
GENEALOGY SOFTWARE

Choosing a program that is right for you

GENEALOGY PROGRAMS

This is not an exhaustive list. These are some of the more popular programs that run on various operating systems.

- Ancestral Quest www.ancquest.com
- Family Historian www.family-historian.co.uk
- FamilyTree Maker www.mackiev.com/ftm
- Gramps gramps-project.org
- Heredis www.heredis.com
- Legacy Family Tree legacyfamilytree.com
- MacFamily Tree www.syniumsoftware.com/macfamilytree
- Reunion www.leisterpro.com
- RootsMagic www.rootsmagic.com

Cyndi's List has a category for Genealogy Software for more program choices.
cyndislist.com/software

TopTenReviews has comparisons for both PC and Mac

PC www.toptenreviews.com/software/home/best-genealogy-software

Mac www.toptenreviews.com/software/home/best-mac-genealogy-software

BASIC REQUIREMENTS TO CONSIDER

- What sort of devices/operating systems do I use? PC, Mac, Tablets, Phones, Windows, iOS, Android, Linux
- Do I need it to work on multiple devices?
- Do I have options to store the database in the cloud? (Google Drive, Dropbox, iCloud, etc.)
- Do I have to be connected to the internet to use the software?
- What are my backup options?
- Support options available? Call-in support number, Online Message boards, Videos, User Groups, Webinars, etc.
- Cost – is there a one-time fee? How do upgrades work? Is there an on-going subscription cost?

EVALUATION OF FEATURES

Review the product's website for a list of features. Take a deeper dive by reading the user manual if available and watching tutorials, webinars, or YouTube videos.

- Ease of Use
 - Is information displayed in ways that make sense
 - Use of color coding and icons
 - Layout of display
 - Help within the program/user manual
- Data Entry
 - Support of international character sets
 - Data entry validation
 - Formatting of dates
 - Location validation
 - Name formatting
 - Problem alerts
 - Sources
 - Free-form citations or templated
 - Ability to create your own templates
 - Add text and images to sources
 - Evidence evaluation tools
 - Recording Events
 - Shared events - witnesses
 - Notes
 - Private Notes
 - Custom Events
 - Sentence customization
 - Attach Images, files, and/or hyperlinks
- Reports and Charts
 - Comprehensive list of reports
 - Family Group Sheets
 - Ancestor/Descendent reports
 - Narrative reports
 - Timelines
 - Customizable report options
 - Can you print in different languages?
 - Ability to create your own reports
 - Publishing - Combine reports and charts into a book
 - Output of reports
 - Print
 - PDF – makes sharing reports easy
 - RTF – export to a word processor for further editing
 - CSV – export data to use in a spreadsheet

- Search/Queries
 - Find people who fit certain criteria
 - Empty data fields
 - Fields without sources
 - Potential Problems
 - Create your own queries
 - People living in a certain place at a certain time
 - People born in a certain place
 - People who died in a specific place
 - People who were a certain age during a specific range of years
- Viewing more than one data file at a time
- Merging of duplicate individuals
- Mapping integration
- Photo Editing
- Create Web pages and/or DVDs
- Research/To Do lists, Research logs
- Searching of online repositories (Ancestry, FamilySearch, FindMyPast, MyHeritage, etc.)
 - Create your own web searches
 - Automatic searches with indicators
- Integration with other online trees
- Data Import/Export
 - GEDCOM
 - Direct from/to specific programs
 - Can you select what lines/people to export?
- Integration with other Software
- Be cautious of too much automation with online databases
 - May have a negative impact on productivity (can you say “Squirrel!”?)
 - Can use up data if you are on a limited data connection
 - May cause too many notifications
 - Make sure there is a way to turn off this features

TRANSFERRING DATA BETWEEN PROGRAMS

GEnealogical **D**ata **COM**munication – standards for translating genealogical data from one program to another

GEDCOM 5.5 – Latest version of GEDCOM standard released in 1996

homepages.rootsweb.ancestry.com/~pmcbride/gedcom/55gctoc.htm

Features of the genealogical software programs have outgrown the GEDCOM standard. It mostly still works and genealogy software vendors have tried to fill the gaps. Some provide direct import from other genealogy program.

TRYING IT ON FOR SIZE

Once you narrow your choices down to 2-3 programs, try them on for size! This is really the best way to see if it “fits”.

Many programs offer a free or trial version. The trial versions usually are limited in number of people you can enter or for a set amount of days.

The free versions are usually not limited in the amount of time you can use it, but have some of the features disabled.

SUGGESTIONS

1. Browse around the sample database if it was included in your trial.
2. View the different screens. Pull some sample reports.
3. Import your data into the new program. See how things look. You are familiar with this data and it is much easier to determine if things look like they should.
4. View any quick start tutorials and enter a new person with some basic birth and death information.
5. Enter a few different record types such as a census and a death certificate
 - a. Were you able to create a good source citation? How long did it take to enter all of the information?
 - b. Was there a place to enter notes on the quality of the evidence?
 - c. How does the information display? How does it print on reports? What options do you have to change the report display?
6. How are people displayed who have been married more than once and have had children with both spouses?
7. Is there a limit to the number of children displayed? Is it easy to identify there are more?
8. View other similar situations within your family file.
9. Check any special characters used in different languages. Do they display correctly?
10. If you aren't seeing information the way you want, verify that there are not options within the program to change the view.
11. Prepare for a research trip or searching a new online collection using the software's features
 - a. Can you make a list of people and attach research tasks?
 - b. Can you pull up research tasks by repository?
12. Make an evaluation sheet for each program and its features. Prioritize the 'must have' vs. the 'nice to have'.
13. Have fun!