Choosing Genealogical Software

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Te Rangapū Kaihikohiko o Aotearoa

Family history - Preserving our past for the future
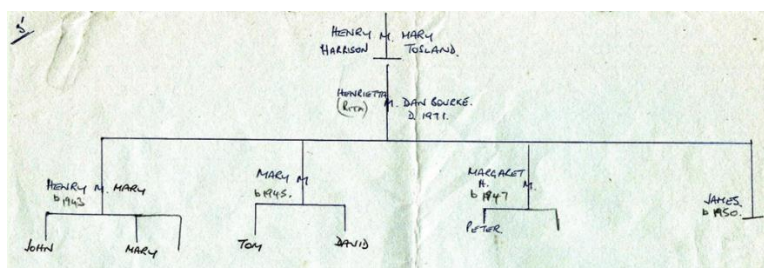
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Choosing Genealogical Software

First, a little history.
In the past, before computers, family history research involved hours of manual research in libraries and similar places. Much of the family tree came from relatives who knew about their ancestors. This knowledge was usually kept in family trees drawn out on pieces of paper.

The results of the research were kept in folders, and some had indexes to the folders and the persons held in them. Some people were very efficient in their record keeping and others just filed their findings willy-nilly and had great difficulty retrieving the data.

To aid in research, a range of pre-printed forms were available such as Family Group sheets, pedigree charts and descendancy charts.

From this research, some people drew family trees and created individual narratives of their people or family and others wrote a complete book.

Computers

During the 1980's decade, personal computers became available and with them, genealogical software. Typically, compared to today, the software was rudimentary and only a repository for the family tree and supporting events, dates / places.

Internet

In the early 90s we were able to access the internet and research expanded to finding family history online. Today, there are millions of pieces of family history accessible on the internet using computers and now tablets & smartphones.
It is not the purpose of this presentation to cover tablets & smartphones.

The software

In 2023 there are a great many Genealogical / Family History applications. Far too many to be covered here. In this presentation, we will look at some of the main ones.

What does the Genealogical software do?

In technical terms, Genealogical Software is a "Database".
This is software that holds and collates a 'table' of individual pieces of data like a name and an event on a date at a place.
In most genealogical software the table is not visible.
For an example, imagine a page with lines to form a grid giving rows & columns.
The columns can be labelled, Name, Event, Date & Place.

The rows begin with the person's name and continues with say, birth event, date of birth & place of birth.

Name	Event	Date	Place
John Soppet	Birth	8 Aug 1834	Sherriff Hill, Gateshead, England
John Soppet	Immigration	18 May 1859	Auckland, New Zealand
John Soppet	Marriage	27 Feb 1864	Auckland, New Zealand
John Soppet	Death	02 Jul 1915	Auckland, New Zealand

An example of a database table

The database knows how to connect all the pieces together and the persons relationship to their other family members.
The simplest genealogical software only holds the pieces of data described above.
The most powerful software holds much more than that.

Choosing the Software

First, there are some questions to be answered;

1. How computer aware are you?
   This gives an indication of how you will use your software. Some software can be quite daunting to use well.

2. How big is your family, or, how broadly do you want to cover your extended family, and how many generations are you interested in?

3. How much detail do you want to store?
   Simple software just stores the basics. The most powerful software can store an enormous amount of data on each person.

4. What kind of output do you want?
   The kind of reports or family tree printouts you want may be the governing factor in your choice.

Answering the questions

1. Computer Awareness
   If you are not very computer aware, you will be best to have software with simple screen layouts. You do not want a screen that is too 'busy'. i.e. too much detail.
   All genealogical software uses multiple screens to display and allow entry of data about a person and their family. Transition from one screen to another should be either guided or intuitive.

   For an experienced computer user, a 'busy' screen containing a lot of data will not faze them. Most transitions from one screen to another should be intuitive or learned.

2. Size of family
   If you are only interested in just your immediate family and first or second cousins going back to say, 5 generations, simple software is for you.

   If you want to capture thousands of people in many families going back as many generations you can find, then the most powerful software is for you.

3. How much detail
   If you want to stick to the basic details about a person, simple software is for you. Most software will allow you to store a photo.

   The most powerful software will store a great number of additional details for a person, including sources & citations, media and audio clips.

4. *Output*
   Simple software will allow you to print family trees in at least a couple of formats along with Family Group sheets and lists of people.
   All Genealogical software will allow you to create a 'Gedcom File'.
   Gedcom is a file format that allows transfer of genealogical data from one application to a different one.

   Powerful software does all of the above and much more.

Cost

I have not mentioned cost. Something that everyone wants to know.
Most Genealogical software is moderately priced and is usually available direct from the manufacturers' website for less than $100.
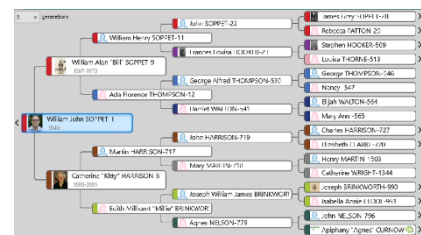For most manufacturers', buying the software is a 'one-off' charge for the current major version. Minor version upgrades are free and some are automatic.
You will have to pay a nominal charge to upgrade to a new major version.
Most software has a free evaluation version that works just like the paid version and allows a limited size database. From these evaluation versions, you can give them a try. If you try one and don't like it, create a Gedcom of your file and import it into the next one you try.

A number of software manufacturers provide good examples of what their screens look like, and these images may prompt you to try them.

a typical pedigree view screen

Very few Genealogical software applications can be bought over the counter in a shop and I am not aware of any that have demonstrations in the shop. So essentially, you are stuck with finding your software online. Your, "Try before you buy", is by installing the free or demo version.

Source Format of the software.

Almost all Genealogical software applications now <u>do not</u> come on a CD unless you choose to buy it that way. Some are available on a memory stick.
The usual process is to download the software from the manufacturer's website as the free version, install it and then pay online for the full version.
After payment, you receive a 'key' which you enter into the software to 'unlock' the full version.

Online Databases

Strictly speaking, an online database or Family Tree is not 'software'. However, an increasing number of people are choosing to use this format instead of software installed on their computers. Online Family Trees are accessed using your web browser.

For the less computer-aware person, online Family Trees satisfy the '*Simple'* category, which most of todays' software does not.

Online Family Trees can be found or created on; Family Search, Ancestry, MyHeritage, Geni, and many more.

The Software Applications Themselves

Availability of Genealogical Software applications is to some degree governed by which operating system your computer uses. Essentially, these are Windows, Apple (Mac) or Linux.

The most common applications are; Family Tree Builder, Family Tree Maker (FTM), Legacy RootsMagic, Gramps and a lot more.

Available for Windows and Mac

Ancestral Quest 16
    Manufacturer: Incline Software
    Has a limited Trial Version
    http://www.ancquest.com/index.htm

Family Tree Builder
    Manufacturer: MyHeritage
    No trial version because the full version is
    free
    (Is designed to sync to a Tree on MyHeritage)
    https://www.myheritage.com/family-tree-builder

Family Tree Maker 2019
    Manufacturer: Software MacKiev Company
    There is no trial version
    *(The 2019 is specific because earlier versions
    were by a different manufacturer)*
    https://www.mackiev.com/ftm/index.html

Heredis 2023
    Manufacturer: Heredis
    Has a limited Trial Version
    Also has versions for iOS & Android
    https://www.heredis.com/en/

RootsMagic 9
    Manufacturer: RootsMagic, Inc.
    Has a limited Trial Version
    New version released 28 Feb 23
    https://rootsmagic.com/RootsMagic/

Only for Windows

Genbox Family History
Manufacturer: Thoughtful Creations
Has a limited Trial Version
http://www.genbox.com/
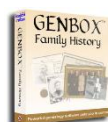
Legacy Family Tree 9.0
Manufacturer: Millennia Corp.
Has a limited Trial Version
https://legacyfamilytree.com/

Only for Mac

GEDitCOM II
Manufacturer: John A. Nairn
Has a limited Trial Version
http://www.geditcom.com/GCFeat.html

iFamily for Mac
Manufacturer: Keith Wilson
Has a limited Trial Version
https://ifamilyformac.com/index.php

MacFamilyTree 10
Manufacturer: Synium Software
Has a limited Trial Version
https://www.syniumsoftware.com/macfamilytree

Reunion 13
Manufacturer: Leister Productions
Has a limited Trial Version
https://www.leisterpro.com/

Available for Linux & Windows & Mac

Gramps
Gramps is a free software project and community
*It is a community project, created, developed
and governed by genealogists*
https://gramps-project.org/blog/

More Software

The above listing has given you the most popular applications. There are significantly more.
A good listing of those available are shown on Wikipedia.
https://en.wikipedia.org/wiki/Comparison_of_genealogy_software

There are four comparison charts which show the features / differences between applications. If you look at the General Features and Genealogical Features tables, the more green squares there are, the more powerful the software is.

Software Syncing & Hints

Many of the applications can synchronise with online family trees. The software website will tell you more about this.
Also, many can connect to Ancestry, MyHeritage and Family Search to provide useful data about a person. The result of finding data is called a hint.
When there is a hint an icon will appear alongside the person's name.
To use these hints, you will need a login to the website.

Getting started with your software

Don't rush in and start entering your Grandad ! !
Always start with yourself – YOU are number one.
Next, your parents with your father first, then your mother.
Just put in the essentials like Birth date & place, Marriage date & place, Death date & place.
You can put in more events later.
With just three people, the software will have become functional and now is the time to explore and get familiar with it's features.
When you have entered another generation, and you discover a mistake, it's not too hard to fix.
With more data entered, errors become harder to fix, especially relationship errors.

HELP !

All of the manufacturer's websites have quite extensive help.
Mainly, this is because they do not produce a user manual. Some provide a manual to be downloaded and others rely on their online help.
All have a means to submit suggestions, feature change requests & report 'bugs'.

Many of the Genealogical Software applications also have supporting Facebook pages where you can find additional user advice.

From my own experience, my software manufacturer provides a 'knowledge Base', Technical Support, 'Frequently asked questions', user forums and how to videos on You Tube and 2 Facebook pages. Also, there is a user group in which I am the Auckland representative.

What Next

For help with your Genealogical software, contact us at the GCG.
You will find someone with experience in the most common software.
We may not know the finer details of some of the less common software, but we have sufficient experience to find our way around yours.

You are most welcome to come to our meetings held every third Saturday of the month, February to November, at the FRC starting at 1:30pm.
$5 door charge to cover afternoon tea.
$15 to join giving a subscription to our magazine.
We have members spread throughout New Zealand.

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