



# Beyond Family Tree Maker: *How to Take Control of Preserving Your Family Tree Information*

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Are you taking care of your family tree—and all that research and the legacy it represents—in the best possible way? Here's a solid game plan for taking care of your family history research. Opinions expressed are based on my own personal experience. I encourage you to do your own homework, ask these questions, and most importantly, put a plan in place for protecting your family history.

## ***Even if Your Head Is in the Cloud, Keep Your Heart at Home***

### **Family Tree Maker Retirement**

- In December 2015, Ancestry.com announced the “retirement” of its Family Tree Maker desktop software.
- In February 2016, Ancestry.com announced that another company would continue supporting Family Tree Maker software, but not before thousands of Family Tree Maker customers took their business elsewhere.

### **The Cloud**

- Moving into the future means moving the desktop onto the cloud (or online database).
- Companies like Adobe and Microsoft have already moved that direction by discontinuing physical software sales and moving to a cloud-based subscription service.
- In the genealogy space, some of us have deliberately chosen to store certain files online. (For example: Evernote, a free note-taking app and software.)

### **Protect Your Family Tree**

We all want to safeguard our family tree files. But I know that thousands if not millions of people have gradually gotten into the habit of doing much or all of their family history research and source citations in their online family trees at Ancestry.com and other genealogy websites. It certainly seems convenient. The tools to build a tree are right there on the site and so are the records you can connect to them. ***So why wouldn't you continue to do that?***

### **Security**

- When you keep your master tree on someone else's website, you're losing control of its security.
  - Websites go down.
  - They get hacked.
  - They go out of business or sell out to another company who may or may not be interested in maintaining your tree.
- Our family trees are not Ancestry.com's responsibility, or anyone else's for that matter. They are our responsibilities.

### **Privacy / Money Tree**

- The information you share online is financially valuable to genealogy websites. They can and will use your tree and DNA data for their own purposes.

- DNA has dollar signs written all over it. Companies sell aggregated data, including de-identified DNA test results, to other companies.
  - They are beginning to use it for medical and pharmaceutical research.
  - Both AncestryDNA and 23andMe have these kinds of business partnerships.

Read [Ancestry's Terms of Service](#) to refresh yourself on what they can do with your information.

Read [this article](#) at Wired.com about one partnership Ancestry has with the Google-owned biotech company Calico.

### ***It's Your Life, Your Family, Your Data – Protect It!***

#### **Doing the Genealogy 2-Step to Protect Your Research**

Try this 2-step “genealogist-protected approach” to retain control and privacy.

#### **Step 1: Purchase a genealogy software program and load it on your computer.**

Let's start with the current status of Family Tree Maker software:

- On Feb 2, 2016, Ancestry announced that Family Tree Maker software for Mac and Windows was being acquired by Software MacKiev.

According to the press release:

- You will receive software updates and new versions from Software MacKiev, and have the ability to purchase new versions of Family Tree Maker from Software MacKiev as they are released.
- You will have continued access to Ancestry Hints, Ancestry searches, and be able to save your tree on Ancestry with Family Tree Maker moving forward.”

#### **What do you need your family history software to do for you?**

Basic functions of most family tree software:

- Organize your tree data
- Keep track of all details related to a person
- Link to your sources
- Add digitized photos, documents, sound, video, etc.
- Create charts, reports, and other ‘shareables’

#### **Questions to ask about synchronization:**

- How well does your software interact with the genealogy websites you use? A lot of us use more than one!
- How easily does your software help you transfer discoveries from all the websites you use to your software?
- Does it sync your software with any part of your tree you DO choose to keep online at those sites?

#### **Software Question Checklist**

Here are some of the key questions to ask when evaluating a software program:

- Does it offer a free trial, so I can try before I buy?
- Does it have free training materials (videos, forums, FAQs) to teach me to use it?
- Is the company growing or declining?
- Does it have a free app for mobile use?
- Can it produce a quality GEDCOM file?
- Is it available for my computer(s) (Windows and/or Mac?)

### ***My Personal Recommendation: Rootsmagic***

I have been using RootsMagic for years and in that time I've gotten to know it well and watch it grow. This software is excellent, reliable and extremely well supported. They continue to give me new reasons to be happy I choose them as they grow and adapt in the changing genealogy marketplace. Here are examples:

- They have reached out to folks who were stranded by the Family Tree Maker announcement, and have walked thousands of them through the process of transferring their Family Tree Maker files into RootsMagic.
- By the end of 2016, it is planned that RootsMagic trees will sync with Ancestry trees, and from within the software you will be able to access Ancestry hints and searches.
- RootsMagic is known as the software "[easiest to sync with FamilySearch](#)."
- RootsMagic can pull [web hints from MyHeritage.com](#) and it will soon start doing so with British records giant FindMyPast.com.
- RootsMagic backs up directly to Dropbox and Google Drive

*In the spirit of full disclosure that RootsMagic is a sponsor of my free Genealogy Gems podcast. But that's not why I mention it here. I have called it out for just the reasons I mentioned. I accepted them on as a sponsor **because** I use the software myself and have been so happy with it, not the other way around.*

### **Online Trees**

You might be wondering—if I just said not to solely put your master family tree online, why I am talking about software that allows you to sync with online versions of your family tree? Because, I'm not saying not to upload your tree. I'm suggesting that you do it strategically:

- Rather than upload your entire tree, export the portion of your tree that you want to generate "leads" on as a gedcom and upload that.
- Focus your efforts, hint reviews, and collaborations on certain parts of your tree, such as your direct ancestors and the brick walls.

### **Homework**

I encourage you to do your own homework, and use the criteria I've laid out for you here to help you make your decision. I hope your research will include downloading the free versions of the various programs and giving them a test drive.

- RootsMagic has [RootsMagic Essentials](#). It's fully operable software, there's no time limit after which it expires and you can always upgrade later to the full software.
- Legacy Family Tree has a free "standard" edition.
- MyHeritage has their free Family Tree Builder.

### **Step 2: Back up your entire computer with a cloud-based backup service.**

After choosing software that will live on your home computer, you need to protect the files you'll create on it. The best type of protection involves:

- multiple copies
- updated regularly and automatically
- at least one copy stored in a different physical location than your computer

### **Old School**

The old school way of backing up was to plug an external hard drive into your computer and copying the data onto it. There are multiple problems with this approach:

- You have to remember to do it
- It only creates one duplicate copy

- That external hard drive is still in your house, which means that if there is a disaster at your home it falls prey to the same damage as your computer
- External hard drives are mechanical devices that can break or be misplaced

### **The Modern Solution: Cloud Backup**

*There are many cloud back up services out there. Here's a comparison article by PC magazine for 2016: <http://www.pcmag.com/article2/0,2817,2288745,00.asp>*

Here's my list of topic things to look for:

- Backup of all files automatically (including video – not all services do!)
- Multiple/redundant copies of your data
- Free app for accessing files on mobile
- Encryption and security
- Ease of restoration
- Competitive price

### ***My Personal Recommendation: Backblaze***

I researched lots of different back up companies, and found Backblaze suits my needs because:

- it backs up all of my genealogy files (digitized documents, images, research notes, etc.)
- It backs up my personal and business files (video interviews and tutorials, audio files for my podcasts, text files and images for my books and blog posts, business files, etc.)
- it's affordable at about \$5 a month

You can learn more about it at <http://www.backblaze.com/Lisa>

*Yes, they too are now a sponsor of my podcast and have sponsored past episodes of The Family Tree Magazine podcast, but again, that's because of my personal experience with and belief in their product.*

### **Bottom Line**

Be responsible for the control and security of your master genealogy data – and all the other files on your computer. Personally, I do this when I:

- 1) Use RootsMagic as my master database on my desktop computer and download the app to my mobile devices. I also periodically export a complete gedcom file (the universal genealogy file format) of my database, and save that to my hard drive so that I have a universally usable version of my database immediately accessible at any time.
- 2) Strategically upload the portion of my trees that I'm researching to genealogy websites in order to generate new leads and connections, and reduce unwanted prompts.
- 3) Use the Backblaze cloud-based computer backup system that automatically backs up my entire computer (including my RootsMagic files) on an ongoing basis. This protects me from losing files due to theft, disaster at my home, computer crashes, and anything else that threatens my data.

Whatever software and backup system you choose, make sure it is right for your needs and protects your precious family history.