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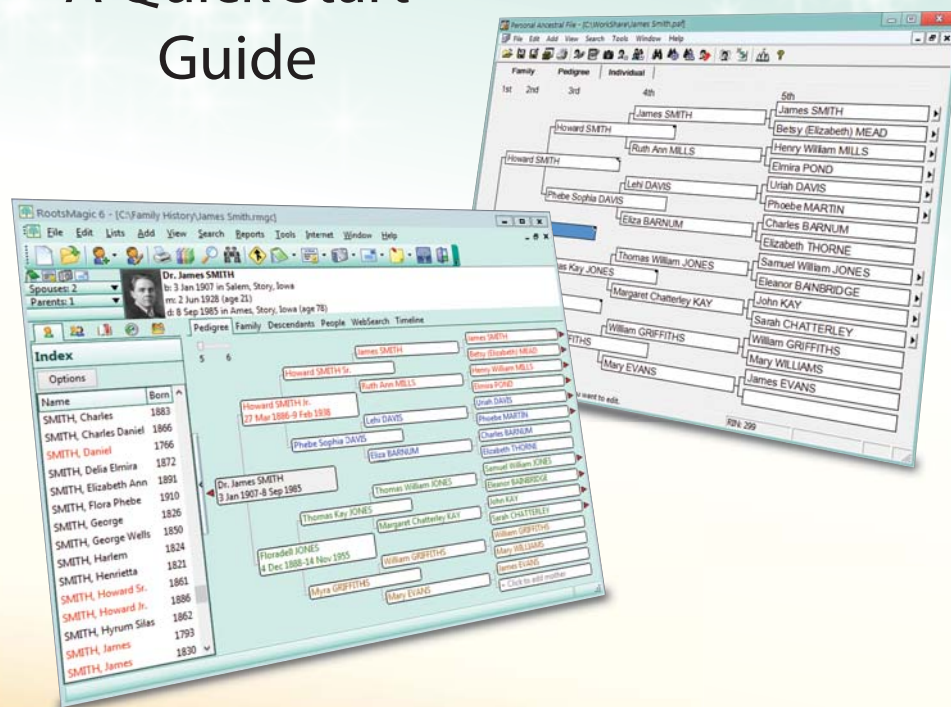


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RootsMagic[★] for PAF Users

A Quick Start Guide



RootsMagic for PAF Users

A Quick Start Guide

Welcome to RootsMagic!	1
Moving Your Data to RootsMagic	2
Navigating the Main Screen.	4
Editing Your Data	6
Customizing RootsMagic	8
Frequently Asked Questions	9
Appendix 1: PAF Menu Items in RootsMagic	10
Appendix 2: PAF Reports in RootsMagic.	12



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Still have questions?



We're here to help you get the most out of RootsMagic! Visit:

www.RootsMagic.com/help

for Forums, Mailing Lists, Webinars, User Groups, Knowledge Base
articles, and other technical support.

Appendix 2: PAF Reports in RootsMagic

RootsMagic can create over 100 colorful reports and charts. The following are the charts and reports available in PAF and their equivalents in RootsMagic.

PAF Report	RootsMagic Report
Pedigree, Single page	Pedigree
Pedigree, Cascading	Pedigree, Print cascading charts
Pedigree, Blank form	Blank reports, Pedigree chart
Family Group, Single family	Family Group Sheet
Family Group, Cascading	—
Family Group, Blank form	Blank reports, Family group sheet
Ancestry, Standard chart	Ahnentafel
Ancestry, Wall chart	Wall Chart, Ancestor chart
Descendants, Standard chart	Descendant List
Descendants, Wall chart	Wall Chart, Descendant chart
Books, Ahnentafel (Ancestry)	Narrative, Ancestors
Books, Modified register (Descendancy)	Narrative, Descendants
Individual Summary	Individual Summary
Scrapbook	Scrapbook
Custom	Custom Report
Lists, Unlinked individuals	Individual List, Unlinked
Lists, Duplicate individuals	Duplicate List
Lists, Individuals sorted by RIN	—
Lists, Individuals sorted alphabetically	Individual List, Selected
Lists, Marriages	Marriage List
Lists, Possible problems	(Main Menu) Tools > Problem Search > Problem List
Lists, End-of-line individuals	Individual List, No parents
Lists, Family reunion contacts	Address List
Lists, Places sorted alphabetically	Place List
Lists, Individuals with notes	Custom Report
Lists, Sources	Source List
Lists, Citations referencing a source	Source List, Citation details
Lists, LDS incomplete individual ordinances	LDS Ordinance List, Individual ordinances, Only those missing ordinances
Lists, LDS incomplete marriage sealings	LDS Ordinance List, Marriage sealings, Only those missing ordinances
Lists, LDS family ordinance summary Calendar	LDS Ordinance List Calendar

Welcome to RootsMagic!

“I have used PAF for all my years in Family History research. I now enjoy working with RootsMagic. It is by far the best program. Thank you.”

— Joyce

Change isn't easy. Like many genealogists, you've probably used Personal Ancestral File (PAF) for years. You know it like you know your grandma's sugar cookie recipe. It's comfortable, it's familiar, and unfortunately, it's no longer being updated or supported.

As you considered your options, you learned about RootsMagic. Like PAF, RootsMagic is desktop genealogy software that allows you to record, research, and share your family history.

Unlike PAF, RootsMagic is actively being developed and updated—supporting the latest operating systems and genealogical technologies.

RootsMagic has all the features you've come to depend upon in PAF. Plus it does so much more.

RootsMagic introduces amazing new features such as book publishing, color coding, wallcharts, Shareable CD's, running straight

off of a flash drive, interactive problem lists, online publishing, a mobile app, and more!



It can even search and share data between your file and FamilySearch Family Tree!

Again, we understand that change isn't easy. But we're sure that, with a little of your time and a little help from us, you'll be just as comfortable with RootsMagic as you were with PAF.

If you'll excuse me, I think I'll go make some sugar cookies now. ■



Did you know that RootsMagic has been around for over 20 years? It's original name was "Family Origins".

Like PAF, it originally started as a DOS program before moving to Windows. In fact, Family Origins pioneered many of the features that you enjoyed in PAF.

Moving Your Data to RootsMagic

"I want to thank everyone at RootsMagic for all their hard work! I purchased RootsMagic after attending a genealogy seminar this past September. I was still using PAF at that time. When Bruce explained how easy it was to convert my data I was ecstatic, so I purchased the software. When I received it, it loaded quickly, converted all my old PAF data (just as Bruce said it would) and I was up and running. . . Love is a very strong word, and I Love RootsMagic!! Thanks everyone, great job!!"

- Kathy

When you think of moving your data from one genealogy program to another, you probably have nightmares of GEDCOM files, incomplete transfers, and lost information.

You can rest assured that RootsMagic spares you all of these headaches. You don't even have to know how to pronounce "GEDCOM" to move your data over.

RootsMagic can directly import your original PAF database (not a PAF backup file) into a new RootsMagic file.

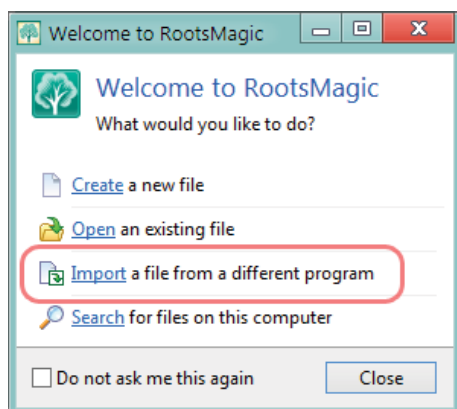


RootsMagic will directly import your PAF 2, 3, 4, or 5 files, no matter their size.

It keeps everything including your names, events, notes, sources, and pictures. It even preserves your RIN numbers!

To Import Your PAF File:

1. Upon starting up RootsMagic for the first time, you'll see the "Welcome Screen". Click **Import a file from a different program**.



If you do not see the "Welcome Screen", you can also select **File > Import** from the RootsMagic Main Menu.

The "Import File" screen will appear.

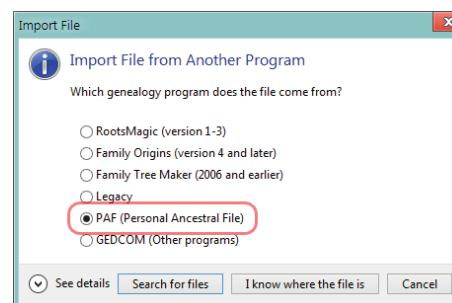
PAF Menu Item	RootsMagic Menu Item
Add > Mother	Add > Parents P
Add > Other Parents	Add > Parents P
View > Family	View > Family view
View > Pedigree	View > Pedigree view
View > Individual	View > People view
View > Toolbar	Right-click toolbar, Toolbar
View > Status Bar	—
Search > Individual List	Search > Person List Ctrl+F
Search > Marriage List	Search > Family List Shift+Ctrl+F
Search > Descendancy List	View > Descendants View
Search > Find by RIN/MRIN	Search > Person List, Record
Search > Advanced Focus/Filter	Search > Person List, Find
Search > Home Person	Search > Go to Root Person Ctrl+Home
Search > On FamilySearch Internet	View > Web search
Tools > Match/Merge	Tools > Merge > Duplicate Search Merge
Tools > Merge Duplicate Sources and Citations	Tools > Merge > Automatic Merges, SourceMerge
Tools > Global Search and Replace	Search > Search and Replace Ctrl+H
Tools > Change Names to Mixed Case	—
Tools > Create Web Page	Internet > Publish online
Tools > Notepad	—
Tools > Relationship Calculator	Tools > Relationship Calculator
Tools > Date Calculator	Tools > Date Calculator
Tools > Soundex Calculator	Tools > Soundex Calculator
Tools > Preferences	Tools > File Options or Program Options Shift+Ctrl+P
Window > Cascade	Window > Cascade
Window > Tile Horizontally	Window > Tile Horizontally
Window > Tile Vertically	Window > Tile Vertically
Help > Current Topic	Help > Contents F1
Help > Help Topics	Help > Contents F1
Help > Keyboard	Help > Contents F1
Help > Getting Started Guide	Help > Contents F1
Help > User's Guide	Help > Contents F1
Help > Lessons	Help > Learning Center
Help > Feedback and Frequently Asked Questions	Help > Technical Support
Help > Find a Family History Center	—
Help > Check for Software Updates	Help > Check for Updates
Help > About The Church of Jesus Christ of Latter-day Saints	—
Help > About Personal Ancestral File	Help > About RootsMagic

Appendix 1: PAF Menu Items in RootsMagic

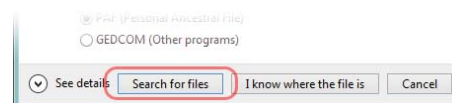
The following are the Main Menu items available in PAF and their equivalents in RootsMagic, as well as a keyboard short-cut, if available.

PAF Menu Item	RootsMagic Menu Item
File > New	File > New Ctrl+N
File > Open Ctrl+O	File > Open Ctrl+O
File > Close Ctrl+F4	File > Close Ctrl+F4
File > Save As	File > Rename
File > Import	File > Import
File > Export	File > Export
File > Export for TempleReady for Windows	File > FamilySearch
File > Add TempleReady Update	File > FamilySearch
File > Properties	File > Properties
File > Backup	File > Backup
File > Restore	File > Restore
File > Check/Repair	File > Database tools
File > Delete	File > Delete
File > Print Reports Ctrl+P	Reports > Print a report Ctrl+P
File > Exit Alt+F4	File > Exit Alt+F4
Edit > Individual Ctrl+I	Edit > Person Enter
Edit > Notes Ctrl+N	Edit > Person, Note
Edit > Multimedia Ctrl+M	Edit > Person, Media
Edit > Unlink Individual	Edit > Unlink
Edit > Delete Individual	Edit > Delete > Person Delete
Edit > Marriage	Edit > Person Enter
Edit > Parents	Edit > Person Enter
Edit > Parents' Marriage	Edit > Person Enter
Edit > Order Spouses	Edit > Rearrange > Spouses
Edit > Order Children	Edit > Rearrange > Children
Edit > Source List	Lists > Source List
Edit > Repository List	Lists > Repository List
Edit > Individual Event List	Lists > Fact Type List
Edit > Marriage Event List	Lists > Fact Type List
Add > Individual Ctrl+A	Add > Individual I
Add > Family	Add > Parents P
Add > Spouse Ctrl+U	Add > Spouse S
Add > Child Ctrl+L	Add > Child C
Add > Father Ctrl+T	Add > Parents P

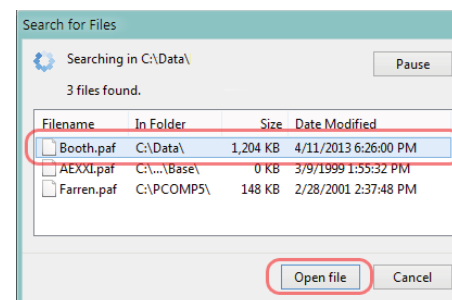
2. Select **PAF (Personal Ancestral File)** from the "Import File" screen.



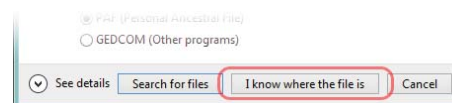
3. If you don't know where on your computer the PAF file is, click **Search for files**.



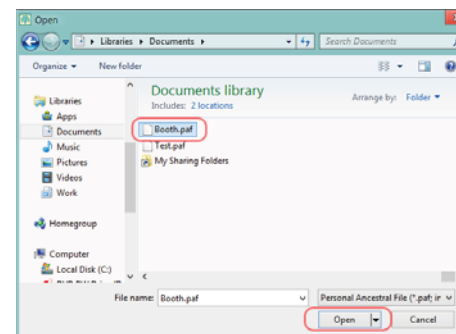
RootsMagic will search all of your drives for any PAF files and display them in a list. Select a file and click **Open file**.



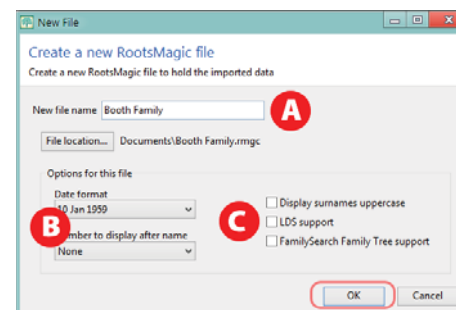
4. If you do know the location of the PAF file you want to import, click **I know where the file is**.



Select the appropriate folder and file, then click **Open**.



5. Set the options for the new RootsMagic file.



Options include: **A)** Filename, **B)** Number to display next to a person's name, and **C)** LDS and FamilySearch Family Tree support. Click **OK** to complete the import.

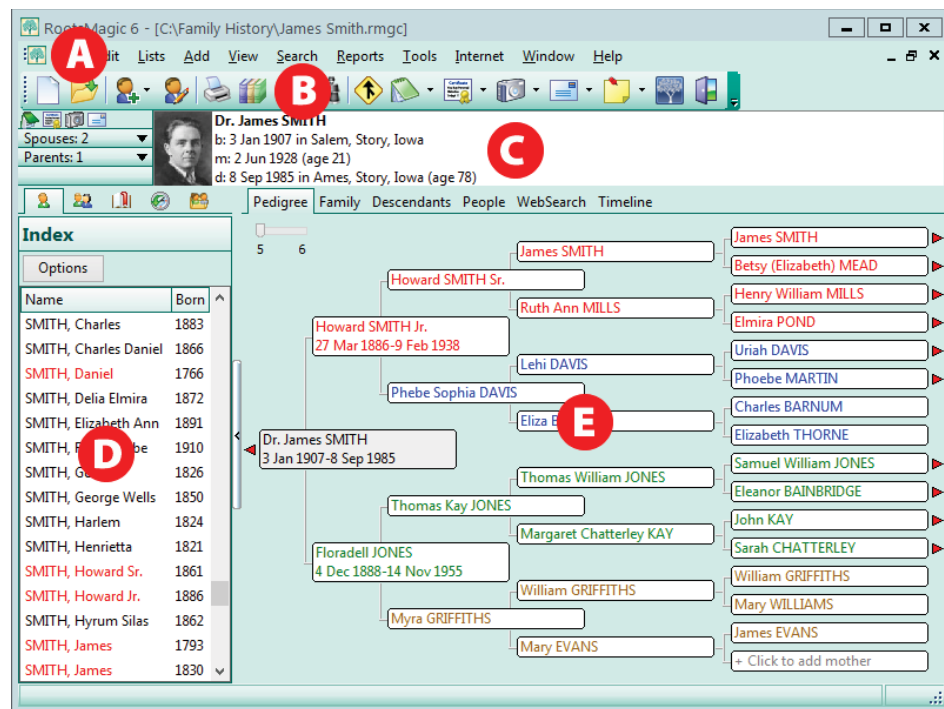
6. Your PAF data is now happy and safe in its new RootsMagic home!

If you wish, you may now safely uninstall PAF and archive your PAF files and backups. ■

Navigating the Main Screen

"I have been working on the family history for many years using PAF, and converted to RootsMagic, which is a great program, very user friendly. I have recommended the program to beginners that are interested in finding and recording their own family genealogy."

- Shirley



Like PAF, the Main Screen of RootsMagic has a Main Menu, Toolbar, Status Bar, and tabbed "views".

A - Main Menu

The Main Menu gives access to all of RootsMagic's main features. For a list of PAF main menu items

and their RootsMagic equivalents, please see **Appendix 1: PAF Menu Items in RootsMagic**.

B - Toolbar

The Toolbar gives access to the most commonly-used RootsMagic features. To add your own favorite features to the toolbar, right-

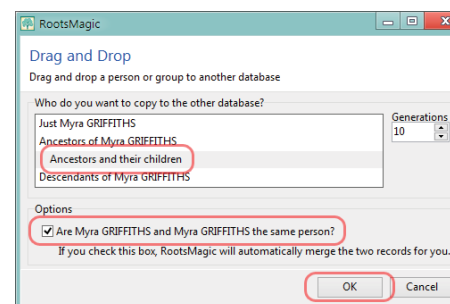
Frequently Asked Questions

"I am new to RootsMagic but am thrilled with the little exposure that I have had. It makes genealogy so simple. . . For many of us, PAF 5 was all we knew and it was overwhelming to think that it was going by the wayside. . . THANKS!"

- Margaret

Q: How do I merge multiple PAF files into one RootsMagic file?

A: RootsMagic lets you split and combine files using "Drag and Drop", similar to pruning and grafting branches of a tree.



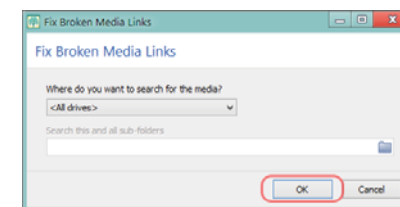
1. Open both the file to be combined and the file to be combined into.
2. Choose a person that is common to both files. Click on this person in the file to be combined.
3. While holding the mouse button down, move the mouse pointer over to the common person in the file to be combined into.
4. Let go of the mouse button. A

screen will appear asking you which people you wish to copy over. Make the selection (often **Ancestors and their children**).

5. Check the box that asks, **Are (name) and (name) the same person?** Click **OK**. The selected people will be copied over into the file. ■

Q: Why do some of my pictures have a red "X" on them?

A. Like PAF, RootsMagic stores only the filename of each picture. A red "X" means that it cannot find the file. This often happens if the pictures have moved to a new folder on your computer.



RootsMagic can automatically find the missing files for you. From the Main Menu, choose **Lists > Media gallery**. Click **Tools > Fix broken media links**. Click **OK**. ■

Customizing RootsMagic

"In the past I have used PAF for my family history. A couple of weeks ago I was asked to change to RootsMagic. I really like the program. It is very easy and I like that the updates are easy to do. Since I am only on the 1800's and 1700's on lines I will use this program for years to come."

- Sherri

RootsMagic lets you customize how you view and interact with the program and your data. With a few tweaks, RootsMagic can be made to behave in a more familiar and PAF-like fashion.

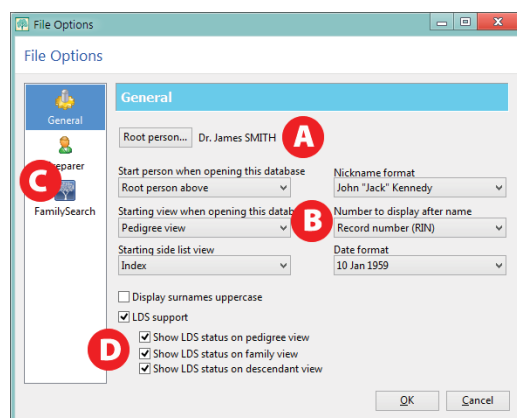
To access the options, select **Tools > File Options** from the Main Menu.

A) Root person - Here you change the "root" or default person for the file. In PAF, this is known as the "home" person.

B) Display options - Here you change which start person to show and which view to display when a file is opened. RootsMagic defaults to the "Pedigree view" but PAF users may be more used to starting with the "Family view".

You can also set which number to

display after a person's name in the software. RootsMagic defaults to "None" but PAF users may be accustomed to seeing the "Record number (RIN)" after each name.



C) Family-Search options - Here you enable or disable support for FamilySearch Family Tree in the file.

When enabled, you will see a small FamilySearch

tree next to each person on the main screen.



D) LDS options - Here you enable or disable support for LDS ordinances in the file. When enabled, you will see a small LDS temple next to each name on the main screen. ■

click on the toolbar and choose **Customize**.

C - Info Area

The Info Area displays information about the currently highlighted person including name, birth, marriage, and death. It also shows a list of spouses and parents of the person.

D - Sidebar

The Sidebar provides five tabs of information, the default being the **Index Sidebar**. This provides a sorted list of all individuals in the file.

E - Navigation Views

The main body of the screen displays one of six views. The tabs at the top let you switch between the different views.

Pedigree View

Just like in PAF, the Pedigree View is a 5 or 6-generation ancestor tree of your family.

Family View

Just like in PAF, the Family View displays a single family; a father, a mother, and the children.

Descendants View

The Descendants View shows up to 7 generations of descendants for a selected person with each



Did you know that in a list of names, you can quickly jump to any person by simply typing their name? Just type the surname followed by a comma and the given name.

In fact, this works in most any sorted list in RootsMagic including places, fact types, sources, etc. Just start typing and it will find the first item that matches what you type!

generation indented.

People View

The People View is equivalent to the Individual View in PAF. It shows an alphabetical list of people in your file with customizable columns of information.

WebSearch View

The WebSearch View automatically searches online resources for the currently selected person.

Timeline View

The Timeline View gives you a chronological listing of events from the current person's life as well as vital events of that person's immediate family members. ■

Editing Your Data

“A great improvement from PAF. This will help with the work. Thanks!”

- Garth

To add or edit information about a person, simply double-click on their name on the Main Screen. You may also press the **Enter** key to edit the currently selected person. The “Edit Person” screen will appear.

Where PAF uses several different screens to view and edit information about a person and families, RootsMagic simplifies things and puts it all in one place.

On the left of the Edit Person screen, you’ll see a list of all available information about that person. On the right, you can edit information as it is selected from the list on the left.

Names and Relationships

The first line of the list is labeled, “Person”. Clicking on this line will allow you to edit the person’s name.

The next lines in the list display all spouses and sets of parents for the person.

Facts and Events

Next are all the facts and events for the person, sorted chronologically. The list shows the date, place, description, and age for each fact and event.

Adding New Facts and Events

To add a new fact or event, click **Add a fact** on the top of the screen.

Choose the type of fact that you wish to add from the list and click **Select**.

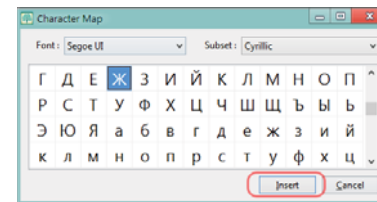
Editing Facts and Events

Clicking on any fact or event will allow you to edit information about it on the right.

Enter the event’s date, place, and other information as appropriate. Click the **calendar** to bring up a date calculator. Click the **magnifying glass** to lookup a place name.

Accented Characters

To enter international or accented characters, press **Ctrl+T** while in an edit box.

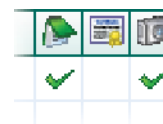


Select a letter and click **Insert**.

Notes, Sources, and Media

Like PAF, RootsMagic lets you record notes, sources, and pictures for a person. It also lets you record notes, sources, and pictures for individual events and facts.

The three right-most columns in the list represent that item’s notes, sources, and media. A checkbox in a column tells you that a note, source, or picture exists for that item. Clicking in a column lets you add or edit that item’s note, source, or media. ■



Did you know that the notes, sources, and pictures that you enter for a person in PAF are all found on the first line of the Edit Screen’s list? Just click in the three right-most columns of the row labeled, “Person”.