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Word for Genealogy: Utilizing Microsoft® Word in Genealogical Documents in Register, *or Modified* Register *[NGSQ], Format, Part 2*

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This installment of "Word for Genealogy" continues the discussion of automatic numbering and renumbering begun in the summer 2004 issue, and introduces internal hyperlinks.

Updating existing documents

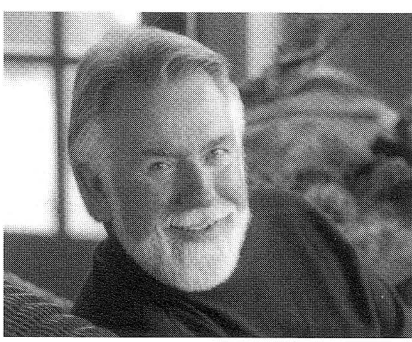
Suppose you have a genealogical document you've written in the past that is, say, fifty pages long or so, long enough that you would not want to retype it. You will be happy to learn that the techniques from Part 1 can be added to your old document without having to rewrite it. Here is a suggested set of steps for "modernizing" your document to take advantage of the techniques described last time:

1. First do the Arabic numbers (that is, insert SEQ *Person*) for the first sketch (only) and for the children in all the sketches. This directive means for all the children in the paper if using Modified *Register* [NGSQ] format, but only all those that have further sketches if using the *Register* system. Just select an automatic Arabic number you have created. Copy it with Control + C, then paste it with Control + V where Arabic numbers used to be.[1] Be sure to delete the numbers you had typed there previously. Note that all Arabic numbers will be the same until you update the entire manuscript with Control + A (or Edit: Select All) then F9. Click Update entire table, if asked, then OK in that case. (Let's call this procedure an Update All.) Note that the numbers for sketches are not changed in this step (except for the first one).

2. Next enter bookmarks for each child who is to be expanded into a sketch. This directive means for each child line with a + sign if using Modified *Register* [NGSQ] format, or only those child lines with an Arabic number if using the *Register* format. Do so by selecting the Arabic number field on each child line of a child to be expanded. Then insert a unique bookmark there.

3. In this step the sketch numbers are made automatic. Link each child sketch to the corresponding child line in its parents' sketch. Do so by selecting the Arabic number at the beginning of each sketch [after the first, which was numbered in step 1] and inserting there SEQ *Person [bookmarkname]*, where *[bookmarkname]* represents the unique bookmark you created for the corresponding child in step 2. You can tell that this step has been done by the presence of a gray field surrounding the sketch's number.[2] [Hint: You might want to insert hyperlinks while you do this step — see the next section. This is a great time to do it, and it lets you check immediately to see whether you've correctly linked child to parent and vice versa.]

4. Now create all the "first" child numbers in all sketches — that is, the children with lowercase Roman numeral i. Create the first child's number explicitly by inserting [SEQ *Child* \r *1* * roman] in the proper place in the first child line of the first sketch with children. Then select and copy that field (with Control + C) and paste it (with Control + V) into the proper position in the first child line of all other sketches with children.



Alvy Ray Smith. Courtesy Kathleen King Photography, Seattle, Washington.

5. Then go back and create the "non-first" child numbers in all sketches — that is, the children with lowercase Roman numerals greater than i. Find the first sketch in the paper with more than one child. Create the first "non-first" child's number explicitly by inserting [SEQ *Child* * roman] in the proper place in the child line of the second child of that sketch. Then select and copy that field (with Control + C) and paste it (with Control + V) into the proper position in the child lines of all non-first children in other sketches with children. Note that the roman numerals will all be the same until you do an Update All.

Marsha Hoffman Rising, an early user[3] of the techniques here, reported that it took her about an hour to automatically number a 165-page manuscript.

Troubleshooting

1. If nothing happens when you think you have completed the steps, you probably have forgotten the VERY IMPORTANT Add to Field.

2. If you get an error message: **Error! No sequence specified.**, you have forgotten *Person* or *Child* or whatever you have named your number sequence.

3. If you get a field (a gray square) but it has no number, you have forgotten to put a number after the \r switch in \r * roman. Forgetting to specify a number for \r usually generates a 0, but in Roman numerals a zero is undefined so you get a blank.

4. If your sketch numbers don't match the corresponding child numbers after an Update All, then you have made a mistake entering the bookmark in the child's line. Perhaps you did not enter it just left of, or atop, the *Person* number field there. Or you forgot an Add to Field.

5. There is a WORD trick (already mentioned in a footnote) to know if you are having trouble with bookmarks. Turn on the checkbox next to Tools: Options: View: Bookmarks (under Show), which will display gray [and] brackets around each bookmark you have inserted. Field shading can interfere with the visibility of these marks which are also gray. In general then, it is a good idea to turn off Field shading with Tools: Options: View: Never, while looking for bookmarks. The brackets will overlap, forming a large uppercase I, if the bookmark is located at a selected point rather than over a selected area.

Internal hyperlinks

The bookmarking skill from the previous lesson can be extended to internal hyperlinks. These allow an author to skip around in convenient ways through a large document without having to remember or search. For example, suppose that the sketch for Preserved Partridge above was fifty or a hundred pages long, instead of two lines long. Then the sketch for Experience would be located in the document a long way from the sketch for Preserved. In genealogy documents it is often convenient to skip back and forth between a parents' sketch and sketches for their children, and then from each of these sketches to those for their children in turn. Hyperlinks make such movement easy.

Example 8. Here we will use bookmarks in both a parent and a child sketch to implement hyperlinks between them. Let's use the familiar sketches from before. I won't bother to use a separate example for Modified *Register* [NGSQ] format because exactly the same technique is used in either format.

1. PRESERVED[1] PARTRIDGE was born 1642, died 1701, and married in 1664 CHARITY HOPKINS, who was born 1643, and died 1699.

Children:

i ZEBULON[2] PARTRIDGE, born 1664.
2 ii EXPERIENCE PARTRIDGE, born 1668.
iii BETHUEL PARTRIDGE, born 1670.

. . . [Assume many pages here to make this example more meaningful.]

2. EXPERIENCE[2] PARTRIDGE (*Preserved*[1]) was born 1668, died 1735, and married SAMUEL THOMAS, who was born 1666, and died 1727.

We are already prepared to insert the first hyperlink because we have inserted a bookmark for child ii, Experience, in Preserved's sketch in the exercises before. Remember? We selected the *Person* number field in that line and inserted a bookmark there. That is, we associated a bookmark name with that number, which just so happens to be the child line for Experience corresponding to a sketch for Experience. Now go to the sketch for Experience, select her name, EXPERIENCE[2] PARTRIDGE (select the whole name), and right click to get a menu.[4] Click on Hyperlink on this menu. Click on the Bookmarks button and then select the desired bookmark by clicking on it, then click OK. The desired bookmark in this case is *EXPERIENCEofPRESERVED*, the same bookmark we inserted in the *Person* number field of the child line for Experience in her parents' sketch. That is all there is to it! You can now press Control + Click on EXPERIENCE[2] PARTRIDGE in your document to be carried back to line ii of Preserved's sketch. Notice that the WORD cursor changes to a pointing finger when you pass over a "hot" name, one that has a hyperlink in it.

After we learn how to hyperlink in the other direction, I will show you how to get rid of the need to press Control, so that just a click will carry you to the remote location. And we will deal with the underline and colored text problem.

Let's do the other half of hyperlinking first. Let's establish a hyperlink to get from the child list to the corresponding sketch for that child. First, insert a new bookmark in the child's sketch. For example, in the sketch for Experience Partridge, click in a convenient place for a bookmark, say just left of Experience's name. Then, using the insert bookmark skill, insert a bookmark there with a memorable name. I suggest using something like *EXPERIENCEofPRESERVED_down*. Notice that this is the same name that takes us up, from child sketch to parent sketch, but with the suffix *_down* to remind us that it is for the corresponding hyperlink in the opposite direction, down from parent to child. Now return to the child item under Preserved. This is easy! Just Control + Click on the hyperlink you've already established. Then select EXPERIENCE PARTRIDGE (select the whole name) on line ii and insert the hyperlink to the bookmark you've just created. You can, as before, right click on her name,[5] click on Hyperlink: Bookmark: *EXPERIENCEofPRESERVED _down*: OK: OK. Or you can click on Insert: Hyperlink: Bookmark: *EXPERIENCEofPRESERVED_down*: OK: OK. That's it. You can now leap back and forth between parent and child.

I recommend that you insert these hyperlinks, in both directions, as you generate each child's sketch. You will find them immediately helpful (as we did above).

You will have noticed that two bookmarks are needed for each sketch, except the first. You do not have to

use the bookmark naming conventions I have used in the examples, but it is important to use some scheme that is consistent, so that you don't get confused. The scheme suggested above has the advantage of requiring invention of only one unique name per sketch rather than two.

Now, as promised, let's learn how to get rid of the need to press both Control *and* Click to make a hyperlink. To do this: Click on Tools: Options: Edit and turn off the checkmark by Use Control + Click to follow hyperlink. Then click OK. Now just a click will transfer you through the document. You will note that when you hover over a word containing a hyperlink, a message comes up telling you to Click to follow the link. This is how you can tell a hyperlink is embedded.

Next problem: You have undoubtedly noticed WORD's default tendency to underline text that contains a hyperlink and turn it some color, like blue or magenta. This is well-known behavior for web pages but is not useful in a genealogical document not meant for the web. Recall that the hyperlinks internal to a genealogical document are for the author's use, not for the reader's. In general, we want these hyperlinks to be invisible to the reader. The blue or magenta underlined words *are* visible exactly that way in a printed WORD document, so next we will see how to get rid of the underline and the color while maintaining the hyperlink.

Unfortunately, versionitis is a serious problem on this topic, so if you have an older version of WORD, be sure to read the paragraphs below that are surrounded with square brackets. They will instruct you on alternatives that are required in older versions. In either case, read the immediately following paragraph:

You need to change the formatting that WORD automatically applies to hyperlinks. To do this, click on Format: Styles and Formatting. This causes display of a list of the formats built into WORD. The ones to change are called Hyperlink and FollowedHyperlink. Find the item Hyperlink on the list. As you hover over the item, a down-arrow will display to the right of the item. Click on this downarrow, then click on Modify. Click on the button labeled U to turn underlining off. Click on the downarrow next to the button labeled with an A and a bar of color (probably blue or magenta). This will cause display of a color palette. Select a square colored black. If the box labeled Formatting is not empty, delete what is there.[6] If the box next to it, for font size, is not empty, delete what is there.[7] IMPORTANT — Turn on the checkmark beside Add to Template by clicking on the little box there, and click OK. Then save your file. This will store the new Hyperlink format. Repeat the above for the style FollowedHyperlink, which is the style used once you have used a link to make an actual jump. This may seem like a lot of work, but once it's done, it never has to be revisited.

[For older versions of WORD: You will be dismayed to see your careful choices of font and font size blown away by the procedure above. Also your choices of case (italic, bold, small caps, etc.) are destroyed, and if you had a generation superscript in the name, it is lost. This is because older versions of WORD associate a specific font, font size, etc. with a hyperlink. One of the improvements offered by newer versions is the ability to preserve the font characteristics of a hyperlinked word, whatever they are. There is a workaround for this flaw, but it is cumbersome. Nevertheless users agree that the resulting power of hyperlinks is worth the effort. So here goes:]

[It *is* possible to change the formatting of a hyperlinked word or words after you have inserted the hyperlink. To do this you must select the word (or words) and set the format in the usual way with Format: Font or with toolbar commands. But there is a problem. If you click on a word with a hyperlink embedded in it, you will cause a leap to the target location, and not be able to select the word. So how do you select the word for reformatting? There is a trick you can use: Select near the word, but not on the word, and then use the arrow keys to step into the word. If you also hold down the Shift key while moving the cursor with an arrow key, you can select the desired word.

[Other tips to consider in this situation are these: To simplify the reformatting task, choose only, say, the first name to make "hot" with a hyperlink. The idea here is to reduce the amount of reformatting required by, for example, not including a superscript. Another idea is to make a space near a name "hot," rather than the name itself. With this idea you won't even have to reformat. A third idea is to embed hyperlinks in words of a constant format. In this case, you can set the single set of parameters in the Modify dialog box used to modify the Hyperlink and FollowedHyperlink styles. But this tip requires that the format of all words with embedded hyperlinks must be identical in font, size, and case.]

Updating existing documents

These instructions should be read in conjunction with the preceding instructions of the same name, in the section about automatic numbering and renumbering. In step 3 there, the insertion of automatic sketch numbers, I suggested that hyperlinks are conveniently inserted during that step:

1. Insert a hyperlink from each child line with a sketch expansion to the corresponding sketch and a hyperlink back to the corresponding child line. For maximum efficiency, click at the left of the name at the beginning of a sketch (except the first), insert a new bookmark that is related in a systematic way with the bookmark that you used to automatically number the sketch. Suppose that bookmark were named *EXPERIENCEofPRESERVED*, then the new bookmark might be named *EXPERIENCEofPRESERVED_down*, since it will be used, in step 4, to pass down the family tree from the parent sketch to this child sketch.
2. Then select the person's name for this sketch and insert a hyperlink there to the original bookmark.

Insert: Hyperlink: Bookmark: *EXPERIENCEofPRESERVED*: OK: OK will do it (or right click then Hyperlink: Bookmark: *EXPERIENCEofPRESERVED*: OK: OK for some versions of Word), for example.[8]

3. Now execute the hyperlink you just embedded in step 2, which should take you to the corresponding child line in the parents' sketch.

4. Insert the new hyperlink you created in step 1 here: Select the child's name and Insert: Hyperlink: Bookmark: *EXPERIENCEofPRESERVED_down*: OK: OK (or right click then Hyperlink: Bookmark: *EXPERIENCEofPRESERVED*: OK: OK), for example.[9]

5. Execute the hyperlink you just embedded in step 4, which should take you back to the child's sketch where you started in step 1. This step serves as a check that you can jump both up and down the tree properly.

6. Repeat steps 1–5 for each child sketch in the paper. Notice that at the end of step 5 you are in easy position to find the next sketch and start again with step 1 above.

NB. If you find that you need to change the hyperlink in a word or words that already has one, it is a good idea to delete the hyperlink that is there first. This is easy: right click on the word or words with the hyperlink and click on Delete Hyperlink. ◆

In the next issue: Automatic table generation

Notes

1 Edit: Copy and Edit: Paste accomplish the same thing.

2 Recall that this step requires that you have turned on field shading with Tools: Options: View: Field shading: Always.

3 In the software industry we call these people "beta-testers." They have to endure very buggy code, but they get first crack at it. It is sometimes worth the pain.

4 If this right-click menu in your version of WORD does not have the Hyperlink command, then you will have to use the alternative approach: click on Insert: Hyperlink.

5 If your version of WORD allows it.

6 Older versions of WORD don't allow you to delete the font name here. Just proceed to the next step. We will fix this in the bracketed paragraphs below.

7 See note 6.

8 For older versions of WORD, here you might also have to reformat the words or words with embedded hyperlink.

9 See note 8.

Acknowledgment: I am greatly indebted to my two beta-testers, Marsha Hoffman Rising, CG, FASG, and Robert Charles Anderson, FASG, for helping me to debug this complex document.

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