

HRE Beta Tester Presentation
For the October 10, 2026 Meeting
of the Roots User Group of Arlington, VA

by

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My Background

- Retired IT professional with experience in (among many other things) programming, debugging, and Quality testing of application software.

- User of Genealogy software since the 1990s. Moved to TMG in 2002 when the other software went un-supported. Stayed with TMG through its final 9.05 release and still use it today on Windows 11.

- Have tried a number of newer genealogy programs that can import TMG data but lost too much data so I abandoned all of them. Looking for additional options is what led me to find out about the HRE project.

- Beta tester since May 2026.

- Doing the Beta testing on HRE has deepened my understanding of the range and depth of TMG capabilities.

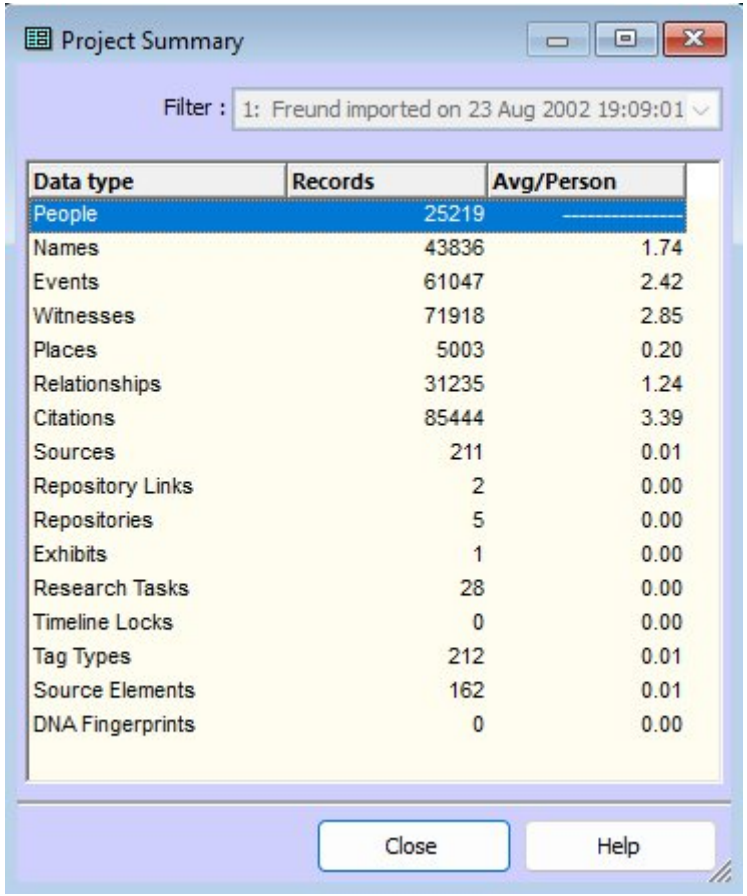
- My Beta testing has all been concentrated on dealing with my imported TMG database. I have not looked at HRE outside of that scope.

My TMG Project

- My late father and I both created TMG projects with family information.

- My current project is a merger of our two databases. There was overlap in content so I ended up using the TMG Merge Person function a lot. I'm still finding overlaps and merging people.

TMG Project Statistics:



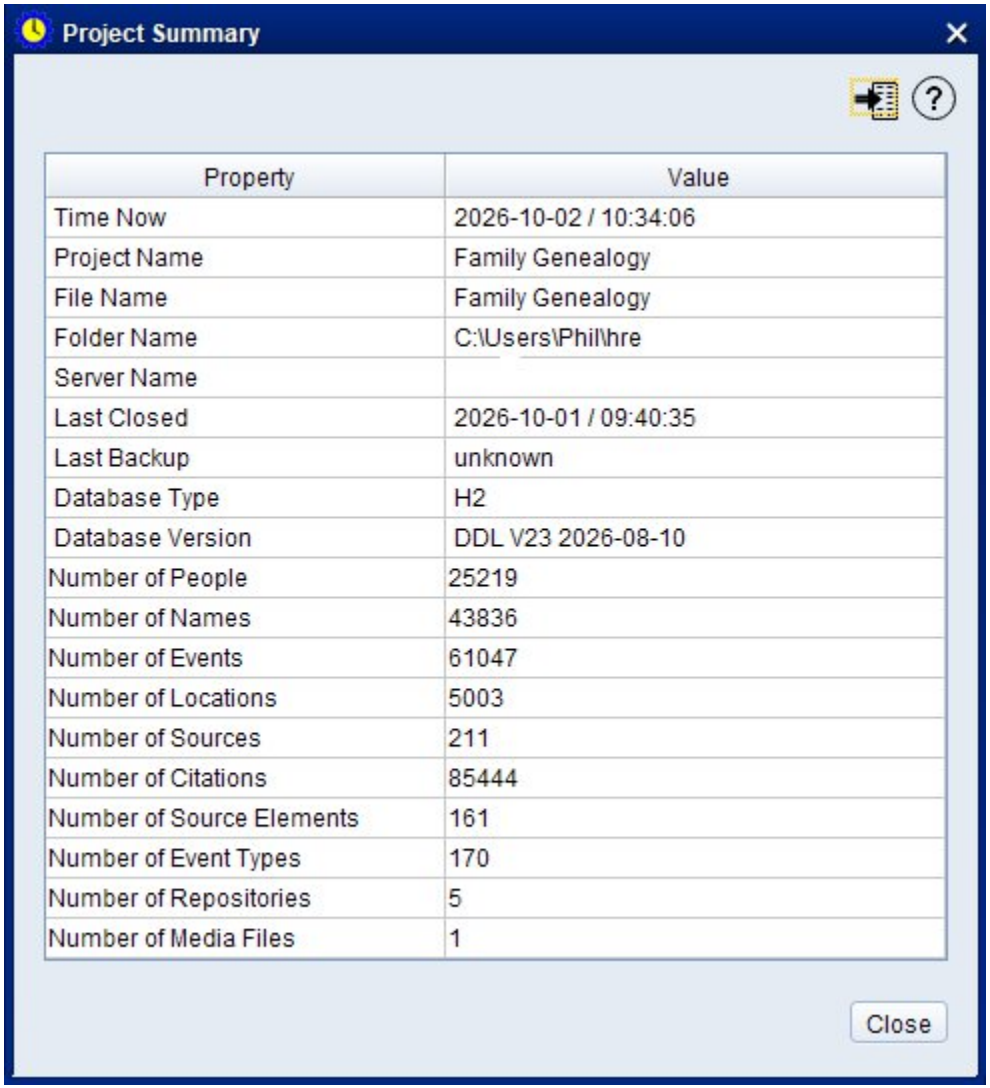
Data type	Records	Avg/Person
People	25219	----------
Names	43836	1.74
Events	61047	2.42
Witnesses	71918	2.85
Places	5003	0.20
Relationships	31235	1.24
Citations	85444	3.39
Sources	211	0.01
Repository Links	2	0.00
Repositories	5	0.00
Exhibits	1	0.00
Research Tasks	28	0.00
Timeline Locks	0	0.00
Tag Types	212	0.01
Source Elements	162	0.01
DNA Fingerprints	0	0.00

Other Project characteristics

- Includes at least 42 generations of ancestors.
- Many Old Style dates.
- A fair number of irregular dates.
- 83 custom tags spread across all Tag Groups.
- Massive number of memos. Almost every event has a memo.
- Modified sentences at both the tag definition level and the individual event level.
- No DNA or images.
- To-do’s entered in the Research log**.**
- Customized reports to clear and set custom flag values.
- Frequently use the Copy Tag function.
- Intermittently use the Merge Two People function.
- Location information contains the Display suppression codes.

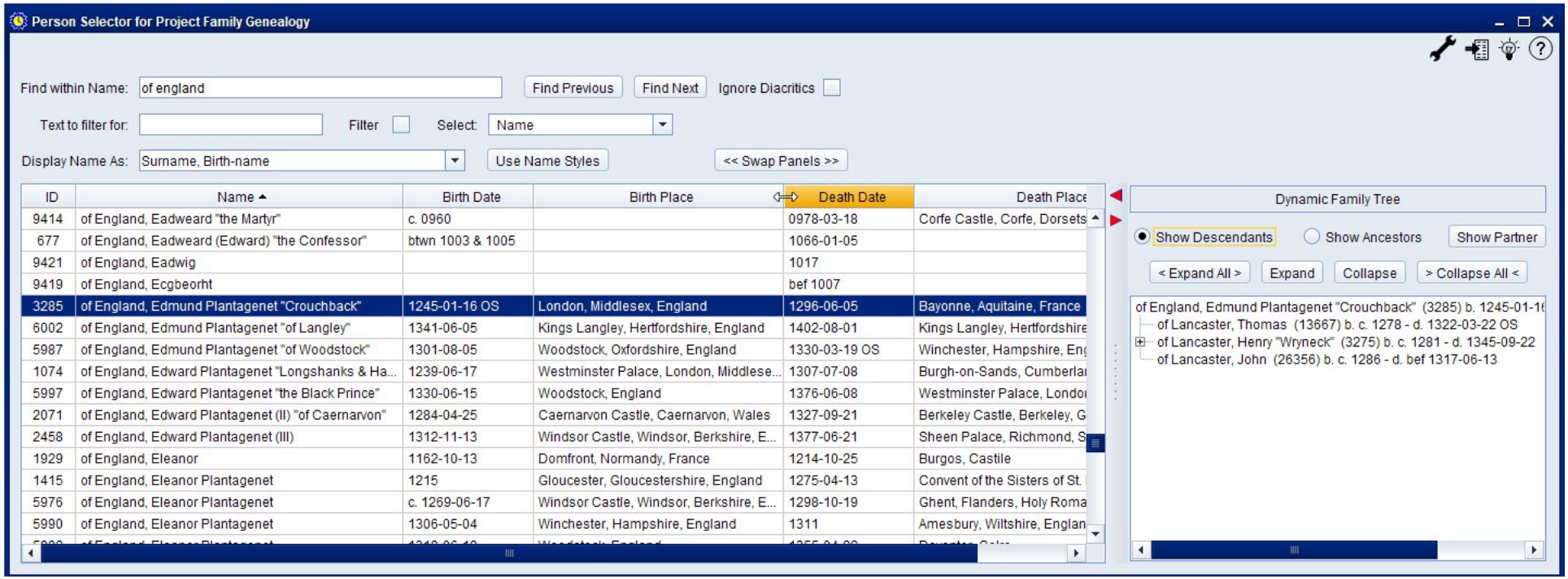
HRE import info as of the latest Beta release.

- Import Time: 175 seconds (2 minutes 55 sec)

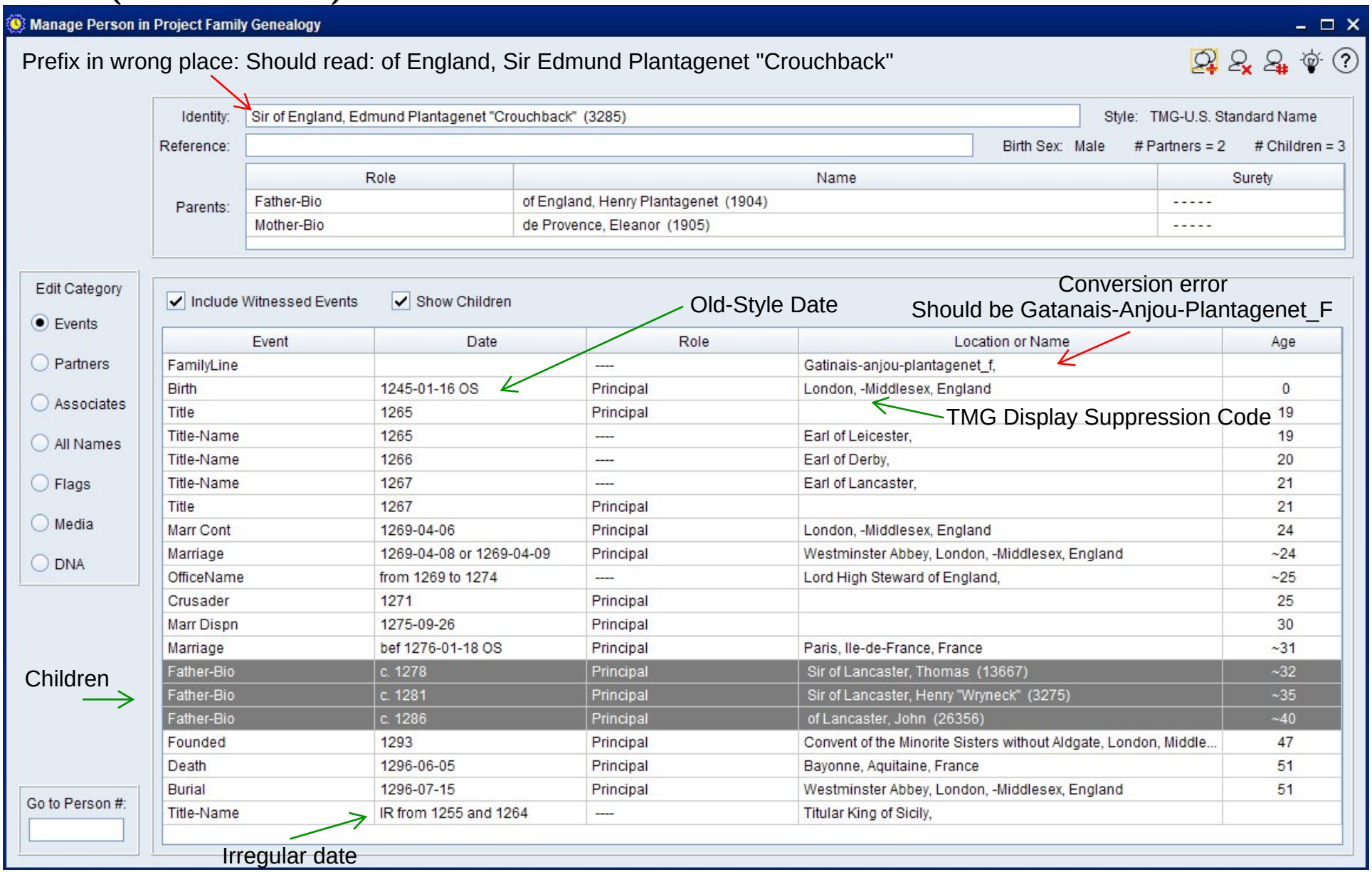


Sample Screens

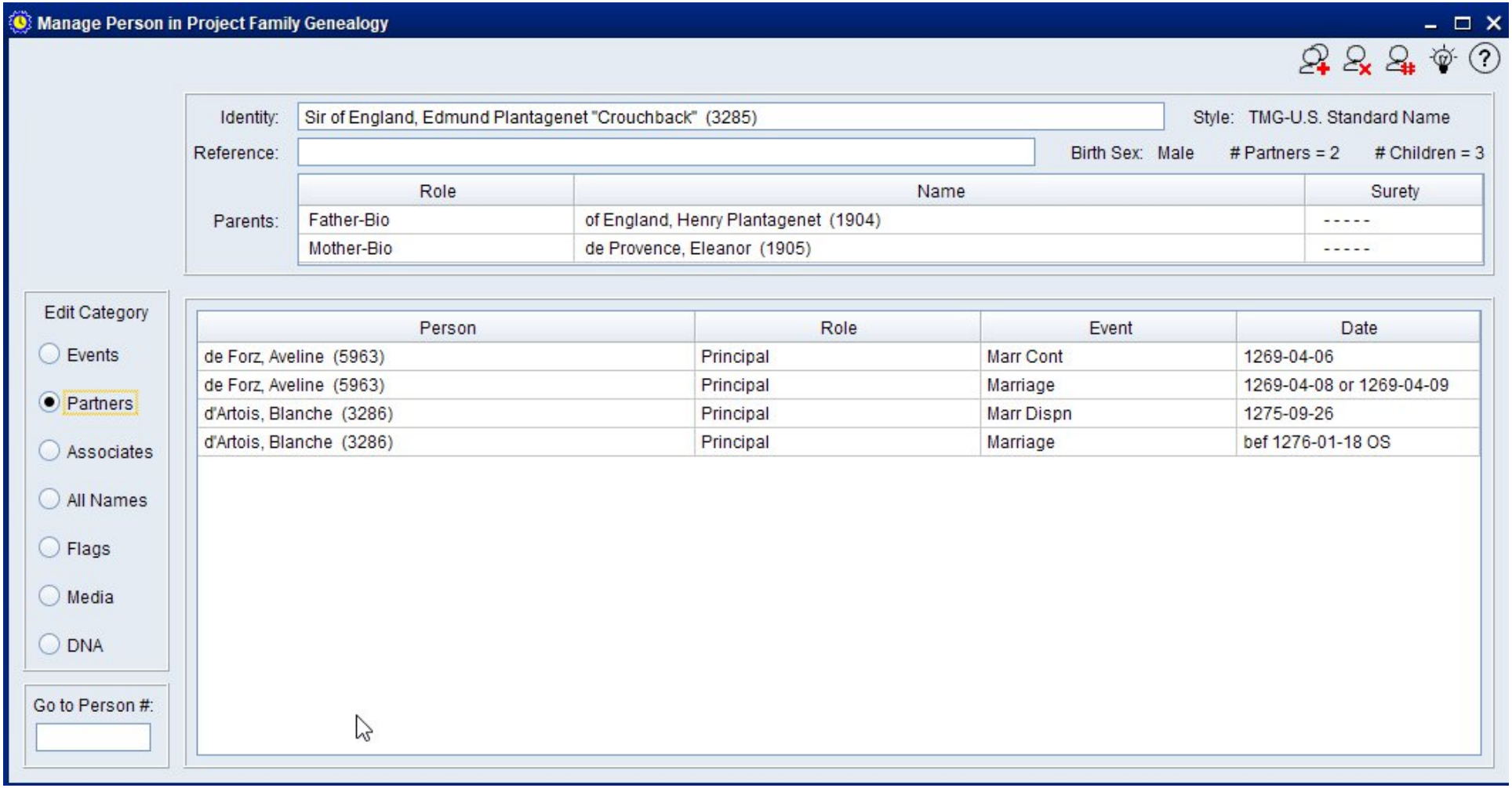
Person Selector



Manage Person in Project
Events (Default screen)



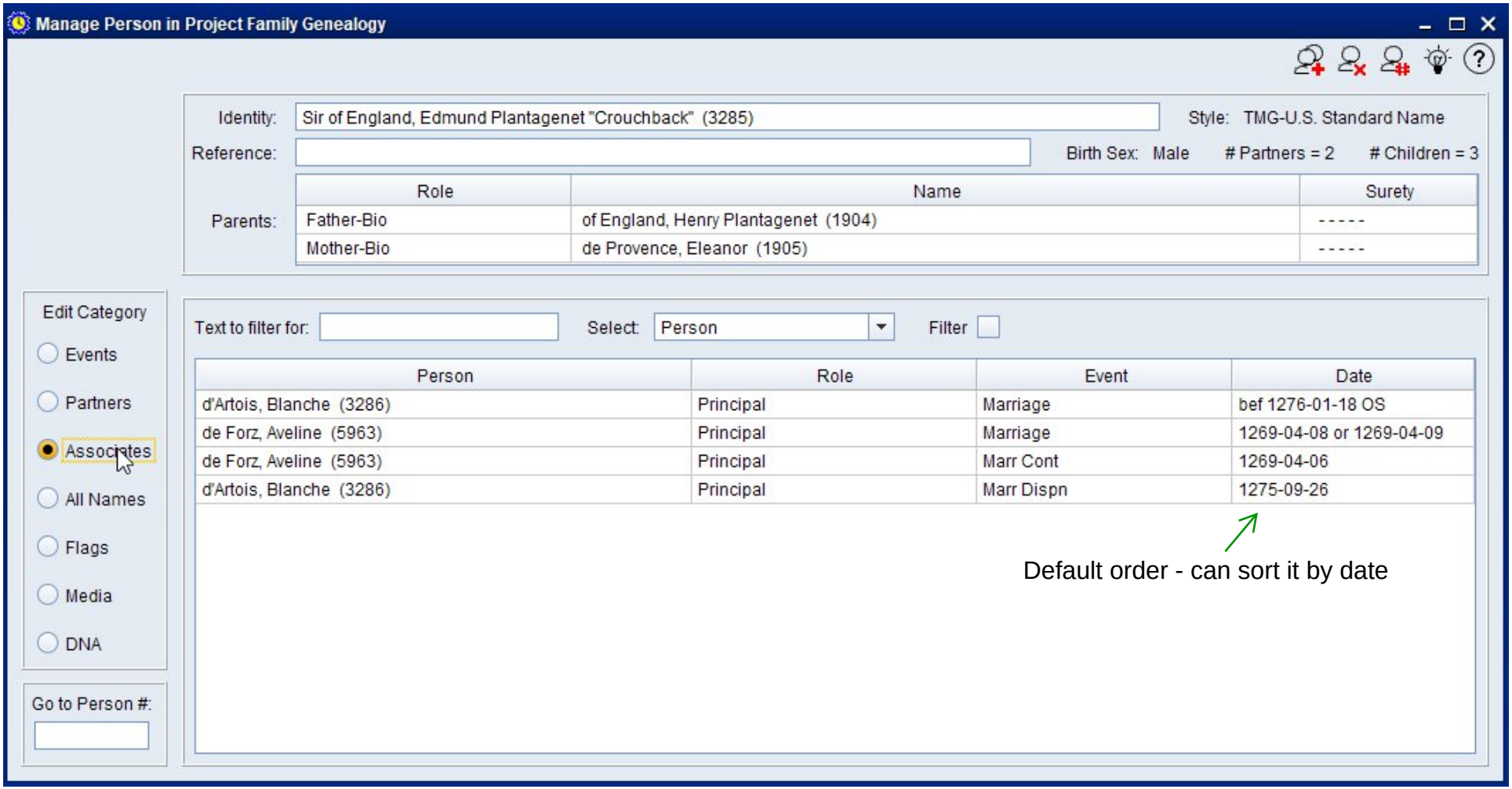
Partners


Manage Person in Project Family Genealogy
Identity: Sir of England, Edmund Plantagenet "Crouchback" (3285)
Style: TMG-U.S. Standard Name
Reference:
Birth Sex: Male
Partners = 2
Children = 3
Role
Name
Surety
Parents:
Father-Bio
of England, Henry Plantagenet (1904)

Mother-Bio
de Provence, Eleanor (1905)

Edit Category
Events
Partners
Associates
All Names
Flags
Media
DNA
Go to Person #:
Person
Role
Event
Date
de Forz, Aveline (5963)
Principal
Marr Cont
1269-04-06
de Forz, Aveline (5963)
Principal
Marriage
1269-04-08 or 1269-04-09
d'Artois, Blanche (3286)
Principal
Marr Dispn
1275-09-26
d'Artois, Blanche (3286)
Principal
Marriage
bef 1276-01-18 OS

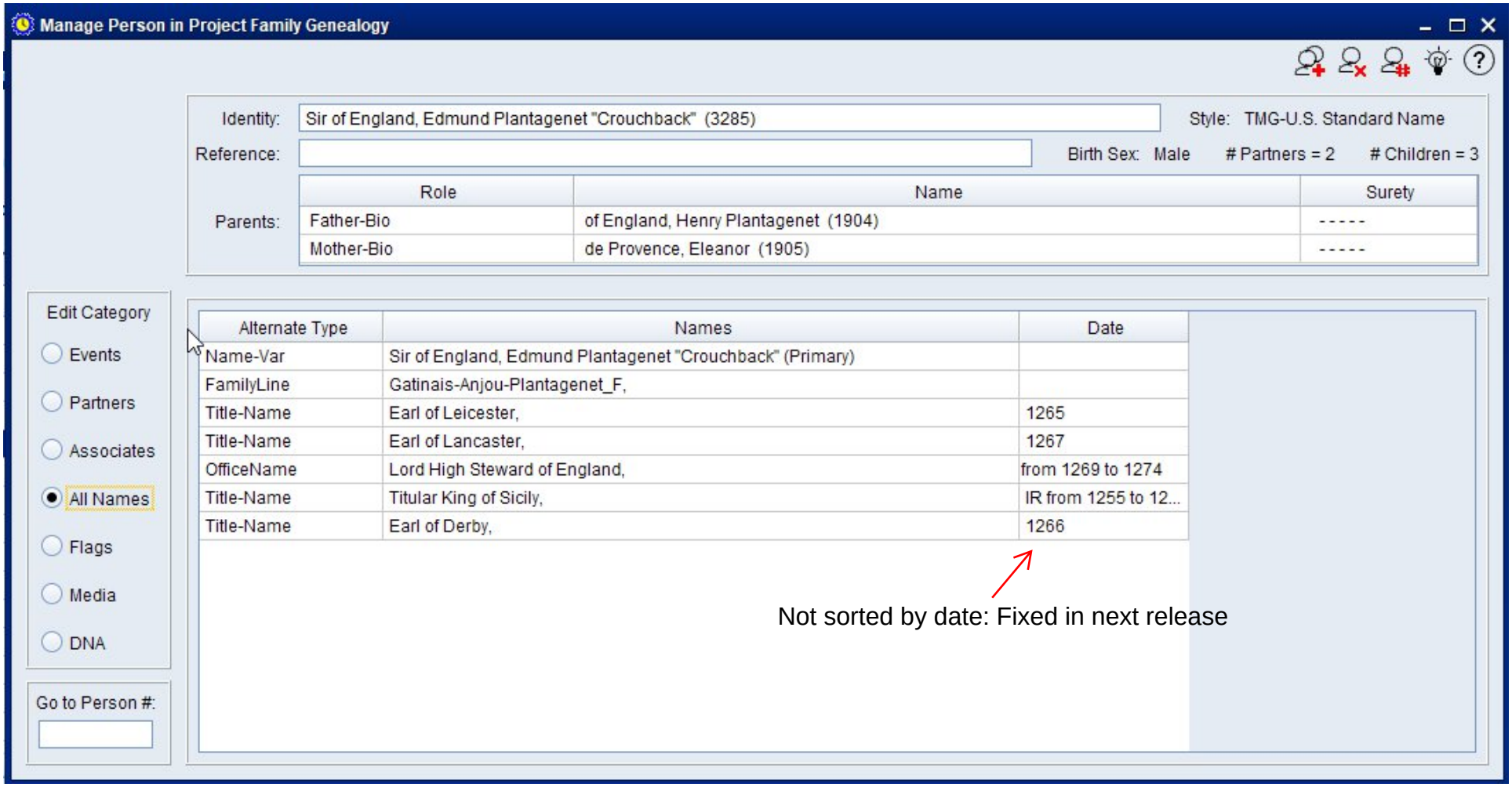
Associates


Manage Person in Project Family Genealogy
Identity: Sir of England, Edmund Plantagenet "Crouchback" (3285)
Style: TMG-U.S. Standard Name
Reference:
Birth Sex: Male
Partners = 2
Children = 3
Role
Name
Surety
Parents:
Father-Bio
of England, Henry Plantagenet (1904)

Mother-Bio
de Provence, Eleanor (1905)

Edit Category
Events
Partners
Associates
All Names
Flags
Media
DNA
Go to Person #:
Text to filter for:
Select: Person
Filter
Person
Role
Event
Date
d'Artois, Blanche (3286)
Principal
Marriage
bef 1276-01-18 OS
de Forz, Aveline (5963)
Principal
Marriage
1269-04-08 or 1269-04-09
de Forz, Aveline (5963)
Principal
Marr Cont
1269-04-06
d'Artois, Blanche (3286)
Principal
Marr Dispn
1275-09-26
Default order - can sort it by date

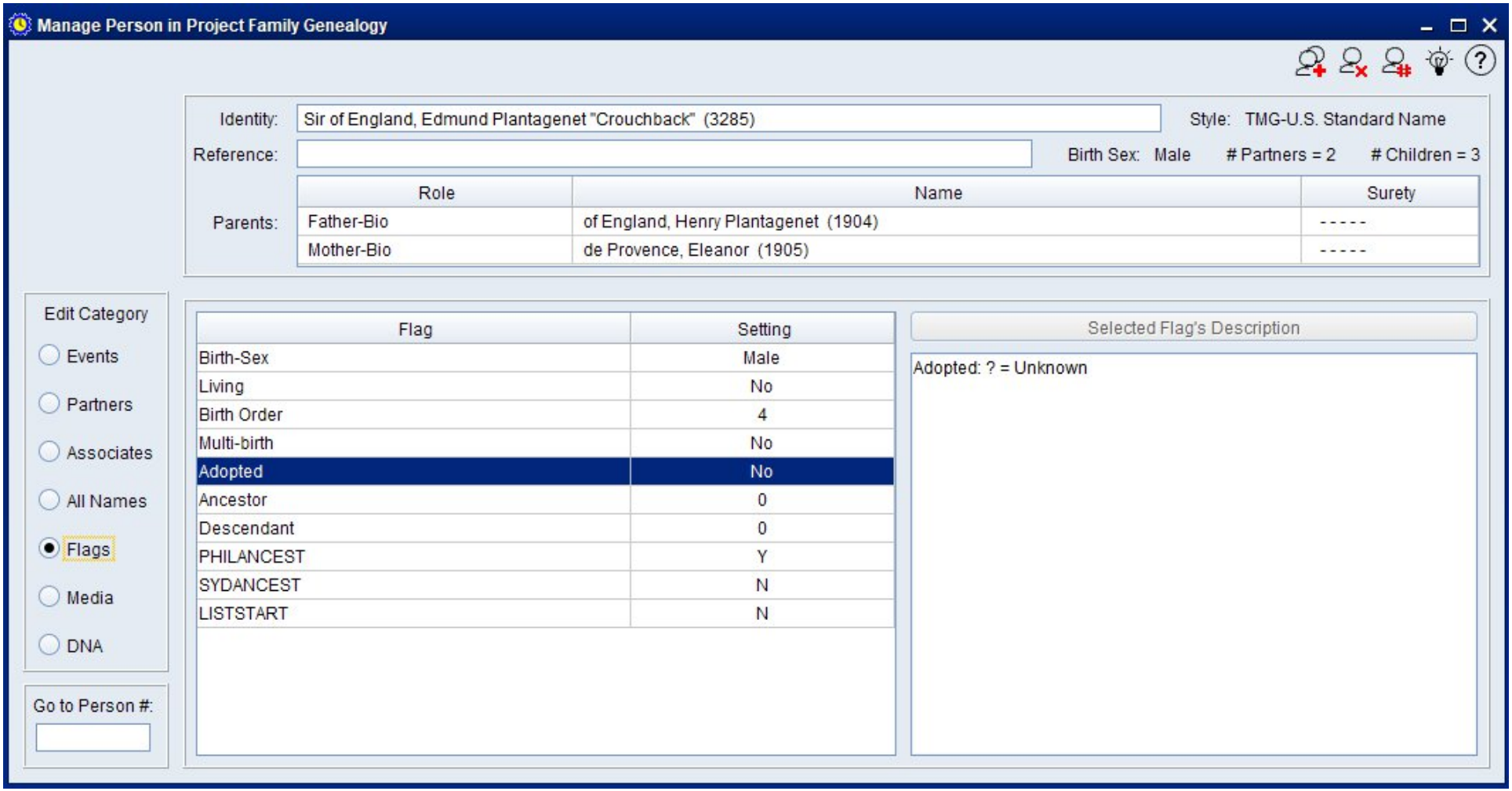
All Names


Manage Person in Project Family Genealogy
Identity: Sir of England, Edmund Plantagenet "Crouchback" (3285)
Style: TMG-U.S. Standard Name
Reference:
Birth Sex: Male
Partners = 2
Children = 3
Role
Name
Surety
Parents:
Father-Bio
of England, Henry Plantagenet (1904)

Mother-Bio
de Provence, Eleanor (1905)

Edit Category
Events
Partners
Associates
All Names
Flags
Media
DNA
Go to Person #:
Alternate Type
Names
Date
Name-Var
Sir of England, Edmund Plantagenet "Crouchback" (Primary)
FamilyLine
Gatinais-Anjou-Plantagenet_F,
Title-Name
Earl of Leicester,
1265
Title-Name
Earl of Lancaster,
1267
OfficeName
Lord High Steward of England,
from 1269 to 1274
Title-Name
Titular King of Sicily,
IR from 1255 to 12...
Title-Name
Earl of Derby,
1266
Not sorted by date: Fixed in next release

Flags


Manage Person in Project Family Genealogy
Identity: Sir of England, Edmund Plantagenet "Crouchback" (3285)
Style: TMG-U.S. Standard Name
Reference:
Birth Sex: Male
Partners = 2
Children = 3
Role
Name
Surety
Parents:
Father-Bio
of England, Henry Plantagenet (1904)

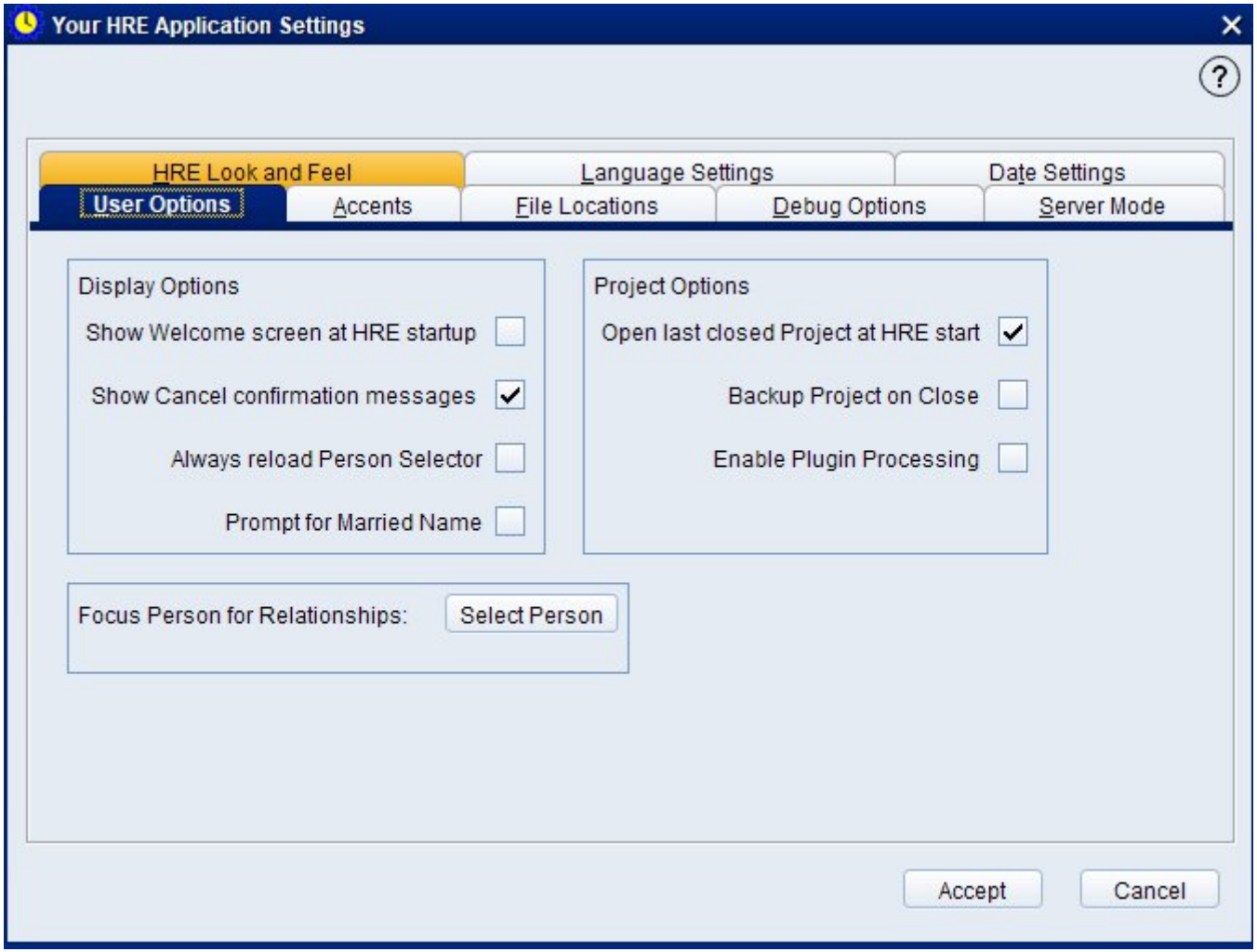
Mother-Bio
de Provence, Eleanor (1905)

Edit Category
Events
Partners
Associates
All Names
Flags
Media
DNA
Go to Person #:
Flag
Setting
Birth-Sex
Male
Living
No
Birth Order
4
Multi-birth
No
Adopted
No
Ancestor
0
Descendant
0
PHILANCEST
Y
SYDANCEST
N
LISTSTART
N
Selected Flag's Description
Adopted: ? = Unknown

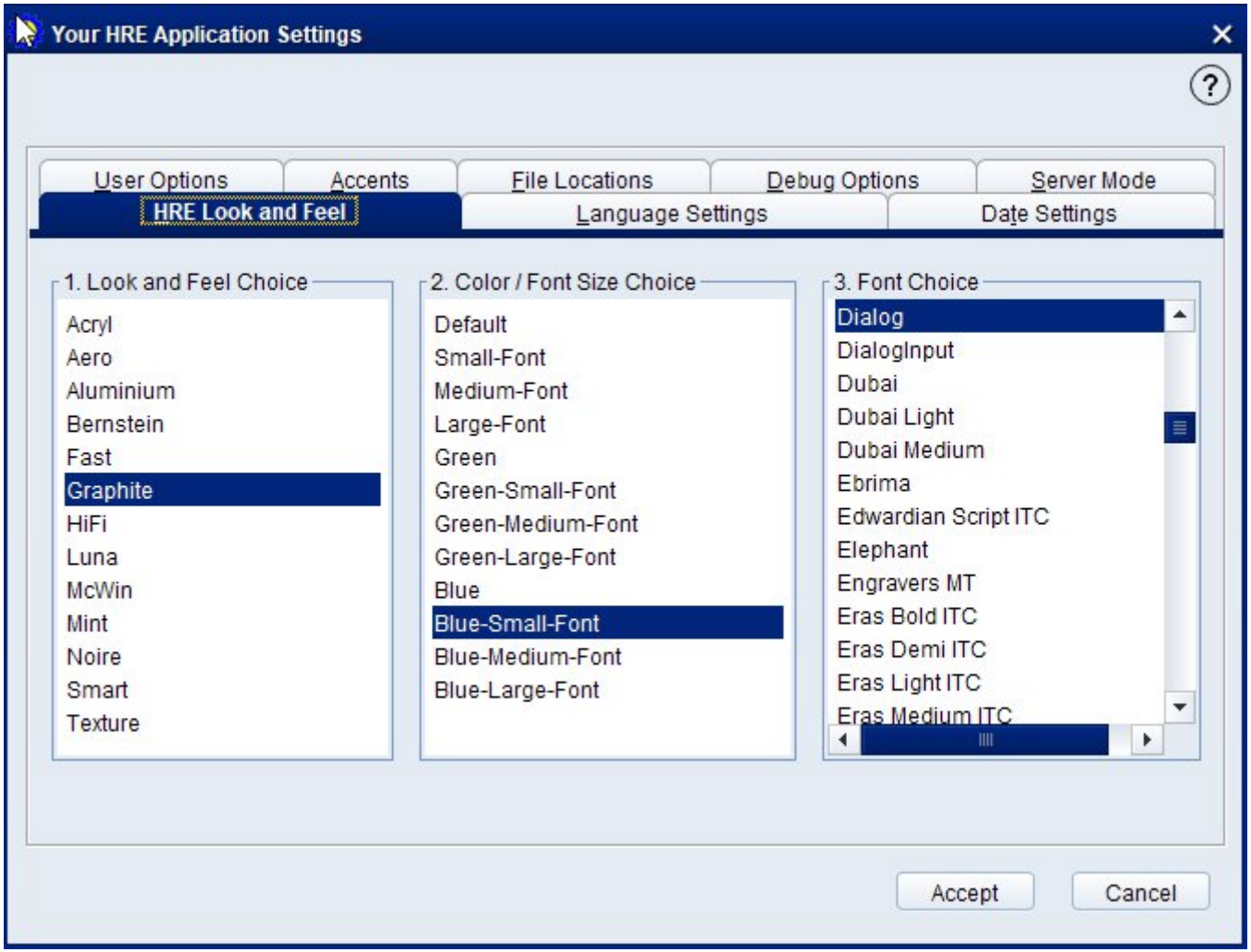
Conversion Suggestions

- Just prior to importing to HRE, run TMG File> Maintenance> Validate File Integrity to cleanup any outstanding TMG Database issues.

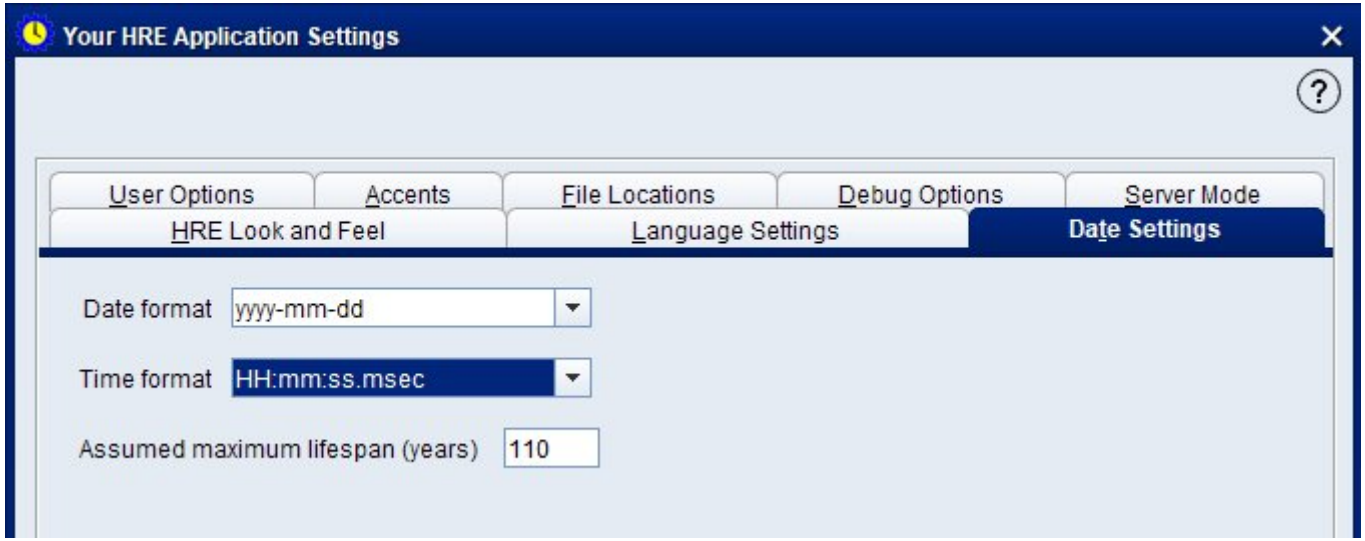
- Before importing for the first time, consider setting up your HRE settings: Tools> Settings
  - User Options

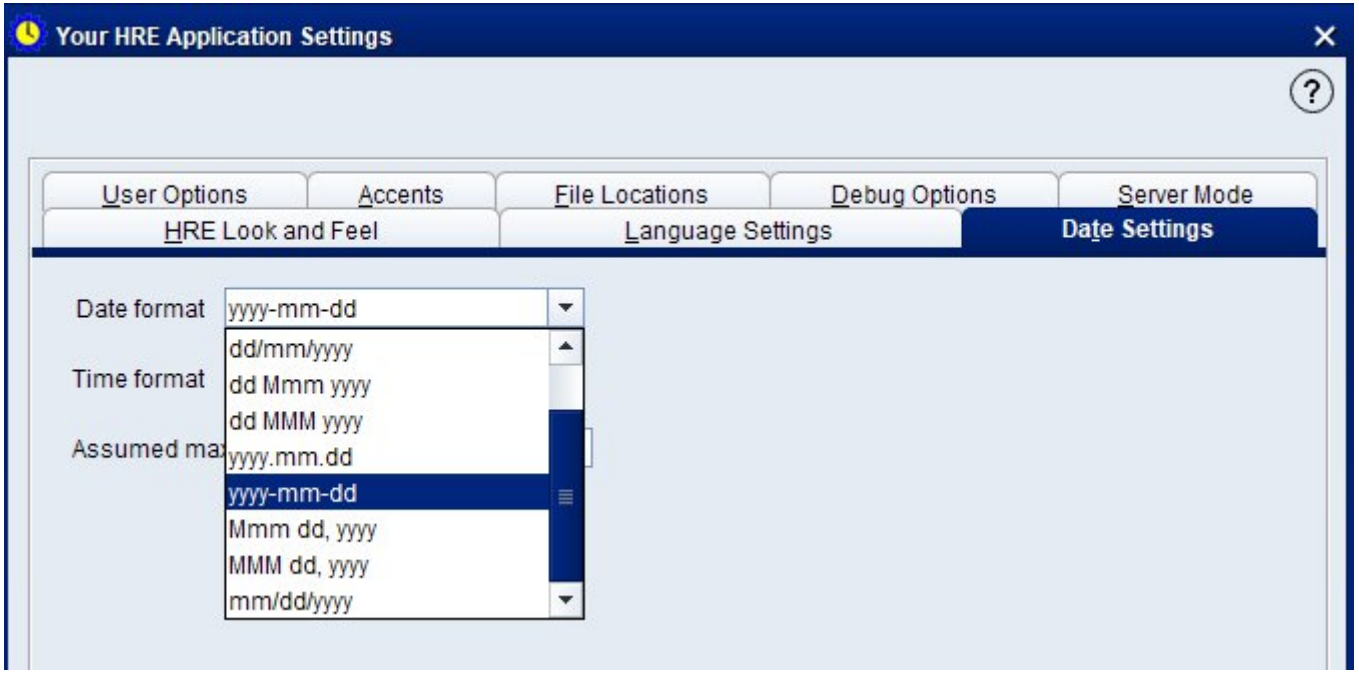


- HRE Look and Feel

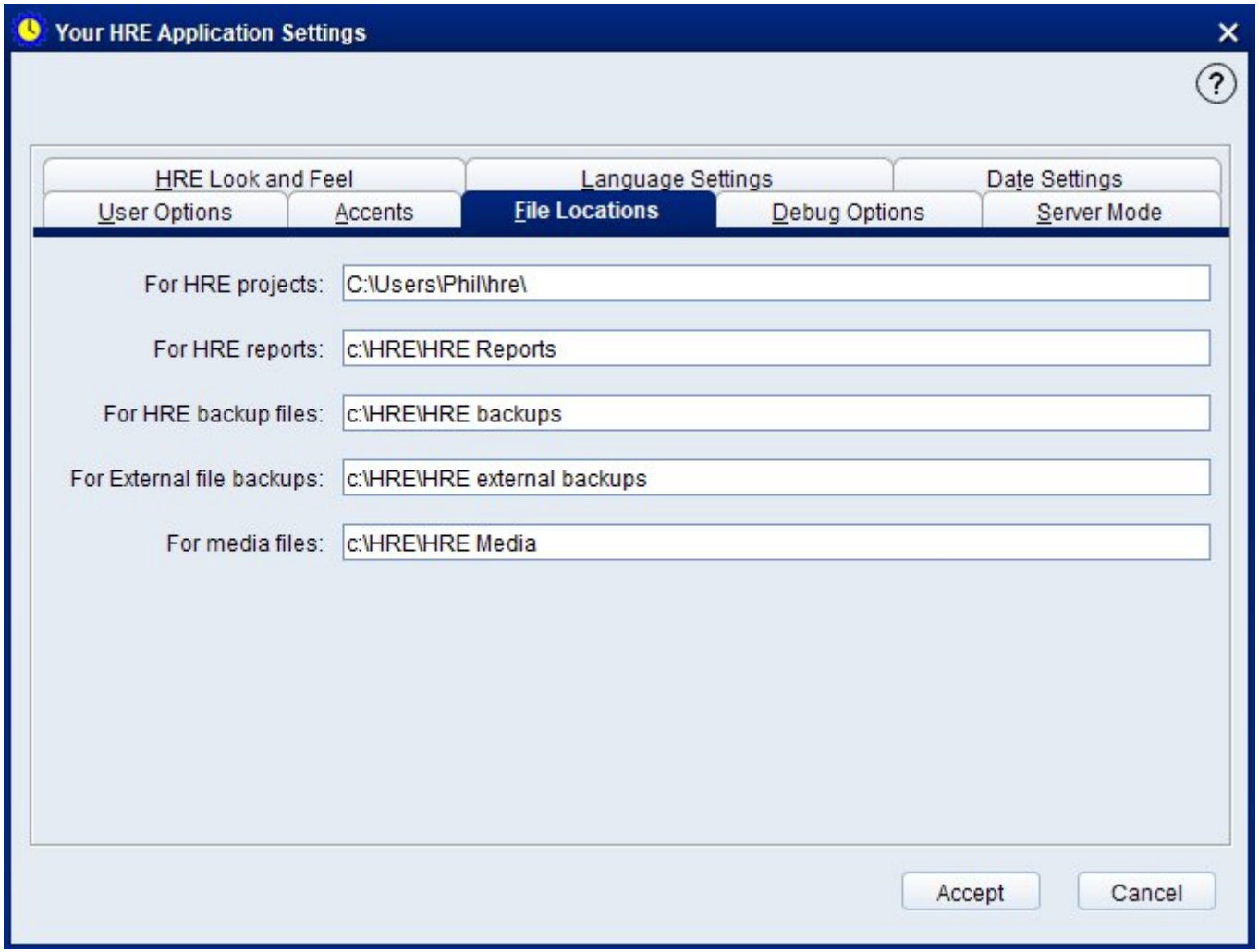


- Date Settings





- File Locations



Enhancements Requested

- **Manage Person Screen:** Display memos in the Event detail box. (My #1 Priority)
- **Import data entry:** When starting an import, default the file name to the Project Name entered in the "Define Project Name" field.
- **User Settings: Color/Font Size Choice**: Ability to set the display font size to something smaller than the current Small-Font size.
- **Person Selector Screen**: Add the ability to directly enter an ID number and have the list scroll to that record with that ID selected.
- **Person Selector Screen**: Add the ability to open the Manage Person screen for an person selected in the Dynamic Family Tree.
- **Person Selector Screen** "**Display Name As" options**: Ability to set default values for "Display Name As" options. Alternatively, make it default to the last used value.
- **Person Selector Dynamic Family Tree and Ancestor/Descendant Report Creator:**
    - Current functionality allows either All or +/-1 generation to be selected. Add a new option to allow entry of a total number of generations to be displayed. If there are a lot of generations in the data and All is selected, the processing time can be huge. This would remedy that.
    - Display the current number of generations displayed in the right window header. Value should change as generations are added or removed.
- **New Person Selector Filter**: Be able to filter the contents of the Person Selector screen in the same way that TMG allows you to filter the Expanded Picklist content.

- **Manage Person Screen Person navigation:** Quickly navigate back to the Last Person you worked on. This is the “Last Viewed Person” functionality in TMG.
- **Manage Person Screen Person navigation:** Be able to double-click (or right-click menu select) on a person’s name in any Parent Name or Event box to navigate to the Manage Person screen for that person. Having to manually enter the “Go to Person Number” is annoying.
- **Add/Modify Location for an Event**: Need to be able to do a lookup from the Master Location list like TMG to set the values instead of typing them to maintain consistency.
- **Name Style and Location Style for Adds always default to the HRE default.** There doesn’t appear to be a way to set the default Name Style and/or Location Style for a project. The Name Style on all Add screens is always set to “Default Person Names”; the Location Style is always set to “Default Location Names”. If you imported your TMG database and it is set to TMG-U.S. Standard Name, that results in your having to change the Name Style every time you add a new record. Same for the Location style. For consistency, there should be a way to set both the default Name and Location Styles for the project. The import should set them from the values used in the TMG Custom Styles Preferences.

Summary

- The ability to switch over to HRE is still very much in the future.
- I like the progress that these Beta releases have been making. Each one fixes reported issues and adds some functionality.
- There are still import issues that are being worked through as they are identified.