

# Color Tags for Reunion

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## SVCGG Reunion SIG

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This material draws heavily from the Reunion Help Manual, with the addition of tips and comments that the Manual does not include (but should).

### What Are Color Tags ?

- Introduced in the release of Reunion 12.
- Lets you use a **color** to **tag** people in your file so you have a visual clue to *quickly tell you something about them that's important to you*, such as a certain attribute or belonging to a certain group of people, such as:
  - Descendants of any ancestor can be given an orange tag.
  - Ancestors of your grandchild can be given a cyan color.
  - People flagged as "uncertain" can have a magenta tag.
- 12 colors are available. You can repeat their use for up to 75 different tags. Any person can have multiple tags.
- Tags are "automatic." Once a tag is assigned to a particular attribute (or "rule," such as "ancestors of Henry Todd"), anyone later added who meets the rule will automatically get the tag.
- Click **Color Tags** in the Sidebar list to add, remove, edit, enable, disable, or list color tags.
  - The enable/disable feature is what makes it possible to use 12 colors in 75 different ways. **Enable only the ones you want to see at any given time.**
  - Reunion Help is a little confusing on this: "*While there are only 12 colors available for color tags, you may enter up to 75 different color tags by repeating some colors.*"
- If you enable more than one tag of the same color, all tagged people would display the tag in lists and trees – ***you do not get a warning that you have two tags of the same color enabled.***

### Where Do Color Tags Appear?

- In Person buttons.
- In sidebars, at the end of each line. The Help manual says only "People, Results, Bookmarks" sidebars, but they also appear in Relatives and Treetops sidebars.
- In a List window, you can choose Color Tags to be a column header in List Results.
- In boxes in Tree View when you check the Color Tags box in Tree View Settings
- In Tree View boxes , tags always appear **in the same order as you have them in the Color Tags sidebar.**

## General Info on **Color Tags** (see Reunion Help Manual for illustrations)

- To add, remove, edit, enable, disable, or list color tags, start by clicking **Color Tags** in the list of Sidebars. This reveals the Color Tags sidebar.
  - To **add** a new color tag, click the + button.
  - To **remove** a color tag, select a color tag in the list and click the - button.
  - To **edit** an existing color tag, double-click on any color tag in the list. This opens the Edit Color Tag window (next slide).
  - The **number** of people in each color tag group appears at the right edge of the list.
  - The **order** of color tag names in the list may be changed by clicking, holding and dragging.
- When you click the + sign to create a new color tag, the box that opens will read “**Edit Color Tag**” *even though you haven’t created it yet*. Choose a color.
  - The selection you make in the WHO menu determines what you’ll see in the following “**of**” line.
  - The WHO menu is for specifying the group of people to be tagged. (You are choosing the “rule” for applying the tag.)
- To see a list of people with any ONE color tag, select/highlight the color tag name in the top list.
- To see a list of people having **one or more** color tags, Command-click or Shift-click color tags in the top list (to select/highlight multiple color tags). Another button will appear, where you specify whether the bottom list will contain people with ANY of the highlighted tags, or only people with ALL the color tags chosen.
- **Warning:** two “Who” rules are poorly named and inconsistent in application.
  - “Male descendant line...”
    - -- when applied to a man, tags all males descended from him, i.e. **the Y-DNA line**.
    - -- when applied to a woman, tags all males descended from her, their male children, etc.
  - “Female descendant line...”
    - -- when applied to a man, it is **not** all women who descended from him (the reverse of above), it acts like a woman’s mtDNA descendency.
    - -- when applied to a woman, shows all those who inherited that woman’s **mtDNA**, i.e. all women/daughters in the line, and men who got it from their mothers but couldn’t pass it on.
- The mtDNA (Female descendant line) would be very useful for researchers doing DNA work on that line. You could make a tag that duplicates the color of one of your existing tags, but keep it de-activated until you need it. When you DO need it, de-activate the other tag of the same color and activate your mtDNA tag. Reverse the procedure when you stop researching your mtDNA line.

## Creating or Editing Color Tags (see Reunion Help Manual for illustrations)

- A default name for the tag will appear when selecting items from the **Who** menu; however the name can be changed anytime, just edit the text in the Name field.
- The **tag name** is what appears in your list of tags in the Color Tag sidebar.
- To **edit** an **existing** color tag, **double-click** in the list the color tag you want to edit.
- You might want to change the tag name, or "Include Source Person" if you left them out when first creating the tag.

## To Use Color Tags (see Reunion Help Manual for illustrations)

- To see a list of people with any ONE color tag, select/highlight the color tag name in the top list.
- To see a list of people having **one or more** color tags, Command-click or Shift-click color tags in the top list (to select/highlight multiple color tags). Another button will appear, where you specify whether the bottom list will contain people with ANY of the highlighted tags, or only people with ALL the color tags chosen.
- You can click the color tags on a Person Button or in lists, to remind yourself of what each color means. One click on any tag will show the entire group of tags.
- In your Color Tags sidebar list, you can drag the lines to put them in any order you want.
- Color tags do not appear in reports or charts, except when sharing the Tree View or Family View.
- Color tags are not "static" – they are auto-updated as changes are made in the family file. This means you can't simply "un-display" a tag for a specific tagged person. You'd have to enable or disable the tag itself to make it show or not show for everyone who has that tag.
  - EXCEPTION: if the "WHO" rule you chose is "People with flag checked," an individual's color tag **would** disappear if you unchecked, for that person, the flag associated with the color tag rule.
- See the Help Manual for a few more tips.

## Using Flags with Color Tags

- A common use for a color tag is to give you a visual indicator that someone you've added to your family file is uncertain or has an uncertain relationship.
  - Step 1: create a new flag (Reunion/Preferences/Fields/Flags) and name it "Uncertain" or similar.
  - Step 2: Add a new color tag that will use the **Uncertain** flag. To do this...
  - [Help Manual says "Select Change in the left navbar. You do NOT have to do this.]
  - Select Color Tags in the right sidebar.
  - Click the + button.
  - In "Edit Color Tag" window, use the Who button to select People with flag checked.

- Select “Uncertain” from the drop-down menu of all your flags that will appear under “Who.”
- Now, everyone with the “Uncertain” flag will get a tag with the color you chose. If later that flag is unchecked for any given person (e.g., because they are no longer Uncertain), his/her color tag will disappear.
- Any **new** people added with the Uncertain flag will get the color tag, and **existing** people who later get the flag checked will get the tag.
- **Tip:** When Using Color Tags with Flags
  - When your color tag rule is “People with flag checked...,” you must leave that flag in your list of flags (and obviously, leave that flag assigned to the people you want to track) *if you want your color tag to work as intended.*
- If you are creating a flag for a very limited purpose, consider adding an “x” or “z” to the beginning of the flag name, to drop it to the bottom of the list of flags out of the way.

## Some Uses of Color Tags

- Tag the male descendant lines of certain ancestors to identify which lines might yield a living candidate for a Y-DNA test. Or similarly, tag the mtDNA-descendant line for a woman, to identify where to look for living candidates for an mtDNA test. (These are two default choices offered in the Who menu.)
- If you’d rather set a Flag for these lines, Color Tags make it easier to do so:
  - Go to Person button of the ancestor of interest.
  - Add a color tag, choose the Rule for “Male descendant line” or “Female descendant line” [again, not really an accurate rule name], and select the person.
  - Use FIND (left sidebar) to find the people with that tag and Mark them.
  - Use CHANGE -> Set Flags -> Set -> Flag (scroll up to create New flag) -> and in the same Set Flag window, select “Marked People” as those to apply the new flag to.
  - De-activate the color tag. (Don’t just delete it, you might want to re-use it again starting with a different ancestor.)

## Color Tags still need some Leisterpro attention

- The Help Manual needs to define more clearly what some of the default rules mean.
  - Male descendant line... and Female descendants line... as discussed before.
  - **Relative** means related by blood (only).
    - Your aunts and uncles who married into the family will NOT get tagged, but your first cousins (children of those aunts and uncles) WILL get tagged.
  - **Ancestor** means direct-line ancestors.
  - Same for **Maternal ancestor** and **Paternal ancestor** – direct line only.