12-Step Checklist to Using Your Genealogy Computer Program
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Your genealogy computer program is very powerful – but are you using it to its full potential? This lecture will discuss the "little" things in your software which make a big difference.

	FTM	Legacy Family Tree 7	PAF 5	RootsMagic
1. Relationships	Tools > Relationship Calculator	Tools > Set Relationships and Tools > Relationship Calculator	Tools > Preferences > File > Change	Tools > Relationship Calculator
2. Bookmarks	People button > Person > Add bookmark	Bookmarks icon; Ctrl+S (go to startup person); Quick-Bookmarks	Ctrl+Home	Ctrl+B or Search>Bookmarks; Ctrl+Home
3. Direct Line	Not yet . . .	Can indicate in cascading FGRs with an X; direct line is highlighted in lists	Can indicate in cascading FGRs with an X	Not yet . . .
4. ½ relationships	Click on the Choose Spouse button to switch to the next spouse to view the other siblings.	Right-click on child > View > View ½ siblings; Chronology View.	Click on the Other Marriages button to switch to the next spouse to view the other siblings.	Click on the arrow next to the Spouses label; Print Reports > Lists > Timeline List
5. Symbols		+ § !		
6. Set the initial Startup family	Person > Set as Home Person	Options > Set Preferred Startup Family	Tools > Preferences > File > RIN of Home Person on File Open	Tools > Options > Database Options > Start person when opening this database
7. Preferences	Tools > Options	Options > Customize OR Ctrl+Z	Tools > Preferences OR Shift+Ctrl+P	Tools > Options
8. Create Backups	File > Backup	File > Backup Family File	File > Backup	File > Backup
9. Potential Problems	No report.	Reports icon > Books/Other > Potential Problems	File > Print Reports > Lists > Possible Problems	Tools > Problem Search
10. File Maintenance	Tools > Compact File	File > File Maintenance	File > Check/Repair	File > Rebuild Indexes
11. Tree Finder	Use GenViewer (islands)	View > Tree Finder	Use GenViewer (islands)	Tools > Count Unlinked Trees
12. Customize toolbar		Right-click on Tool Bar		Tools > Options > Main Screen > Customize Toolbar

1. Relationships
Being able to visually understand how the currently-highlighted individual is related to you can be important. For example, when you clicked on Jeremiah COLE, if your relationships were set, it could tell you that he is your ½ 3rd great-uncle, 3 times removed. The relationships are not automatically displayed. You need to set the option. Then, as you add new individuals to your database, the new relationships will automatically be calculated and displayed.

2. Bookmarks
Bookmarks are shortcuts to navigating to a person. Each program has the ability to quickly navigate to the "home" person. All but PAF have additional bookmarks that can be set. These additional bookmarks can be useful when you are researching a few different families at once. Just set a bookmark on each person, and you can very quickly navigate to them.

3. Direct Line
When printing cascading family group records, it is often helpful to know which of the children is part of the direct line. Most of the programs will mark the direct line child with an X.

4. ½ Relationships
Just like today's families, your ancestral family may have had ½ siblings growing up together. Being able to easily view the "complete" family is helpful in the analysis of your research. Arranging the families into a chronology/timeline is one way to study the complete family. Progeny's *Charting Companion* software (www.progenysoftware.com) will combine multiple family group records into one report. Genelines, Family Tree Maker, Legacy, and RootsMagic will create a timeline from the data you have already entered.

5. Symbols
Understanding the little symbols on the screen can save you time:

>   Family Tree Maker: Ancestry hints; has kids
>   Legacy: has descendants or ancestors; child is married, but has no descendants; never married
>   PAF: has notes and multimedia; has notes; child has no descendants
>   RootsMagic: has ancestors; has descendants

6. Set the Initial Startup Family
There is nothing more frustrating than opening your software, only to view your 19th cousin, 4 times removed – every time. Setting the initial startup family allows you to select which person you want to have displayed when you start the software. You can either select a certain person to appear each time, or you can select to view the last person you were working with.

7. Preferences
Each program has different preferences that can be set – which colors to display, LDS options, surnames in ALL CAPS, formatting of dates, displaying RINs. To learn about all the different preferences, select one, and see what it does. Preferences will not "touch" your data. But it is still always a good idea to make a backup before playing with options with which you are not comfortable.

8. Create Backups
Creating a backup of your database isn't really that important – that's what we think until we lose everything! In addition to backing up to a floppy disk or hard drive, consider these other alternatives:

- Backup to a USB/jump/flash drive, CD, DVD, external hard drive
- Create a backup/GEDCOM and send (email) it to all your family members. Even if they don't have any interest in genealogy, they at least have a backup for you, off-site, in case anything happens.
- Publish your GEDCOM to an Internet site. Rootsweb's WorldConnect is free. You can remove it or update it at any time.
- Offsite backups: Mozy.com, Dropbox, BackBlaze

9. Potential Problems
This tool will search your database for potential problems caused by typos, or mis-interpretation of records. It can warn you if a child was born before the parents were married, if the person was married before the age of 12, if the child was born after the mother died, etc. Legacy and RootsMagic allow you to ignore individual problems from the potential problems report.

10. File Maintenance
Sometimes the database can develop problems that have nothing to do with the information you have typed. These problems may occur if your computer was turned off before the software was closed, and power failure, etc. Always make a backup before performing file maintenance.

11. Tree Finder
For one reason or another, intentionally or not, you may have "floating" individuals in your database that are not linked to your main family lines. The tree finder tools will search for these unlinked individuals. You can then confirm these separate trees, or link them where they should be linked.

12. Customize Toolbar
The toolbar has icons which represent the most commonly-used features in the software. Legacy and RootsMagic allow you to customize the toolbar.