

Choosing Genealogy Software: How to figure out what you need

Top Priority

1. Other people's opinions (including mine) may be helpful, but the bottom line is - what are YOUR needs?

2. The only absolute requirement in my opinion (but see #1, above) is a GEDCOM import/export feature. If you can't export the data, you can't move it to another program. If the publisher goes out of business or disappears and you can't move your data to another program, you have to type everything over again. Some publishers keep changing the format of the databases, and unless you install every new update, your data format may become outdated and not be readable by the latest version of the program. GEDCOM to the rescue! If you like a particular program but it doesn't do fancy charts or web publishing - never fear, GEDCOM is here! (there are utility programs which will produce fancy charts or an HTML file for the internet from a GEDCOM file). Most genealogy programs include GEDCOM import & export.

3. The next most important feature is source documentation. You **MUST** document your sources, and if the program makes this easy for you, you might actually do it! If the only way to document sources is in a Notes or Comments field where you have to type everything out every time, you're going to get lazy, and later you will regret it. With proper source documentation, you enter the info about the source once, then refer to it for each piece of data entered from that source.

4. Events - (a) Types of events. Some programs allow an unlimited number of events, of any type. Other programs allow only a specific number of events per person. Some programs allow only the basic events of birth, marriage and death. Others add christening & burial, and perhaps military service, residence, occupation, or other specific information. Some have between 2 and 5 user-defined fields, where you can enter whatever info you want. But if you want to enter all of the items mentioned, plus all of your census records, land purchases, wills & probate and other legal transactions, education, public offices held, etc., you are soon going to run out of fields - you need a program that allows for an unlimited (or very large) number of types of events.

Events - (b) Multiple events of the same type. If you want to use the program as a tool for ongoing research, you must be able to enter different dates & locations for birth, death, etc as reported by different sources. This means that the program must allow you to enter multiple events of the same type. If it allows you only one field for birth, for example, what will you do with conflicting info?

Important

Note: Examples given below refer to PAF, Roots & TMG - those just happen to be the programs with which I am most familiar. (Roots no longer exists.)

Ease of use - it seems logical that a program with more features would be more complicated to use, but it's not necessarily true. I switched from Roots IV to The Master Genealogist; and while they were fairly comparable in the number of features, TMG is much easier to use. Most programs allow you to download the software and try it out, which is the only way to judge ease of use.

Reports - will it print the lists you need for research, in the format you want? I use a list of events sorted by place, and a list of names with date & place of birth & death, plus spouse name. PAF does these, TMG does them, Roots IV didn't. Will it print pedigree charts the way you want? Fancy boxes on the pedigree chart aren't important to me, but some programs make a big deal about them. Does it do custom reports? Does this matter to you; and if so, how easy or difficult are the custom reports?

User support - before you buy the software, call up the company and ask them a few questions. Can you reach them? Can they find the support guy? Are they helpful? Send them an email with more questions. How long does it take them to respond? Did they answer the questions you asked, or did they give you a bunch of information that wasn't relevant to your question?

What doesn't the program do??? This is, to me, the hardest question to answer, and it can be a serious trap!

If you're just starting out, you don't know which features will matter to you. The best way to deal with this is to take a thorough look at several programs, make notes of the features you like, and make sure that your final choice includes as many of those features as possible.

Other Features to consider: (in alphabetical order)

Data CD's included - some software comes with reference books on CD, an atlas, social security death index, census data, other historical records, etc, etc, etc. Are these important to you?

Family relationships - do you need flexibility? Adoption, with the ability to connect both adoptive and birth parents to a child; step-families; children whose parents weren't married to each other?

Graphics & multimedia - a "hot" item: scan your old photos and attach them to your charts. Sounds spiffy, but I only know a few people who actually use this feature.

Manual - is there one? Quite a few of the programs are available by downloading, and these don't have a manual. (There may be a manual available for an extra charge.) If, like many people, you don't read manuals, then this won't matter to you. Is the manual organized in a way that makes sense to you? Are the instructions clear to you?

Medical info tracking - I haven't used this, but it's important to some people.

Publishing - do you intend to publish your work? Some programs make this easier by providing a variety of narrative reports, making those reports customizable, and providing output to word processing file formats.

Research tools - research notes, to-do lists, reports which help you find loose ends in your database.

User's group - would it be helpful to you to discuss the program with other users, learn which features they find useful, get help from them when you run into problems? The local PAF group is large, well-organized, and nationally known for its publications. The TMG group is smaller and more informal.

Web publishing - the newest hot item in genealogy programs, all the rave! Generate an HTML file to publish on your web site! TMG will do this with the narrative reports, but not with the family group sheets, which is how I wanted to do my website. So I use another program to create the html files for my website.

Try it out!

This is the only way to find out whether a program is easy to use. It's the only way to find out how the program runs on your computer. And it's the only reliable way to evaluate the features that matter to you. Most programs are available by downloading; some have a free trial period, some have a sample version with a limited set of features, some are shareware (you only pay if you want to).

Sources:

1. "Genealogy Software Guide" by Marthe Arends, in our collection at GS 929.1 A68, 1989. Data on specific programs is already outdated but discussion of features and what to look for is very helpful.
2. www.lkessler.com/gplinks.shtml - best site I found on genealogy software. Links to the publisher's website for each program; links to impartial reviews and other related sites for some programs. Includes programs for Mac, DOS, Unix & Linux; also includes programs in various European languages.
3. blog.eogn.com - Dick Eastman's Online Genealogy Newsletter
4. www.cyndislist.com/software.htm
5. genealogy.about.com
6. www.genealogysoftwarenews.com

Local User's Groups

PAF = Personal Ancestral File

Free download from www.familysearch.org; \$8.25 for CD which includes Companion program for printing charts

BIG users group meets 2nd Saturday, 9-11 am, at LDS church on Quince Ave off Homestead between Kiely & Lawrence. Multiple speakers each month usually include some topic relating to computers and genealogy; a class about PAF for beginners; and a demonstration of another program.

Users group website: svpafug.org

TMG = The Master Genealogist

www.whollygenes.com

very small, very informal users group meets 4th Tuesday, 7-9 pm, in the Sycamore Room at the Santa Clara City Library.