My Migration to Family Historian

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9 July 2022

Roots Users Group of Arlington, VA

Thanks to Jim Byram for his careful feedback,
Linda Reinfeld for being an enthusiastic co-migrator, and the
Boston Area TMG User Group for listening!!

Topics

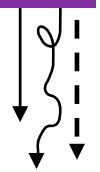
- Migration
- What do I like about Family Historian? Not like about FH?
- The preparation and testing process
- Deep dive: how I learn and test, with a focus on FH Facts
- Wrap-up

Next up

- *Linda Reinfeld's experience*
- *Q&A*

Disclaimers

- My reasons for migrating (or not) may be different than yours (or not).
- Results of my testing are not authoritative and may not be valid for you.
- I am still working on preparation for migration.
- I may have erred or missed something.
- I am a Family Historian beginner+.
- Your mileage will vary.



Migration

FH is *not* TMG. It's like comparing …

Source: Wikipedia

Why do I want to migrate?

- I want to future-proof my databases.
  1. I have had at least 3 corruptions in my TMG database.
  2. I want it to be easy for my successors to use my data.
- I like FH.
- If I am going to migrate, I want to do so sooner rather than later.
- Even if I eventually decide not to migrate, at least I will have cleaned my TMG data.

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On the other hand …

- I know TMG (pretty well). I am used to TMG. I like TMG.
- It is not easy to learn a new complex software program.
- I have to rethink many of my long-established personal standards, best practices, workflows.
- For me, migration requires a lot of careful work. I am spending more time preparing to migrate than I am doing genealogy.
- What if …… ?

For Other Perspectives on Migration…

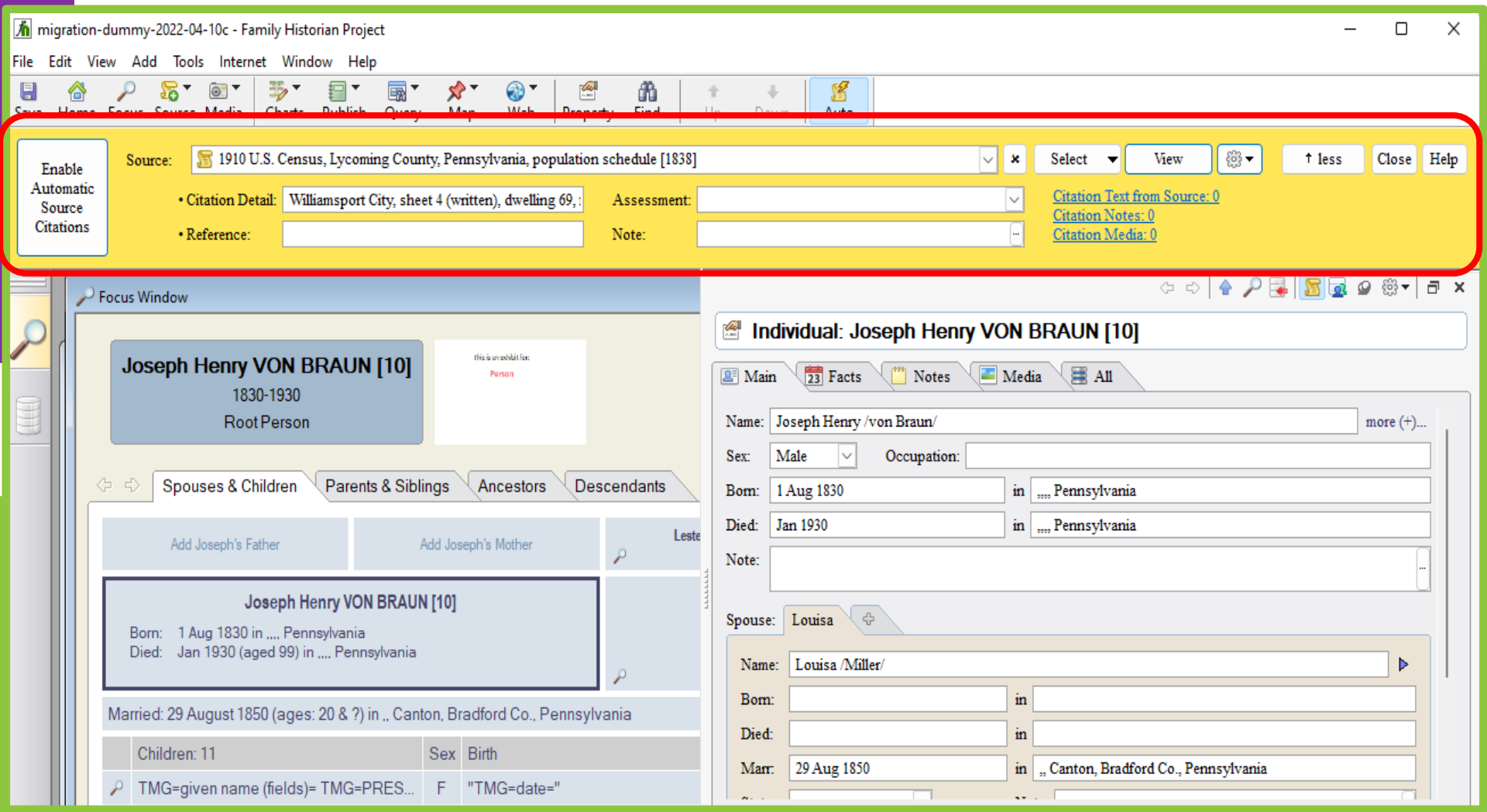
- "The best program for any given person is the one they like to use the most.“ Jane Taubman, 2019, https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=16593&p=90463#p90463
- **TMG-L**, https://tmg-l.groups.io/g/main/
- **TMG-Refugees**, https://groups.io/login?r=https%3A%2F%2Fgroups.io%2Fg%2FTMG-Refugees
- **Family Historian User Group (FHUG) Forum**, https://www.fhug.org.uk/forum/
  - Advice Needed from TMG Users Who Switched to FH, https://www.fhug.org.uk/forum/viewtopic.php?f=32&t=16593&p=90463#p90463

What do I (not) like about Family Historian?

What do I like about Family Historian?

- Everyday tasks seem straightforward.
- Data entry feels fast.
  - Automatic source citations.
  - Looking forward to experimenting with Ancestral Sources and Source-Driven Data Entry.
- Powerful search capabilities, e.g. find people named Sam with parents Joseph and Louisa. Possible in FH and TMG. Not possible in RootsMagic (when I tested).
- Plugin-capability provides custom extensibility. I can modify existing plugins or write my own (!?!?!?).
- Direct import from TMG seems to be pretty good.
- FH supports Sort Dates (as of Dec 2020).
- Works with GedSite.
- GEDCOM-based. I feel more confident that
  - I will be able get my data out again more easily (as compared with TMG).
  - My successors will be able to use my data more easily.
- Calico Pie seems to have worked hard to attract TMG users.
- Excellent peer-to-peer support.
- The FH user community discusses things of interest to me.
- *Your mileage will vary.*

Automatic Source Citations



Query

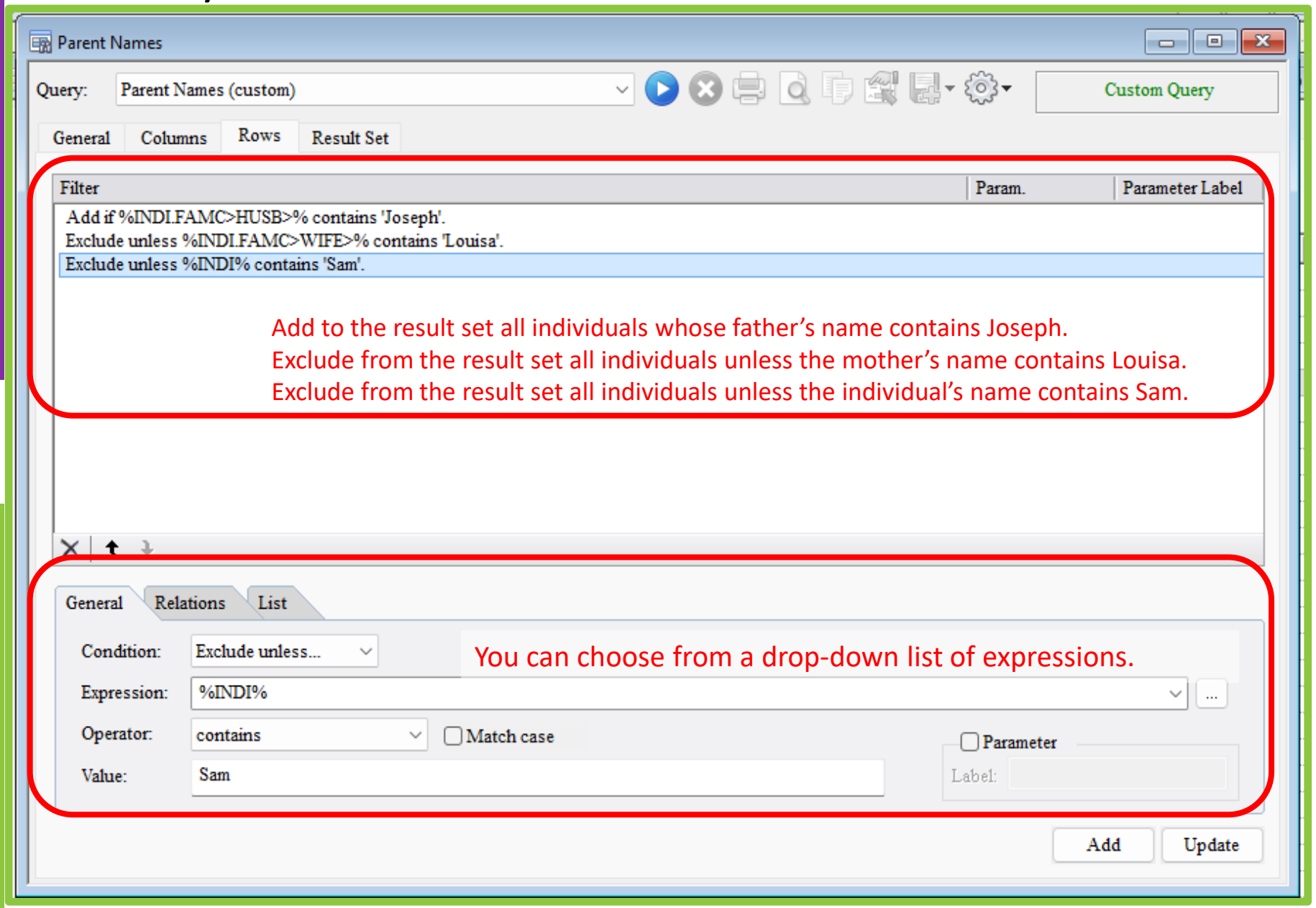
Query: All Facts

General | Columns | Rows | Result Set

Fact date	Fact Type	Value	Fact Owner 1	Fact Owner 2	Place
Sep 1914	Immigration		Catherine REARDON		Florida, USA
21 Jan 1880	Immigration		Charles William Smith MUN...		New York City
Q3 1970	Marriage		Emily Susan MUNRO		Farley, Hampshire,...
15 Jan 1915	Marriage		Michael Pleasance MUNRO	Catherine REARDON	Florida, USA
Q1 1993	Marriage		Edward Ian WILEY	Anna COLE	Salisbury, Dorset, ...
21 Sep 1967	Marriage		Martin HODGES	Alison CARP	Cheltenham, Glouc...
Q3 1943	Marriage		Jonathan Wesley HODGES	Julia Rosalind MUNRO	Farnborough, Ham...
May 2001	Marriage		Nigel ANDERSON	Susan Isabel DOWLING	St Pauls, Bristol, E...
18 Jul 1945	Marriage		Henry DOWLING	Helen JONES	Adelaide,South Au...
Q3 1960	Marriage		Edmund Peter MUNRO	Virginia PEARSON	Winchester, Hamp...
21 Jul 1956	Marriage		Alan CARRINGTON	Elizabeth HODGES	Ealing Broadway, L...
15 Jun 1911	Marriage		Alexander James DOWLING	Jenny Katherine ROWL...	Tailem Bend, Sout...
14 Feb 1947	Marriage		Anthony Edward MUNRO	Julia Amanda FISH	Clifton, Bristol, Eng...
c. 1884	Marriage		Charles William Smith MUN...	Margaret PLEASANCE	Florida, USA
15 May 1983	Marriage		Graham Anthony MUNRO	Rosemary BOWDAGE	Taunton, Somerse...
1945	Marriage		Peter Michael MUNRO	Helen Mary ADDISON	
Oct 1950	Marriage		Anthony Edward MUNRO	Susan Isabel DOWLING	Redland, Bristol, E...
12 Jan 1986	Marriage		Ian Stephen MUNRO	Charlotte CARRINGTON	Midsomer Norton, ...
	National o...	both British and...	Michael Pleasance MUNRO		
2 Apr 1911	National o...	Scottish	George DOWLING		
2 Apr 1911	Occupation	fisherman	George DOWLING		Kirkwall,Orkney, S...
2 Apr 1911	Occupation	trawler hand	John WALLINGTON		Orkney, Scotland

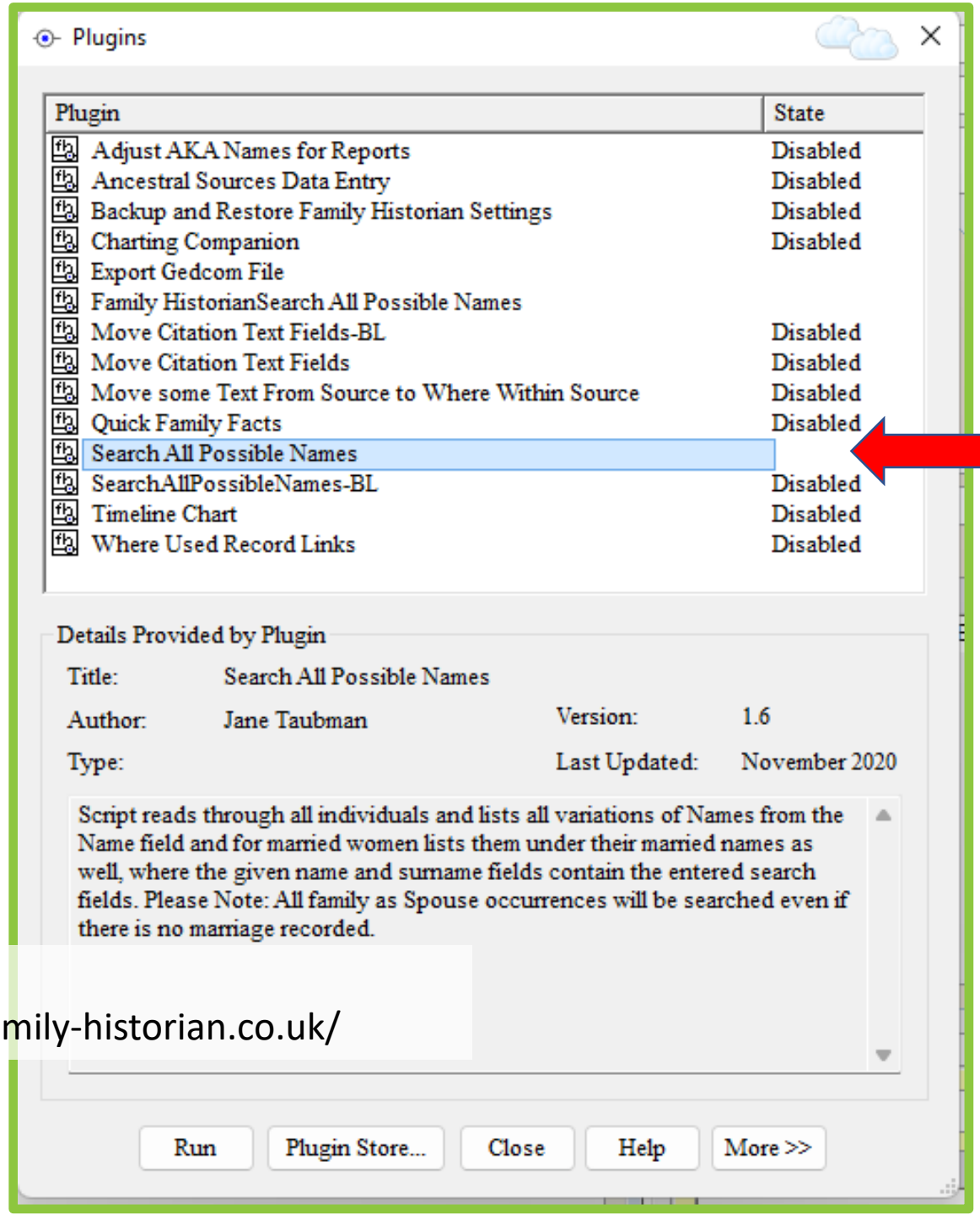
Source: FH Sample Project

Query



[migration-dummy > Query > Query Window > Parent Names (custom)]

Plugins



Plugin Store
https://pluginstore.family-historian.co.uk/

Plugins

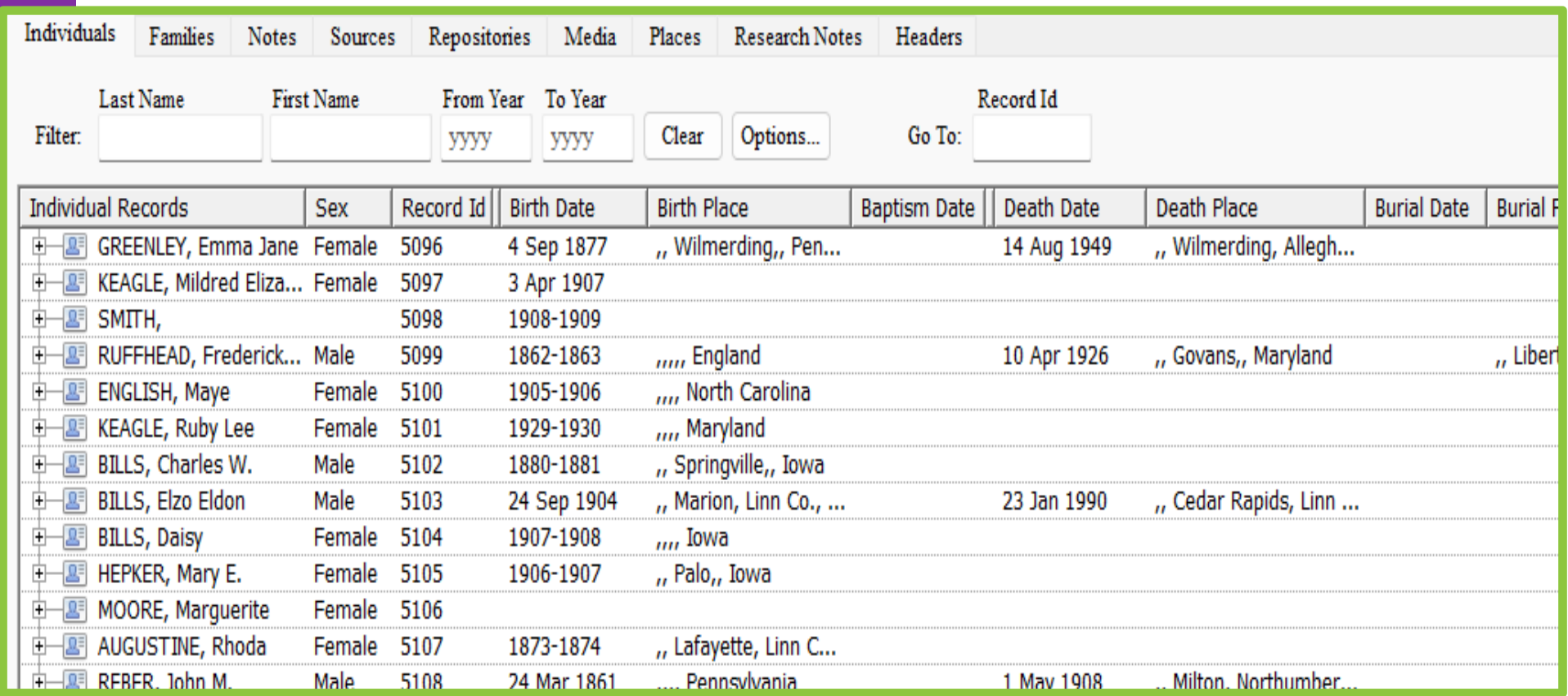
Query:

General | Columns | Rows | Result Set

Surname	Given Names	Type	Lifedates	Marria...	Record	Ref	Family	Soundex
CAMERON	Allison	Married	1887-		Allison WATSON	34	...of Laurie CAMERON and Allison WA...	C565 A...
WATSON	Allison	Primary	1887-		Allison WATSON	34		W325 ...
MUNRO	Amanda Morag	Primary	1926-2009		Amanda Morag MUNRO	10		M560 A...
WILEY	Anna	Married		Q1 1993	Anna COLE	78	...of Edward Ian WILEY and Anna COLE	W400 ...
COLE	Anna	Primary			Anna COLE	78		C400 A...
MUNRO	Anna Lesley	Primary	2013-		Anna Lesley MUNRO	70		M560 A...
MUNRO	Tony	Subfield	1922-1998		Anthony Edward MUNRO	1		M560 T...
MUNRO	Anthony Edward	Primary	1922-1998		Anthony Edward MUNRO	1		M560 A...
HODGES	Anthony Munro	Primary	1970-		Anthony Munro HODGES	32		H320 A...
FISH	Arnold	Primary			Arnold FISH	94		F200 A...
HODGES	Arthur	Primary			Arthur HODGES	42		H320 A...
JAMES	Arthur	Primary			Arthur JAMES	77		J520 A...

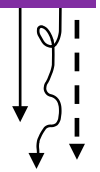
Source: FH Sample Project

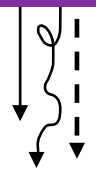
On a related topic… Individuals Records Window



Individual Records	Sex	Record Id	Birth Date	Birth Place	Baptism Date	Death Date	Death Place	Burial Date	Burial P
GREENLEY, Emma Jane	Female	5096	4 Sep 1877	,, Wilmerding,, Pen...		14 Aug 1949	,, Wilmerding, Allegh...		
KEAGLE, Mildred Eliza...	Female	5097	3 Apr 1907						
SMITH,		5098	1908-1909						
RUFFHEAD, Frederick...	Male	5099	1862-1863	,,,,, England		10 Apr 1926	,, Govans,, Maryland		,, Liber
ENGLISH, Maye	Female	5100	1905-1906	,,,, North Carolina					
KEAGLE, Ruby Lee	Female	5101	1929-1930	,,,, Maryland					
BILLS, Charles W.	Male	5102	1880-1881	,, Springville,, Iowa					
BILLS, Elzo Eldon	Male	5103	24 Sep 1904	,, Marion, Linn Co., ...		23 Jan 1990	,, Cedar Rapids, Linn ...		
BILLS, Daisy	Female	5104	1907-1908	,,,, Iowa					
HEPKER, Mary E.	Female	5105	1906-1907	,, Palo,, Iowa					
MOORE, Marguerite	Female	5106							
AUGUSTINE, Rhoda	Female	5107	1873-1874	,, Lafayette, Linn C...					
REBER, John M.	Male	5108	24 Mar 1861	.... Pennsylvania		1 May 1908	.. Milton, Northumber...		

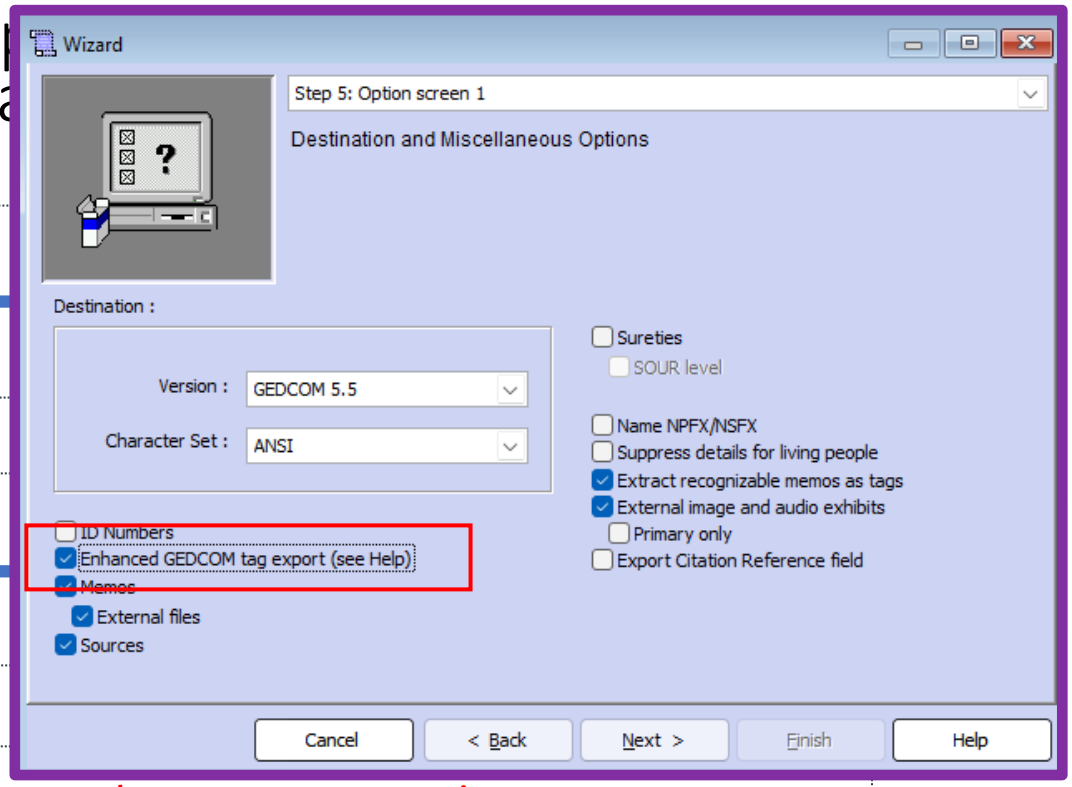
What do I *not* like about Family Historian?





The Preparation and Testing Processes

Three viable migration p
(not all are necessarily a



1. TMG —direct import→ Family Historian

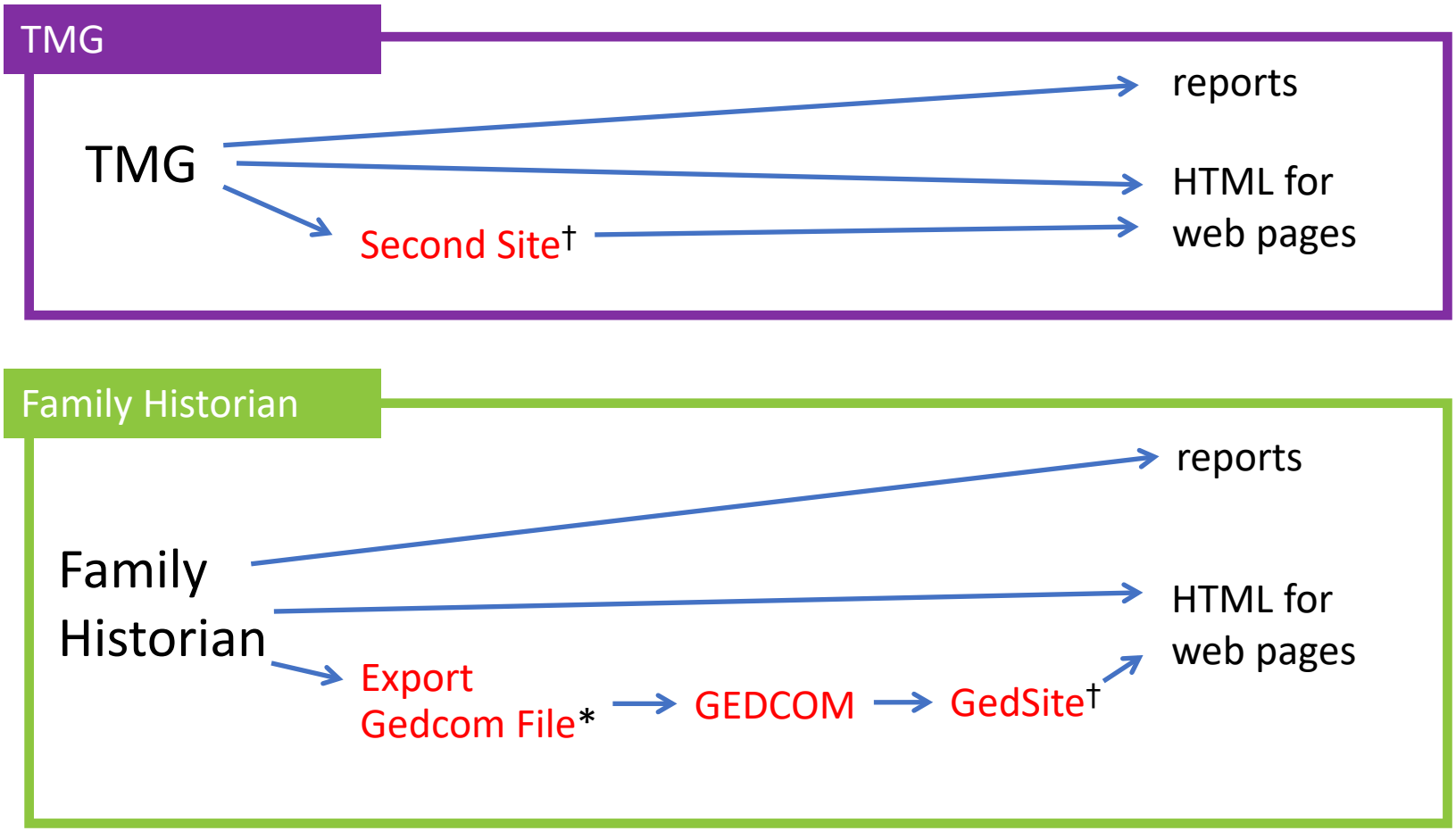
2. TMG —export→ GEDCOM —import→ Family Historian

3. TMG —export using *Enhanced GEDCOM tag export*[3]→ GEDCOM —import→ Family Historian

4. TMG —convert using *TMG to GEDCOM*[4]→ GEDCOM —import→ Family Historian

(3) TMG File > Export > ... > Step 5: Option Screen 1. See "GEDCOM Export", TMG help system
(4) https://www.johncardinal.com/, John Cardinal.

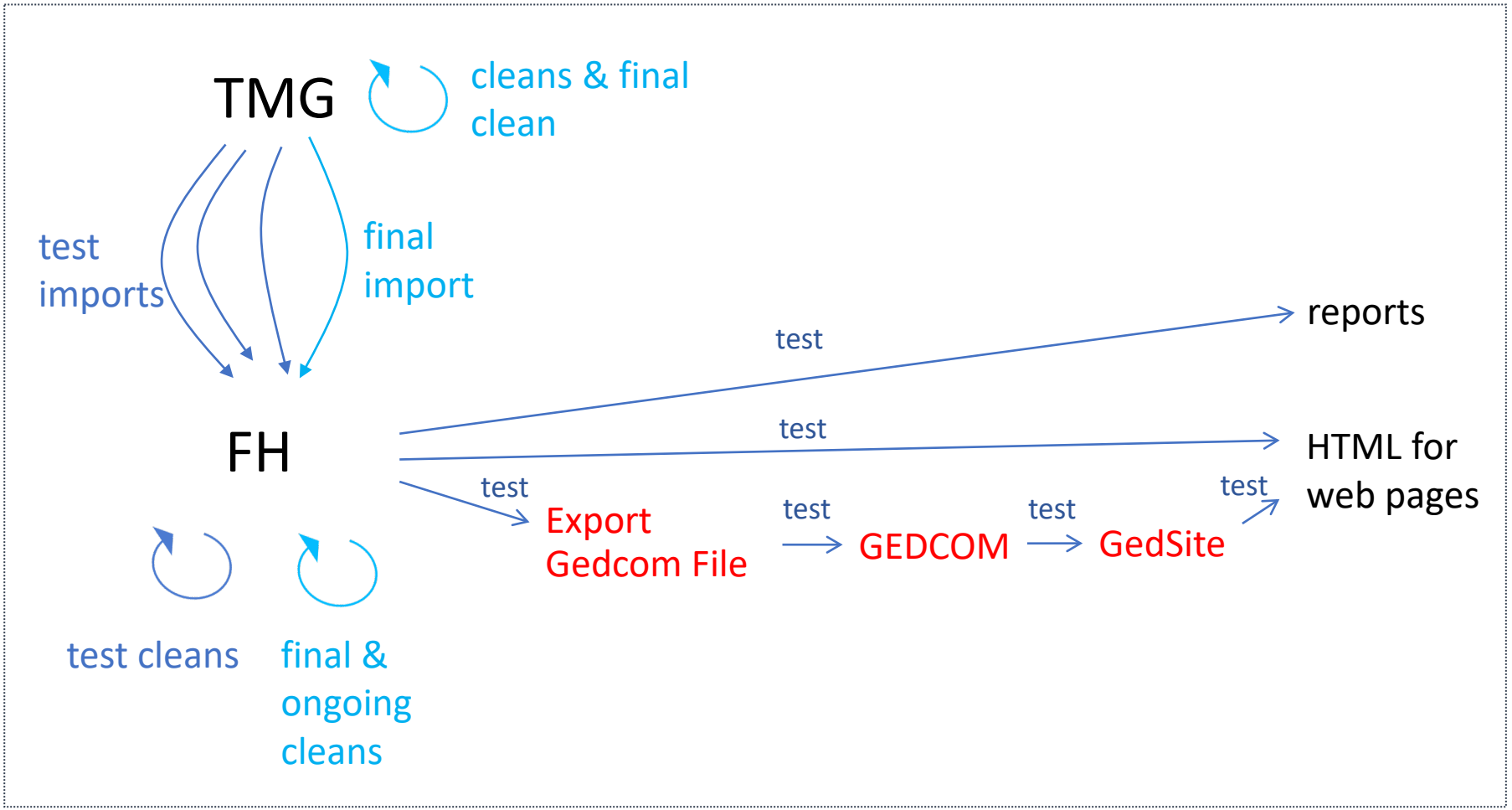
Paths to reports and to HTML



* Export Gedcom File, FH plugin, Mike Tate, https://pluginstore.family-historian.co.uk/page/plugin/export-gedcom-file, https://www.gedsite.com/en/familyhistorian.htm

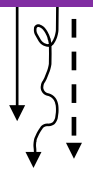
† https://www.johncardinal.com/, John Cardinal. Second Site works only with TMG files and for TMG is preferred over GedSite.

Testing and cleaning



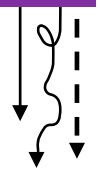
My preparation and testing process

- Begin to learn FH in general. Perform everyday tasks. Learn how FH does things that may be different from TMG. Learn FH best practices.
  - FH Sample Project.
  - Create my own native FH database.
- Evaluate import. Focus on one category at a time, e.g. FH facts; built-in TMG tags; sentences ...
  - Start with FH Sample Project and native FH database. Learn how FH does things.
  - Test my own imported TMG databases.
  - Test using the imported TMG Migration Dummy (for targeted test imports).
  - Map TMG to FH, i.e. reconstruct how the programmer imported TMG data to FH.
  - Look for potential problems. Determine whether it is a problem I want to fix.
    - If so, look for solutions.
  - Read FH help materials. Ask FH experts for assistance.
- Clean my data.
  - Non-destructively clean my data within TMG.
  - Do test-cleans within FH.
- Keep good records of my findings, what I do, and what I plan to do within TMG before the final import or in FH after the final import.
- Repeat repeatedly.



My databases

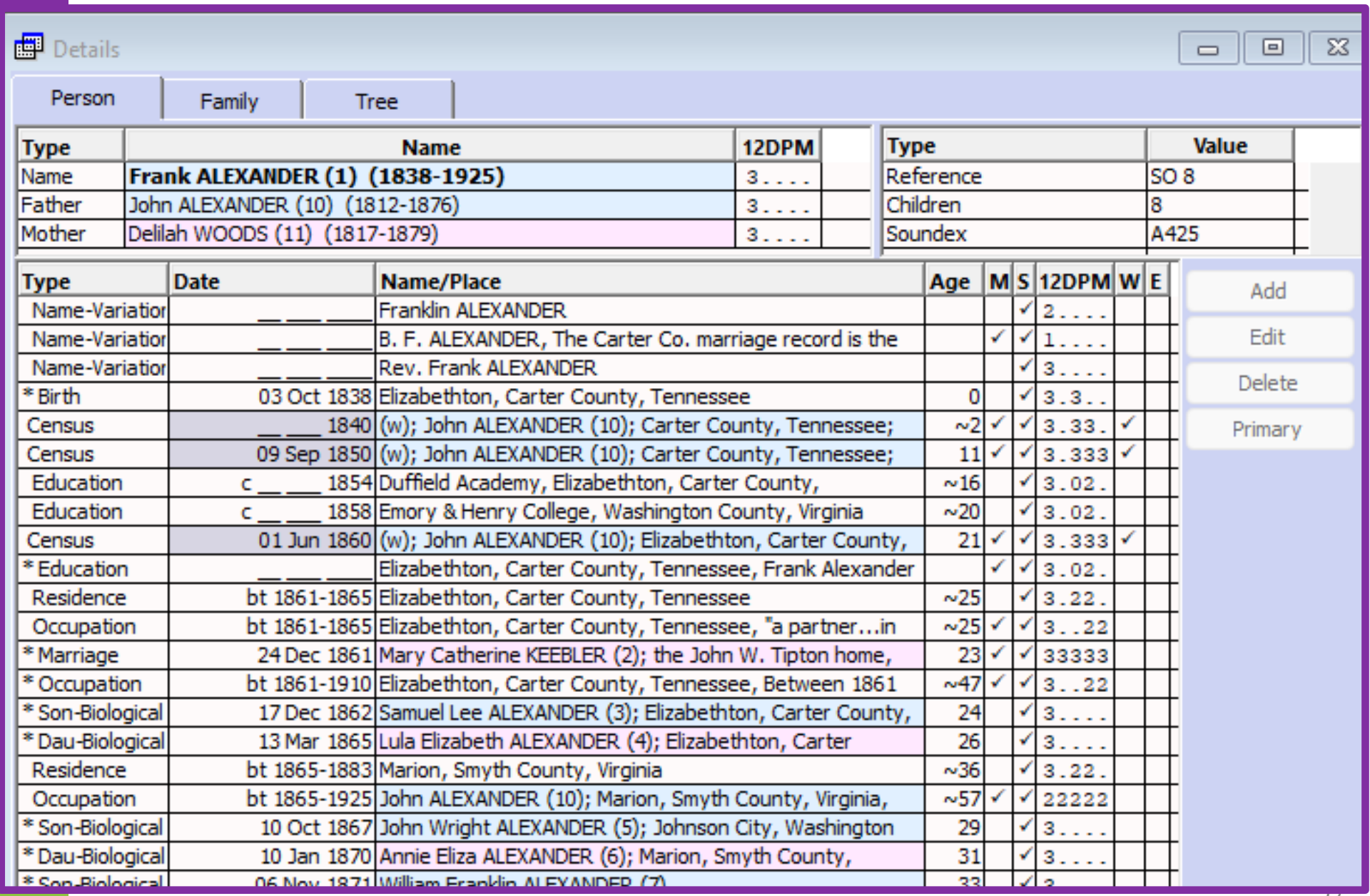
- Native TMG databases (import into FH)
- Native TMG migration dummy (import into FH)
- Native FH databases
- FH Sample Project



Deep dive: how I learn and test

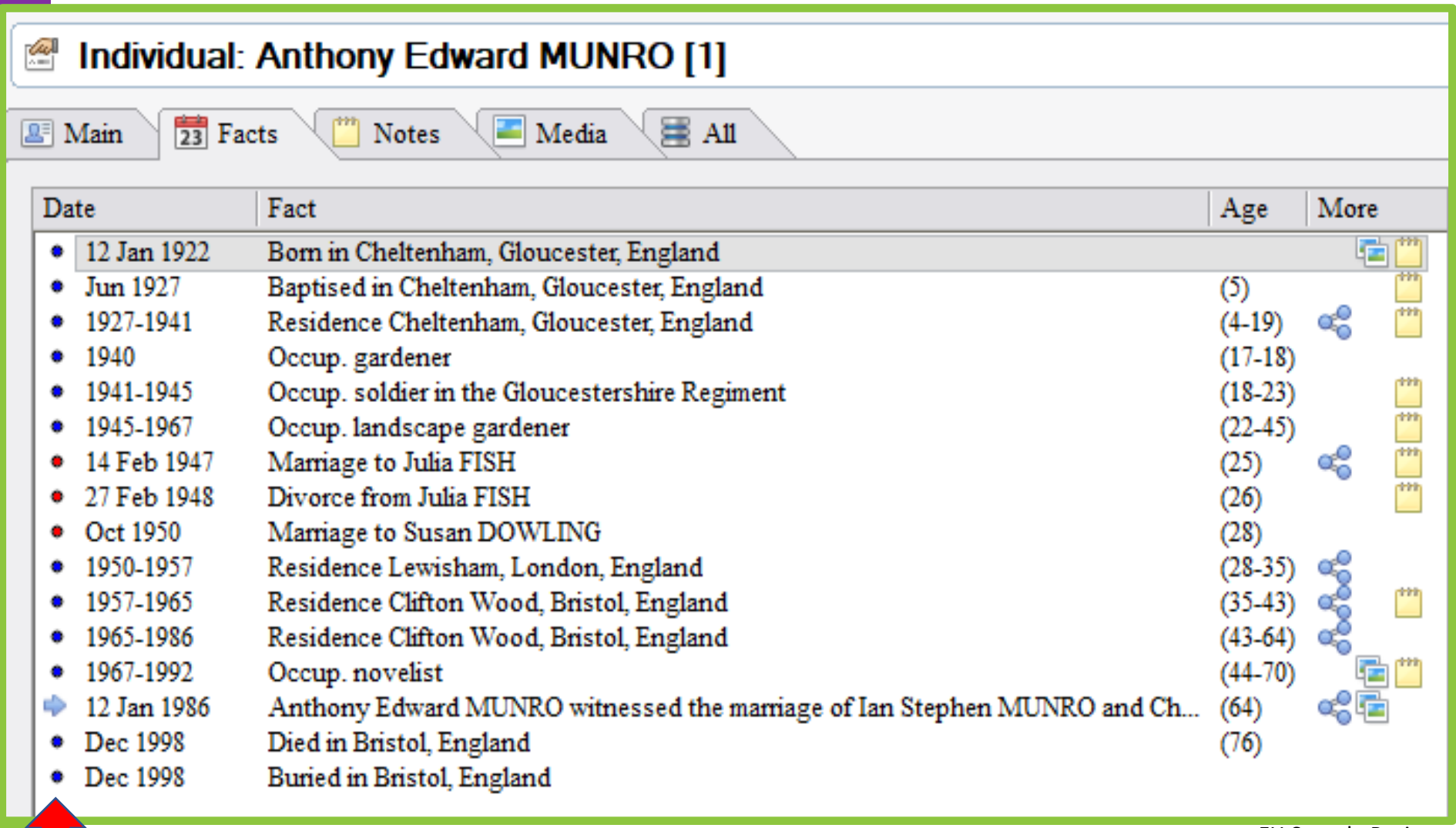
Focus on FH Facts

Learning about FH Facts



TMG Sample Project

Learning about FH Facts



Date	Fact	Age	More
12 Jan 1922	Born in Cheltenham, Gloucester, England		
Jun 1927	Baptised in Cheltenham, Gloucester, England	(5)	
1927-1941	Residence Cheltenham, Gloucester, England	(4-19)	
1940	Occup. gardener	(17-18)	
1941-1945	Occup. soldier in the Gloucestershire Regiment	(18-23)	
1945-1967	Occup. landscape gardener	(22-45)	
14 Feb 1947	Marriage to Julia FISH	(25)	
27 Feb 1948	Divorce from Julia FISH	(26)	
Oct 1950	Marriage to Susan DOWLING	(28)	
1950-1957	Residence Lewisham, London, England	(28-35)	
1957-1965	Residence Clifton Wood, Bristol, England	(35-43)	
1965-1986	Residence Clifton Wood, Bristol, England	(43-64)	
1967-1992	Occup. novelist	(44-70)	
12 Jan 1986	Anthony Edward MUNRO witnessed the marriage of Ian Stephen MUNRO and Ch...	(64)	
Dec 1998	Died in Bristol, England	(76)	
Dec 1998	Buried in Bristol, England		

FH Sample Project

"Family events and attributes (the ones that apply to a couple) have a red dot in the listing. Individual events and attributes have a blue dot." "How to Record Details About a Marriage", FH Help system

Learning about FH Facts

These appear to be new animals (as compared with TMG). What are they?

- Individual events •
- Individual attributes •
- Family events •
- Family attributes •

TMG	FH (and GEDCOM)		
Tags	**Facts**		
		Events	**Attributes**
Address Adoption AFN Age Anecdote Annulment Associatn Attributes Baptism BarMitzvah BasMitzvah Biography Birth (^B)	**Individual** •		
	Family •		

Learning about FH Facts

Based on the FH Standard Fact Set

TMG	FH (and GEDCOM)		
Tags	**Facts**		
		Events	**Attributes**
Address Adoption AFN Age Anecdote Annulment Associatn Attributes Baptism BarMitzvah BasMitzvah Biography Birth (^B) Birth-Alt BirthIlleg BirthStill Blessing Burial (^U) Burial-Alt Caste	**Individual** •	• Adoption • Baptism • Bar Mitzvah • Bat Mitzvah • Birth • Blessing • Burial • Census • Christening • Christening (adult) • Confirmation • Cremation • Death • Emigration • First communion • Graduation • Immigration • Naturalisation • Ordination • Probate • Retirement • Will	• Child Count • Education • Group/Caste Membership • Marriage Count • National Identity Number • National or Tribal Origin • Occupation • Physical Description • Possessions • Religion • Residence • Title • U.S. Social Security Number
	Family •	• Annulment • Census (family) • Divorce • Divorce Filed • Engagement • Marriage • Marriage Banns • Marriage Contract • Marriage Licence • Marriage Settlement	• Residence (family)

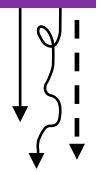
Learning about FH Facts

What are possible consequences of these new (to us) distinctions

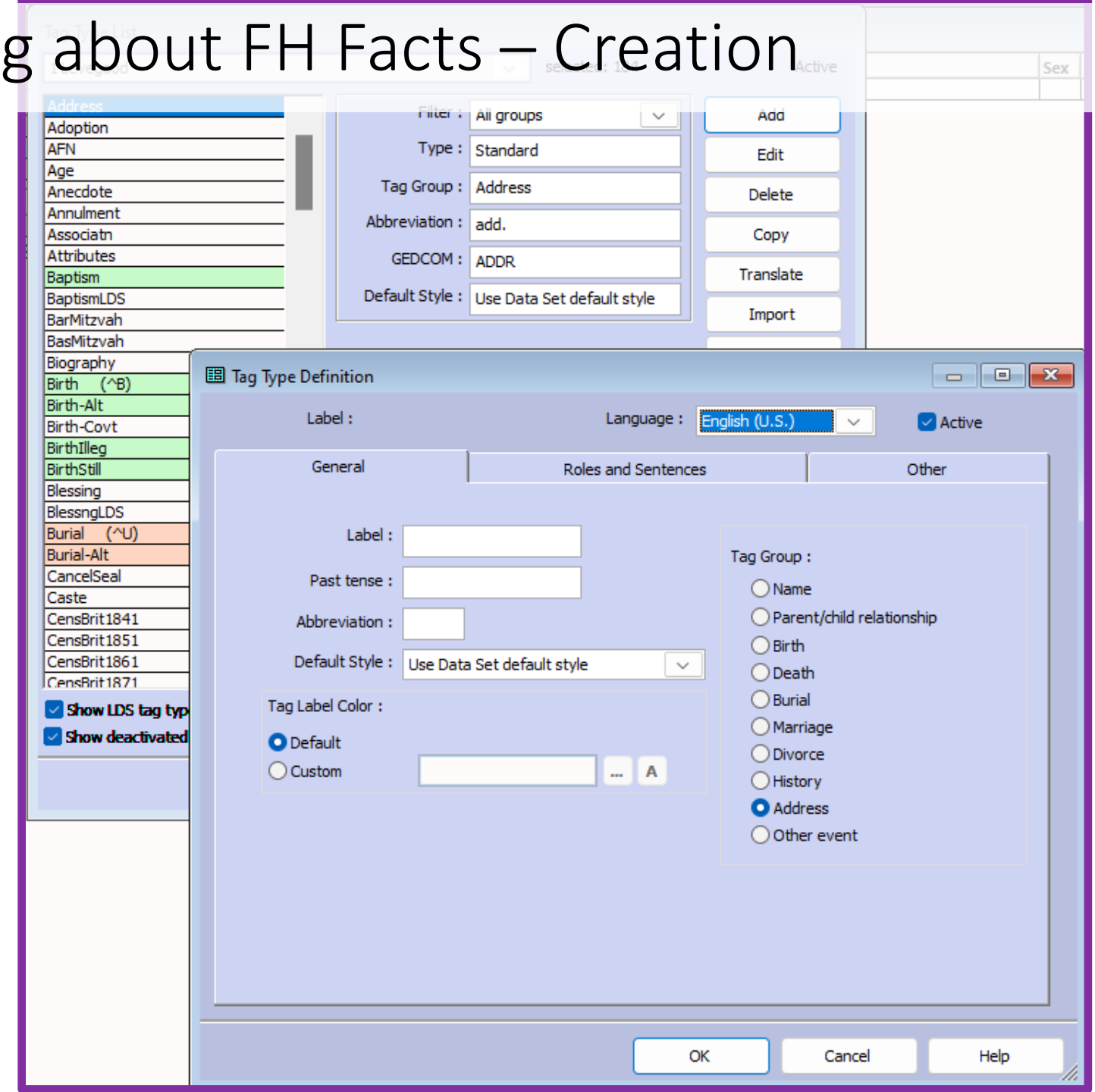
- Individual events •
- Individual attributes •
- Family events •
- Family attributes •

for …?

- Creation of a new FH fact
- FH sentences
- FH reports
- Import of TMG tags
- Etc.



Learning about FH Facts – Creation

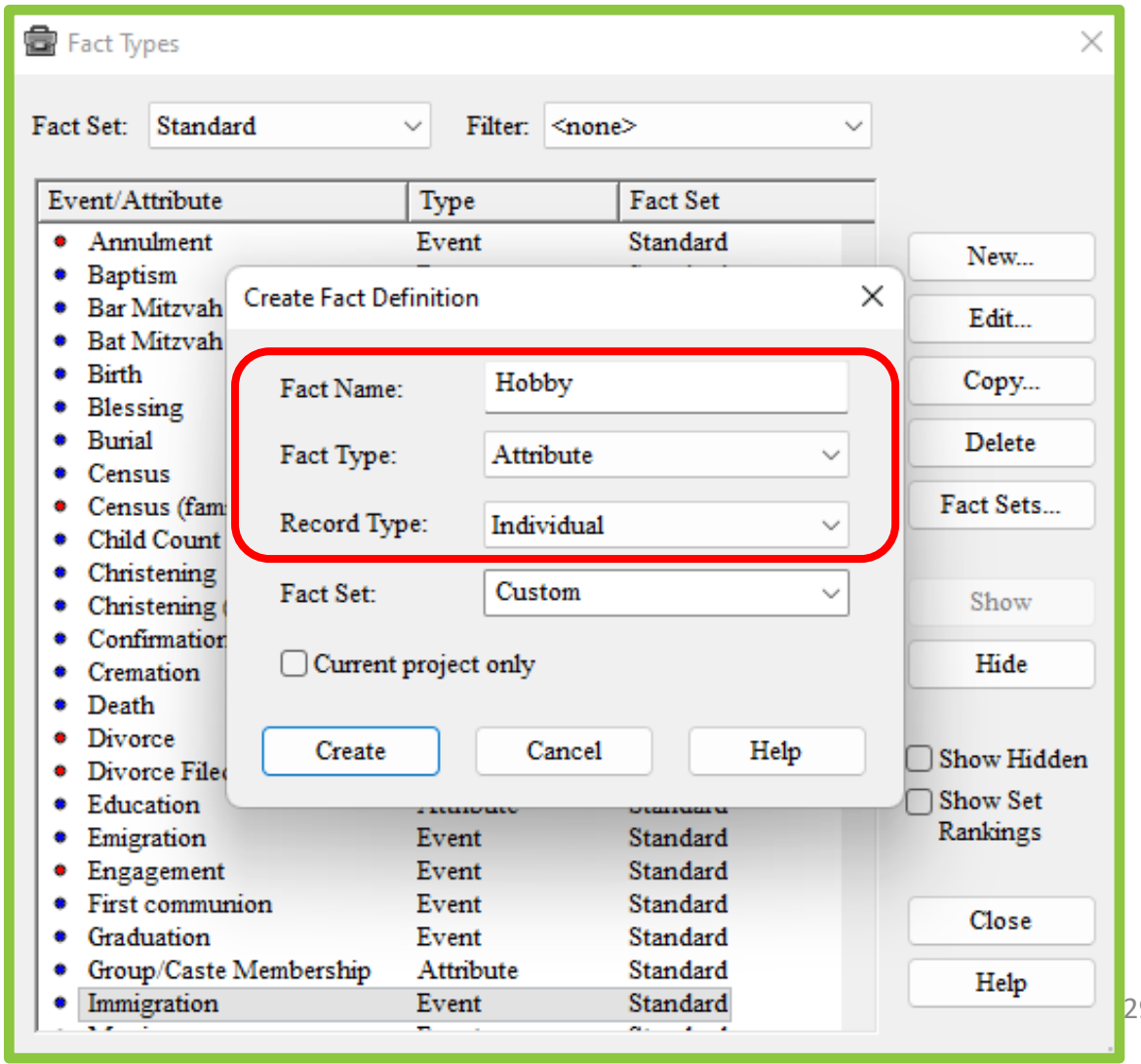


Learning about FH Facts – Creation

Create new FH fact: Hobby. Need to specify whether it is

- **Fact Type:** Event or Attribute
- **Record Type:** Individual or Family

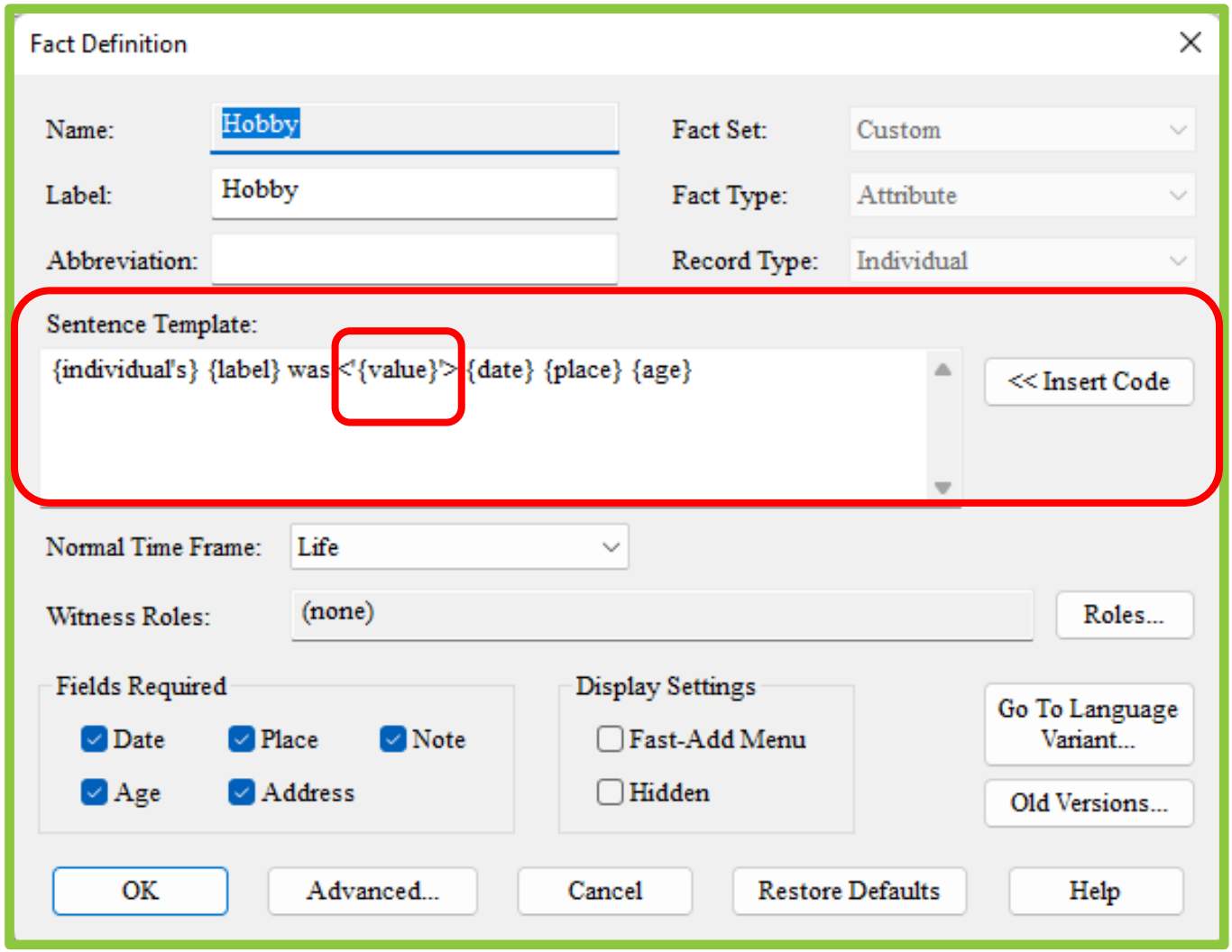
Based on FH documentation, I chose Attribute and Individual.



Learning about FH Facts – Sentences

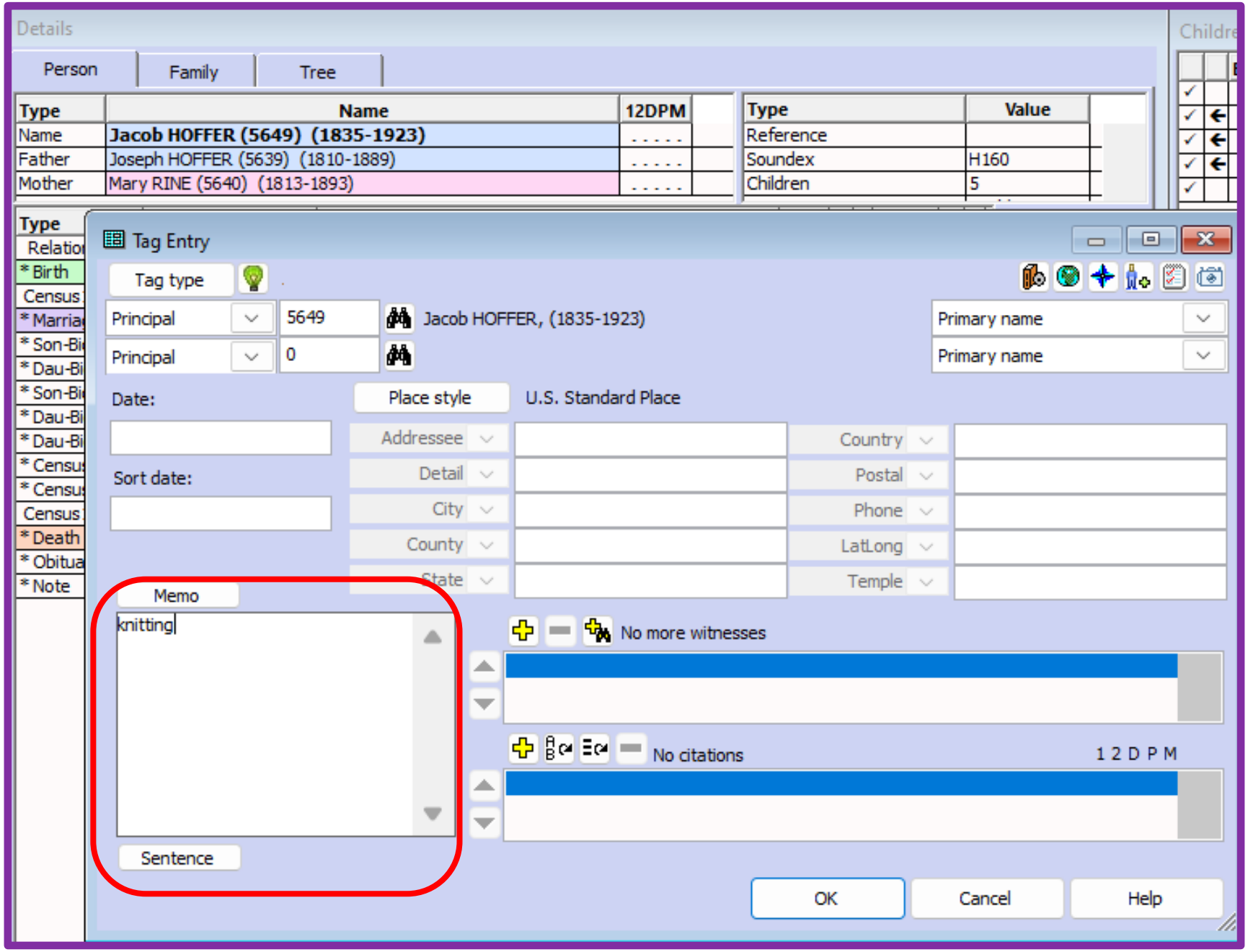
Create new FH fact. (Hobby is an Individual Attribute.)

- The new Fact has its own Sentence Template.
- Note: Value is an extra field only for Attributes.



FH Sample Project

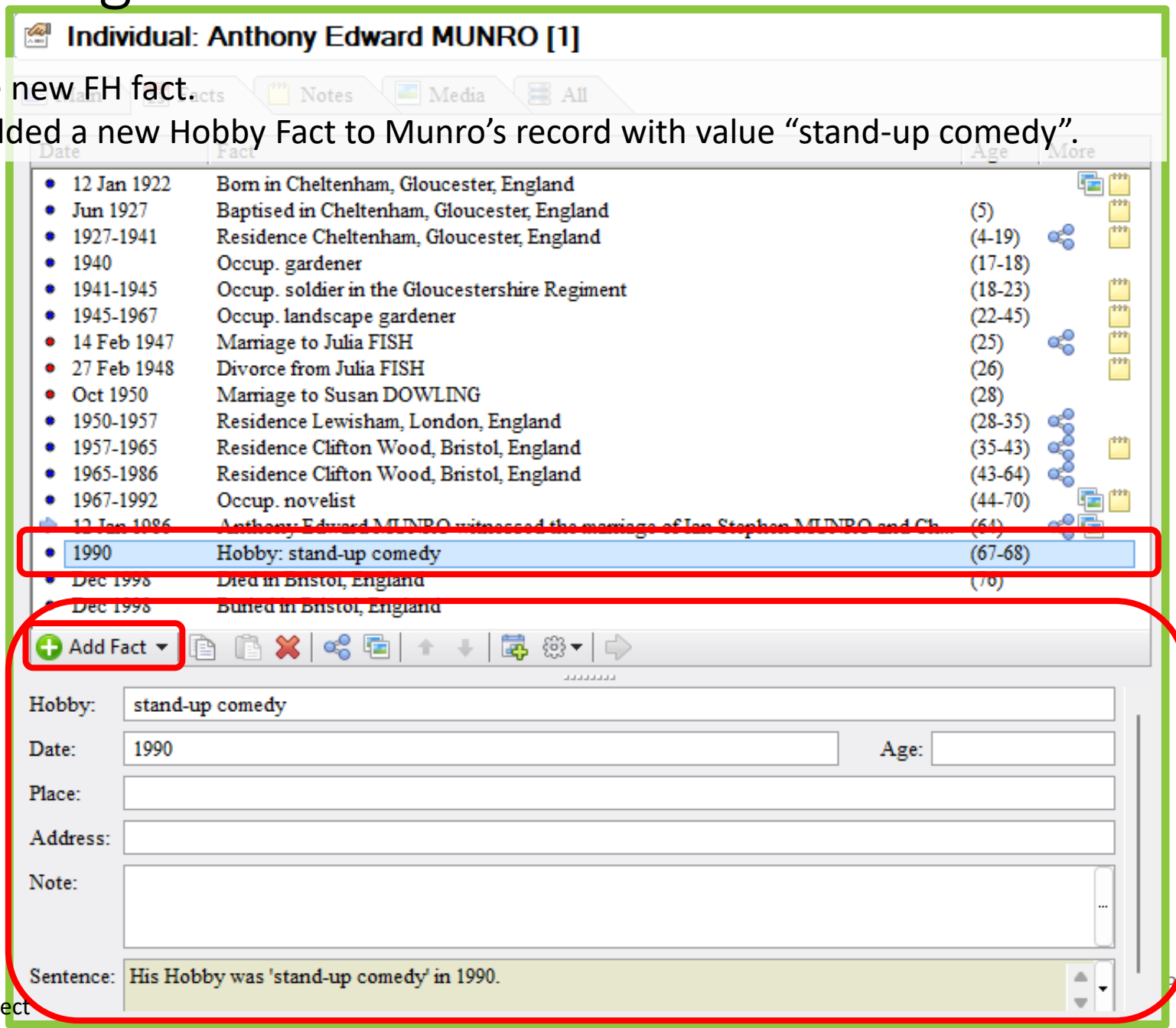
Learning about FH Facts



Learning about FH Facts

Create new FH fact.

- I added a new Hobby Fact to Munro's record with value "stand-up comedy".



Learning about FH Facts – Reports

Anthony Edward MUNRO (1922-1998)

Anthony Edward MUNRO[1] (known as Tony), son of Michael Pleasance MUNRO (1891-1978) and Catherine REARDON (1895-1963), was born on 12 January 1922 in Cheltenham, Gloucester, England.[2,3] Anthony weighed 8lbs and 3ozs at birth. He was 3 weeks early, born at 12.12am. Tony was baptised in June 1927 in Cheltenham. Anthony had 4 god-parents. Two of each sex. Apparently all 4 attended his baptism, but their names are not known. From 1927 to May 1941 Tony lived in Cheltenham. From 1940 to 1940 he was a gardener.[4] Between January 1941 and 1945 he was a soldier in the Gloucestershire Regiment. Tony signed up as soon as he reached 18, and was involved in the D-day landings before going on to serve through France and Germany. From 1945 to 1967 Tony was a landscape gardener.[4] After demob from the army Anthony returned to Gardening. Tony married **Julia Amanda FISH** on 14 February 1947 in Clifton, Bristol, England. The best man was Peter Michael MUNRO. Emma FARRINGTON and Helen SAVAGE were bridesmaids. The marriage was witnessed by Peter Michael MUNRO. The ceremony was conducted by Rev Peter Evans.[5,6] This was a large affair with approximately 100 guests. Tony and Julia Amanda FISH were divorced on 27 February 1948.[7] The divorce was acrimonious at the time, but later Anthony and Julia were reconciled and became quite good friends again. Tony married **Susan Isabel DOWLING** in October 1950 in Redland, Bristol, England.[8,9] Between November 1950 and 1957 he lived in Lewisham, London, England with Susan Isabel DOWLING. From May 1957 to 1965 he lived in Clifton Wood, Bristol, England with Susan Isabel DOWLING, Judy Susan MUNRO, Ian Stephen MUNRO, Sally Theresa MUNRO and Nigel MUNRO. From May 1965 to 1986 he lived in Clifton Wood with Susan Isabel DOWLING. From 1967 to 1992 he was a novelist.[10,11] 2 novels published. Names not known. Tony witnessed the marriage of Ian Stephen MUNRO and Charlotte CARRINGTON on 12 January 1986 in Midsomer Norton, Somerset, England.[11] His Hobby was 'stand-up comedy' in 1990. He died of a stroke in December 1998 in Bristol, England. He was buried in December 1998 in Bristol.

Anthony Edward MUNRO, 2001, age 79

Spouse: Julia Amanda FISH, 1985, age 60

usan

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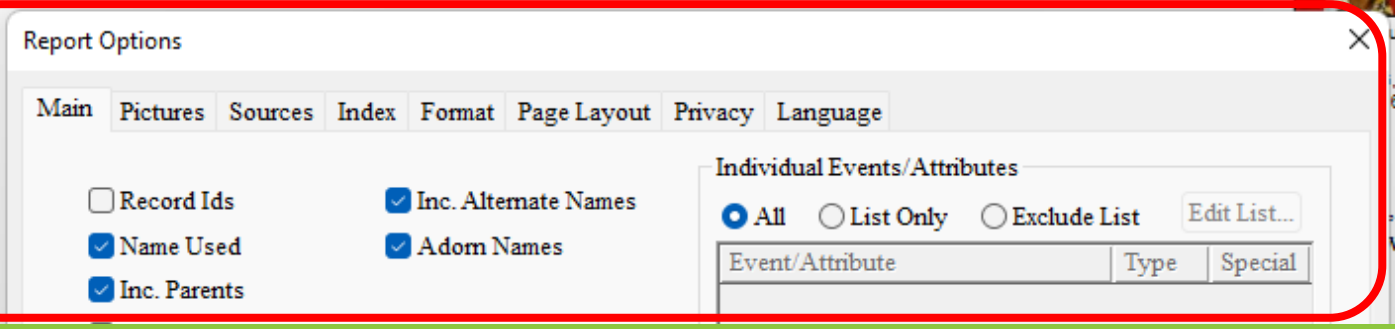
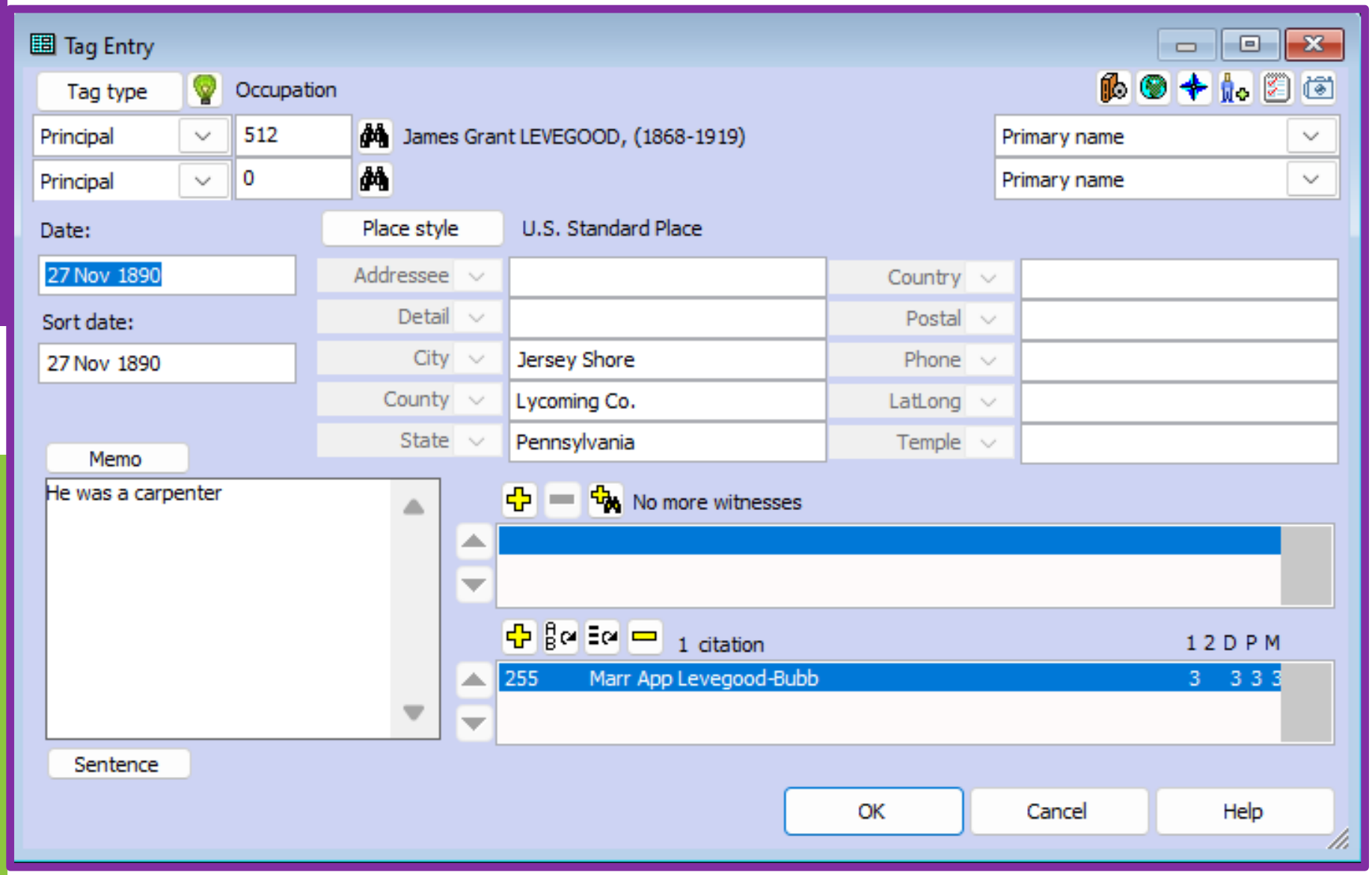
Ian

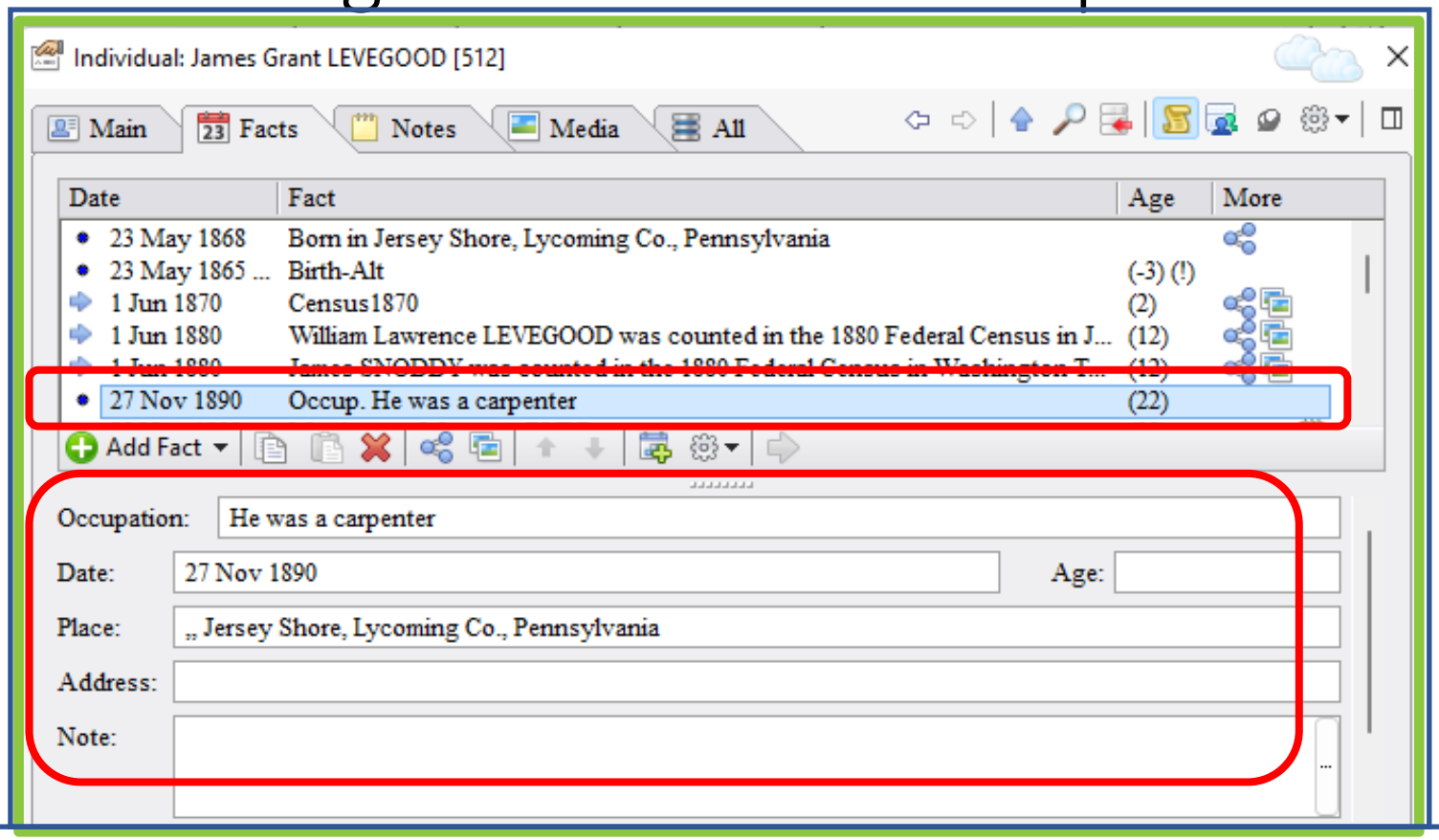
vith



Learning about FH Facts-Import from TMG

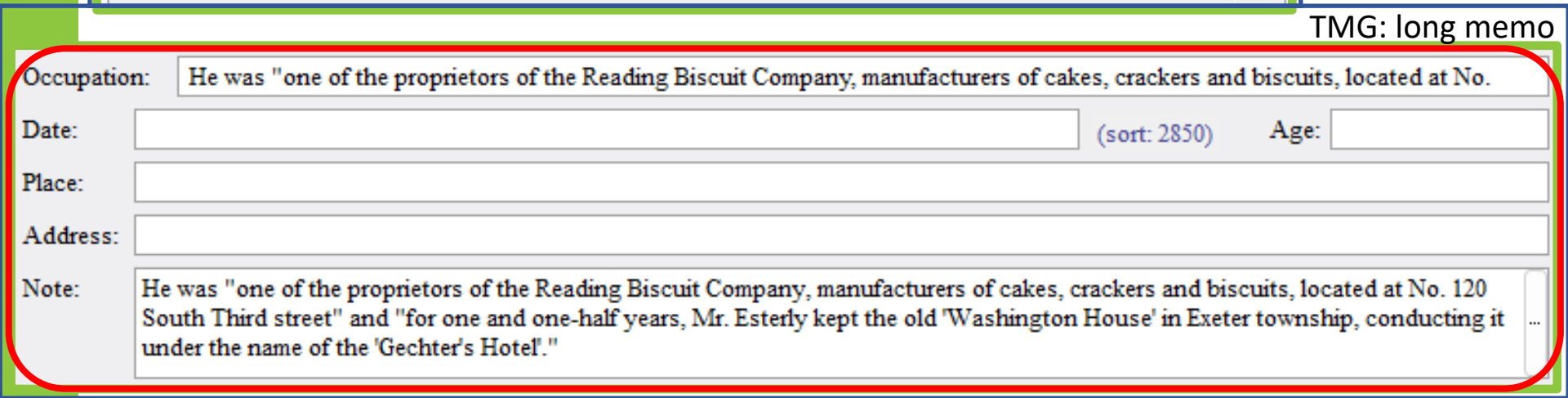


Learning about FH Facts-Import from TMG



TMG: short memo

TMG: long memo



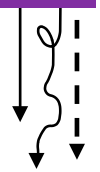
Learning about FH Facts

What are possible consequences of these new (to us) distinctions

- Individual events •
- Individual attributes •
- Family events •
- Family attributes •

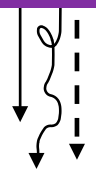
for …?

- Creation of a new FH fact
- FH sentences
- FH reports
- Import of TMG tags
- Etc.



Learning about FH Facts-To Do List

- From testing FH Facts
  - Decide how to handle long TMG Occupation Memos (and other Memos that will end up as FH Attributes).
    - What other TMG tags end up as FH Attributes?
  - Learn more about FH Individual vs. Family Facts.
  - Etc.
- Other FH topics to thoroughly test
  - Principals and roles
  - Sentences
  - Reports
  - Sources, citations
  - A million other things…
- GedSite
- Etc.



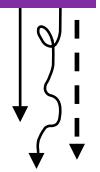
Wrap Up

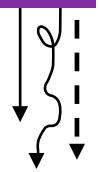
FH help

- Support from expert users
  - Family Historian User Group (FHUG), https://www.fhug.org.uk/
  - FHUG KnowledgeBase, https://fhug.org.uk/kb/
  - Family Historian at Groups.io, https://www.family-historian.co.uk/community/fh-at-groups-io
- Family Historian help system. Content also available online, https://www.family-historian.co.uk/help/fh7/
- Simon Orde, *Getting the Most from Family Historian 6*, Calico Pie, 2016. 243 pages. "Written by the creator of Family Historian." Still useful.
- General Tips for TMG Users, https://www.family-historian.co.uk/support/general-tips-for-tmg-users
- Frequently Asked Questions – for TMG Users, https://www.family-historian.co.uk/support/faq-tmg
- Importing from The Master Genealogist, https://www.family-historian.co.uk/support/tmg-import
- "New Project Wizard - TMG Import Options", FH help system
- TMG Import: Pre-import Tips, https://www.family-historian.co.uk/support/tmg-pre-import-tips
- TMG Import: Post-import Checks for Best Results, https://www.family-historian.co.uk/support/tmg-post-import-checks

FH tools

- Import log files under FH Window > Log Files
- FH File > File Statistics
- FH Publish > Miscellaneous Reports > File Statistics
- FH Plugins from Mike Tate: TMG File Project Summary.fh_lua, https://www.fhug.org.uk/forum/viewtopic.php?f=40&t=11462&p=54509#p54509. (Compare with TMG File > Project Summary.)





Thank you!

Next Up: Linda Reinfeld