your degree of relationship to the individual. Once you are granted shared ownership of the individual and the individual's family, you will receive an e-mail listing all of the individuals in the family tree that you now share ownership of, and can therefore update and see the private information for.

Now when you go to any of the identified individuals you will see a new button on the main page for the individual:

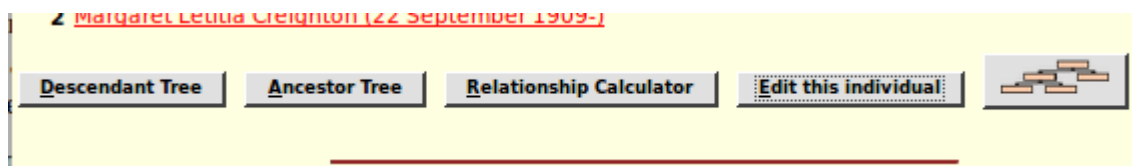


Illustration 3: Edit this Individual Button

This functionality can also be requested by holding down the Alt shift, on either side of the space bar on most keyboards, and pressing the letter “E”.

When you click this button you are presented with the information recorded about the individual presented as an input form.

Edit James Cathcart Creighton (19 May 1863 - 1946) [? Help](#)

Update Individual Merge Grant Access Search

Identity:

IDIR: 23794
Surname: Creighton
Given Names: James Cathcart [Details](#)
Gender: Male

Events

Date:	Location:	Preferred:	
Birth: 19 May 1863	Blanshard, Perth, ON, CA	<input checked="" type="checkbox"/>	Details Delete
Christening:		<input checked="" type="checkbox"/>	Details Delete
Worked as at: 1901	Undertaker Toronto, ON, CA	<input type="checkbox"/>	Details Delete
Worked as at: 1903	Mattress Maker Toronto, ON, CA	<input type="checkbox"/>	Details Delete
Lived: 1903	Wellesley Ave, Toronto, ON, CA	<input type="checkbox"/>	Details Delete
Worked as at: 1909	Book Keeper Strathroy, Middlesex, ON, CA	<input type="checkbox"/>	Details Delete
Lived: 1909	High St, Strathroy, Middlesex, ON, CA	<input type="checkbox"/>	Details Delete
Worked as at: 1911	Upholsterer Strathroy, Middlesex, ON, CA	<input type="checkbox"/>	Details Delete
Death: 1946		<input checked="" type="checkbox"/>	Details Delete
Buried:	Strathroy Municipal Cemetery, Adelaide, Middlesex, ON, CA	<input checked="" type="checkbox"/>	Details Delete

[Add Event](#) [Order Events by Date](#)

Other:

Private: No ☐ Never Married: ☐
User Ref: Ancestral Ref:
Ancestral Interest: Low Descendant Interest: Low

Buttons:

Edit General Notes	Edit Families
Edit Parents	Add Address
Edit Pictures	
Edit Research Notes	Edit Medical Notes

Illustration 4: Edit Individual Dialog

You can change the contents of any of the input fields and then click on the “Update Individual” button, or use the keyboard short-cut Alt-U, to apply the changes.

At the top right of the form there is a link “[? Help](#)” which opens a page of documentation explaining in overall terms the use of this page. More usefully holding the mouse over any input field or button pops up a detailed description of the exact meaning and use of that field or button. Don't worry about entering bad values, since you can always just return to this page and correct the value. If you enter a value in a field that is inconsistent with the expectations, for example if you misspell the name of a month in a date field or enter an unusual character in an address, the color of the text changes to red as a reminder to you to reconsider the value. This is only a warning, you can store any value that you like into the database, but an invalid value may be misinterpreted.

Location input fields on the form, as elsewhere on the site, try to guide you in entering values that are as consistent with the standards of the site as possible. It is desirable that each actual location be identified as much as possible in the same way. For example a village name in Canada or the USA is normally entered in explicit form with the township, county name, postal abbreviation for the state or province, and the two-character international country code (as used in Internet domain names). So when you enter a location name that has never been used before anywhere on the site there is a popup dialog to warn you that you have entered a completely new place name.

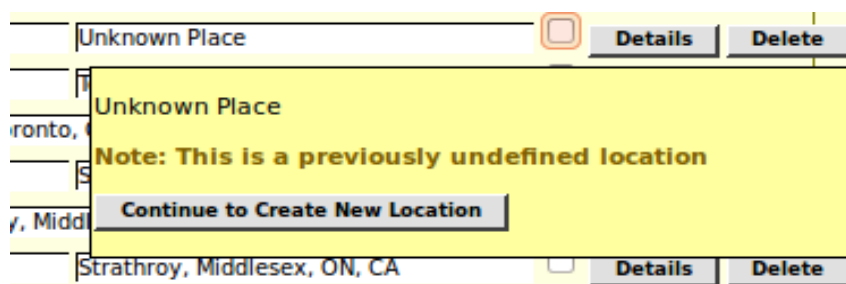


Illustration 5: Prompt to Confirm Previously Undefined Location

You can then reconsider and change what you entered. Another feature is that you can just enter the beginning of a place name. If only one existing place name starts with that value, or if that value has been explicitly defined as a short-cut, then that one existing place name will replace what you have typed. If there are multiple existing place names starting with the same text then you are presented with a selection list from which you can choose. In addition your web-browser may suggest values that you have previously entered that partially match your text.

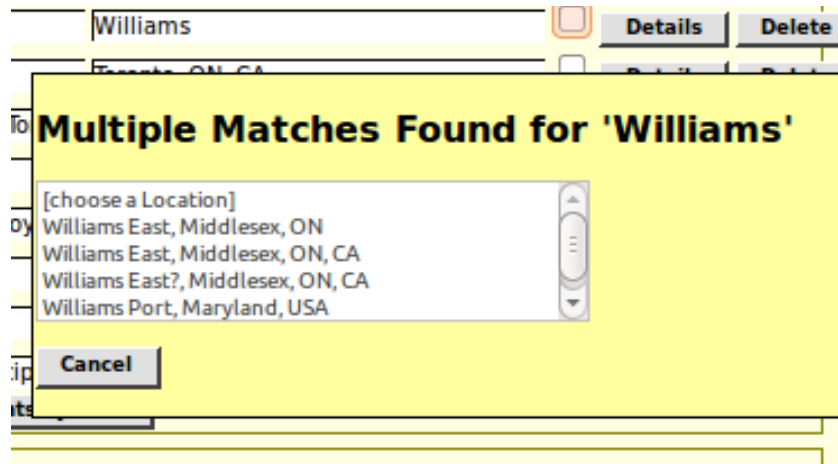


Illustration 6: Multiple Matches on Beginning of Location Name

I have tried to make this page as intuitive as possible, but if you have any concerns even after viewing the popup help for a field do not be afraid to click on the “Contact Author” button in the bottom of the page. This queues a message to all of the administrators and all of the current owners of the individual as discussed above.

This edit dialog page is intended to be opened in a full-screen browser window, even though the elements as laid out only occupy a portion of that window. This is because most of the buttons on this form open supporting forms in the right hand half of the window. This is what is called “tiling” in the user interface business. Instead of the 1980s style “messy desk” method of screen space management, the application manages the available window space so as to automatically keep all of the work items that you are currently dealing with laid out as separate areas within the window. Less urgent items are temporarily hidden, and revealed as soon as you finish with the current activity.

In particular if you click on the “Edit Families” button, which appears as “Add Spouse or Child” if there are no families defined for this individual, the right hand side of the window presents an edit dialog for information about the preferred family.

Genealogy: Canada: Ontario: Services: Nominal Index : Surnames Starting with 'C': Surname 'Creighton': James Cathcart Creighton:

This Space for Rent
Contact

Edit James Cathcart Creighton (19 May 1863 - 1946)

[7 Help](#)

Update Individual Merge Grant Access Search

Identity:

IDIR: 23794
Surname: Creighton
Given Names: James Cathcart
Gender: Male

Events

Date	Location	Preferred	Details	Delete
Birth: 19 May 1863	Blanshard, Perth, ON, CA	<input checked="" type="checkbox"/>	Details	Delete
Christening:		<input checked="" type="checkbox"/>	Details	Delete
Worked as a: 1901	Undertaker Toronto, ON, CA	<input type="checkbox"/>	Details	Delete
Worked as a: 1903	Mattress Maker Toronto, ON, CA	<input type="checkbox"/>	Details	Delete
Lived: 1903	Wellesley Ave, Toronto, ON, CA	<input type="checkbox"/>	Details	Delete
Worked as a: 1909	Book Keeper Strathroy, Middlesex, ON, CA	<input type="checkbox"/>	Details	Delete
Lived: 1909	High St, Strathroy, Middlesex, ON, CA	<input type="checkbox"/>	Details	Delete
Worked as a: 1911	Upholsterer Strathroy, Middlesex, ON, CA	<input type="checkbox"/>	Details	Delete
Death: 1946		<input checked="" type="checkbox"/>	Details	Delete
Buried:	Strathroy Municipal Cemetery, Adelaide, Middlesex, ON, CA	<input checked="" type="checkbox"/>	Details	Delete

[Add Event](#) [Order Events by Date](#)

Other:

Private: No Never Married: ☐
User Ref: Ancestral Ref:
Ancestor Interest: Low Descendant Interest: Low

Buttons:

Edit General Notes	Edit Parents	Edit Families
Edit Pictures	Add Address	
Edit Research Notes	Edit Medical Notes	

Edit Families for James Cathcart Creighton

[7 Help](#)

Families

Date	Husband	Wife	Pref	Actions
23 Apr 1902	James Cathcart Creighton	Letitia Smyth	<input checked="" type="checkbox"/>	Edit Family Delete Family

[Add Family](#) [Order Families by Date](#)

Husband

Name: James Cathcart Creighton [Edit Husband](#)
Married Surname: Creighton
[Select Existing Husband](#) [Create New Husband](#) [Detach Husband](#)

Wife

Name: Letitia Smyth [Edit Wife](#)
Married Surname: Creighton
[Select Existing Wife](#) [Create New Wife](#) [Detach Wife](#)

Events

Married: 23 Apr 1902 at Blanshard, Perth, ON, CA [Details](#)
[Add Event](#) [Order Events by Date](#)

Information

IDMR: 7018
Status: no special status
Name Rule: Replace Wife's Surname with Husband's Surname
Notes:
[Edit Pictures](#) [Details](#)

Children

Given	Surname	Birth	Death	Actions
Harry	Creighton	21 Jan 1903		Edit Child Detach Child
Margaret Letitia	Creighton	22 Sep 1909		Edit Child Detach Child

[Add Existing Child](#) [Add New Child](#) [Order Children by Birth Date](#)

[Update Family](#) [Close](#)

Illustration 7: Edit Individual with Edit Family Dialog

You can modify any of the input fields in the “Edit Families” dialog and then apply the changes by clicking on the “Update Family” button, or discard them by clicking on the “Close” button. If you click on a button to edit a family member, then a new edit individual dialog is displayed on top of the edit dialog for the primary individual:

Edit Margaret Letitia Creighton (22 Sep 1909 -)

[7 Help](#)

Update Individual Merge Grant Access Search

Identity:

IDIR: 16506
Surname: Creighton
Given Names: Margaret Letitia
Gender: Female

Relationship to:

Final Status: Ordinary
James Cathcart Creighton: ordinary Private? ☐
Letitia Smyth: ordinary Private? ☐
Sealed to Parents: [Details](#) [Delete](#)

Events

Date	Location	Preferred	Details	Delete
Birth: 22 Sep 1909	High St, Strathroy, Middlesex, ON, CA	<input checked="" type="checkbox"/>	Details	Delete
Christening:		<input checked="" type="checkbox"/>	Details	Delete
Death:		<input checked="" type="checkbox"/>	Details	Delete
Buried:		<input checked="" type="checkbox"/>	Details	Delete

[Add Event](#) [Order Events by Date](#)

Other:

Private: No Never Married: ☐
User Ref: Ancestral Ref:
Ancestor Interest: Low Descendant Interest: Low

Buttons:

Edit General Notes	Edit Parents	Edit Families
Edit Pictures	Add Address	
Edit Research Notes	Edit Medical Notes	

Edit Families for James Cathcart Creighton

[7 Help](#)

Families

Date	Husband	Wife	Pref	Actions
23 Apr 1902	James Cathcart Creighton	Letitia Smyth	<input checked="" type="checkbox"/>	Edit Family Delete Family

[Add Family](#) [Order Families by Date](#)

Husband

Name: James Cathcart Creighton [Edit Husband](#)
Married Surname: Creighton
[Select Existing Husband](#) [Create New Husband](#) [Detach Husband](#)

Wife

Name: Letitia Smyth [Edit Wife](#)
Married Surname: Creighton
[Select Existing Wife](#) [Create New Wife](#) [Detach Wife](#)

Events

Married: 23 Apr 1902 at Blanshard, Perth, ON, CA [Details](#)
[Add Event](#) [Order Events by Date](#)

Information

IDMR: 7018
Status: no special status
Name Rule: Replace Wife's Surname with Husband's Surname
Notes:
[Edit Pictures](#) [Details](#)

Children

Given	Surname	Birth	Death	Actions
Harry	Creighton	21 Jan 1903		Edit Child Detach Child
Margaret Letitia	Creighton	22 Sep 1909		Edit Child Detach Child

[Add Existing Child](#) [Add New Child](#) [Order Children by Birth Date](#)

[Update Family](#) [Close](#)

Illustration 8: Edit a Child

When you do this notice that all of the “Edit” buttons for individuals in the Edit Families dialog are disabled. This is show by the text in the button changing from black to dark grey. To make this very clear if you click on the “Update Family” button while there is an unfinished edit of a family member displayed in the left hand side of the window, you will be warned to complete that edit before continuing.

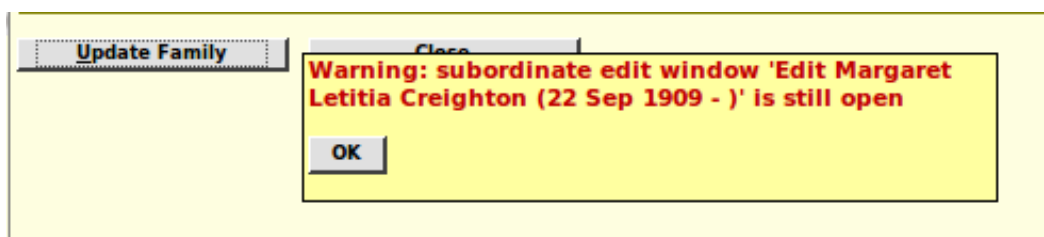


Illustration 9: Warning of Attempt to Update a Family while Member Being Edited

You must update the family member by clicking on the “Update Individual” button or using the keyboard shortcut Alt-U. This applies any changes and closes the edit family member dialog, which reveals the edit dialog for the primary spouse.

All of this applies equally to the Edit or Add Parents dialog.

You can continue to make changes to the primary individual while editing the family. For example if you click on the “Details” button for any of the events in the left hand side of the window, an edit event dialog overlays the edit family dialog until you apply the changes to the event.