



Going Digital, part 2

Chatham Community Library

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Topics

- Desktop genealogy software.
- Backing up your digital assets.
- Sharing genealogy with collaborators.
- Tools: Hardware and Software.



Why buy Desktop Genealogy Software?

- In this presentation, we abbreviate this as DGS.
- DGS is not Ancestry.com, FamilySearch.org, or any other online place you might keep your family tree.
- DGS lives on your computer, on your hard drive, where you control the data and all changes made to it.
- DGS lets you get information from many providers, plus your own research, and bring it together in one place.
- Five of the top programs are profiled, and there is a list of others in the backup slides.

All DGS should let you:

- Build your family tree, adding relatives and all details.
 - Produce built-in family and pedigree charts, at least minimal reporting/ charts and the ability to import and export data.
 - Should have robust ability to document and cite sources.
 - Add media and link to facts, to include pictures, documents, videos and perhaps sound clips (interviews).
- Store, or link to, your DNA test results.
- Show your family facts on a map.
- Publish your results.
- Get tips/ web hints from major databases, e.g., Ancestry and Family Search.
- Run Windows-only programs on iOS with a wrapper like Crossover, and some make it easier.



DGS: Family Tree Maker

Platform	Windows and Mac OS 10.10+
Website, version, price	https://www.mackiev.com/ftm/ . FTM 2019. \$80. No trial version.
Pro's	Easy entry of information, so good for beginners. Download info directly into your tree from Ancestry and Family Search. Sync's with up to three Ancestry trees, making collaboration very easy. Can include same sex marriages.
Con's	Not so excellent source and citation capability. Cannot control person reference ID's. Downloads all media to a single directory. Purchasing from MacKiev web site is convoluted.
Unique (mostly) features	Extremely tight integration with Ancestry.com Can undo last 1000 changes. Free cloud backup for first year, then subscription.



DGS: Roots Magic

Platform	Windows and Mac (iOS 10.8+, non-native)
Website, version, price	https://www.rootsmagic.com/RootsMagic/ . Ver 7, with v8 to be released “any day now.” \$30 for v7 includes upgrade to v8. RM Essentials free forever, with some limits. RM To Go will fit on a USB flash drive.
Pro’s	Fantastic support forums. Embedded browser. Can control person reference ID. Can have more than one database open at a time and compare two trees. Can handle any type of parental partnership/ family.
Con’s	Charts are less wonderful. Outdated interface in v7, but improving in v8.
Unique (mostly) features	Open SQL database lets advanced users manipulate data in bulk. Free online web site for your family tree.



DGS: Legacy Family Tree

Platform	Windows only
Website, version, price	https://legacyfamilytree.com/ . Ver 9. Download program for \$35. Many bundles with different options. Standard version is free, Deluxe version has all features.
Pro's	Embedded browser. Great ability to document sources. Can customize your interface and many aspects of the program. Excellent GEDCOM import accuracy. Excellent scrapbooking tools and charts, including X-DNA. Can compare two people side by side. Can apply hashtags to people to group them, e.g., all farmers. Supports same sex couples.
Con's	No undo/ redo tool. Very dated user interface.
Unique (mostly) features	Connects to the most online sources. Secure online backup for family tree.



DGS: Family Historian

Platform	Windows only.
Website, version, price	https://www.family-historian.co.uk/ . Ver 6 (2015). \$46.50. 30 day free trial of full version. Several bundles.
Pro's	Lots of chart options. More modern interface with easy navigation. Good for online publishing and scrapbooking. Excellent GEDCOM import accuracy. Compare two trees before merging them.
Con's	Cannot enter DNA results without custom fact. Basic chart designs.
Unique (mostly) features	Connects only to FindMyPast and MyHeritage, so is focused on UK and Europe.

DGS: Family Tree Heritage

Platform	Windows only
Website, version, price	http://www.familytreeheritage.biz/ . Ver 9. \$49 for Gold version. Free 7-day trial at http://www.individualsoftware.com/?page_id=4973 . Older, more limited Platinum version \$20 at http://www.individualsoftware.com/?product=family-tree-heritage-platinum-9-2 .
Pro's	<ul style="list-style-type: none"> Can make changes/ corrections in bulk. Easy to cite sources. Can attach multiple people to same source with ditto tool. Powerful tools to merge two family trees. Supports same sex and non-traditional couples. Can add up to three tags to people. Work with multiple databases.
Con's	<ul style="list-style-type: none"> Cannot sync tree to web. No mapping feature. Limited chart choices with plain presentation. No embedded browser.
Unique (mostly) features	Very good reports and charts.

Backup, Backup, Backup!

Tips described here apply to all your data, not just your genealogy data.



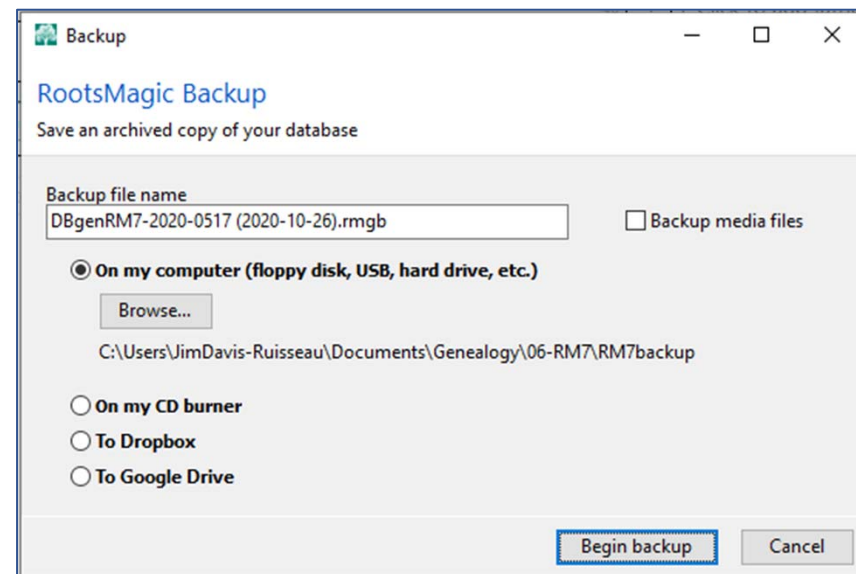
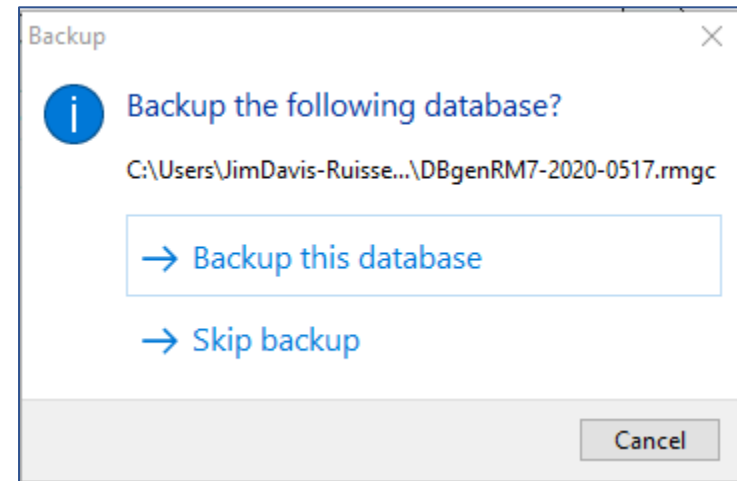
Back-up is terrifically important!

- If your house burns down, all your paper files are gone!
- If your computer crashes, all your digital media is lost! (it might be recoverable)
- If you're on a road trip with your laptop, what if it gets stolen?

If you follow a thorough back-up procedure, your electronic files are still available.

Very geeky back-up schema

- Level 1: Make a back-up copy of the DGS data file every day.
- When exiting the program, do accept the option to make a backup if you have changed any data.
- If your DGS does not offer the option to backup, then manually backup.



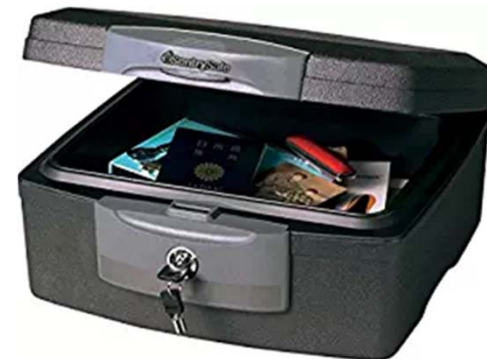
Very geeky back-up schema

- Level 2: Back-up your computer daily to external hard drive.
- A USB flash drive (no moving parts) is convenient and can be stored away from your home.
 - 128GB for \$17, sizes up to about 2TB
- A USB hard drive might store more data, which is useful if you have lots of media.
 - 2TB external drive for \$62, sizes up to 12TB
- A network attached drive can be used to back up multiple computers.



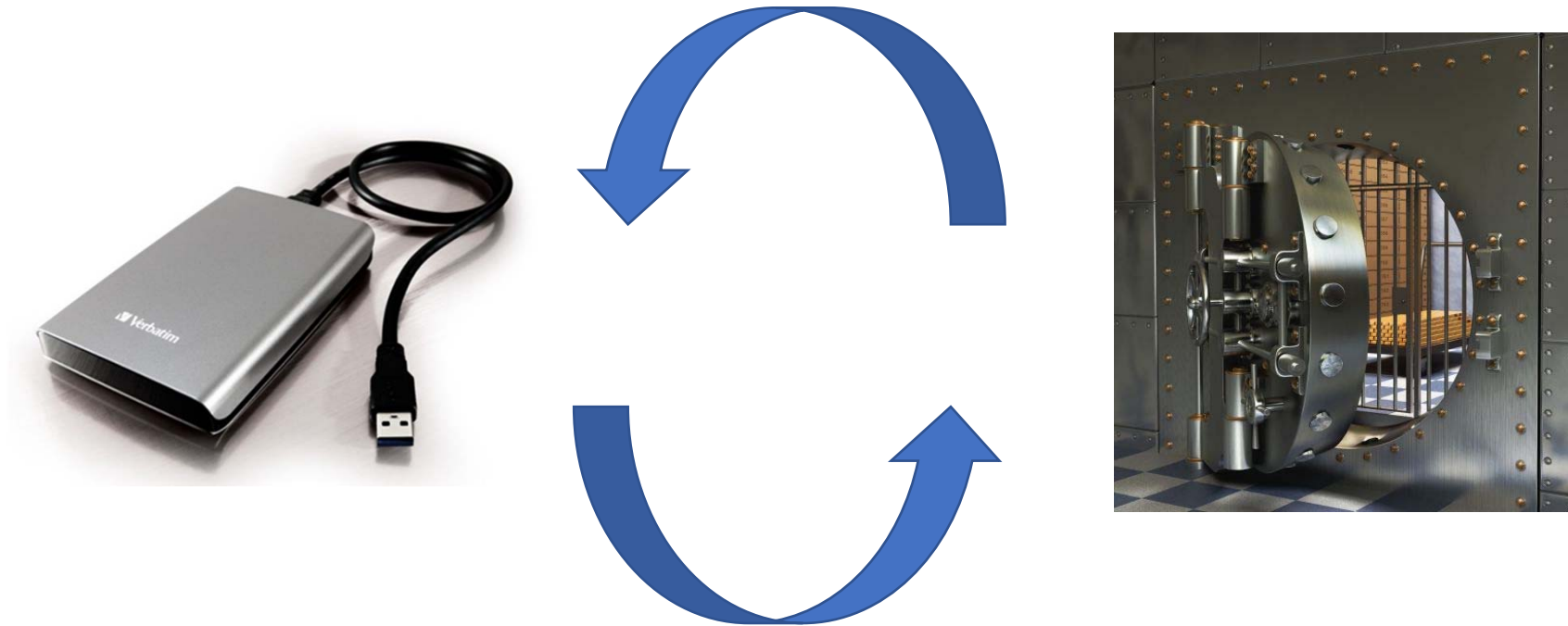
Very geeky back-up schema

- Level 3: Copy the entire contents of the external hard drive to another hard drive not less often than monthly.
- Store the external hard drive in a media safe.
 - Normal fire-proof safes only protect above the combustion point of paper, i.e., 451° Fahrenheit.
 - Media (CDs, DVDs and drives) are damaged between 211°F and 311°F.



Very geeky back-up schema

- Level 4: Rotate the Level 3 external hard drive offsite at least monthly with a second Level 3 drive.





Encrypt your external drives!

- There are several ways to encrypt a drive to protect it from snooping if lost or stolen:
 - Windows 10 Pro includes Bitlocker.
 - Apple provides FileVault and you can encrypt from Finder.
 - Non operating system tools include VeraCrypt for Windows and Kruptos 2 Go for Mac, and there are many others.
 - Some antivirus tools have encryption systems.



Use a password manager!

- If you use a password manager, all you must remember is how to open the password database. You can generate random, complex passwords that are extremely difficult for computers to guess.
- Use random, complex passwords for ALL your online activity!
- Password managers abound and are sometimes provided by your antivirus software. None are perfect.
- Good alternatives (some free) include KeePass, LastPass, Dashlane, NordPass and Password Safe.

Very geeky back-up schema

- Level 5: Store important data in the cloud. Encrypt the data in transmission and at-rest to prevent hacking.
 - For Google Drive, Dropbox and OneDrive, you have a folder on your hard drive. You copy your files into that folder and the application synchronizes them into cloud storage with a secure connection.
 - Amazon Drive works through your web browser and a certain amount of storage is included with a Prime subscription.
 - Other providers include Spider Oak, Carbonite, Blaze, etc., and carry a subscription cost.





Here's what OneDrive looks like.

The screenshot shows a OneDrive interface. On the left is a sidebar with navigation options. The main pane displays a table of files and folders.

Name	Date modified	Type	Size
.tmp.drivedownload	10/9/2020 7:01 PM	File folder	
01-Letters	10/10/2020 9:18 AM	File folder	
02-Cemeteries	10/9/2020 8:04 PM	File folder	
03-People	10/9/2020 6:46 PM	File folder	
04-Books and sources	10/10/2020 9:18 AM	File folder	
05-Places	10/9/2020 7:00 PM	File folder	
06-Clooz	10/10/2020 2:39 AM	File folder	
06-RM7	10/14/2020 4:05 PM	File folder	
07-Forms and templates	10/10/2020 9:18 AM	File folder	
08-Guides and tips	10/10/2020 2:44 AM	File folder	
09-media	10/10/2020 4:01 AM	File folder	
10-Gen files to process	10/10/2020 9:19 AM	File folder	
11-Mindmaps and reports	10/10/2020 9:19 AM	File folder	
12-NGS and NCGS	10/10/2020 9:19 AM	File folder	
13-GSUG	10/10/2020 9:19 AM	File folder	
14-Durell	10/10/2020 9:19 AM	File folder	
15-Ships	10/10/2020 9:19 AM	File folder	
16-Zotero	10/10/2020 9:19 AM	File folder	
17-DNA stuff	10/10/2020 9:19 AM	File folder	
18-Charting Companion	10/10/2020 9:19 AM	File folder	
Gen research tasks.xlsx	9/16/2018 5:33 PM	Microsoft Excel W...	21 KB
Genealogy tips for the new FH.docx	12/26/2019 8:59 AM	Microsoft Word D...	20 KB
Genealogy tips for the new FH.pdf	12/26/2019 8:59 AM	Adobe Acrobat D...	94 KB

Some cloud storage options

Provider	Cost	Comment
Google Drive	15 GB free, more with payment	Shareable, convenient
Amazon Prime	Included with Prime subscription.	Unlimited storage for photos with fast search.
Microsoft OneDrive	5 GB free, more with payment. 1 TB included with MS 365.	Shareable, convenient
DropBox Basic	2 GB free, some advertising freebies, more with payment and inviting others.	Shareable, convenient. Free version on only three devices.
Spider Oak One Backup	150GB, \$6/ mo, \$69/ year.	Very secure
Back Blaze	\$6/ mo, \$60/ year.	Unlimited data storage

How do you copy files to storage?

- Drag and drop to your external drive or cloud storage folder.
- Use copy tools.
 - Free File Sync (<https://freefilesync.org/>) has versions for Windows, macOS and Linux.
 - Time Machine for the MAC platform. Built into the Apple operating system.

Most DGS does not work well if data files are used from cloud storage. Use them from your hard drive and copy the file to cloud storage when you're finished for the day.

Technology marches on!

- Audio
 - 78 rpm records
 - 33 1/3 rpm records
 - Reel to Reel
 - Cassette tapes
 - CD rom
 - MP3
 - Streaming
- Video
 - 16mm and Super 8 film
 - Betamax
 - VHS
 - Laserdisc
 - CD's
 - DVD's
 - Blue Ray
 - Streaming
 - Your smart phone!
- Storage
 - Paper
 - Software programs
 - 10MB hard drives
 - Big hard drives
 - Huge hard drives!
 - Floppy disks
 - 8", then 5 ¼", then 3 ½"
 - Iomega
 - Thumb drives increased in size

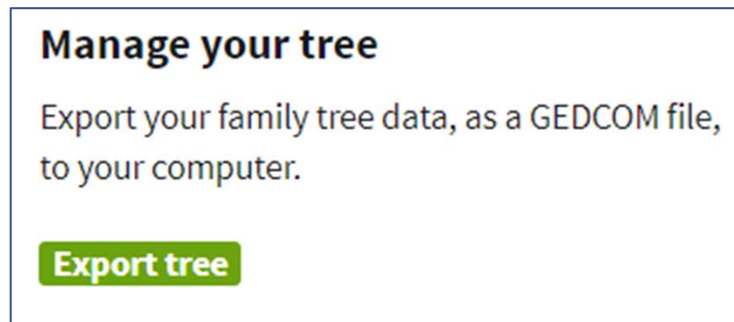
**Many old technologies cannot
now be read!
You must transfer your
information to new media
periodically!**



Sharing with collaborators

Digital genealogy sharing

- Send files and information via email.
- Exchange GEDCOM files, which is an easy way to provide a lot of info quickly.
 - All DGS allows you to export your data to a GEDCOM file and read it into another, but implementation of the standard isn't standard! Example: shared facts.
 - Ancestry lets you export your tree.



- FamilySearch lets you upload a file to preserve an unchanged version but does not support export/ download.

Digital genealogy sharing, cont'd.

- Create a sharable folder or file in the cloud.
 - Remember, “the cloud” is simply someone else’s computer at a physical distance from you.
 - You can share folders in almost all the cloud providers.
 - Share GED files, pictures, documents, etc.
 - It is best not to share DGS data files that are being used. Share copies, not your active file.
- Use OneNote and share a notebook.
 - Lots of text info, embedded pictures, etc.
 - This presentation was developed using OneNote for collaboration, through One Drive.

Digital genealogy sharing, cont'd.

- Provide access to your online tree.
 - Limit access privileges to only those collaborators need.
 - Ancestry allows you to collaborate without synchronization issues.

Manage invitees + Invite people

Username	Nickname	i Role	i Living Information	Tools
cwikander1	<input type="text" value="cwikander"/>	Guest ▼	<input type="checkbox"/> Can see living people	Remove
mymagicbrushes	<input type="text" value="mymagicbrushes"/>	Guest ▼	<input type="checkbox"/> Can see living people	Remove
swtsherlock	<input type="text" value="nikki"/>	Contributor ▼	<input checked="" type="checkbox"/> Can see living people	Remove
tom_bush3	<input type="text" value="tom.bush3"/>	Guest ▼	<input type="checkbox"/> Can see living people	Remove
biz.davis2012@gmail.com <small>(has not responded to invite)</small>	<input type="text" value="biz.davis2012"/>	Contributor ▼	<input checked="" type="checkbox"/> Can see living people	Remove Reinvite
Username	Nickname	Role	Living Information	Tools

Save Changes

- FamilySearch uses the model “One Tree to Rule Them All,” so anybody can edit anything.
 - Collaborators won’t be able to see your living people.



Improve collaboration by posting your tree in the cloud.

- Post your family tree online in your own web space using special software like TNG (<https://www.tngsitebuilding.com/>). *Complex.*
- Many DGS let you post your tree to free web space. See mine at <http://sites.rootsmagic.com/Davis-Boyt/>. *Moderate difficulty.*
- Post your tree on sites like rootsweb.com.
- Make your Ancestry tree “Public.” *Easy.*



Scanning Tools



Convert your photos and paper files to digital format using a document scanner

- Scanners abound. Cheap ink-jet printers and all-in-one machines typically have a scanning function.
 - Next page discusses differences.
- Service bureaus exist for batch scanning of documents and photos.
 - Service bureaus save time, which might be scarcer than your dollars.
- Digital files are easier to save and share than paper.
- Digital files are a preservation method for the originals, which may be delicate.

Scanner examples

	Scanner	About
A	Fujitsu ScanSnap ix1500	Scans to many file formats. Quickly scans both sides simultaneously. Includes OCR software. Paper and photos.
B	Epson DS-40	Scans one sheet at a time, one sided. A good travel scanner for documents.
C	Epson V550	Flatbed scanner for photos and large documents. Can scan film, slides and negatives.
D	Multifunction fax machine	Most have a scanning function. Smaller flatbed, sometimes auto document feed.
E	Wand scanner	For framed items, fabrics, etc.
F	Your phone or digital camera	Take pictures of documents, photos, landscapes, etc.



A



B



C



D



E



F

A copy stand can be useful.



Good to photograph large format items like photo albums.

Visualization of your family history

Use Google Map to visualize.

- Open your web browser. Once you're signed into your Google account, head to Google Maps.
 - Your Google account is the same one you use with Google Drive.
- To get started, click on the "My Places" option at the left of your screen, under the Google logo.
 - Create Map. You can do this within Google or import data from a variety of file types.
 - Add a Location and then add more locations!
 - Zoom on Your Location.
 - Draw a Route. Add lines and shapes to your map.
 - Add photos, video, text notes and extra information.
 - Share a map with a web address. Embed a map into a web page. Take a screen shot and save to a file.

<https://support.google.com/mymaps/topic/3024924?hl=en>

Example: custom Google Map

Davis-Boyt Family genealogy
10 views
All changes saved in Drive

Map controls: Add layer, Share, Preview

- Hearn/ Hearne Family
- Davis-Boyt marriage perambulati...
- Bush ancestral line**
 - Sequence of color and letters
 - 1722 Bertie Cty, NC
 - 1749 New Bern
 - 1760 Johnston County, NC
 - 1765 Barnwell, SC
 - 1778 Orangeburg, SC
 - 1792 Dublin GA
 - 1813 Milledgeville
 - 1817 Fort Gaines, GA
 - 1821 Early County, GA
 - 1880 Colquitt, GA
 - 1910 Mitchell, GA
 - 1920 Pelham, GA
- Laird ancestral line
- Dick ancestral line
- Goodwin ancestral line
- Base map

Map locations: St. Louis, Cincinnati, Louisville, Lexington, Nashville, Knoxville, Asheville, Charlotte, Greensboro, Durham, Norfolk, Virginia Beach, Richmond, Roanoke, Philadelphia, Washington, New Jersey, Delaware, Maryland, WEST VIRGINIA, VIRGINIA, NORTH CAROLINA, SOUTH CAROLINA, GEORGIA, ALABAMA, MISSISSIPPI, TENNESSEE, KENTUCKY, FLORIDA, Jacksonville, Savannah, Columbus, Atlanta, Chattanooga, Huntsville, Memphis, Birmingham, Tuscaloosa, Montgomery, Tallahassee, Panama City Beach, Pensacola, Mobile, New Orleans, Daytona Beach, Orlando, Tampa, St. Petersburg, West Palm Beach, Miami.

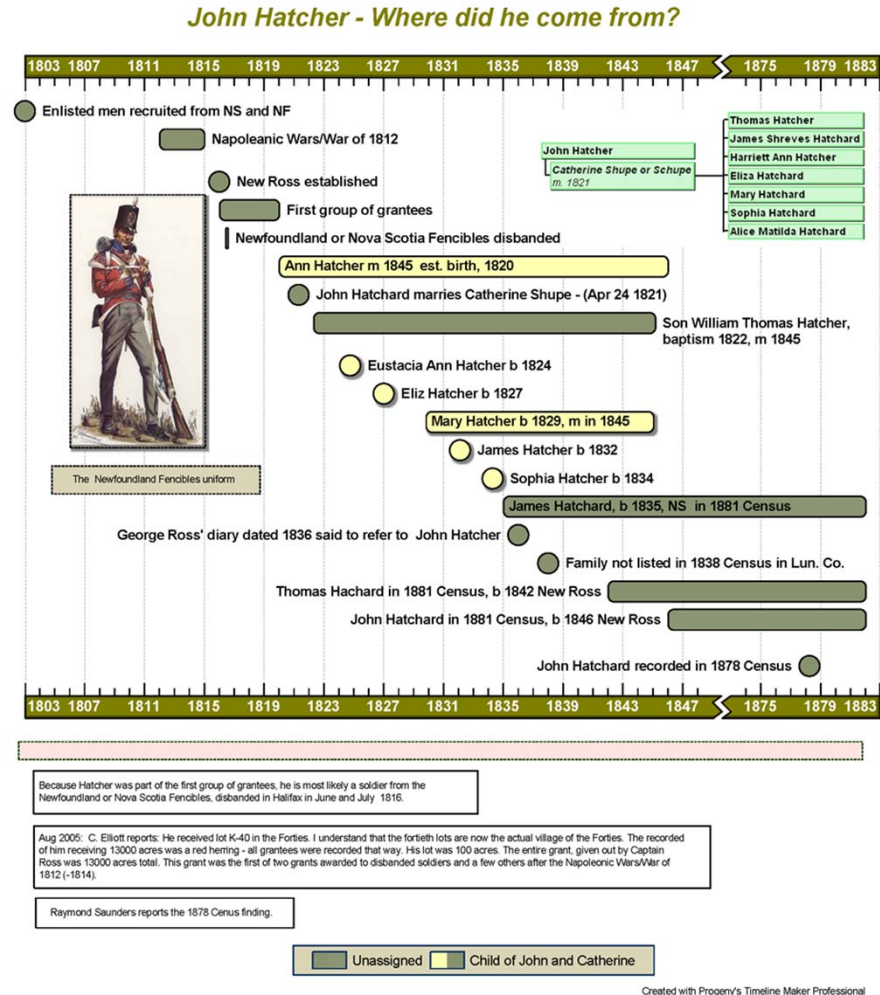


Uses for custom Google Maps

- Use Google Maps to show migration patterns or places an ancestor lived.
- List all the places you traveled on a particular family vacation.
- Show all the countries you've visited in the world.
- Zoom in on a small area and pinpoint all the addresses of family, friends and neighbors for the brick wall ancestor.
- Use layers to understand relationships. Satellite, terrain, political, etc.
- Focus on the blank spots.

Use timelines to solve problems

- Make your own with Word or use a commercial product.
- Lets you see what you've already done, and what still needs to be done.
- Keeps you organized when working on multiple lines or generations.
- Might highlight connections, e.g., a boarder in one census that is a SIL in next.
- Distinguishes between people with same name, age or birthplace.
- Lets you see trends and inconsistencies across census records.



Timeline Maker Pro



More tools

More tools

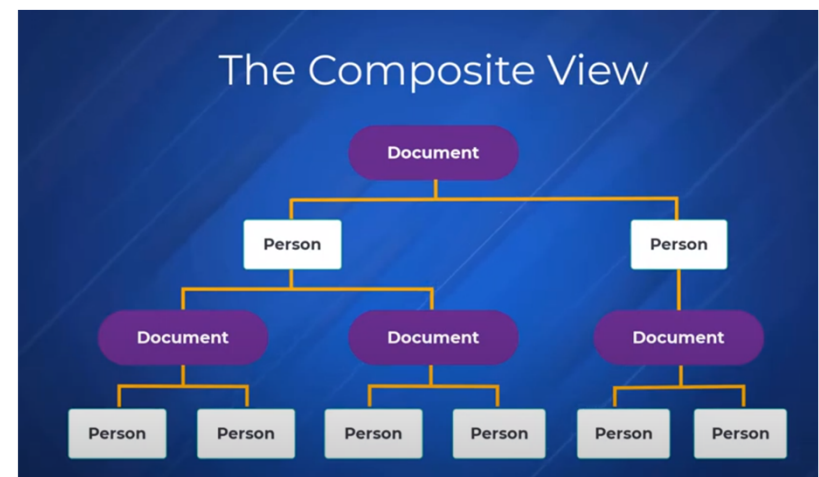
- Read the blog post on Going Digital at <https://www.wearecousins.info/2015/01/introduction-to-going-digital-with-your-genealogy/>.
- Use Family Tree Analyzer to investigate your family tree in new and interesting ways.
 - See where your ancestors lived and moved over time using the maps feature. Find errors in your tree. See lists of who is missing from census searches then click their name to automatically search on Ancestry, Find My Past, FamilySearch etc.
 - <https://ftanalyzer.com/> for Windows and Mac.
- Atlas of historical county boundaries: <http://publications.newberry.org/ahcbp/index.html>

Zotero helps your research

- <https://www.zotero.org/>. Free. Windows, Mac and Linux.
- Take quick citation information from your web browser. Instantly creates references and bibliographies for any text editor.
- Bibliographies help you when you publish.
- <https://zoteroforgenealogy.com/> discusses many ways to use Zotero in your research.

Clooz uses a document-centric approach.

- <https://clooz.com/>, 14-day free trial.
- A very detailed document recording system with excellent indexing and image linking.
- Example: record all info about a family from their census record.
- Export info to your DGS.
- Link persons to documents.



Evidentia focuses on sources.

- <https://evidentiasoftware.com/>. Free trial.
- Organize sources, assign evidence to multiple people and events and use strict approach to proving/ solving puzzles.
- Sort through fiction versus fact. Claims from each source are proven when each claim is supported by hard evidence. Analyze evidence to answer research questions.
- Export research results via GEDCOM to DGS and online sites.



Roots Tech 2021 is free!

- Roots Tech is one of the largest genealogy conventions, usually held annually Salt Lake City.
- The February 2021 event will be entirely virtual and completely free.
- Sign up at <https://www.rootstech.org/?lang=eng>.



Digital workflow: what steps do you follow? One example:

- Find a new source
- Create a digital file
 - Scan in paper or photo
 - Download a file from a web site
 - Combine documents and photos in a single file
- Give the file an appropriate file name per your filing system.
 - If using library management approach, enter the metadata about the file in your database.
- Store the file in the appropriate place on your hard drive within your filing system.
- Link or embed the file in the right fact, source or citation in your DGS.
- If a photo, embed desired EXIF or IPTC information in the file.
- Back up your digital assets!

I recommend you devise and consistently follow your digital workflow!

Questions?

Contact Jim at

genealogy@creeksidefarm.org

Schedule individual sessions at

[this link](#)

Back-up slides

Adobe Lightroom

- Import your photos into a catalog, and either move them or leave them where they are.
- Non-destructively edit photos to enhance or add special effects. You can experiment with all sorts of changes without ever changing the original photo.
- Write photo metadata, singly or in batch.
- Manage your digital assets across all your devices and platforms (with Creative Cloud version).
- Share photos in multiple ways.

www.adobe.com/lightroom

DGS not covered above

- GRAMPS. Free. Windows, Mac and Linux. <https://gramps-project.org/>.
- The Next Generation (TNG). Requires web space hosting and some tech knowledge.
- Ancestral Quest. <https://www.ancquest.com/index.htm>. Windows and Mac. Free limited version.
- Family Tree Builder. <https://www.myheritage.com/family-tree-builder>. Free. Associated with the My Heritage online site.
- GenoPro. <https://genopro.com/>. Used by many scientific disciplines to map complicated social relationships and genograms.
- Personal Ancestral File. Not supported since 2013 but still active.
- Mac Family Tree. Mac specific.