

# Choosing a Genealogical Software Program

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Over the years there have been many genealogical software programs designed. Some of them have stood the test of time while others have come and gone. And one thing is certain, a family historian's genealogy program is *almost* more sacred than his or her ancestors.

## Some Genealogy Programs

There are many different genealogy software programs. These are but a few—think most common—that people use.

- Ancestral Quest (Win) – [www.ancquest.com](http://www.ancquest.com)
- Brother's Keeper (Win) - [www.bkwin.org/](http://www.bkwin.org/)
- Family Tree Maker – [www.mackiev.com/ftm/](http://www.mackiev.com/ftm/)
- Heredis – [www.heredis.com/en/](http://www.heredis.com/en/)
- iFamily (Mac) - [ifamilyformac.com/](http://ifamilyformac.com/)
- Legacy (Win) – [www.LegacyFamilyTree.com](http://www.LegacyFamilyTree.com)
- MacFamilyTree (Mac) – [www.synium.com/macfamilytree](http://www.synium.com/macfamilytree)
- Reunion (Mac) – [www.leisterpro.com](http://www.leisterpro.com)
- RootsMagic – [www.rootsmagic.com](http://www.rootsmagic.com)

*Tip: See if the software developer has offered a free or trial version for you to test.*

## Essential Features

Regardless of your operating system or choice in programs, there are certain essential features that should be expected regardless of what program you choose and whatever extra bells and whistles it has.

### Data Entry

Data entry is the most important aspect of genealogical software. It is the entire point of having your ancestors in a program—the ability to keep track of them and their relationships. However, computers do not always think like genealogists.

#### Names:

- Simple Surname: Rufus Herman BAILEY
- Multi-word: George DE LA VERGNE
- Dit Names: Pierre DU BOIS DIT MORELET

- Hyphenated Surnames: Louise BECK-SMITH

### Dates

- Standard Dates: 6 Mar 1806
- Approximated Dates
  - ca 1707
  - bef 5 Jun 1877
  - btw 189801903

### Free-form Dates

- Quaker Dates: 1707 6th mo 4th day
- Regnal Dates: 4 May in the 3rd year of the reign of His Majesty George III (which converts to 4 May 1763)

*Tip: ALWAYS record the original form of a free-form date even if you convert it for the computer to handle.*

### Places

It is important to understand how your genealogy software program handles places. Does it expect a town to be in a “town” space? Keep in mind that what you are viewing in the graphical interface may NOT be how the program is recognizing the data you type in. In some programs you may need to include extra commas to ensure that the places are accurately recognized, otherwise when you go to do a search on a town, you may not get all of the results you should.

This is actually more important if you know only the county and not the actual town. Some programs treat the first word of the place as a “town.”

### Sources

The ability to record the source of the information on your ancestor should be one of the most important aspects of working with a genealogy program. The flexibility to cite sources completely is essential to understanding how reliable your information is. It is also important when sharing information or seeking guidance. Invariably the person who you are seeking help from will want to know where you got said information and it is difficult to help if that is unknown.

You want to be able to cite sources as you enter information about a new person. You also don't want to have to re-type that same source when entering another person. So, you want a system that allows you to draw from a list of sources and then allows you to put a different page number or record number.

Remember that it is the sources you cite that will be the basis of evaluation when others see your research. And it should also help others to go directly to the source, so your genealogy software program should allow you to record all the pertinent details whether it is a census page, published book, newspaper, or vital record.

## Merging Duplicates

One of the things you will find, especially if you trace your ancestors back to early Colonial times, is that you have individuals already entered only to discover later that you have perhaps a brother of one family marrying into one of your lines (and you have entered his parents' names) but you already have the parents entered perhaps because you had previously identified a daughter of theirs who married another of your ancestors.

It is times like this, or when you have imported a GEDCOM file, that you may discover that your family history file has duplicate people. Merging them and having control over the identification of the actual duplicate individuals is important.

A computer program may take two people with the same name but different birth dates and consider them "close enough" to be merged. Most genealogical software programs offer some automatic merging, but it is the manual merge option that is more important.

## Basic Reports

In addition to keeping track of our ancestors and their relationships in the genealogy software, there are times when we may want to share a report showing a family group or the lineage of a specific individual with someone. You may also want to print out some reports before going to a repository to do additional research.

### Family Group Sheets

Just as there are different programs, there are different formats to the reports that are printed. Many family historians started their family history research before computers and may have become familiar with a specific type of family group sheet that shows all the critical pieces of information for a father, mother and children including:

- Birth date and place
- Death date and place
- Marriage date and place
- Name of spouse (or other spouse of father or mother)
- Names of parents (of father and mother)
- Space to write information that was previously unknown
- Ability to include source citations on the printed report

### Multi-generational Charts

More often referred to as a "pedigree chart" within the genealogical software programs, these roadmaps of your lineage can show just which lines need the most work. As such, you want them to be easy to follow, to be able to handle multiple generations, and to not take up exorbitant pieces of paper or ink. Once again, this form has been in existence for a long time and family historians are often comfortable with the known. So major changes to a tried and true form can be disconcerting.

## Genealogy Reports

While these narrative-style reports cannot be submitted for publication due to the stilted language of the sentences, we do expect them to adhere to numbering and formatting of some of the more popular publishing styles including:

- Register Style
- NGSQ Style
- Ahnentafel Style

We want them to handle sources, which could appear as footnotes, endnotes or embedded in the narration, Likewise we want to be able to follow the descent or ancestry within these reports, so they cannot be overly confusing say by putting many relationships in that are not standard to these types of reports (like aunts, uncles, cousins, etc, for each person included in the report).

Often such reports are used as the basis for an article that will be submitted for publication, and the closer it resembles the style of the journal the easier it is to follow it while perhaps writing in a word processing program.

## Reliability Checks

A computer is a brain and as such it should point out when you type something in that is incorrect. It should also question the 6-year-old mother as well as the 66-year-old mother. It should point out when a marriage date falls after the birth of a child – just to call your attention so you can verify that it is the case.

Typos creep in, especially since so many of us live on keyboards. We are used to relying on spell-checkers in word processing software and as such should expect to find it in our genealogy software. We also want the program to point out if we are off by a century. For instance, the person was born in 1900 and we accidentally type his death year as 1876. Errors like this are better fixed right away.

## Technical Support

These are computer programs and there are times when they either don't do something as you suspect or something has happened to your data. As a result, you want to know that there are avenues available to you via phone, email, or online to which you can turn for help. You may also want to look for bulletin boards in which fellow users share how they handle certain idiosyncrasies in their record keeping.

As a result, you want to spend some time looking not only at the software program itself but also the website of the developer to see what options of support are available.

*Tip: BACK UP your files. It is not IF but WHEN a computer will eat your data.*

## Moving to a New Program

One thing to always keep in mind is how fancy the program is with data entry for that moment when it becomes necessary to move your family tree to a new program. If you have availed yourself of a lot of the bells and whistles of a particular program you may discover that some of that information does not port

over as easily into a new genealogy program.

Some software programs offer a variety of import options beyond the standard GEDCOM file. GEDCOM stands for GEnealogical Data COMmunication and is a method of taking the basic details of names, dates and places and creating a file (ends in .GED) that can be read by the new program. It doesn't always handle newly created facts or events, where you have added a fact or event previously not in the program. It expects to find specific headings and chokes on things that don't adhere to that.

However, the steps for moving your family from one program to another are pretty standard:

1. Determine important options in the new genealogical software program
2. If necessary, create a GEDCOM in the old program
3. Use import function in the new program
4. Take note of exceptions of information imported
5. Re-locate or move images to proper place so the new program recognizes them

*Tip: SAVE GEDCOM file until you are sure ALL the information has made it to the new program.*

## **Finding Software**

Cyndi's List – Software & Computers, <https://www.cyndislist.com/software/>

Choosing a Genealogical Software Program, <https://www.americanancestors.org/tools/genealogical-software>