

ORA Auto Type Templates

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ORA Templates

- Templates allow ORA users to process text values and insert them into their genealogy applications.
- Using templates, you can automate repetitive data entry tasks.
- ORA templates are like templates used in RootsMagic, Family Historian, Legacy, TMG, and other applications to construct text for events and citations.

Text Templates vs. Auto Type Templates

Text Templates create text that you see and use in your browser when visiting a repository site.

Auto Type Templates create text that ORA sends to your genealogy application.

Auto Type Templates are a *superset* of Text Templates. They work the same as Text Templates except you can add *control sequences* to send special keystrokes to your genealogy application.

The Auto Type facility exploits the ability to control applications via the keyboard.

Auto Type Process

- **OraExtension** evaluates the template to create text to send to **OraHost**.
 - OraExtension runs in your browser.
 - OraHost runs as a separate application that your browser starts when needed.
- OraExtension sends the text to OraHost.
- OraHost brings the *target application* to the front.
- OraHost sends **keystrokes** to the target application.

The *Focus*

- When controlling an application via the keyboard, it's important to know which input control (textbox, button, etc.) has the *focus*.
- User actions, such as keying, apply to the user interface control that has the focus.
- The input control with the focus usually has some visual indicator such as a special border. For textboxes, the text cursor indicates the textbox has the focus.

Name:	Alfred /Wood/		
Sex:	Male	Occupation:	
Born:	Jan 28, 1842		
Died:	Apr 4, 1906		
Note:			

Spouse:	Harriet
Name:	Harriet Rebecca /Hamilton/
Born:	Jun 18, 1847

1 citation	
172	Johnston_M, Maud's Bible

B2		
	A	B
1		
2		

Control Sequences

- In Auto Type Templates, *Control Sequences* send keystrokes for keys that are not represented by a single character on the keyboard or are not visible as characters when you type them.
- Control Sequences are also used to send *key chords*. A key chord is multiple keys pressed at the same time, such as CTRL and V which is the standard key sequence for pasting text.
- Control Sequences are wrapped in the { and } characters.

Example Template #1: Citation

Let's examine a relatively simple Auto Type Template that sets the source number and citation detail text for a citation. It is used with a birth record on the Nova Scotia Genealogy site:

<https://archives.novascotia.ca/vital-statistics/birth/?ID=180318>

Example Template #1

12

{TAB}{FAST}

[NAME]

< Date: [Birth Date:date:dd Mmm yyyy:Mmm yyyy:yyyy]>

< Place: [Place]>

< Registration Year: [Year]>

< Book: [Book]>

< Page: [Page]>

< Number: [Number]>

Example Template #1 - Output

The screenshot displays a software interface with two main sections. The top section is a window titled "Full Footnote (Read only)" containing a text area with the following text: "Nova Scotia Archives and Records Management (NSARM), "Birth Registrations," online <https://archives.novascotia.ca/vital-statistics>, Benjamin Bezanson; Date: 21 November 1855; Place: Garland, Kings County; Registration Year: 1904; Number: 91100181." Below the text area are "Close" and "Help" buttons.

The bottom section is a "Citation" panel. It includes a "SOURCE" section with radio buttons for "Existing" (selected) and "New", a "Source #" field with the value "12", and icons for "NSGen Births". Below this is a "CITATION" section with a "Citation Detail" field containing the text: "Benjamin Bezanson; Date: 21 November 1855; Place: Garland, Kings County; Registration Year: 1904; Number: 91100181".

Example #1: Notes

- Only two Control Sequences: {TAB} and {FAST}
- The first output is the source number which is specific to my TMG project (“12”).
- The Citation Detail (CD) text is a series of Field values extracted from the NSGEN page, each preceded by a prefix/title *if* the Field value is not empty.
- The CD meets my requirements, but may not meet yours.

Example Template #2: Citation

Let's examine a more involved Auto Type Template that, like Example #1, creates a citation but where the collection includes multiple record types (births, marriages, deaths):

<https://www.familysearch.org/ark:/61903/1:1:QLGR-TF4S>

Example Template #2

954

{TAB}{FAST}

[=:Event Type:[Event Type:capitalize]]

<[?:Event Type=Birth]

[Name]

<; Birth Date: [Event Date]>

<; [Place]>

<; Father: [Father's Name]>

<; Mother: [Mother's Name]>

>

<[?:Event Type=Marriage]

[Name]

<; Spouse: [Spouse's Name]>

<; Marriage Date: [Event Date]>

<; [Place]>

<; Father: [Father's Name]>

<; Mother: [Mother's Name]>

<; Spouse's Father: [Spouse's Father's Name]>

<; Spouse's Mother: [Spouse's Mother's Name]>

>

<[?:Event Type=Death]

[Name]

<; Death Date: [Event Date]>

<; [Place]>

<; Father: [Father's Name]>

<; Mother: [Mother's Name]>

>

Example Template #2: Event Type

[=:Event Type:[Event Type:capitalize]]

<[?:Event Type=Birth]

details for birth

>

<[?:Event Type=Marriage]

details for marriage

>

<[?:Event Type=Death]

details for death

>

Example Template #2 - Output

The screenshot displays a software interface with two main sections. The top section is a window titled "Full Footnote (Read only)" with standard window controls (minimize, maximize, close). It contains a text area with the following text: "FamilySearch, *Massachusetts State Vital Records, 1841-1920*, online <https://www.familysearch.org/search/collection/1928860/>, Marietta Bezanson; Death Date: 2 June 1917; Woburn, Middlesex County, Massachusetts; Father: William T Bezanson; Mother: Annie A Gilgun." Below the text area are "Close" and "Help" buttons.

The bottom section is a "Citation" form. It has a "SOURCE" section with a plus icon on the right. Under "SOURCE", there are radio buttons for "Existing" (selected) and "New". To the right of the radio buttons is a "Source #" field containing "954", followed by icons for a family and a lightbulb, and the text "FS MA State Vitals 1841-1920". Below this is a "CITATION" section with a magnifying glass icon and a refresh icon on the right. Under "CITATION", there is a "Citation Detail" field containing the text: "Marietta Bezanson; Death Date: 2 June 1917; Woburn, Middlesex County, Massachusetts; Father: William T Bezanson; Mother: Annie A Gilgun".

Example #2: Notes

- Still only two Control Sequences: {TAB} and {FAST}
- The first output is the source number which is specific to my TMG project (“954”).
- The template adjusts to the “Event Type” (Birth, Marriage, or Death) because the collection includes multiple record types and Fields that vary by record type.

Example Template #3: Add Event

This template is different from the prior examples because it sets more Fields and uses several transforms. The template enters the date and location in a Birth event:

<https://www.familysearch.org/ark:/61903/1:1:6CBH-7FJN>

Example Template #3

[Birth Date:date:d Mmm yyyy:Mmm yyyy:yyyy]

{TAB}{FAST}

{TAB}

{TAB}

{TAB}[Birth Place:placeCity]

{TAB}<-[Birth Place:placeCounty:d]>

{TAB}[Birth Place:placeState]

{TAB}<[Birth Place:placeCountry:d:replace:United States:-USA]>

Example Template #3: Transforms

[Birth Date:**date:d Mmm yyyy:Mmm yyyy:yyyy**]

{TAB}{FAST}

{TAB}

{TAB}

{TAB}[Birth Place:**placeCity**]

{TAB}<-[Birth Place:**placeCounty:d**]>

{TAB}[Birth Place:**placeState**]

{TAB}<[Birth Place:**placeCountry:d:replace:United States:-USA**]>

Example Template #3 - Output

Tag Entry

Tag type Birth

Principal Dorothea BEZANSON, (1921-2009) Primary name

Date: Place style U.S. Standard Place

Sort date:

Addressee	<input type="text"/>	Country	<input type="text" value="-USA"/>
Detail	<input type="text"/>	Postal	<input type="text"/>
City	<input type="text" value="Woburn"/>	Phone	<input type="text"/>
County	<input type="text" value="-Middlesex County"/>	LatLong	<input type="text"/>
State	<input type="text" value="Massachusetts"/>	Temple	<input type="text"/>

Memo

No more witnesses

No citations 1 2 D P M

Sentence

OK Cancel Help

Example #3: Notes

- Still only two Control Sequences, {TAB} and {FAST}, but {TAB} is used multiple times.
- {FAST} is placed after tabbing into the Sort Date field to allow TMG to copy the Date value into the field before we use {FAST}.
- The date transform formats the date in a TMG-friendly way.
- The place transforms (placeCity, etc.) make it easy to split the Birth Place field into the TMG place parts.
- placeCounty and placeCountry will derive a value if necessary. Those derivations are not foolproof, so verify the result before you accept it.
- I use the replace transform to change “United States” to “-USA” to match my data entry preferences/conventions.

Example Template #4: Citation Reference

I hope we have time for this one. It shows some advanced ORA template techniques without being too complicated on the TMG side. I use this via a Library Template to set the Citation Reference value for many, many collections. We'll use this record as a starting point:

<https://www.ancestry.com/discoveryui-content/view/74807919:6061>

Example Template #4: The Challenge

1. I want to save the record ID into the Citation Reference textbox in the Citation window.
2. TMG's Citation window often has one or more Surety textboxes disabled based on the TMG record to which the Citation is added. A Birth or Death has 4 enabled sureties whereas a Burial has 5 and the Add Person window has none. This complicates auto typing from the Citation Detail textbox to the Citation Reference textbox.

Example Template #4: The Solution

I created a Library Template that I call from all my Auto Type Templates that create a Citation.

The Library Template uses a prompt where I respond with the parent record type (Birth, Marriage, Death, etc.), and the template uses that information to vary the number of {TAB}s.

[=:Surety Count (A,N,B,D,U,M,O)][=:SuretyCount:[Surety Count (A,N,B,D,U,M,O)]]

<[?:SuretyCount/^[Aa]\$/][=:SuretyCount:0]>

<[?:SuretyCount/^[Nn]\$/][=:SuretyCount:3]>

<[?:SuretyCount/^[BbDd]\$/][=:SuretyCount:4]>

<[?:SuretyCount/^[MmUuOo]\$/][=:SuretyCount:5]>

<

[?:SuretyCount=0]{TAB*2}|

[?:SuretyCount=1]{TAB*3}|

[?:SuretyCount=2]{TAB*4}|

[?:SuretyCount=3]{TAB*5}|

[?:SuretyCount=4]{TAB*6}|

{TAB*7}

>

[{1:Record ID}]

<

[?:SuretyCount=0]

|

{SHIFT+TAB}

<[?:SuretyCount>0]{SHIFT+TAB}>

<[?:SuretyCount>1]{SHIFT+TAB}>

<[?:SuretyCount>2]{SHIFT+TAB}>

<[?:SuretyCount>3]{SHIFT+TAB}>

<[?:SuretyCount>4]{SHIFT+TAB}>

>

Example Template #4: Part 1

[=:Surety Count (A,N,B,D,U,M,O)][=:SuretyCount:[Surety Count (A,N,B,D,U,M,O)]]

<[?:SuretyCount/^[Aa]\$/][=:SuretyCount:0]>

<[?:SuretyCount/^[Nn]\$/][=:SuretyCount:3]>

<[?:SuretyCount/^[BbDd]\$/][=:SuretyCount:4]>

<[?:SuretyCount/^[MmUuOo]\$/][=:SuretyCount:5]>

Prompt for “parent record type”
which determines how many
surety textboxes to expect.

Convert text value to number.

- A = Add Person (no sureties)
- N = Name (3 sureties)
- B or D = Birth or Death (4 sureties)
- M, U, or O = Marriage, Burial, or Other (5 sureties)

Example Template #4: Part 2

<

[?:SuretyCount=0]{TAB*2}|

[?:SuretyCount=1]{TAB*3}|

[?:SuretyCount=2]{TAB*4}|

[?:SuretyCount=3]{TAB*5}|

[?:SuretyCount=4]{TAB*6}|

{TAB*7}

>

[[1:Record ID]]

Tab to Citation Reference textbox:
6 alternatives, 2 through 7 tabs.

Enter Record ID value. Field name
is first parameter to Library
Template or defaults to
"Record ID"

Example Template #4: Part 3

```
<
[?:SuretyCount=0]
|
{SHIFT+TAB}
<[?:SuretyCount>0]{SHIFT+TAB}>
<[?:SuretyCount>1]{SHIFT+TAB}>
<[?:SuretyCount>2]{SHIFT+TAB}>
<[?:SuretyCount>3]{SHIFT+TAB}>
<[?:SuretyCount>4]{SHIFT+TAB}>
>
```

Tab back to first surety textbox: 2 alternatives.

If there are **zero** surety textboxes, do not shift back at all.

If there are 1 or more surety textboxes, shift back up to 6 times.

Links

- ORA

<https://ora-extension.com>

- Templates

<https://ora-extension.com/en/text-templates.htm>

- Auto Type

<https://ora-extension.com/en/auto-type.htm>

- Auto Type Keyboard Keywords

<https://ora-extension.com/en/auto-type-keyboard-keywords.htm>

More Links

- Record for Example #1

<https://archives.novascotia.ca/vital-statistics/birth/?ID=180318>

- Record for Example #2

<https://www.familysearch.org/ark:/61903/1:1:QLGR-TF4S>

- Record for Example #3

<https://www.familysearch.org/ark:/61903/1:1:6CBH-7FJN>