Genea

Your genealogy research

By Geert Jadoul

Genea

How to do genealogy research with genea for iOS, iOSPad and macOS.

version 2

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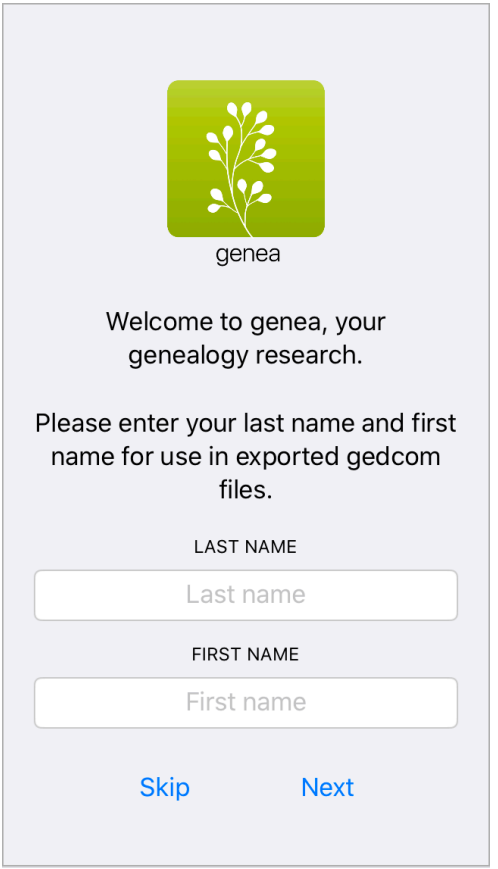
Chapter 1: First launch

When you first launch the genea app, you are presented with some onboarding screens. These screens will give you some information about how to use the app, but are of course no replacement for this manual.

iOS, iPadOS and macOS

The genea app is the same app for iOS, iPadOS and macOS. It's the same code for all the devices. Only in specific cases, which are rare, we implemented specific items for a device. An example of this is keyboard shortcuts for macOS and Touch Bar buttons for macOS. But in most cases, everything is one hundred percent the same.



The onboarding starts with a welcome screen and invites you to fill in your last and first name.
Your last and first name are used when you create a gedcom file (.ged) to export information of a note to be used in your family tree app.
If you don't want to fill in your name here, you can always do it later in the settings of the app.

Click **Skip** if you don't want to enter a name, or click **Next** after you filled in your first and last name.

*A **GEDCOM file** is plain text (usually either UTF-8 or ASCII) containing genealogical information about individuals, and meta data linking these records together. Most genealogy software supports importing from and exporting to **GEDCOM format**.*
Source: Wikipedia

The next screen is called **Organise your research**.
In genea you group your work in notebooks. How many notebooks you want to have is up to you. Personally, I have

a notebook per family I'm researching, but you can also make a notebook for a specific person, or per place.
You can easily move items between notebooks if you need to, but it is important that you think about how to organise your work.

TIP: Managing notebooks can be done in settings. You can rename, create and delete notebooks in settings.

In the next screens are, **Create your first note**, **Add events**, and **Link people**. In the chapter **making notes** we explain this in detail, but the basic idea is that you take a note starting from text or and image, and you add events to it, and link people to the events. The notes, events, people and places are of course searchable.

On the last screen, you click **Get started** which brings you to the start screen of the app.

Languages

For the moment we only have an English version of the manual.

The genea application is for the moment available in multiple languages. The list of languages is:

- English
- French
- German
- Dutch
- Spanish
- Portuguese
- Simplified Chinese
- Japanese
- Italian
- Korean

Chapter 2: Genea concepts

Genea was created to help you with your genealogy research. Specifically to make your life easier. If you have done some genealogy research, you will hit a wall some time. At that point you'll need to do some real research. Genea is developed to help you with that.

The golden rule of research is, that you take notes of everything. You don't know if a person with your family name is an ancestor or descendant. You can only log the person and the events in genea, and later find out if the person is family or not.
Research log is the key to your research. Here you log all the actions you take concerning a person or a persons family. You typically make a research log per person, note the reason why you are doing this research, and which

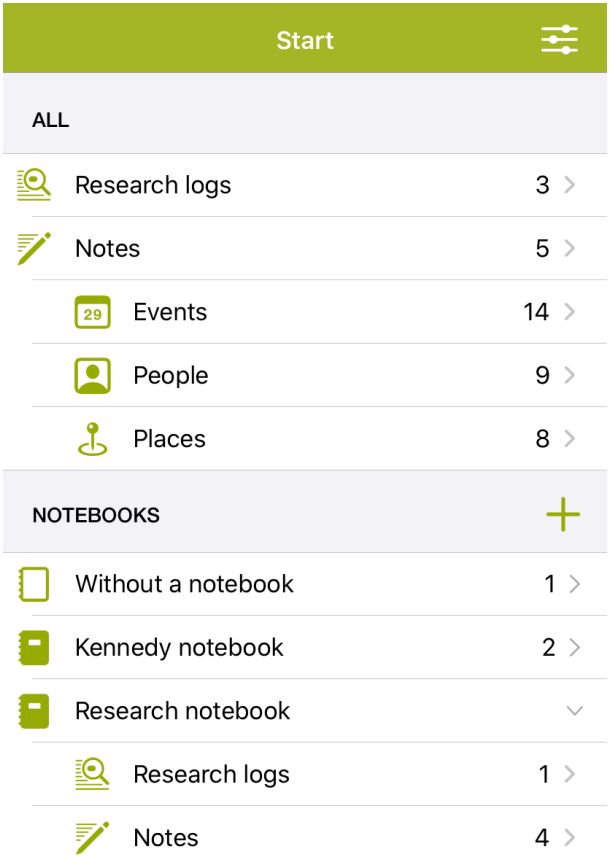
actions you will take or have taken to get the results you look for.
Genea therefore contains 2 different elements, research logs and notes.

Research log
In the research log you specify what you are researching. You add context information like information about the family, the place and extra documents, and you log your planned research, and the research you've done together with the results. Genea helps you structure the information for your research.

Notes
Notes start from an image or the text note you took. You add events to the note, and link people to the events including the relationship of the person to the event.
E.g. if you have the image of birth certificate, you can add an event of type **birth** to the note. You can add (or link) a person to the note. The relationship will be **owner of the event** if the added person is the person that is born. You can add (or link) the parents to the birth event, with their relationships (**father** and **mother**). If there are witnesses to the event, you can also add them to the event.

Notebooks
Organise you work in notebooks, or folders if you like, to group your notes and research logs together.
The start screen shows 2 sections.
The **ALL** section allows you to navigate through and search on all notes and all research logs.
The **NOTEBOOKS** section, allows you to navigate within the specific notebook. You can click a notebook which will

show notes and research logs within the notebook. Click once again on the notebook to hide the details.

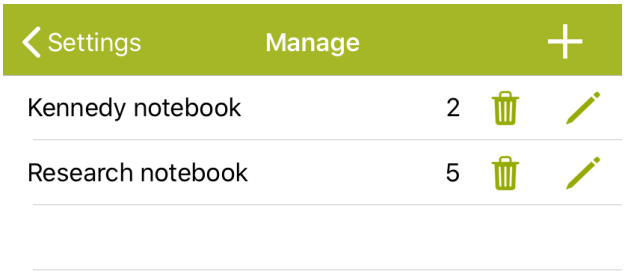


Chapter 3: Settings

Settings configures the Genea app the way you want. You can navigate to the settings by going to the Start screen and by clicking on the top right icon to go to the settings.

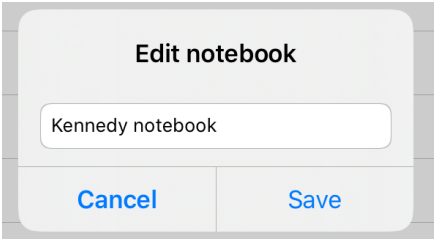
1. Manage notebooks

Here you get the list existing notebooks, with the number of items in the notebook.



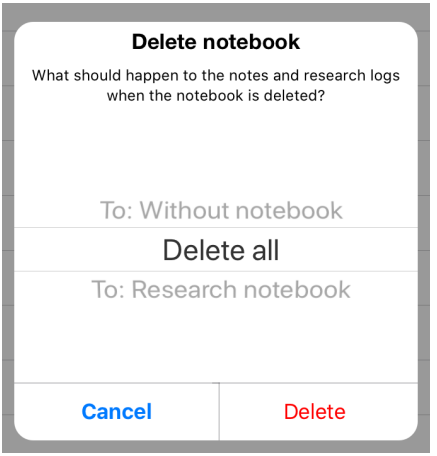
If the research notebook has 5 items than means the number of notes and research logs combined in the notebook.

Add
Click the + **button** at the top right of the screen to add a notebook.



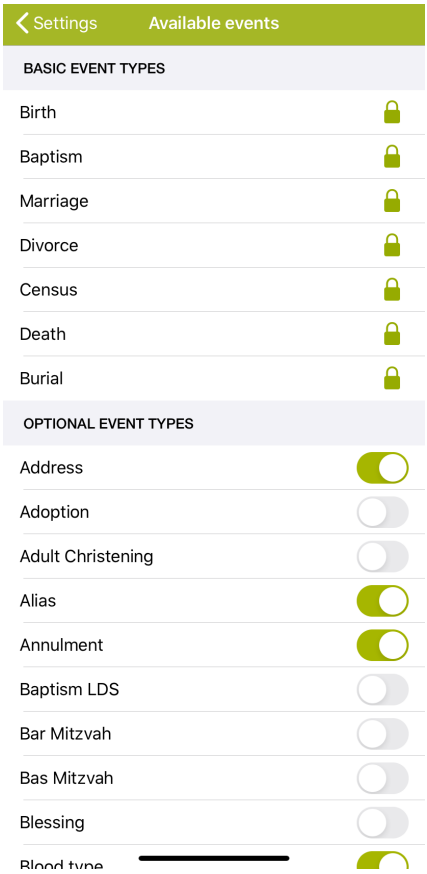
Edit
The pencil on the right next to the notebook opens the **edit** view. Here you can change the name of the notebook to another not already existing name for a notebook.

Delete
If you click the trash icon (delete) next to the notebook, you get 3 options.



- Delete all the notes and research logs in the notebook.
- Delete the notebook and move all notes and research logs of this notebook to another notebook. For example To: Research notebook
-Delete the notebook and keep the notes and research logs without a notebook linked to them.

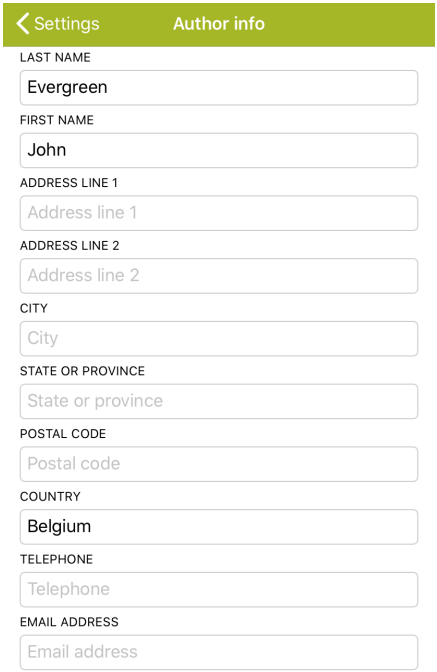
2. Available events



Genealogy apps use a whole list of events, of which most are specified in the gedcom format. In available events, you can specify which of these events you want to see.
The **basic events** are locked and will always be available.
The **optional events** can be enabled and disabled. By default, not all event types are enabled, so you might want to have a look at the available events, to see if you want to enable more events.

Remark: You will not be able to disable an events if the event is being used in a note.

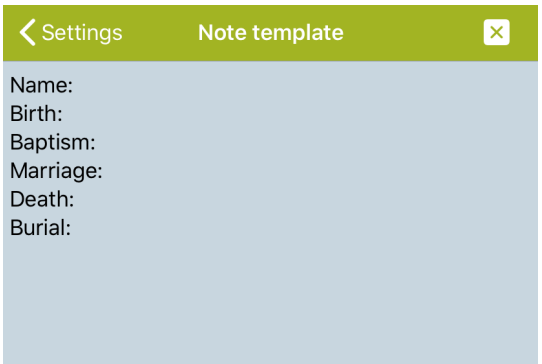
3. Author info



When exporting a gedcom file this author information will be included in the gedcom file.
This information is optional.

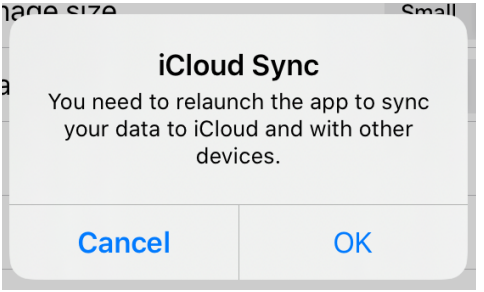
4. Note and family sheet template

Here you can set the default text when you create a new note or add a family sheet to your research log.



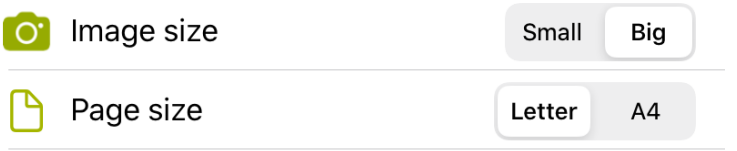
5. iCloud Sync

Genea lets you synchronise your data between your devices with the same iCloud account. This way the information on your Mac, iPhone and iPad are always in sync.



When switching from local storage to iCloud, we ask you to exit the app and relaunch the app to be sure everything is correctly switched.

Remark: If you don't have enough storage space in iCloud, this may cause problems.



6. Image size

Set the image size to small or big, to set the size for images in list views like note.

7. Page size

Set the default page size to Letter or A4.

Chapter 4: Research logs

Research logs are not difficult to understand.
You can find a good explanation about research logs at FamilySearch.org

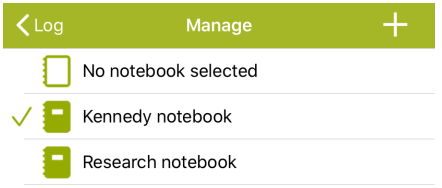
TIP: look at this explanation about research logs.
https://www.familysearch.org/wiki/en/Research_Logs

You can have as any research logs as you want. You typically have a research log for a person and his of her family (spouse and children), but you can define you own research topic.

1. General items

You give the research log a name, and you define the **notebook** it belongs to.

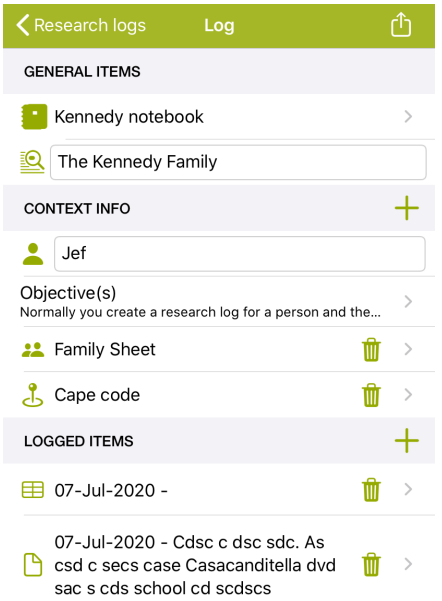
TIP: If you want to add a notebook you click on the + button.
TIP: On macOS and iPadOS you can use the shortcut command + R to create a new event. On the Mac you can also use the Touch Bar if your Mac supports it.



2. Context info

You enter the name of the **person** (or topic) you do research on.

You enter the **objective(s)** of the research. This is useful to keep things focused and limited to this objective. It is ok to have several research logs about the same person.



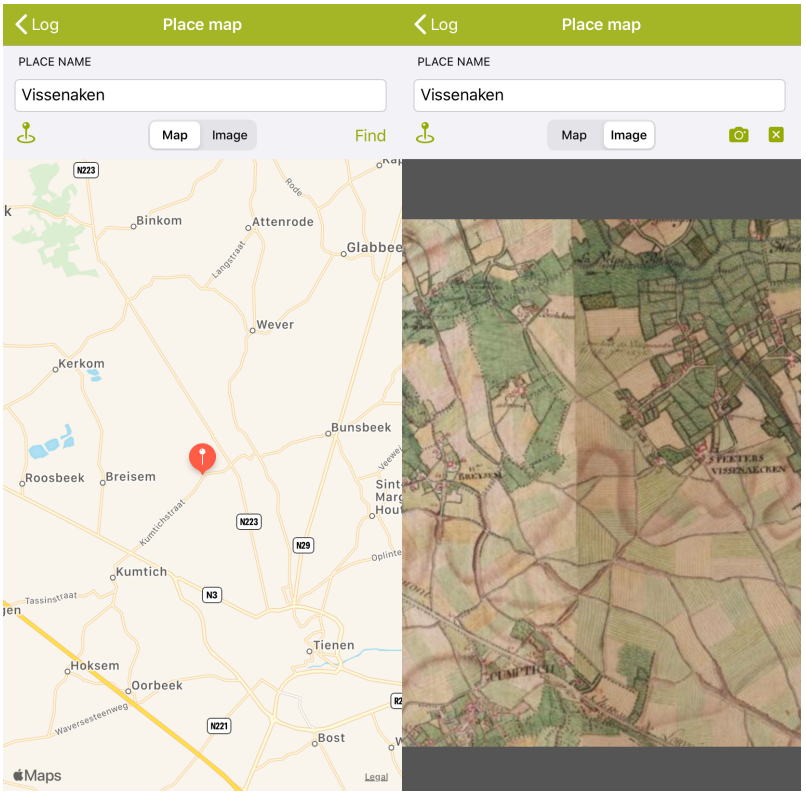
In the context info section you can add additional items.

Family sheets

You add a family sheet (which is text) to give some context to the family you are working on. This can just contain a list of the family members (spouse and children), but can also contain more context which helps you in your research. You can add as many family sheets as you want.

Place maps

A place map provides some inside of the places you are looking at. The place map has 2 views.



The **Map** view allows you to enter a place name. Click the **Find** button to find the place.

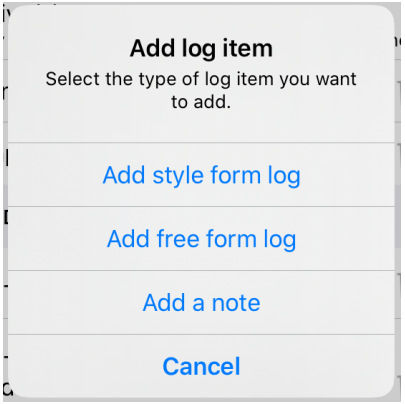
TIP: This can be useful to know which places, districts etc. are located nearby. These might be of interest to you.

The **Image** view allows you to add an image about the place. This can be an old map of the place, which can be useful to get a better understanding of the place and neighbouring places.
You can add as many place maps as you want.

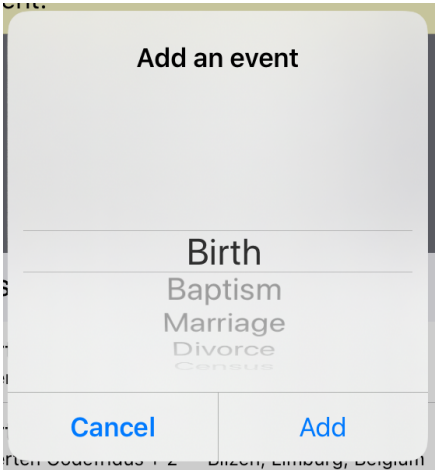
TIP: click the camera button to add an image, or use drag and drop to import the image. Images are stored in the database of genea and will be synchronised with your devices when you enable iCloud Sync.

3. Logged items

These are 3 possible logged items. You can add a logged item by clicking on the + button in the Logged items bar.

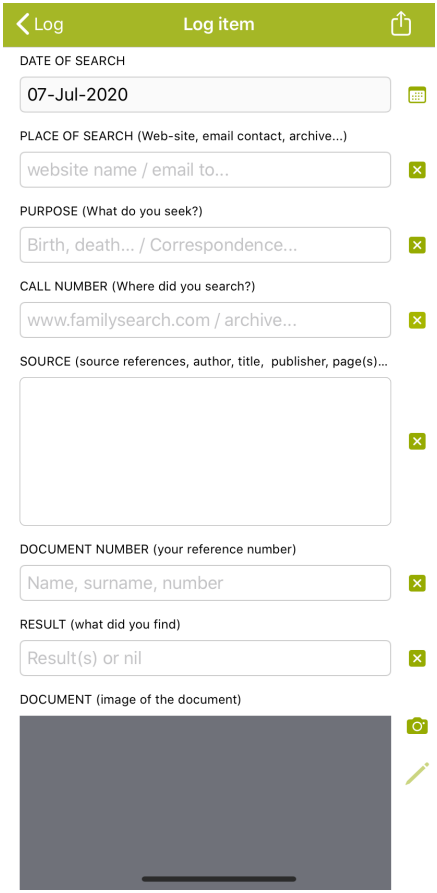


TIP: On macOS and iPadOS you can use the shortcut command + L to create a new log item. On the Mac you can also use the Touch Bar if your Mac supports it.



3.1 Style form

This is a form with specific fields to use for your research. This is intended to bring some structure to your research.



Date of research

Set the date you've done your research, of when you plan to do the research.

Place of search

Where are looking to find answers? Are you going to an archive, are you doing research online, are you mailing with someone to get more information...

Purpose

What result are you looking for? A birth certificate, a legal document...

Call number

Call number is a the specific reference to a microfilm, a books ISBN-number... to allow yourself or others to find the source you are talking about.

Source
Here you write down all relevant source references. This is the proof that what you find is correct and well documented.

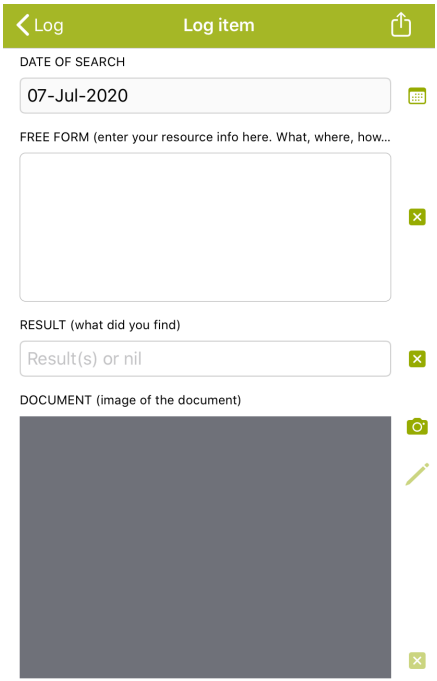
Document number
This is your own document number. A lot of genealogists have their own document number. This can be initials of a person combine with a number of something else. Make sure that you have unique document numbers.

Result
What did you find or didn't find? It is as important to note what you find, as what you didn't find.
The whole idea of a research log is to log everything and everywhere you looked for results. So logging that you looked for a person in the birth or death archives in a specific place and period is relevant. If you don't find a result, you enter nil in the result.

Document (image)
If you find something you can add the image of the result here. It can be useful to have the whole page where the result is on here.
TIP: If you are looking for family members, you can also add this to the Notes section

3.2 Free form

Free form is a form that is a simplified version of the Style form. With the free form, you are responsible to be sure all the relevant information is here.



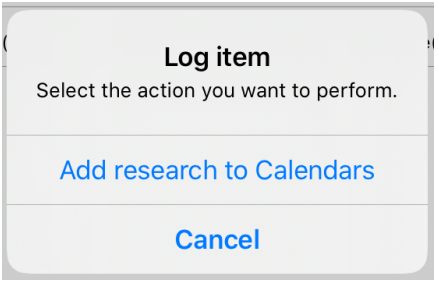
3.3 Notes

Sometimes it is just interesting to add a note to the research log. The date of the note is the date that you created the note.

4. Share the log item

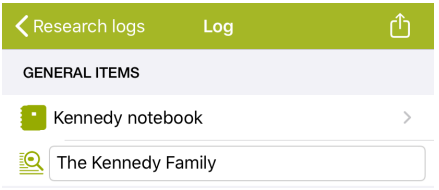
At the top right corner of the screen, you can click the share button. This allows you to schedule a research event

in your agenda. This is of course (only) useful when it's an event in the future.



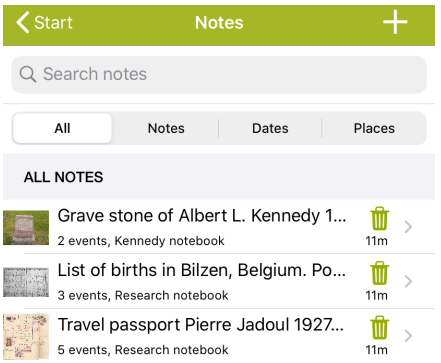
5. Share the research log

At the top right corner of the research log, you can click the share button. This will create a PDF of the research log with all the elements listed above, including and all the log items you added.

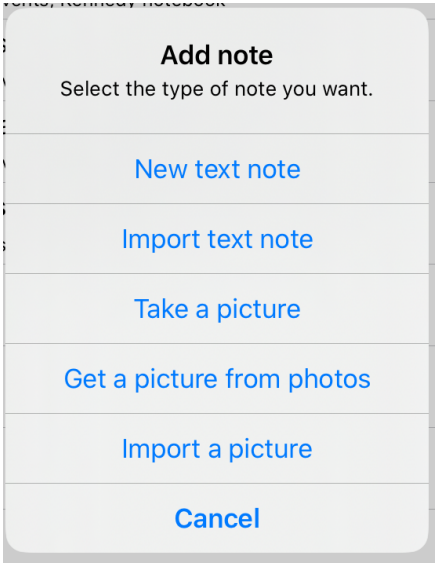


Chapter 5: Taking notes

Notes allows you to take notes starting from text or and image.
You create a note in the Notes list by clicking on the + icon in the top right corner.



This will present you with the following options.



New text note
This will create a note with the template text that you can edit in the Settings.

Import text note
This allows you to select a txt or rtf file which will be imported as the note.

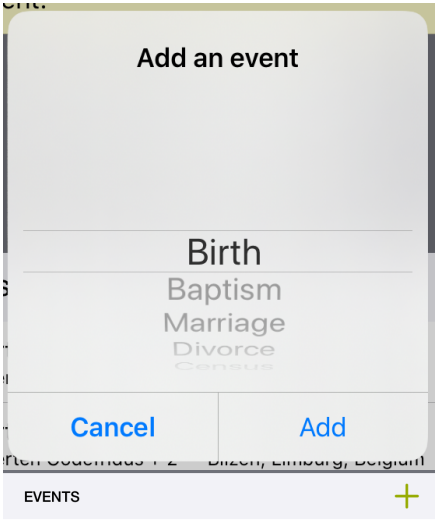
Take a picture
This opens the camera of the iPhone, iPad or Mac to take a picture.

Get a picture from Photos
This brings you to the Photo gallery to select a picture and import it.

Import picture
This brings you to de Folders app on iPhone and iPad, and shows the Open Dialog Box on the Mac.

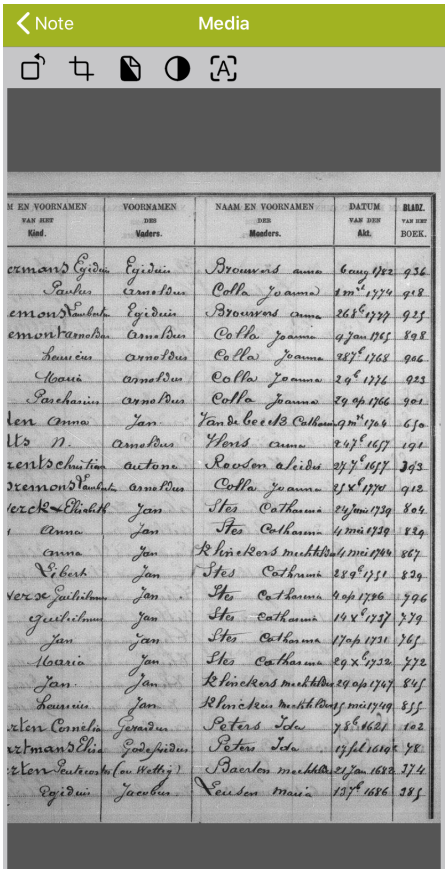
TIP: On macOS and iPadOS you can use the shortcut command + N to create a new event. On the Mac you can also use the Touch Bar if your Mac supports it.

After importing text or an image, you get the note view. Here you can edit the text inline. You can also use drag and drop to add a picture.



In the **General section** you specify the notebook the note belongs to (if any), you enter text and you add or edit the picture.

TIP: The size of the picture can be set too small or big in Settings.



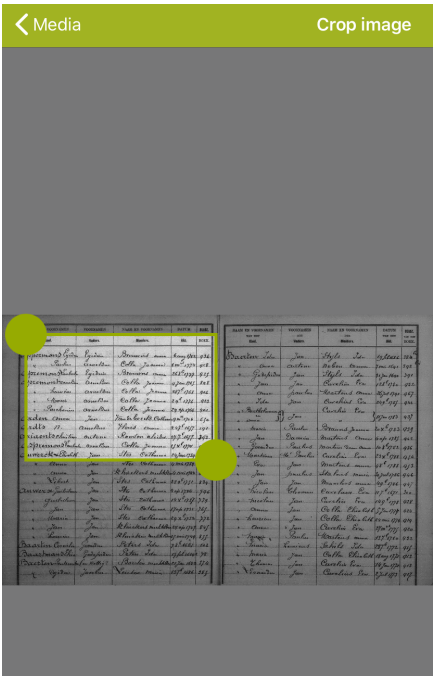
Edit media

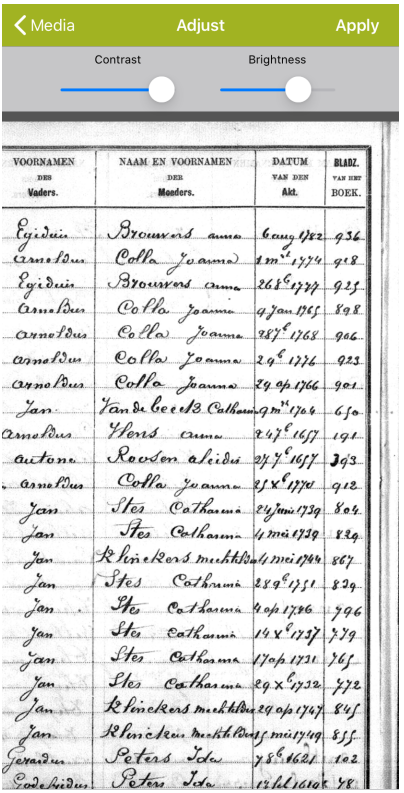
Click on the picture or on the pencil icon to edit the image.

The icons are from left to right:
-rotate image
- crop image
- invert the image (colors)
- adjust the image contrast and brightness
- text recognition

Crop image
Set the rectangle to crop and click on crop image to apply.

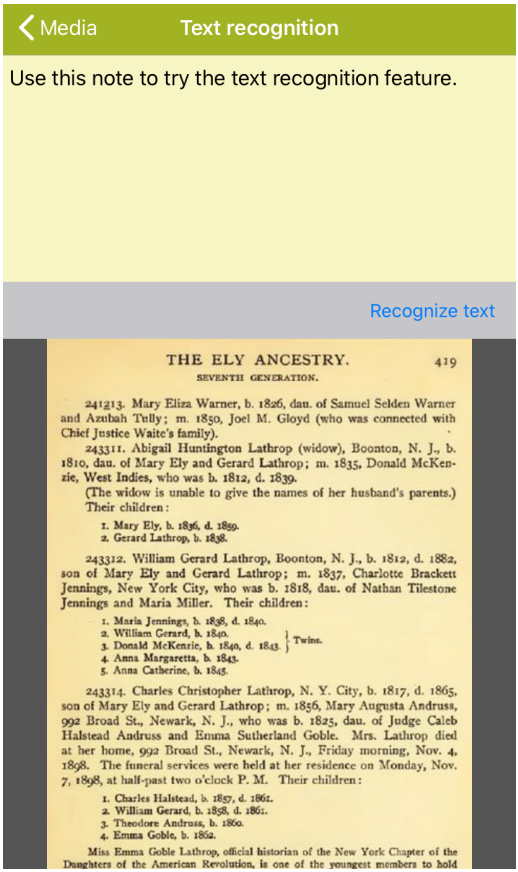
Adjust image
Adjust the contrast and brightness of the image to make it easier te read.





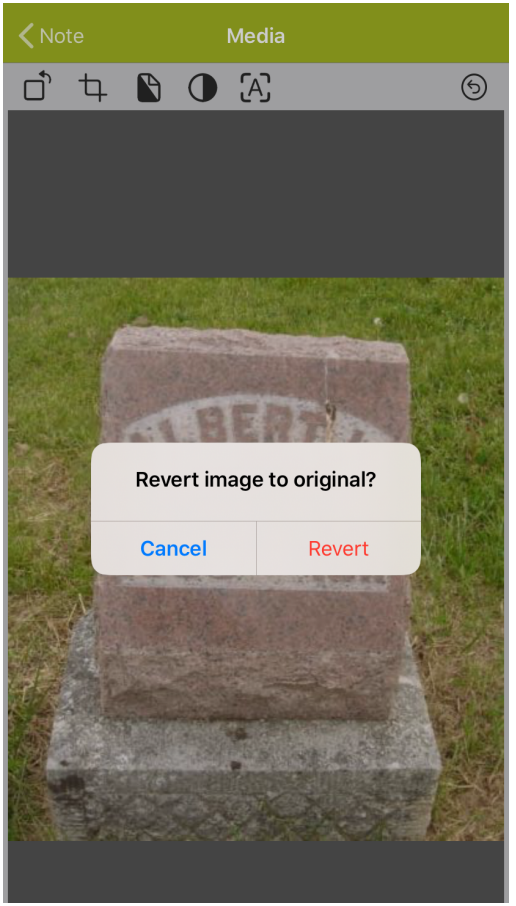
Text recognition

This can be used for typed text. This works best when the text is upright (not rotated), and with a good contrast.
This is not intended to recognise handwriting.
Clicking on Recognise text will add the recognised text at the end of the notes.



Undo changes

When the original image is modified, you can always return to the original image. You might have cropped the image incorrectly, or the image adjustment is to extreme. You tap the revert button in the right to corner of the screen to return to the original image.

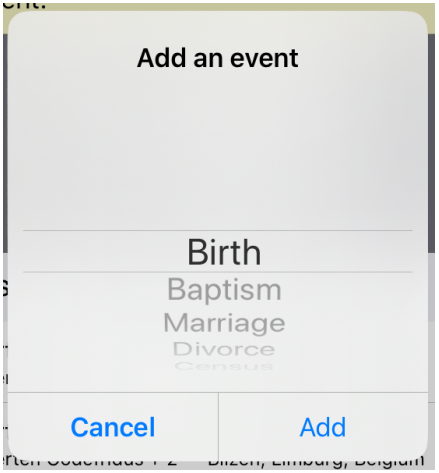


Chapter 6: Adding Events

After having created a note, you want to add events to the note. In a lot of cases, you have found an archive record about a birth, baptism, marriage, death or burial.
From a note you can add one or more events which are relevant. For example a birth certificate gives you information about

- The birth of the child, date and place (1 event)
- The parents names, age, birth dates and places of the parents (possibly 3 events)
- Possible death of a parent (1 event)
- The godfather and godmother of the child (2 events / relationships)
- Occupation of the parents (2 events)

Adding an event is easy.
Click the + button in the Events bar and you'll get this screen. Select the event you want to add.

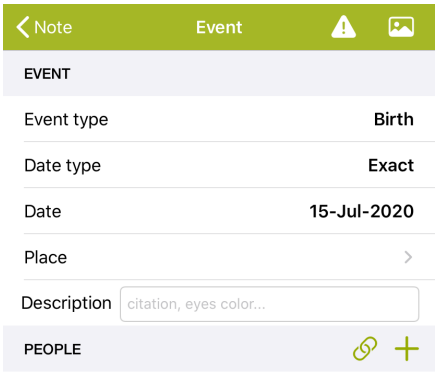


TIP: In Settings you can modify which events are shown in the list.

Click add to create the event, which brings you to the event screen.

TIP: On macOS and iPadOS you can use the shortcut command + E to create a new event. On the Mac you can also use the Touch Bar if your Mac supports it.

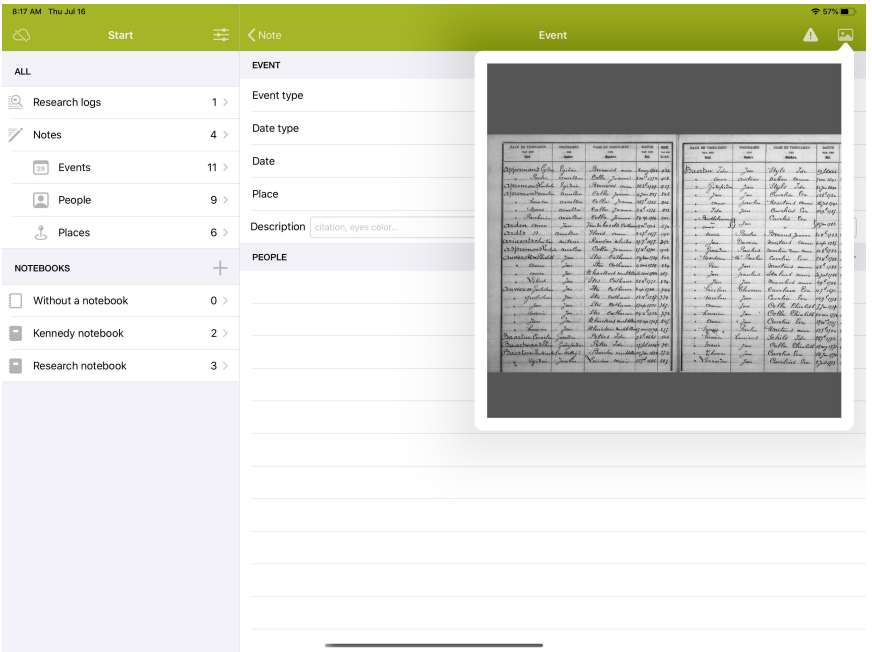
The event screen allows you to add all the needed info about the event.



In the top bar you'll see an **alert sign**, because there isn't a person linked to the event. We will cover that in the next chapter.

The **image icon** in the top bar (at the right), will display the image linked to the note in a popover. This is especially handy on the iPad and Mac, to quickly

look at the image to get the information about the event.

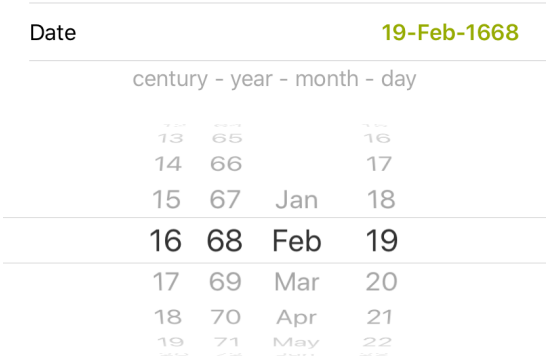


Event type
Tap on event type to display the available events. The first events in the list are the basic events like birth, death, marriage... followed by all other events.

TIP: In settings you can disable or enable events you want to see.

Date type
Tap on date type to see the available date types. This follows the gedcom possibilities of **about, before, after**... or the exact date if you have it.

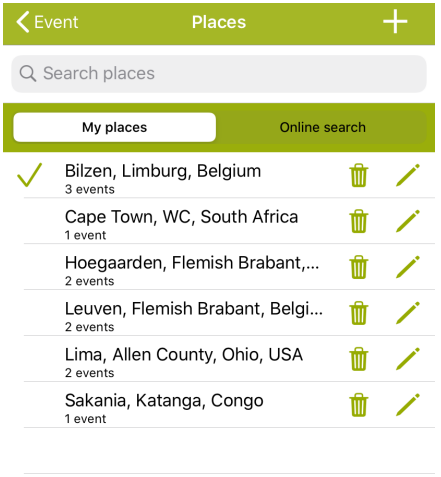
Date
There will be one or two dates depending on the date type. The date type **between...and** will allow you to enter 2 dates (Date and date to).
You can select the century, year, month, day in the picker to set the date.



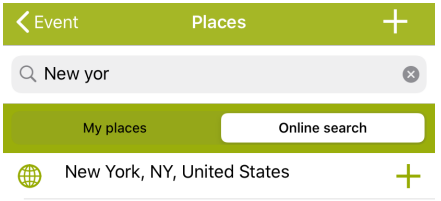
Description
This is a free text field. You can fill in a reference number or some context info about the event.

Place
This is the place of the event. Tap the place to go to the places view. This view has 2 views. My places, which are places already known to the app, and online search which will let you look up places.

TIP: Online search does mean you have to have an internet connection.



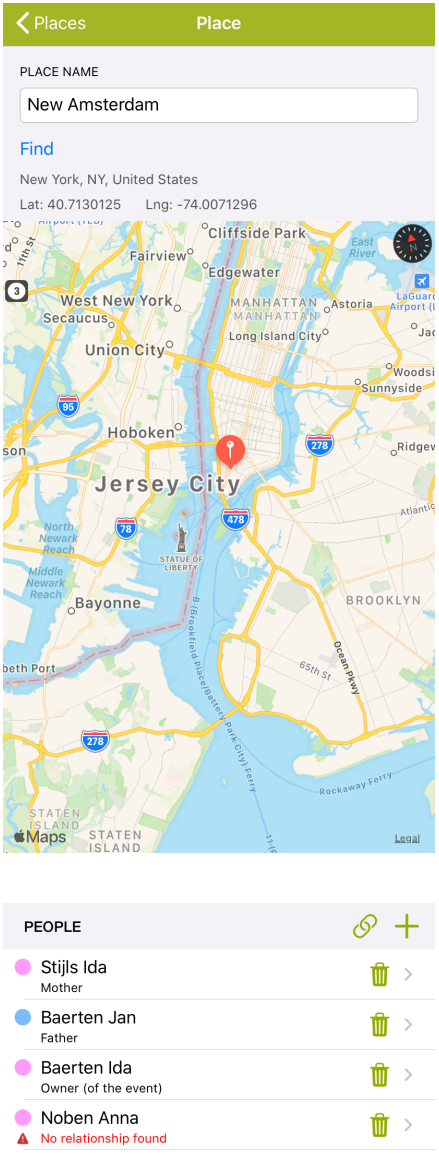
You can add places in 2 ways.
Tap the + icon to add a place name manually



or
search for it online, and when you found the place, tap on the + icon next to the name to add it to the places (and link it to the event)

Each event has one place linked to it. That place can of course be linked to other events.
You can not delete a place if there are still events linked to it. How many events are linked to a place is shown below the event.

Click on the edit icon to go to the place view.



The place view show the place name you gave to the place, and the map of where the place is situated. In an event, I like to give the exact name of the place, like it was called at the time. In this example, I use New York to find the place, but I change the name of the place to New Amsterdam.

In the view you can type in a name and click on Find to find a place, and afterwards you can always change the name of the place...

Chapter 7: Linking and adding people

Genea allows you to add and link people to an event. People can be linked to several events, which can be very useful if you export a note as a gedcom file.

An example of people linked to an event is shown here. The color indicates the gender, and below the name you see the **relationship** of the person to the event.
The relationship is required. There is no reason to link a person to an event if the person wasn't at least a witness to the event.

The different relationship are:
- Owner of the event

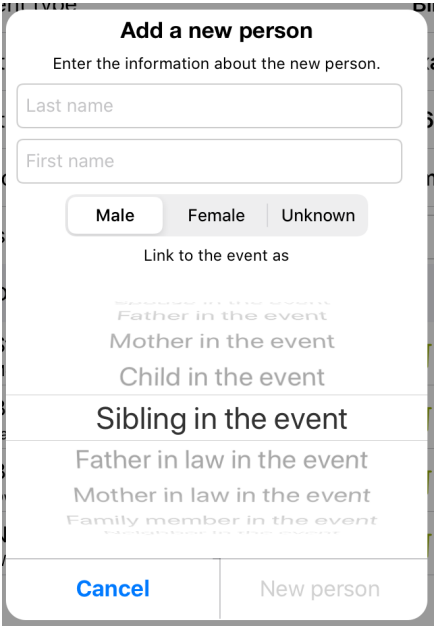
This is the person who this event is about. On a birth

certificate this is the child. For a marriage you pick the husband or the wife...

- Spouse in the event
- Father in the event
- Mother in the event
- Child in the event
- Father in the event
- Sibling in the event
- Father in law in the event
- Mother in law in the event
- Family member in the event
- Neighbour in the event
- Witness in the event
- ? (no relationship)

Add a person.

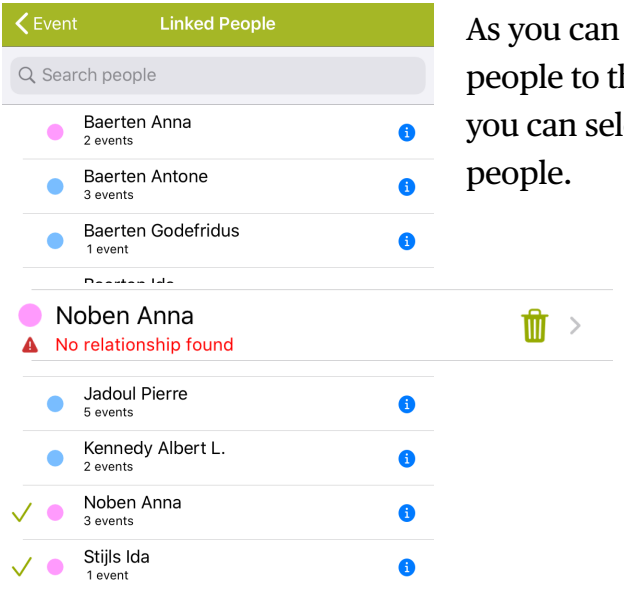
Tap the + icon to add a person.



Enter the first and last name of the person and select the gender.
Next select the relationship this person has for the event.

Link a person.

Tap the chain icon to link a person.

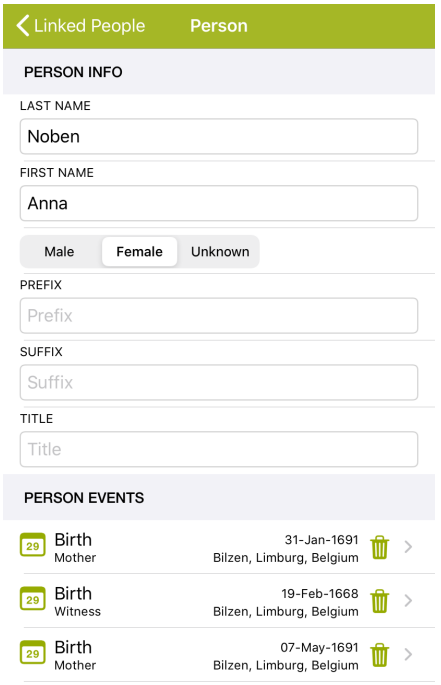


As you can link multiple people to the same event, you can select and deselect people.

TIP: Use the searcher to find the person you are looking for.

If you found a person you want to link to, but you are not sure because there are 3 people with the same name, you click the blue **info** - icon on the right of the person to get more information about the person.

Here you get the **person info** of Noben Anna.



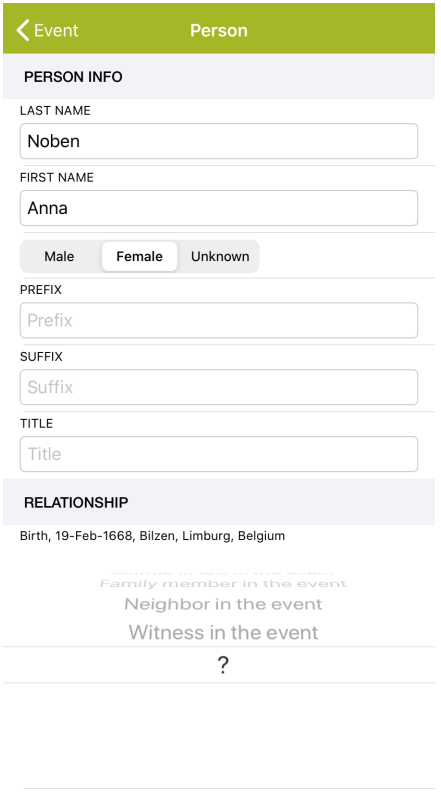
You can edit the info, but more important are the events the person is linked to. In this case she is linked to 3 events, in which she was the mother for 2 of the events. The relationship is noted below the event.

In most cases, this gives enough information to select the correct person.

TIP: You can even tap on the events to get the events info and see other people linked to the event...

After you linked one or more people to an event, you'll get the **no relationship found** warning.

Tap on the person to set the relationship in the following screen.

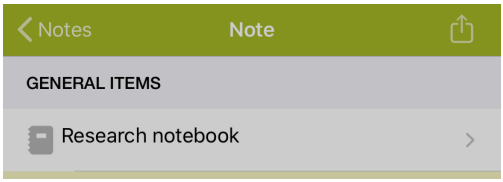


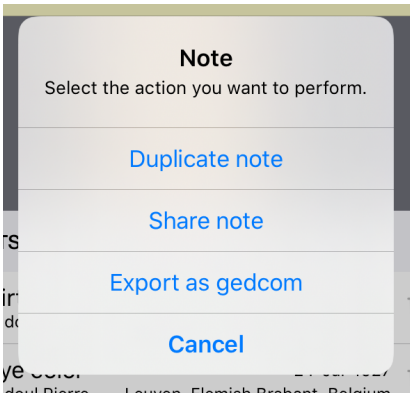
You can edit the name if you misspelled it for example.
Below you'll see that the relationship is set to **?**.
You can set the relationship to the correct state.
The event itself is displayed below the relationship bar.

In this example: Birth, 10-Feb-1668, Bilzen, Limburg, Belgium.

Chapter 8: Share, duplicate or export a note

Notes can be duplicated, shared or exported. Tap the share button at the top right of the screen to get the options.





Duplicate note
This makes a complete copy of the note, but also of the image and text associated with the note.
The people that are linked are NOT copied, so that links stay useful.

TIP: This is useful for census records or other overview records. You can enter a page and afterwards make copies for individual people / records.

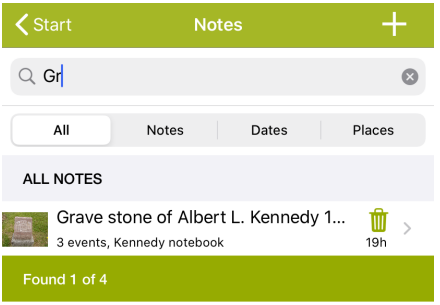
Share note
This allows you to share the note including the text and image. Share it on facebook, to another app, per mail or anyway you like.

Export as gedcom
This creates a gedcom file which you can save or mail together with the image (if there is one).
You can import the gedcom file in you family tree app.

Chapter 9: Finding stuff in notes, events, people, places and research logs

Once you start to get a lot of events and people, you need to be able to find the correct info quickly.
The principle applied for most things to search on are the same for Notes, events , people and places.
You have a general search, and more specific ways to search.

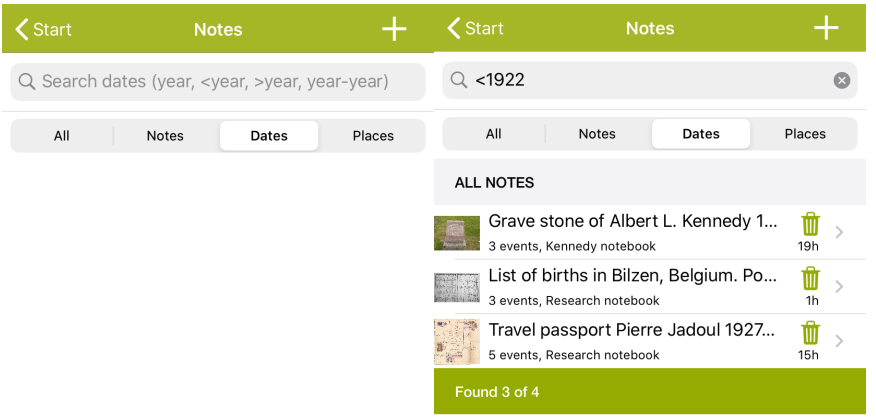
Notes
The general search is called **All**, as you can see here.
The number of matching results are displayed.
Here there is 1 result out of 4 Notes.



General search looks if text contains the text you are searching for. No * wild cards or other special search characters.

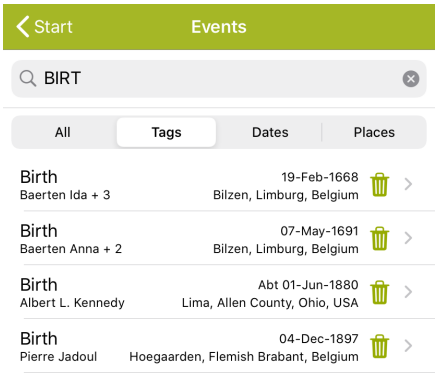
Searching on **dates** is a bit different.
For dates, you can enter
- **year**. This will give all dates in that year
- **<year**. This will give all dates before that year
- **>year**. This will give all dates after that year
- **year-year**. This will give all dates between the years.

*TIP: don't use **spaces** between the <,>,- and year, or between year and -. < 1922 will not work. <1922 will.*



Events

Searching for events has one specific search item for events. That's the **Tags** search.



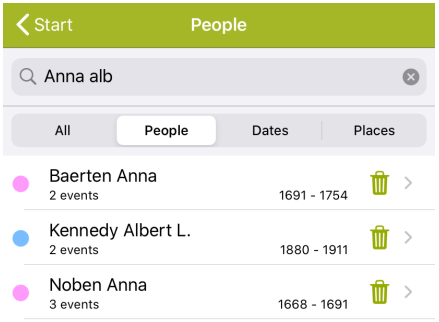
Tags refer to gedcom tags. In gedcom, birth is known as BIRT, marriage as MARR and so on.
Each gedcom event has a 4 character tag.
In English this matches relatively close with the events as we know than, but that doesn't work for other languages. Birth is "naissance" in French. Most genealogy users know the gedcom tags, and that's why we think that using the gedcom tags to search on can be very useful.

People

The one specific item for people is **People**. With people you can combine several names for search results.
For example, you search for "Anna Albert", you'll look for all names containing Anna AND all names containing Albert.
This gives more results and we find this gives you a bigger change to find what you look for.

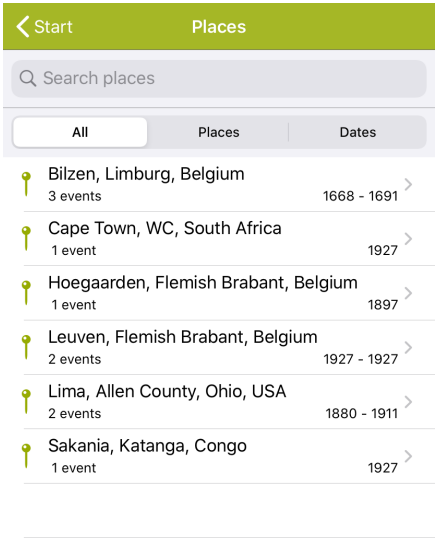
TIP: If you want to look for a person with first name "Anna Albert", you can use the All search.

All searches on text are case insensitive.

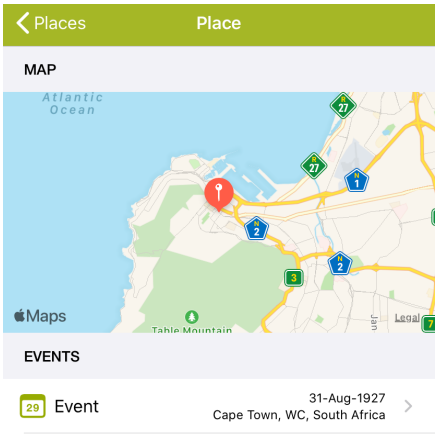


Places

Places has no specific search items for the moment.



Tap on the place name to get the place details with all the events linked to that place.



Here you can see the events linked to the place. Tap on an event you want to get more details...

Chapter 10: Synchronise between devices

To synchronise between devices there is not much you have to do.

Make sure you have switched iCloud **sync on** all the devices you want to synchronise with.
Go the chapter 3: Settings if you have questions about this. This will make sure the data on your device is also available in the cloud.

Make sure that the devices you want to synchronise all use the **same iCloud account**. You can not synchronise over different iCloud accounts.

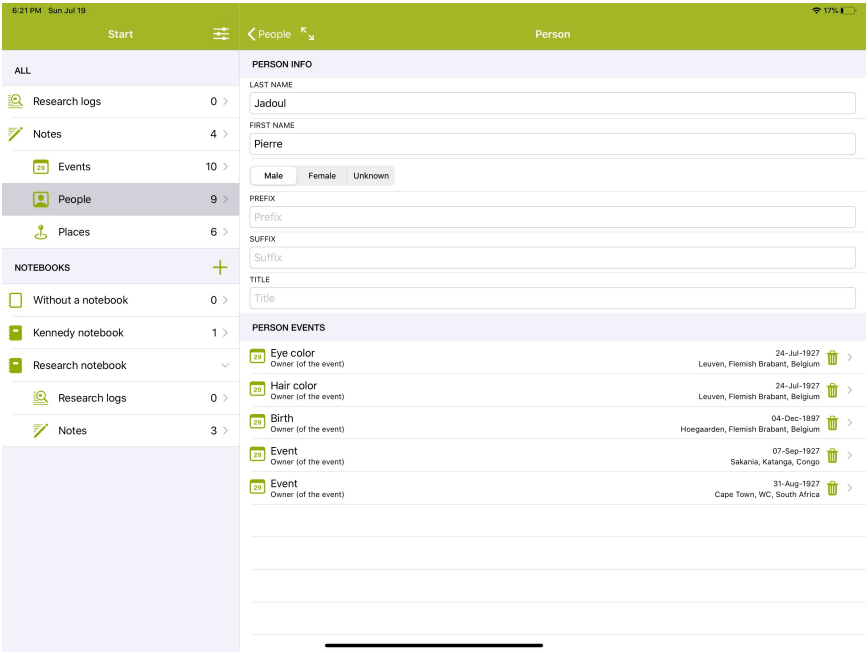
Make sure there is enough **iCloud storage** available, and

that there is enough storage available on your device(s). You can only synchronise data between devices if there is enough iCloud storage.

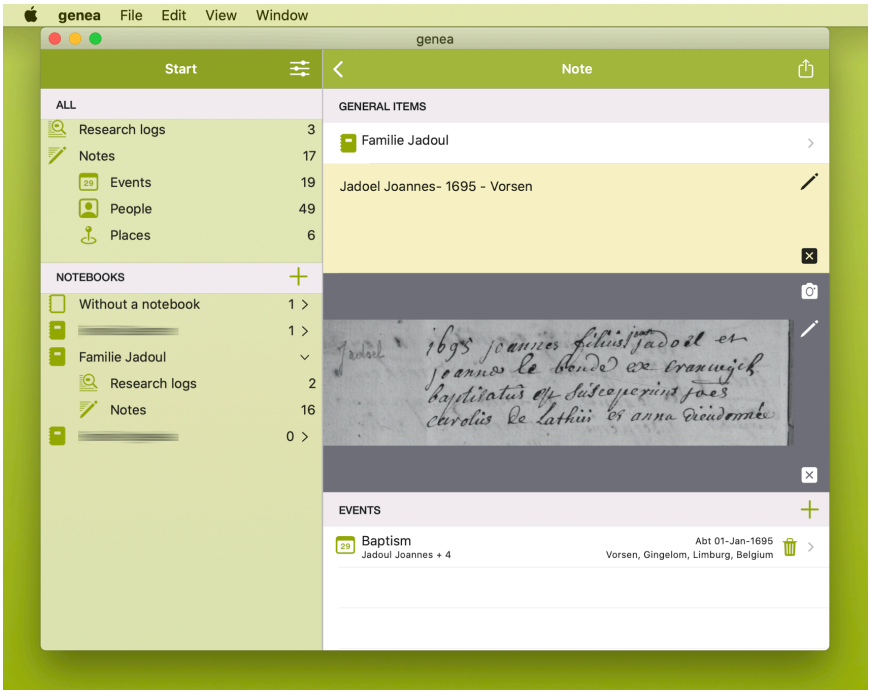
To recap:
- switch iCloud sync ON
- use the same account over all devices
- have enough iCloud storage and storage on your device

This manual has shown screenshots of the iPhone version to keep everything a bit consistent, but we wanted to show some screenshots of the iPad and macOS versions as well. You find them below.

iPadOS screenshot



macOS screenshot



Chapter 11: Nice to know

This chapter lists some nice to know items. They are not essential to the general working of the app.

Dark mode
Genea supports dark mode on iOS and macOS.

Start

ALL

Research logs 0

Notes 4

Events 11

People 9

Places 7

NOTEBOOKS

Without a notebook 0

Kennedy notebook

Research logs 0

Notes 1

Research notebook 3

Notes Note

GENERAL ITEMS

Research notebook

List of births in Bilzen, Belgium. Possible family members of the Baerten family. The birth events are linked to the note. The father and mother of the child are linked to the event.

EVENTS

Birth
Baerten Ida + 3
19-Feb-1668
Bilzen, Limburg, Belgium

Baptism
Baerten Godefridus + 2
31-Jan-1691
Bilzen, Limburg, Belgium

Birth
Baerten Anna + 2
07-May-1691
Bilzen, Limburg, Belgium

About the Author

Geert Jadoul is the founder of Vertical Horizon Software, a software company based in Belgium. Active as industrial designer, graphic artist, program manager and software developer. Geert has a special interest in genealogy and any useful genealogy tool in particular. Genea was created from the need to make genealogy research easier and more insightful.