

Getting the Most out of Your Genealogy Program

by Deena Coutant, January 17, 2012

deenacoutant@yahoo.com

General Considerations

- Investigate before purchasing, upgrading or changing software programs
- Easy to use interface, defaults & customizations
- Available tools, calculators, help & support

Core Features

- Getting data in: data entry screens, shortcuts, web searching, importing, merging
- Finding data: searching, filtering
- Working with data: relationships, places, maps, source citations, media, charts, reports, publishing
- Getting data out: exporting, reporting, backups, privacy controls

Data Cleanup & Analysis

1. General Ideas: use of warnings, alerts & prompts; use of standards & consistency; accurately describe surety of information; evaluate both present & missing information
2. Utilities: merge duplicate individuals, convert names, resolve unrecognized place names
3. Reports:
 - Documented & undocumented facts – which facts do or do not have source citations
 - Missing dates – individuals with blank birth, marriage or death facts
 - Data errors – potential problems with invalid characters, out of sequence dates, improbable events
 - Media usage – media items linked to individuals, facts, relationships or sources, and unlinked media
 - Source usage – every source and citation linked to individuals and facts
 - Unrelated (unlinked) individuals – orphaned individuals not connected to anyone in tree
 - Custom reports – created to target specific information, i.e. family health & cause of death report
4. Task Lists: to-do lists, research notes reports, address lists, using tagging for future follow-up

Extra Features

Historical timelines	Special Reports
Research guidance	Print Options
Web page or CD creation	Photo Displays
Ancestry TreeSync	Other Features

Add-Ons

GenSmarts www.gensmarts.com
Ohana's FamilyInsight www.ohanasoftware.com
MagiKey's MagiCensus Deluxe <http://themagikey.com>
Clooz www.clooz.com

My Goals

Features or Reports I Will Try Out in My Genealogy Software:
