



# GENEALOGICAL ORGANIZATION

SOFTWARE - PAPER

BY DON TAYLOR



# FORM FOLLOWS FUNCTION

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- WHY PEOPLE DO GENEALOGY
  - MEDICAL, PATERNAL, OR INHERITANCE PURPOSES
  - HERITAGE SOCIETY PARTICIPATION
  - RELIGIOUS REASONS
  - RECONNECT WITH FAMILY
  - VALIDATE OR DISPROVE STORIES REGARDING ANCESTORS
  - **GET TO KNOW YOUR ANCESTORS**



# ORGANIZATION

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- DESKTOP SOFTWARE
- ON-LINE
- PAPER





# GENEALOGY SOFTWARE

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- ❑ FILES KEPT ON YOUR COMPUTER
- ❑ OFTEN HAVE ON-LINE FEATURES
- ❑ REPORTING FEATURES
- ❑ USUALLY, EASY DOCUMENTATION WITH USE OF HINT PARTNERS.
- ❑ MOST ARE INEXPENSIVE
  - ❑ FREE TO \$99



# CONSIDERATIONS

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- ❑ COMPLEXITY – BASIC, FULL FEATURED, IN BETWEEN
- ❑ COST – FREE – FEE – PURCHASE
- ❑ LOCATION – YOUR COMPUTER – ON LINE - BOTH
- ❑ OWNERSHIP – YOU – ONLINE COMPANY
- ❑ PRIVACY – PRIVATE – SHARE – PUBLIC
- ❑ SYNCHRONIZATION – ANCESTRY, FAMILY SEARCH



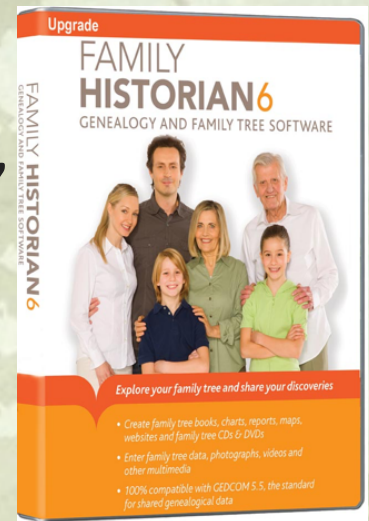
# GENEALOGY SOFTWARE



ANCESTRAL QUEST 15

WINDOWS & MAC (\$29.95/38.95)

HINTS: FAMILY SEARCH, FIND MY PAST,  
HERITAGE



FAMILY HISTORIAN 6

WINDOWS ONLY (\$46.50)

HINTS: FIND MY PAST, MY HERITAGE



FAMILY TREE BUILDER 8

WINDOWS & MAC (SORT OF FREE)

ISRAELI COMPANY

HINTS: MY HERITAGE



# GENEALOGY SOFTWARE



## **FAMILY TREE MAKER 2017**

WINDOWS & MAC (\$79.95)

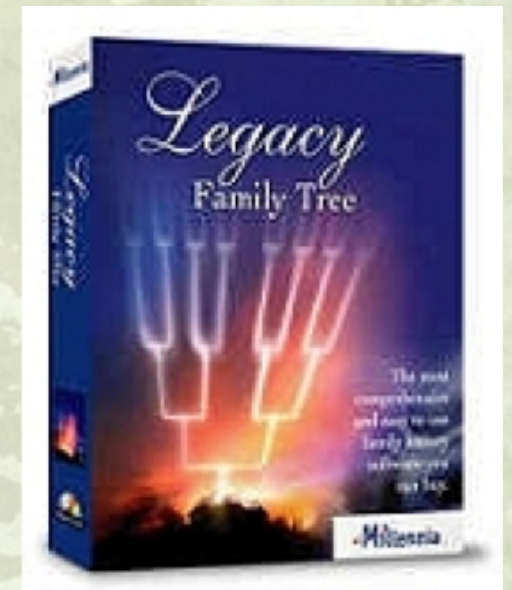
RUSSIAN COMPANY

HINTS: ANCESTRY, FAMILY



SEARCH

- LEGACY FAMILY TREE 9 (WINDOWS)  
BOUGHT BY MYHERITAGE  
HINTS: FAMILY SEARCH, FIND MY PAST,  
GENEALOGY BANK, & MYHERITAGE.



- REUNION 12 (NEW) (MAC) \$99 NEW  
NO HISTORIC PROCESS.



# GENEALOGY SOFTWARE

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- ☐ ROOTS MAGIC
- ☐ MAC VERSION IS RUNTIME
- ☐ USED BY PROFESSIONALS
- ☐ SYNCs WITH ANCESTRY; PARTIAL SYNC WITH FAMILY SEARCH
- ☐ SEARCH FROM WITHIN APP.
- ☐ FREE VERSION IS POWERFUL
- ☐ ONE-TIME COST BUT UPGRADES EVERY FEW YEARS.





# ONLINE TREES

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- ☐ NO SOFTWARE UPDATES
- ☐ ACCESS FROM ANY COMPUTER
- ☐ OFTEN HAVE APP ACCESS
- ☐ CORROBORATION EASIER
- ☐ USUALLY EASIER CITATIONS LIVING PEOPLE CONTROLLED
- ☐ SUBSCRIPTION NAGGING COMMON





# ONLINE TREES

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- ☐ ANCESTRY.COM
- ☐ YOUR TREE – YOU ARE IN COMPLETE CONTROL!
- ☐ PUBLIC OR PRIVATE
- ☐ EASY LINKAGE TO ANCESTRY DNA
- ☐ **NEED SUBSCRIPTION TO USE MANY FEATURES**



# ONLINE TREES

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- FAMILY SEARCH
  - NO COST – NO NAGGING
  - SHARED “WORLD TREE”
  - ONLY YOU SEE YOUR LIVING
  - HAS DOCUMENT SAVE
  - GREAT “SOURCE BOX” FEATURE
  - SYNCs WITH ROOTS MAGIC AND FTM 2017



# ONLINE TREES

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- ☐ WIKITREE
  - ☐ NO COST
  - ☐ NO SYNCING
  - ☐ SOME DNA INTEGRATION
  - ☐ NOT A SEARCH SITE



# SOFTWARE/ONLINE MIX SYNCHRONIZATION

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- ☐ ANCESTRY TREES

- ☐ FAMILY TREE MAKER 2017

- ☐ ROOTS MAGIC 7 WITH TREE SHARE

- ☐ FAMILY SEARCH

- ☐ ANCESTRAL QUEST 15

- ☐ FAMILY TREE MAKER 2017

- ☐ LEGACY FAMILY TREE

- ☐ ROOTS MAGIC 7 WITH TREE SHARE





# WHAT I DO

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- ❑ I USE FAMILY TREE MAKER 2017.
- ❑ I KEEP COPIES OF ALL ELECTRONIC DOCUMENTS ON MY COMPUTER BOTH IN FTM AND IN SEPARATE FILES.
- ❑ I SYNCHRONIZE WITH ANCESTRY TO SHARE. FACTS AND SOURCES
- ❑ I UPDATE FAMILY SEARCH ANY DOCUMENTS WITH FAMILY SEARCH RECORDS
- ❑ I BLOG ABOUT FAMILY MEMBERS AS I GET TO KNOW THEM



# PAPER ORGANIZATION

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PILES OF  
PAPER

PROBABLY  
NOT THE  
BEST



# PAPER ORGANIZATION

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- FILE CABINET
  - PROBABLY ALREADY HAVE
  - MANY ORGANIZATION OPTIONS
    - TABS, COLORS, ETC.



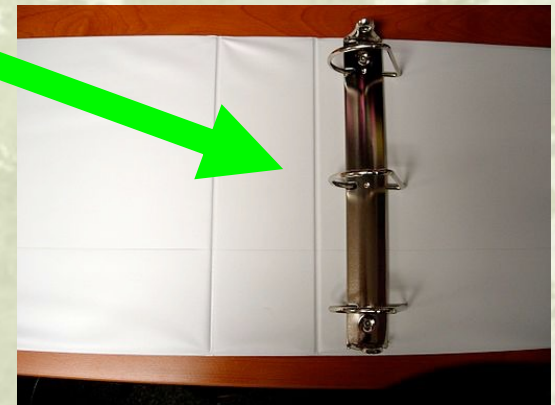
- BINDERS
  - PORTABLE
  - SEPARATE ORIGINALS FROM PRINTOUTS



# PAPER MANAGEMENT

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- BINDER
  - TWO KINDS REGULAR & D RING
  - HIGHLY RECOMMEND D RING
- DOCUMENT PROTECTORS
  - “ARCHIVAL SAFE; ACID FREE”
  - “HEAVY DUTY” DIVIDERS





# USE FORMS TO DOCUMENT

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- ❑ ANCESTRY.COM - [CHARTS AND FORMS](#)
- ❑ CYNDI'S LIST - [PRINTABLE CHARTS & FORMS](#)
- ❑ FAMILY SEARCH – [GENEALOGY RESEARCH FORMS](#)
- ❑ FAMILY TREE MAGAZINE – [MANY VARIED FORMS](#)
- ❑ NATIONAL ARCHIVES – [CHARTS AND FORMS](#)
  - ❑ FORMS: ANCESTRAL CHART
  - ❑ FAMILY GROUP SHEET
  - ❑ CENSUS FORMS - US, UK, CANADA



# ORGANIZATION - PEOPLE

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- ❑ BINDER/DIVIDER FOR EACH ANCESTRAL SURNAME
- ❑ BY NAME OF THE HEAD OF HOUSEHOLD
- ❑ SURNAME, FIRSTNAME (YEAR OF BIRTH IF NEEDED)
  - ❑ FOR WOMEN, SURNAME AT THE TIME (MAIDEN)
- ❑ MAKE A COPY IF CONFUSING (AND NOTE IT)
  - ❑ EXAMPLE: MY GRANDMOTHER (MONTRAN) LIVED WITH HER GRANDMOTHER (BLACKHURST-BARBER) IN 1920.

HAVE A REASON FOR WHAT YOU DO



# ORGANIZATION - SOURCES

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- BY SOURCE
  - 1920 CENSUS, PORTLAND PRESS HERALD, ETC.
- BY REPOSITORY
  - ANCESTRY.COM, NEWSPAPERS.COM, ETC.
- BY NUMBER
  - ASSIGN A SOURCE NUMBER FOR EVERY SOURCE YOU HAVE.

HAVE A REASON FOR WHAT YOU DO



# ORG. - COMPUTER FILES

## GOAL IS TO USE YOUR COMPUTER'S SEARCH

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- BE CONSISTENT - HAVE A PATTERN
  - FOR EXAMPLE: DATE, WHAT, WHERE, WHO, SOURCE
    - 1910 CENSUS – SCARBOROUGH, CUMBERLAND, MAINE – WINSLOW HOMER - FS.JPEG (FS STANDS FOR FAMILY SEARCH)
    - 1920-09-14 – BALTIMORE AMERICAN (BALTIMORE, MD) PAGE 5, “BATHING GIRLS AT GARDEN” – DONNA MONTRAN – NEWSPAPERS.COM
- SHORT FORM OF CITATION



# ORG. - COMPUTER FILES

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- I ALSO USE FILE COMMENTS TO PROVIDE SOURCE
- 1910 CENSUS – SCARBOROUGH, CUMBERLAND, MAINE – WINSLOW HOMER - FS.JPEG

## **Citing this Record**

"United States Census, 1910," database with images, *FamilySearch* (<https://familysearch.org/ark:/61903/1:1:MR3M-SNS> : 20 October 2015), Winslow Homer, Scarboro, Cumberland, Maine, United States; citing enumeration district (ED) ED 101, sheet 15B, NARA microfilm publication T624 (Washington, D.C.: National Archives and Records Administration, n.d.); FHL microfilm 1,374,551.



# DOCUMENT - DOCUMENT

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- DID I MENTION  
DOCUMENT - DOCUMENT - DOCUMENT  
COMPUTER – ONLINE – PAPER - ALL
- PROPER CITATIONS (MOST SOURCES PROVIDE)
  - FOR BOOKS: WORLDCAT.ORG CITE. I USE APA (6<sup>TH</sup> ED.)
  - CREDIBILITY - VERIFICATION
- LINK FACTS SOURCE  
– NO SOURCE MEANS SPECULATION



# WRITE A STORY

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Bring it all together.

You have the basic information.

You have an understanding of some of the things your ancestor did.

Tell a story. What might the grandchildren like to hear.

Share the story. Family, Facebook, Blog.



# I USE EVERYTHING

#1 - I use desktop genealogical software for everything.

#2 - I replicate to an online site & Blog my stories.

#2 - I keep electronic copies filed by Line, surname, date, source.

#3 - I keep folders for all original documents with document protectors

#4 - I use binders for projects for others.



My Site:

[dontaylorgenealogy.com](http://dontaylorgenealogy.com)

# QUESTIONS?



My email [DonTaylor50@me.com](mailto:DonTaylor50@me.com)