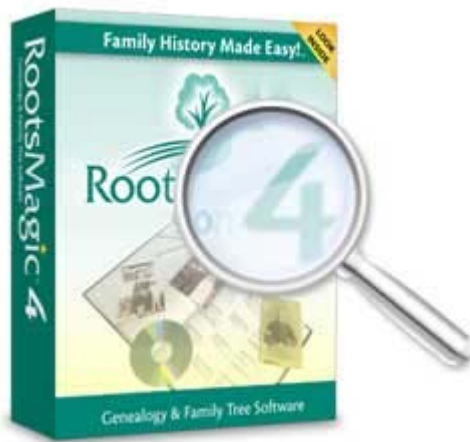


An Introduction to RootsMagic v 4



<http://blog.rootsmagic.com>

Blog Written by: Bruce Buzbee Chief Programmer & Author
AKA: "RootsMagician"



Compiled by: Herb Mellinger

Davison/Richfield Genealogical Society
Davison, MI

January 2009

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January 2009

The RootsMagic “Insider”

- Posted by [Bruce Buzbee](#)
- July 5, 2008



I decided that since everyone else has an “insider”, it was time to have our own. Every effort has been made to conceal my identity as I share secrets from deep within the company.

Did you know that RootsMagic 4 is rumored to be coming out sometime? Just read our [message boards](#) if you don’t believe me. But others have questioned whether we are spending all our time on cruises instead of working on version 4 (shameless plug... here is info on our [next cruise](#)).

Well now you have an insider on your side. I’m going to tell you everything you would want to know about RootsMagic 4, and even give a few of you a chance to win a free copy when it is released.

So here’s the inside scoop... RootsMagic 4 **is** coming. I know you wanted that sentence to have “on <date>” at the end of it, but insiders need job security too.

I *will* tell you that RootsMagic 4 is our biggest upgrade ever (yes, that means we *haven’t* been spending all our time on that one RootsMagic cruise).

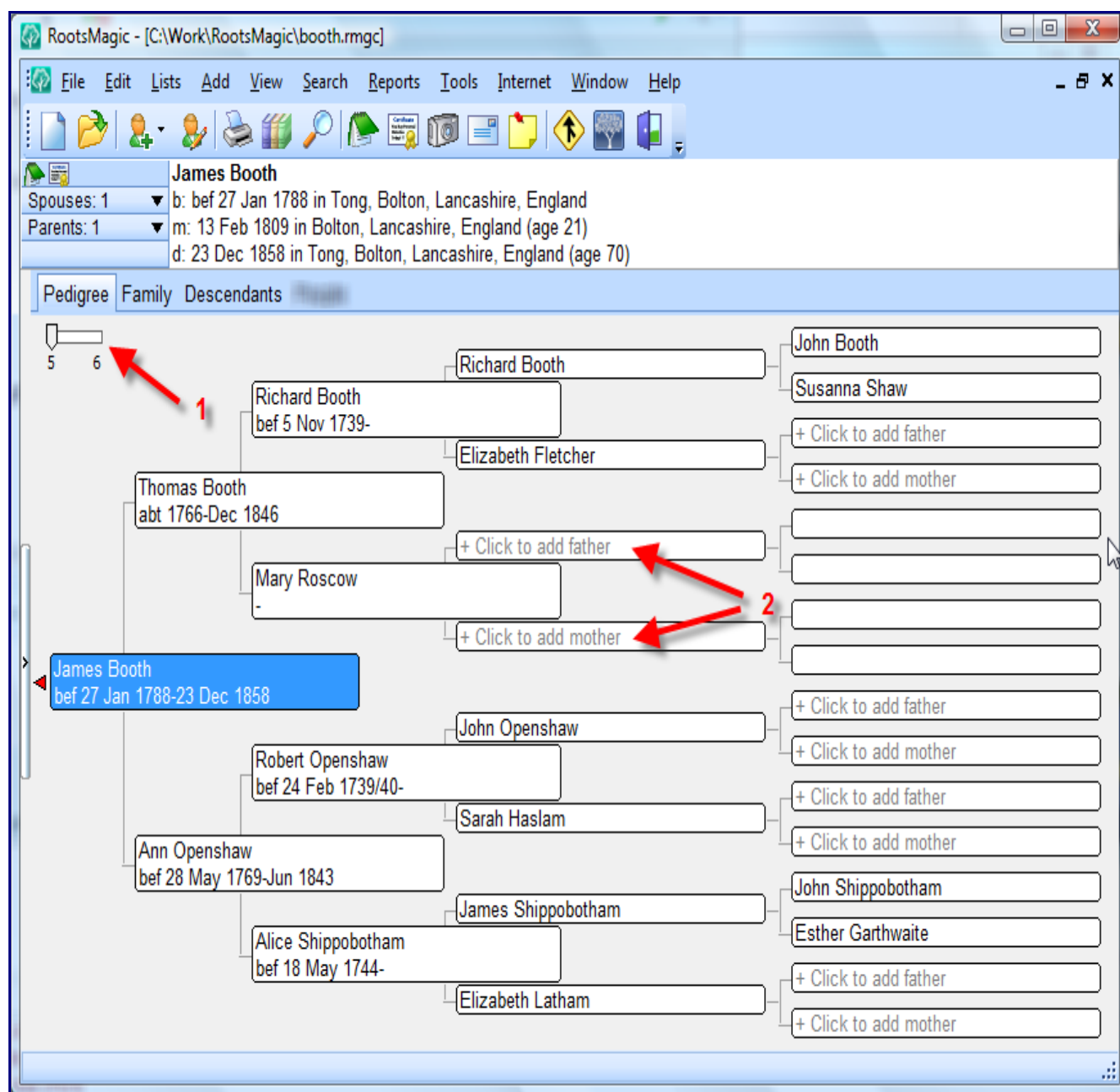
As your faithful insider, I will show you all the new features coming in RootsMagic 4. And by “show you” I mean with real screen shots and descriptions. But as a big tease, I’m going to start with the itchy bitsy new features and work up to the big (really cool) ones. So keep coming back, or better yet subscribe with one of those pretty buttons over on the right side of the home page.

And if you’re new to subscribing to blogs, here’s a great video that makes it easy to understand. Click that big arrow in the middle of the video to start it.

RootsMagic 4 Unveiled

- Posted by [Bruce Buzbee](#)
- July 10, 2008

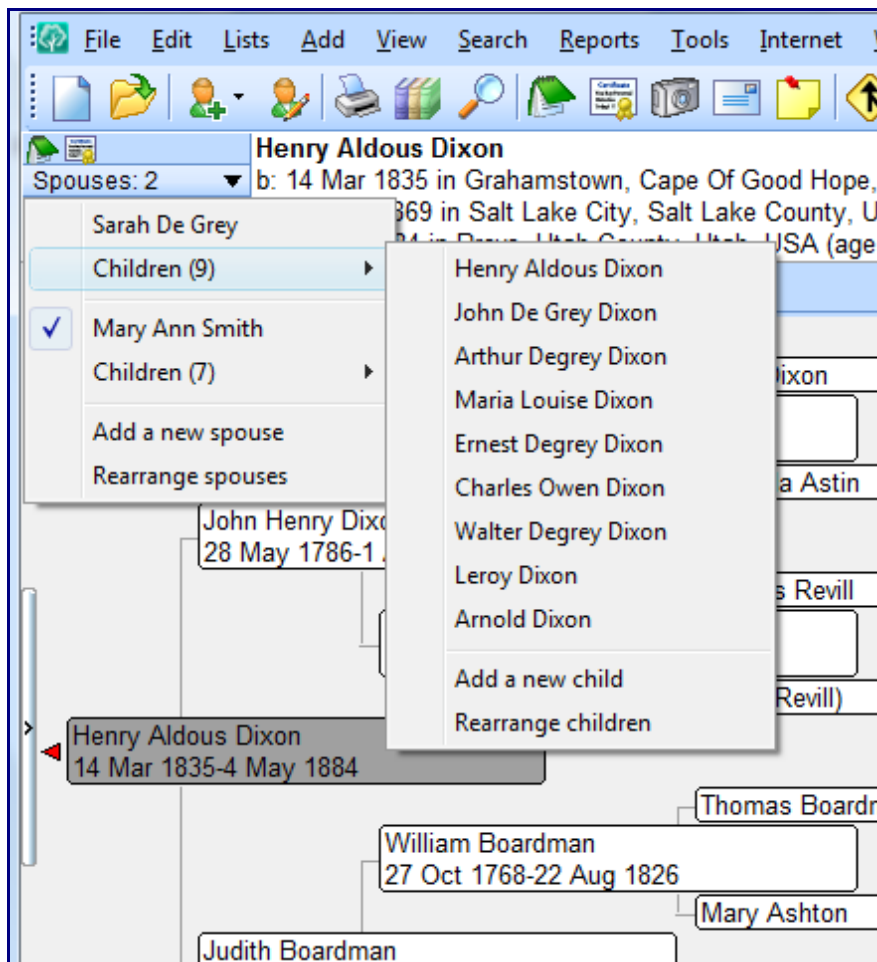
Well, maybe just a little unveiled. As I promised, it's time to start pulling the covers off of RootsMagic 4, but just a little at a time. So let's start with the teeny tiny new features, and we'll work our way to the super-duper new features in the coming weeks. Today I'm just going to show you the main screens in RootsMagic 4. There aren't a lot of differences because if it ain't broke, don't fix it. But there are a couple of small things we've added to simplify things a bit.



So if you clicked on the screenshot above so you could actually see it, you noticed 2 small changes.

Number (1) is a slider to let you switch between 5 and 6 generations on the pedigree chart. Now we've let you do that in the past, but a lot of users never knew it because it was buried down on the status bar. And number (2) is a feature a lot of users (especially beginning ones) have asked for. I think it is probably self-explanatory.

Oh, and by the way, you should probably ignore that little blurred out tab next to the Descendants tab. It's too cool for this early in the show (I told you I was a tease).



We have updated the little info area to the left of the highlighted person's name. Now when you click on the Spouses button you not only see the spouses and children, but you can also 1) add a new spouse, 2) add a new child to a family, or 3) rearrange the spouses or children. Yes, you have always been able to do these things in RootsMagic, but now it's a little easier.

RootsMagic - [C:\Work\RootsMagic\booth.rmgc]

File Edit Lists Add View Search Reports Tools Internet Window Help

Thomas Dixon

Spouses: 1 ▼ b: abt 1754

Parents: 1 ▼ m: 16 Feb 1779 in St. Dunstan, England (age 25)
d: 25 Dec 1837 in Peckham, England (age 83)

Pedigree Family Descendants

Father: Thomas Dixon
b: abt 1754
m: 16 Feb 1779, St. Dunstan, England
d: 25 Dec 1837, Peckham, England

Father's Parents:
John Dixon
Priscilla Astin

Mother: Sarah Revill
b: 5 Aug 1756, England
d: 5 Feb 1844, Peckham, England

Mother's Parents:
Francis Revill
Mary (Revill)

Children	Sex	Born	Birth Place	Died	Death Place
1 Thomas John Dixon	M	bef 29 Oct 1780			
2 Richard Dixon	M	bef 22 Jun 1783			
3 Joseph Dixon	M	bef 29 Jun 1785			
4 John Henry Dixon	M	28 May 1786	West Ham., Essex, England	1 Apr 1874	Grahamstown, Cape Of Good Hope, South Africa
5 Mary Ann Dixon	F	bef 31 Jul 1791			
6 Charles Dixon	M	bef 16 Mar 1796			
+ Click to add a child					

On to the Family View. Once again, little additions to make navigation and adding / editing data easier. Now you can always see exactly how many spouses each parent has (1), and clicking the button will let you switch spouses or add a new one. As in the pedigree view, you can add a new person (2) by clicking right where the person will go. Number (3) brings to the screen one of the most hidden features in version 3 (yes, we know it was hard to figure how to sort those kids). Just click the little sort arrows and you can immediately rearrange the children in the family. And finally (4), we heard you and have added the birth and death places, as well as optionally showing each child's relationship to their parents.

RootsMagic - [C:\Work\RootsMagic\booth.rmgc]

File Edit Lists Add View Search Reports Tools Internet Window Help

Thomas Dixon
 Spouses: 1 ▼ b: abt 1754
 Parents: 1 ▼ m: 16 Feb 1779 in St. Dunstan, England (age 25)
 d: 25 Dec 1837 in Peckham, England (age 83)

Pedigree Family Descendants

2 3 4 5 6 7

Name	Sex	Born	Birth Place	Died	Death Place
1 - Thomas Dixon	M	abt 1754	England	25 Dec 1837	Peckham
+Sarah Revill	F	5 Aug 1756		5 Feb 1844	
2 - Thomas John Dixon	M	bef 29 Oct 1780			
2 - Richard Dixon	M	bef 22 Jun 1783			
2 - Joseph Dixon	M	bef 29 Jun 1785	West Ham., Essex, England		Graham
2 - John Henry Dixon	M	28 May 1786		1 Apr 1874	
+Margaret Waldon	F		Newburgh, Ormskirk, Lancashire, Engl...		Uitenhag
+Judith Boardman	F	16 Dec 1796	Grahamstown, Cape Of Good Hope, S...	23 Sep 1865	Provo, U
3 - Henry Aldous Dixon	M	14 Mar 1835	Dudley, Worcestershire., England	4 May 1884	Provo, U
+Sarah De Grey	F	27 Jan 1845	Salt Lake City, S-Lk, UT	17 Apr 1926	Salt Lak
4 - Henry Aldous Dixon	M	14 Nov 1865	Salt Lake City, S-Lk, UT	1 Jul 1867	Provo, U
4 - John De Grey Dixon	M	16 Jul 1867		4 Oct 1923	
+Sarah Ann Lewis	F	1868			
5 - Henry Aldous Dixon ...	M	1890			
5 - Stanley Lewis Dixon	M	1895			
5 - Rulon Sterling Dixon	M	1898			

The descendant view looks and works just like in version 3, with the addition of the generation slider (1) and the addition of the birth and death place (2) columns.

So there you have it. The tiniest enhancements we made in RootsMagic 4. But those with eagle eyes might spot several hints of other changes on the main screen that we didn't talk about. So keep checking back. It only gets cooler from here

RootsMagic 4 Unveiled (Part II)

- Posted by [Bruce Buzbee](#)
- July 14, 2008

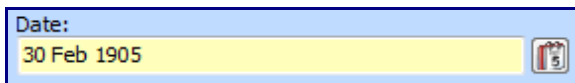
Another little sneak preview of things to come. Let's see a couple of the teeny things we've added to the fact edit screen in version 4. I'm just going to show the fields themselves, because I'm saving the actual edit screen for later.

Dates

We've completely rewritten the date handling in RootsMagic 4, adding built-in support for Quaker dates, quarter dates, and even more flexible regular dates.

- **Quaker Dates** - In version 4 you will be able to directly enter those Quaker dates (the ones that look like 19 da 6 mo 1748). And no, that date isn't June 19, 1748. If you want to know more about Quaker dates, try [this link](#).
- **Quarter Dates** - You will also be able to enter quarter dates as found in UK BMD registrations. So if you enter Q 1 1847, 1st Quarter 1847, 1st Q 1847, March Quarter 1847, Mar Q 1847 or any other quarter format, RootsMagic 4 will understand what you mean.
- **More flexible regular dates** - RootsMagic 4 will let you combine more of the modifiers in a single date. In the past you could have dates like "before 1900" or "about 1900", but not "before about 1900". Now you can.

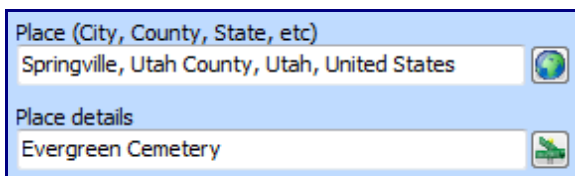
And what about those times when you enter an invalid date or a date that RootsMagic doesn't understand? You know, the ones like February 30th, or the ones that keep sorting to the bottom of the person's fact list.



If you enter a date that is illegal or that RootsMagic 4 doesn't understand, RootsMagic will change the background of the date field to yellow. So you can still have plain old text dates, but now you will know when that is the case.

Place Details

One of the more common little items we get asked is "where should I put the name of the hospital, cemetery, residence, etc?". In the past you could put it either as part of the place name, or throw it into the notes for that fact. There is now a third option.



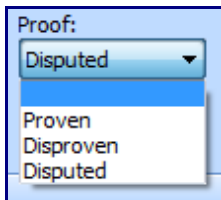
RootsMagic 4 adds a new "Place Details" field where you can put cemeteries, hospitals, street addresses and more. Place details can even have their own latitude and longitude for specific pinpointing of a location.

Latitude and Longitude

And speaking of latitudes and longitudes... are you tired of having to enter latitudes and longitudes in a rigid set of fields, using a rigid set of rules? RootsMagic 4 now supports intelligent fields where you can enter the latitude and longitude in the format most comfortable to you. Enter 35o 5' 3.98", 35 d 5 m 3.98 s, or 35.0844400. Decimal degrees or DMS... the choice is yours, and RootsMagic 4 will figure out what you mean.

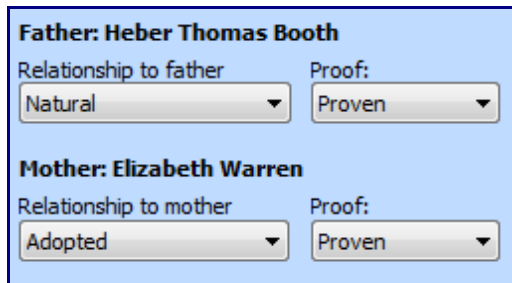
Proof

Here's a little goody RootsMagic 4 will provide when you enter a fact for a person.



Proof:
Disputed
Proven
Disproven
Disputed

You will now be able to specify (optionally) whether the fact has been proven, disproven, or disputed. The new proof field isn't just limited to events either. You can also assign a proof value to relationships like spouse, father, and mother.



Father: Heber Thomas Booth
Relationship to father: Natural
Proof: Proven

Mother: Elizabeth Warren
Relationship to mother: Adopted
Proof: Proven

You might have noticed one other "little" item in that last screen shot. RootsMagic 4 will now let you specify the child / parent relationship separately for the father and mother.

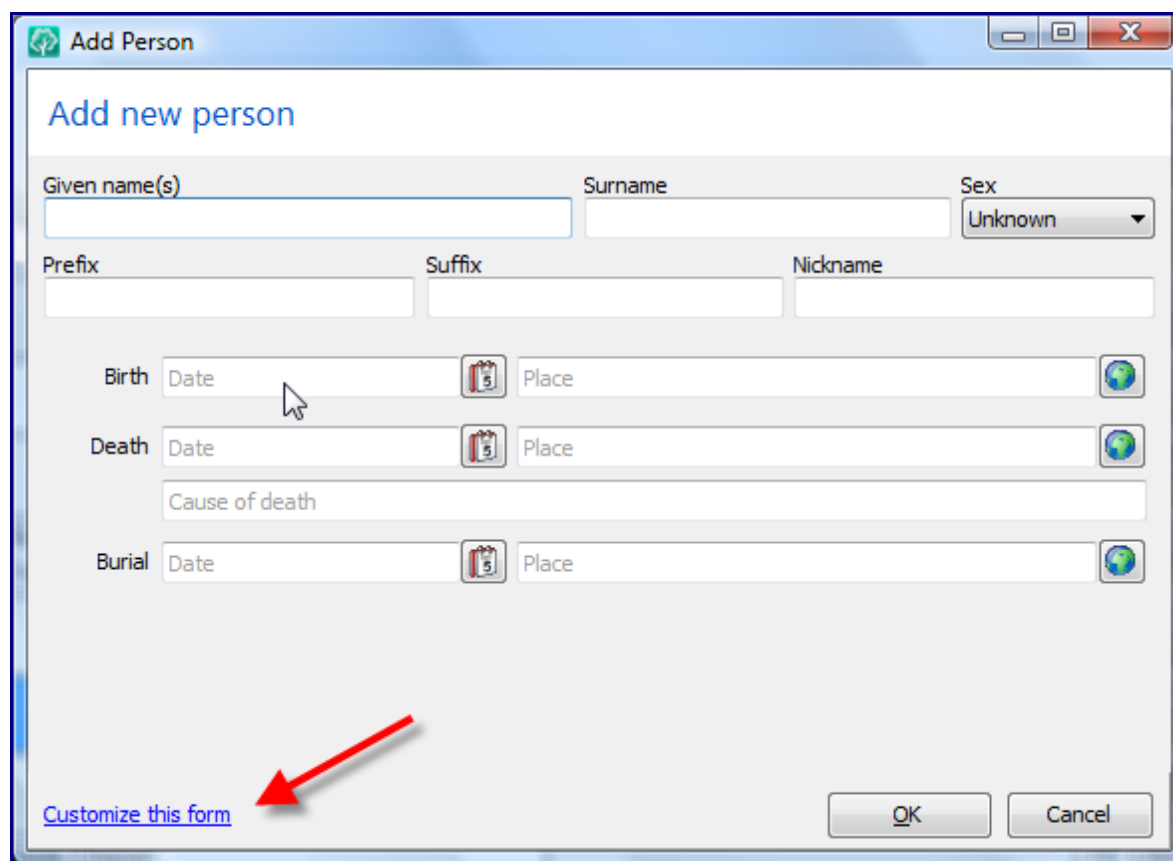
So there we are... another batch of tiny new features as we count down to the coolest new features coming in RootsMagic 4

RootsMagic 4 Unwrapped - Adding a new person

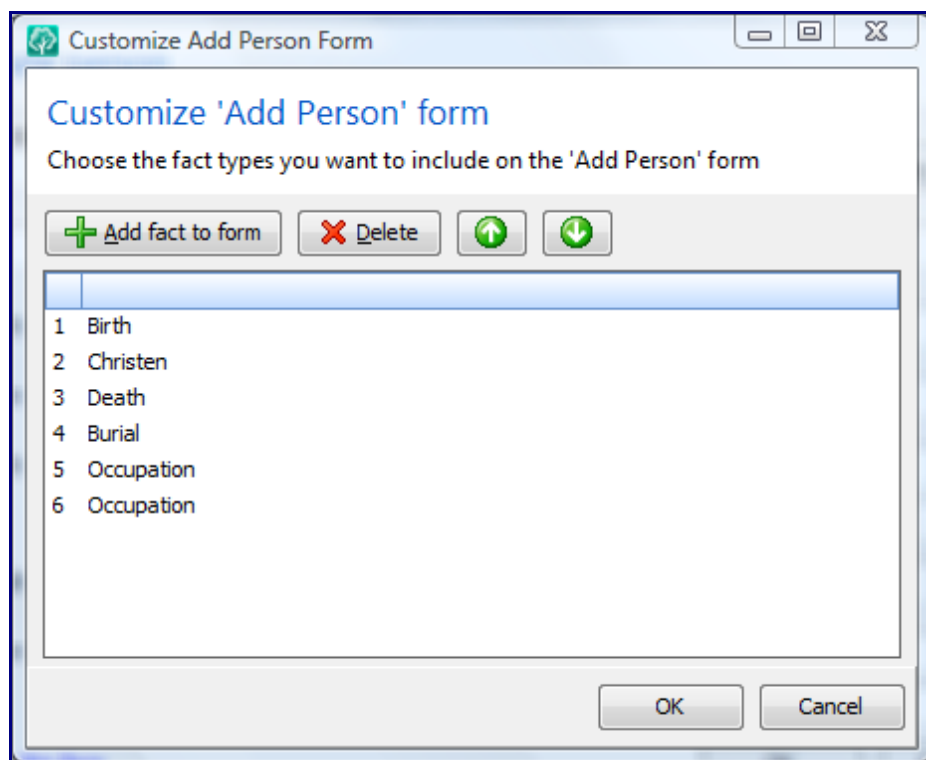
- Posted by [Bruce Buzbee](#)
- July 17, 2008

It looks like Mark Tucker over at [ThinkGenealogy](#) has gotten in on trying to figure out the hints on the new features I didn't talk about in my first "unveiling". I can't believe he figured out our biggest new feature... the reversed note icon on the toolbar. Actually, we have no idea why it is reversed from version 3, but it really doesn't mean anything. I *will* confirm his suspicion that the little arrow on the "Add Person" button means that the same menu as in version 3 will drop down there. As for the other items he picked out, we'll just have to see what those are in future entries. There are still at least two other hints from those screens that nobody has mentioned, but that's ok because they are probably harder to spot than Waldo.

Speaking of adding a new person, let's show a new little feature we added in that area. This is what the RootsMagic 4 "Add New Person" screen looks like (or at least if you click on that thumbnail you will see what it looks like).



There are 2 changes that RootsMagic users will notice. The first is that we have added a cause of death field. The second (and much more exciting) new feature is that little link that the arrow is pointing to. Clicking that link will bring up this customize screen.



You will now be able to create your own custom “Add person” form by selecting the fact types you want displayed on that form. Choose which fact types and what order you want them displayed. Once you are happy with your selections, click OK and RootsMagic will return to your newly customized “Add Person” form.

Add Person

Add new person

Given name(s) Surname Sex
Unknown

Prefix Suffix Nickname

Birth Date Place

Chr Date Place

Death Date Place
Cause of death

Burial Date Place

Occupation Date Place
Occupation

Occupation Date Place
Occupation

[Customize this form](#) OK Cancel

You can even have multiple copies of the same fact type if you want. That's useful if you tend to add multiple census, occupation, or residence facts for people. You can have up to 50 facts on the add person screen, and RootsMagic will add a scrollbar if necessary to see them all.

Oh, and just a little "clarification" for readers who aren't already using RootsMagic. What I've shown here isn't the full-blown edit screen for a person (wait until you see all the cool stuff we added there). This is a "quick add" form that lets you enter basic details on the person before the full edit screen appears (which has no limitations on the amount of data).

So keep checking back. We haven't even scratched the tip of the iceberg

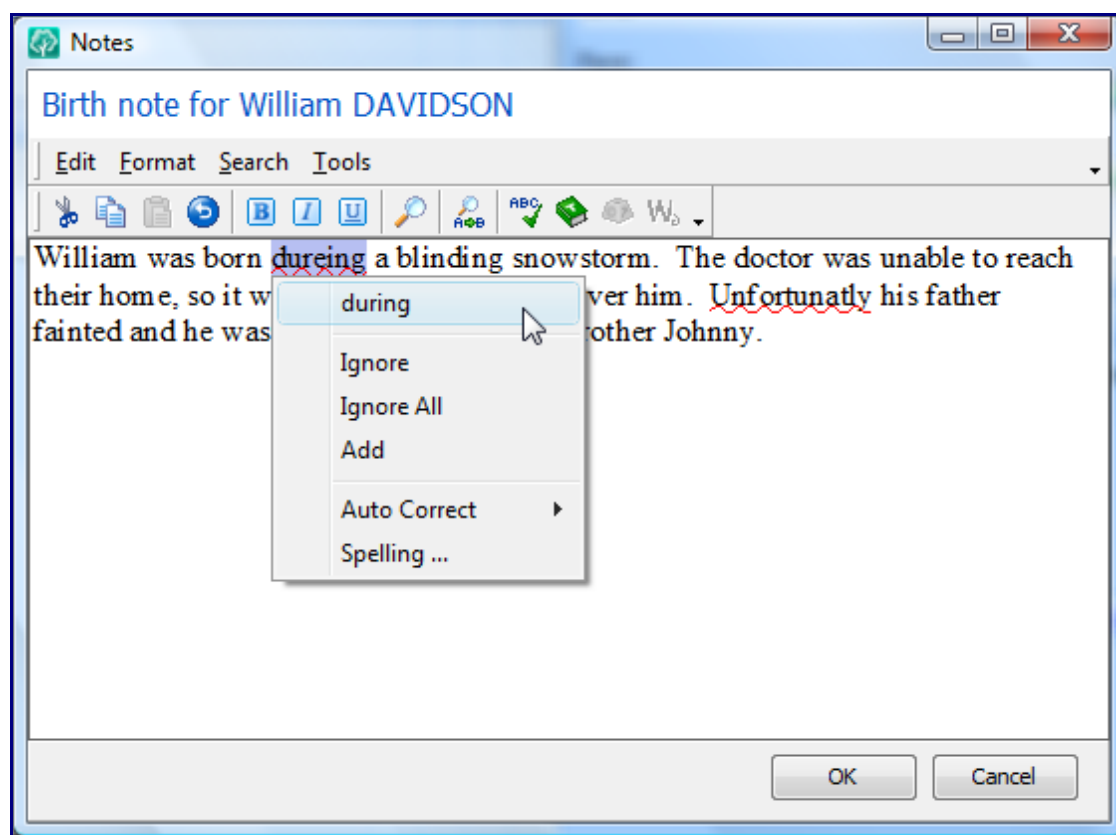
RootsMagic 4 Unwrapped - What's Another Word for Spel Chek?

- Posted by [Bruce Buzbee](#)
- July 22, 2008

Time for a sneak peak at a couple more of the small features coming in RootsMagic 4. I promise the big features are on their way. Just want to give the little ones their time in the sun.

Live Spell Checking

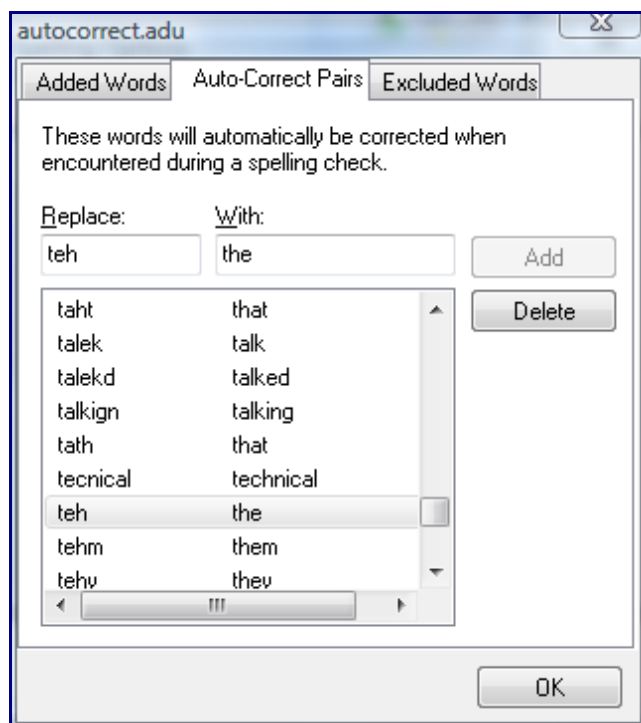
While RootsMagic has always offered spell checking, version 4 now offers “Live” spell checking. You know, those annoying little squiggly red lines that show what a lousy speller you are without you even having to ask for it (click the image below to see them in their full glory).



The nice thing about live spell checking is that you can just right click on the misspelled word and RootsMagic will display a menu with suggested spellings (and other options). And yes, those who are allergic to squiggly red lines can turn off this option and continue to use the old fashioned spell checking.

Auto Correct

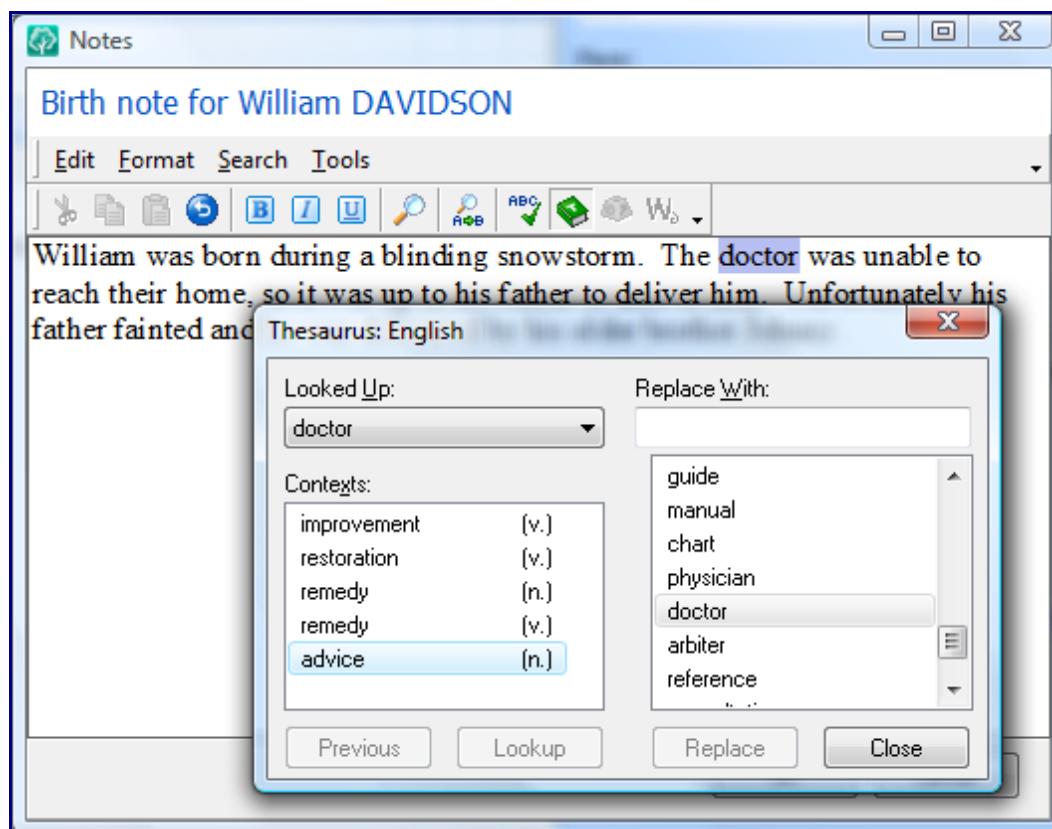
Don't you get tired of typing “teh” instead of “the” all the time? RootsMagic 4 can now automatically fix that for you. If you type “teh”, RootsMagic will automatically correct it to “the” as soon as you enter the space.



If “teh” isn’t your weakness, you can add your own problem areas for RootsMagic to correct. I personally use this feature to change “rm” into “RootsMagic” (yes, I really am that lazy).

Thesaurus

At a loss for words? Or just tired of using the same words over and over?



RootsMagic 4 comes with an updated version of Roget's Thesaurus, making it easy to look up synonyms (words that mean the same thing) for any selected word. And if the thesaurus suggests a word you find more appealing than your own, RootsMagic can replace your boring old word with the new one.

So keep it tuned here as we continue to unwrap RootsMagic 4. The best is yet to come

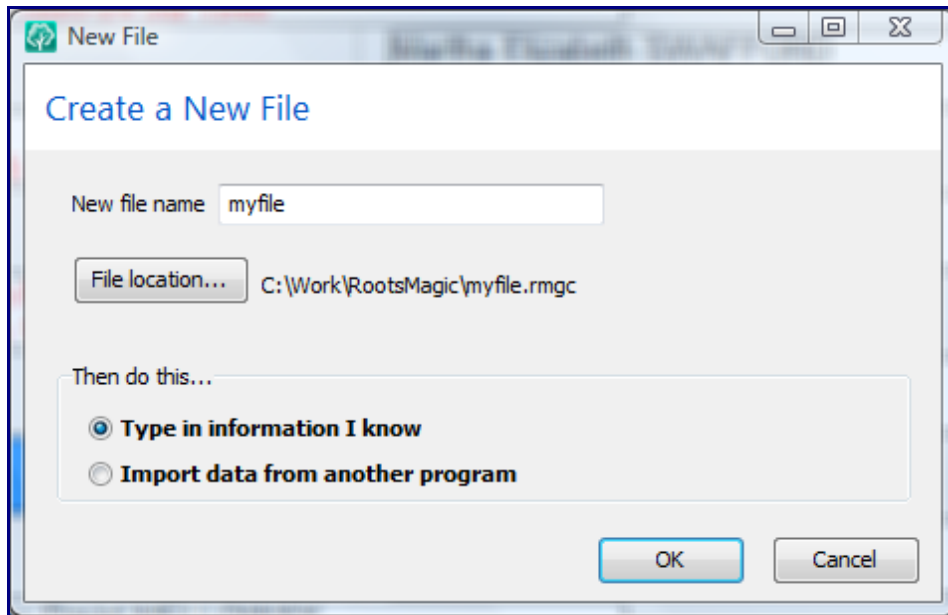
RootsMagic 4 Unwrapped - Files Made Easy

- Posted by [Bruce Buzbee](#)
- July 27, 2008

We've made a few minor enhancements to working with files (aside from the new file extension that Jon mentioned in a comment to an earlier post... we'll talk about what that means in a future post).

Creating a New File

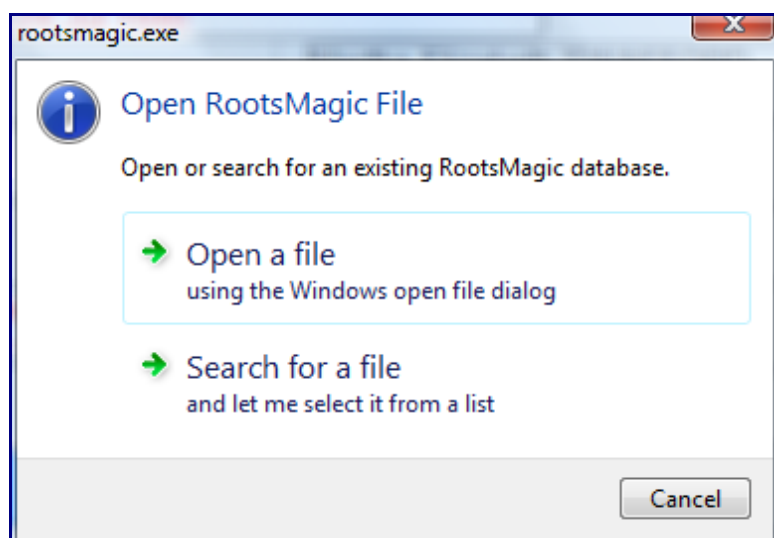
We've created a new "New File" form to simplify creating a new database and getting started.



To create a new database just type in a file name and click OK, and RootsMagic will create the new database in the default folder you have selected. The "New File" form also gives you a couple of options for what to do after the new file has been created.

Opening a File

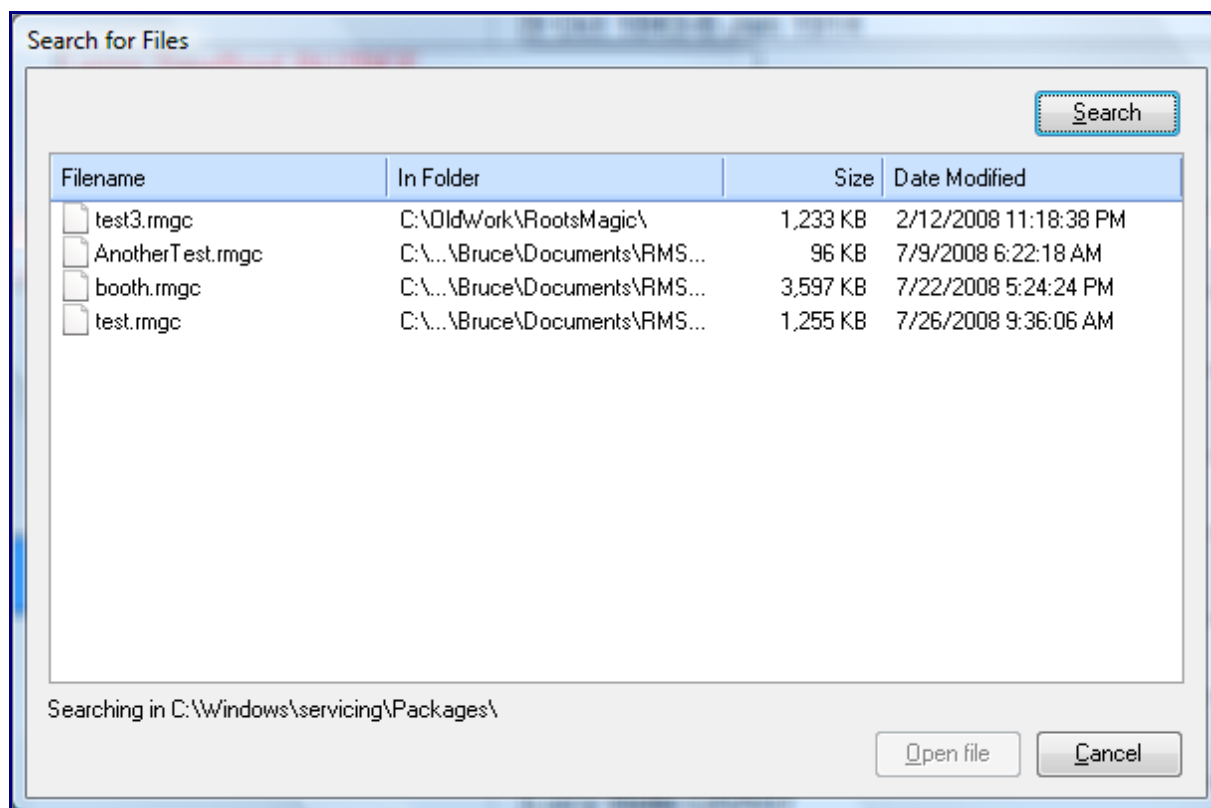
One of the most common tech support issues we get is from users who can't find a file they created. Earlier versions of RootsMagic have had a "Search for files" command, but it was a separate command and not really available when you actually needed it. In RootsMagic 4 we bring the "Search for files" feature front and center. For example, when you choose to open an existing database (File > Open from the menu), you'll see this screen.



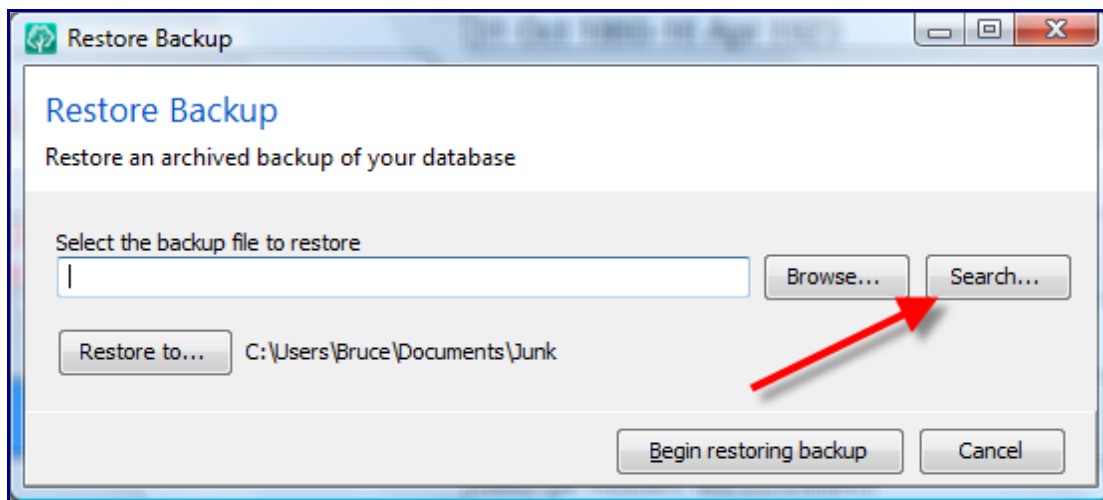
Hopefully it is self-explanatory (or if not, please let us know what wording **would** be). So whether you know where all your files are, or are less than comfortable with the Windows file dialog, we've got you covered.

Searching for Files

If you select "Search for a file" from the form above, RootsMagic will immediately open this screen and begin searching. You can pause the search any time and select any file found up to that point and open it directly from the search results.



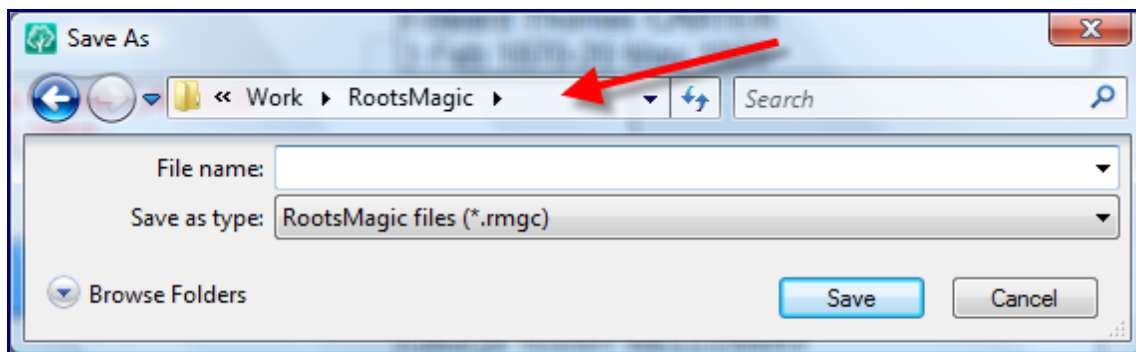
This search screen is also available from other places in RootsMagic 4, like when you are importing data from another program, or searching for a backup to restore.



And of course it is still available directly from the menu.

Rename Can Now Move

Yes, the File > Rename command has put on its dancing shoes. In earlier versions of RootsMagic the Rename command simply changed the name of the database you were working on. The database had a new name but stayed in the same folder.



In RootsMagic 4 you can still do a simple file renaming, but now you can also choose a new folder and have RootsMagic move the database to that new folder. For those of you who have tried to move a RootsMagic database before, you know you like this feature.

Hopefully you aren't getting bored by these sneak peeks (see, I spelled it right this time) at some of the fun little things we have added in RootsMagic 4. Hang in there though. The big stuff is just around the corner.

RootsMagic 4 Unwrapped - Color Is Our Friend

- Posted by [Bruce Buzbee](#)
- July 29, 2008

I am at the BYU Family History Conference all week. But here's a quicky for you.

If you've done much merging, you know that most of your time is spent staring at the screen comparing names, dates, and places. In RootsMagic 4 it is color to the rescue...

frmMergeDuplicates

Merge Duplicate Records

Primary Person	Duplicate Person	Score
Bullough, James	Bullough, James	56.0
Bullough, John	Bullough, John	44.0
Bullough, Robert	Bullough, Robert	42.0
Gregory, Ellen	Gregory, Ellen	40.0
Howarth, Maria	Howarth, Maria	40.0
Bullough, Ann	Bullough, Ann	35.0
Bullough, Peter	Bullough, Peter	35.0

Primary Person

Edit person

	Name / Date	Place	Details
Name	James Bullough-159		
Birth	3 Apr 1684	Lower Hulton, Lancashire, England	
Burial	22 Apr 1735	Rumworth, Lancs., England	
Ref #		, 1572	
Marriage	4 Aug 1713	Deane, Lancashire, England	
Spouse	Maria Howarth-152		
Father	Robert Bullough-160		

Duplicate Person

Edit person

	Name / Date	Place	Details
Name	James Bullough-403		
Birth	3 Apr 1684	Lower Hulton, Lancashire, England	
Burial	22 Apr 1735	Rumworth, Lancs., England	
Ref #		, 1572	
Marriage	4 Aug 1713	Deane, Lancashire, England	
Spouse	Maria Howarth-401		
Father	Robert Bullough-404		

Merge duplicate into primary Not a match Swap Close

If you noticed all the green on the two possible duplicates on this merge screen, you may have realized that green means the fields match on the two records. So if you see a bunch of green, it means to don't have to spend as much time comparing every field of the two records before making a decision whether to merge them. Now take a look at this one...

frmMergeDuplicates

Merge Duplicate Records

Primary Person	Duplicate Person	Score
Bullough, John	Bullough, John	44.0
Bullough, Robert	Bullough, Robert	42.0
Gregory, Ellen	Gregory, Ellen	40.0
Howarth, Maria	Howarth, Maria	40.0
Bullough, Ann	Bullough, Ann	35.0
Bullough, Peter	Bullough, Peter	35.0
Saunderson, William	Saunderson, William	14.0

Primary Person

Edit person

	Name / Date	Place	Details
Name	Peter Bullough-322		
Birth	bef 3 Jul 1748		
Death	1810	Deane, Lancashire, England	
Chr	3 Jul 1748	Deane, Lancashire, England	
Ref #		, 78	
Marriage	25 Aug 1773	St. Peter, Bolton, Lancashire, England	
Spouse	Ellen Brindle-6		
Father	John Bullough-318		
Mother	Ellen Gregory-154		

Duplicate Person

Edit person

	Name / Date	Place	Details
Name	Peter Bullough-411		
Birth	bef 3 Jul 1749		
Death	1820	Deane, Lancashire, En...	
Chr	3 Jul 1748	Deane, England	
Ref #		, 78	
Marriage			
Spouse			
Father	John Bullough-410		
Mother	Ellen Gregory-402		

Merge duplicate into primary

Not a match

Swap

Close

These possible duplicates have some yellow fields and a red field. Yellow indicates that the fields are close but not exactly the same, and red indicates they aren't the same at all. So if you are seeing red, it means don't waste your time comparing all those fields.

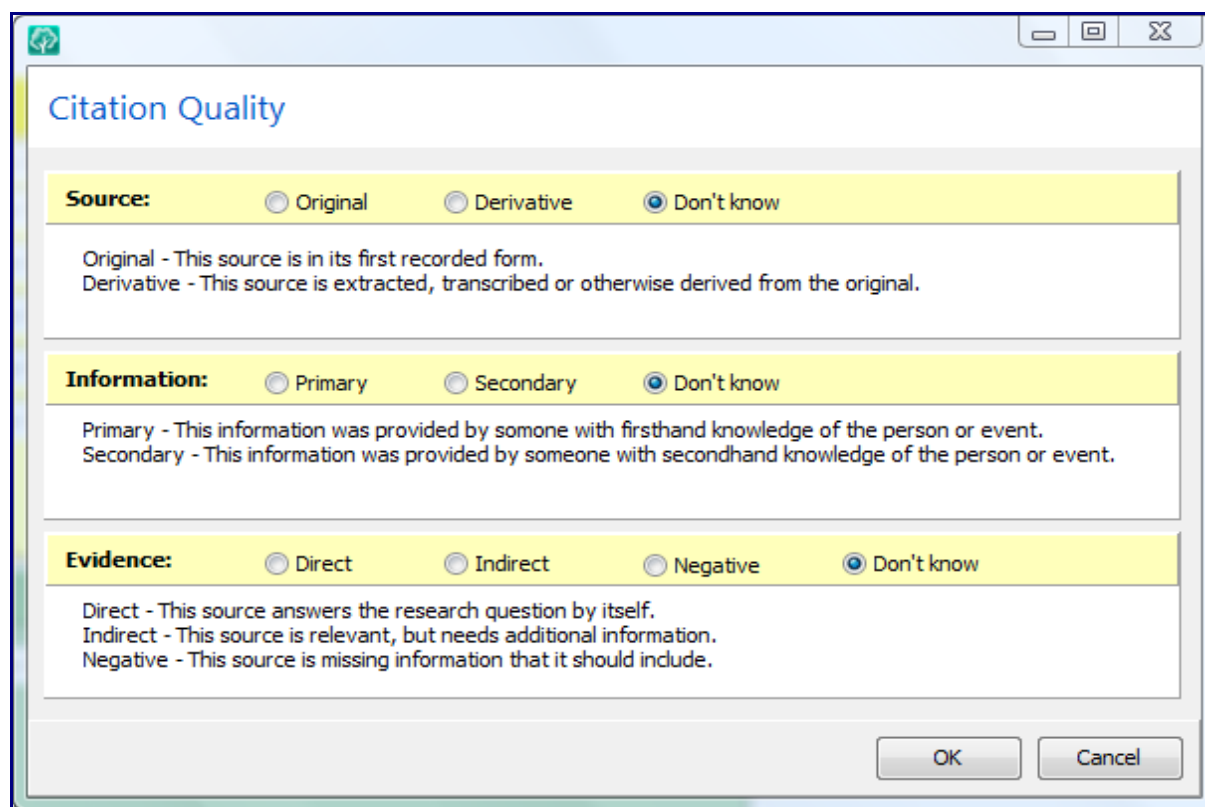
There are a several other areas where RootsMagic 4 uses colors like this, but we'll let you have the fun of discovering those for yourself.

RootsMagic 4 Unwrapped - Citation Quality

- Posted by [Bruce Buzbee](#)
- July 31, 2008

Another quicky while I'm at the BYU genealogy conference.

We all know how important it is to add sources for the information we enter. When adding a source in RootsMagic, we've always been able to enter the "quality" of the citation. But it has been limited to "primary", "secondary", "questionable", and "unreliable". Until now.



The screenshot shows a dialog box titled "Citation Quality" with a light blue header bar. It contains three sections, each with a yellow header bar and radio button options:

- Source:** ☐ Original ☐ Derivative ☒ Don't know
Original - This source is in its first recorded form.
Derivative - This source is extracted, transcribed or otherwise derived from the original.
- Information:** ☐ Primary ☐ Secondary ☒ Don't know
Primary - This information was provided by someone with firsthand knowledge of the person or event.
Secondary - This information was provided by someone with secondhand knowledge of the person or event.
- Evidence:** ☐ Direct ☐ Indirect ☐ Negative ☒ Don't know
Direct - This source answers the research question by itself.
Indirect - This source is relevant, but needs additional information.
Negative - This source is missing information that it should include.

At the bottom right are "OK" and "Cancel" buttons.

As you can see, RootsMagic 4 now follows approved standards for evidence analysis in an easy to understand format.

To learn more about evaluating your genealogy sources, visit:

<http://www.bgc certification.org/skillbuilders/skbld085.html>

And our friend Mark Tucker over at ThinkGenealogy.com has put together a Genealogy Research Map that covers the full research process (including assessing the quality of a citation). You can download it for free from:

<http://www.thinkgenealogy.com/2008/07/31/genealogy-research-process-map-version-2/>

This isn't the only new source enhancement coming in RootsMagic, but we're saving the best for later. Stay tuned.

RootsMagic Unwrapped - And the 4th Tab is...

- Posted by [Bruce Buzbee](#)
- August 6, 2008

Pedigree Family Descendants **People**

People? [Mark Tucker's guess](#) sure sounded a lot more exciting.

But even if the People tab can't automatically do all your genealogy for you, it *will* help you quickly and easily analyze your data in ways that used to require tedious creating and printing custom reports.

So let's take a look at this People page. Click on the screen shot below so you can actually see what it looks like.

RootsMagic - [C:\Work\RootsMagic\test.rmgc]

File Edit Lists Add View Search Reports Tools Internet Window Help

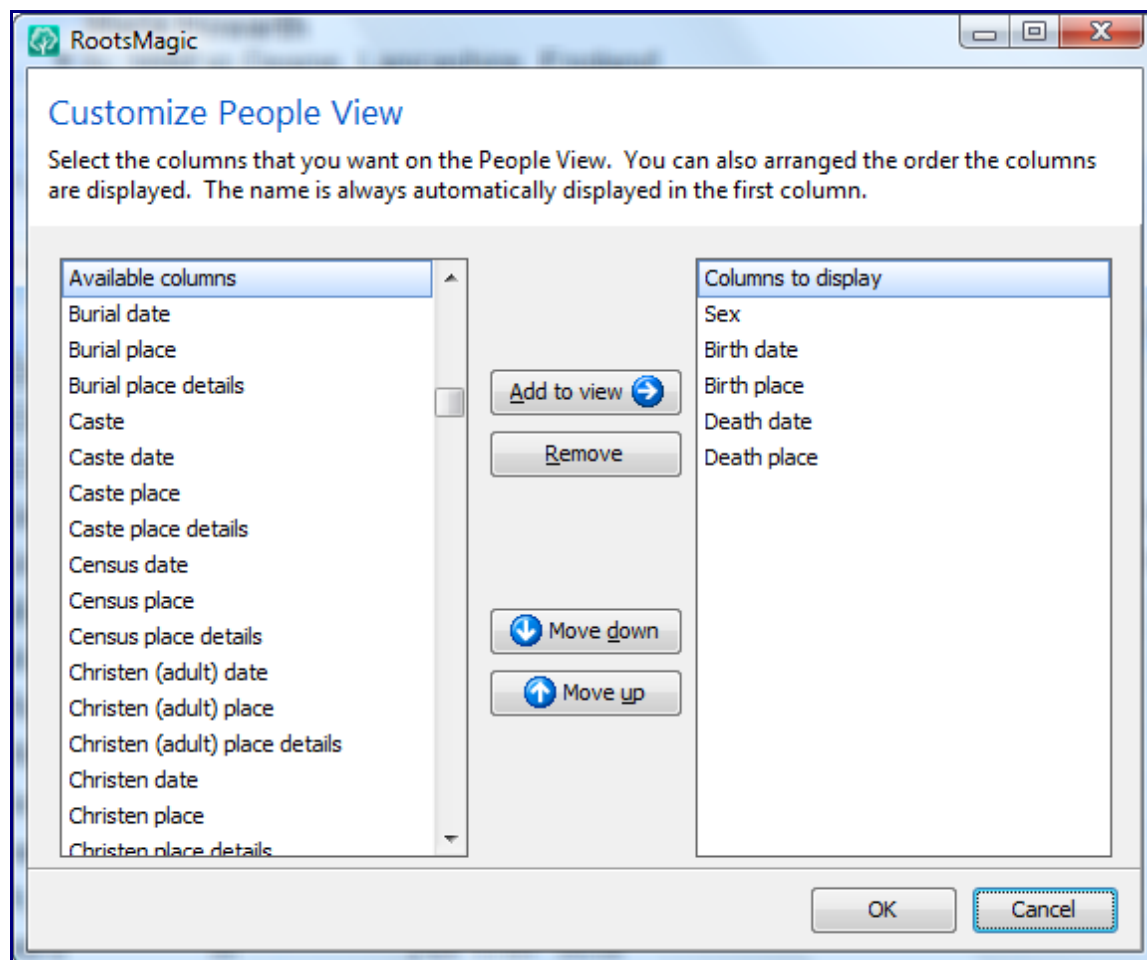
Spouses: 1 ▼ b: 1692 in Deane, Lancashire, England
Parents: 0 ▼ m:
d:

Pedigree Family Descendants **People**

Customize this view ← 1

Name	Sex	Birth Date	Birth Place	Death Date	Death Place
Howarth, Elizabeth	F	4 May 1842	Lostock, Lancashire, England	31 May 19...	Prov...
Howarth, Elizabeth	F	4 May 1842	Bolton, Lostock, Lancashire, E...		
Howarth, Elizabeth	F	4 May 1842	Bolton, Lostock, Lancashire, E...		
Howarth, James	M	Bef 13 Jun 1675	Rumworth, Lancs., England	1 Oct 1778	Rum...
Howarth, John	M	Bef 16 Jun 1804		10 Jan 1854	Chev...
Howarth, Maria	F	1692	Deane, Lancashire, England		
Howarth, Maria	F	1692	Deane, Lancashire, England		
Howarth, Robert	M	Abt 1643	Over Hulton, Lancashire, En...		
Howarth, William	M	Bef 7 Aug 1742	Rumworth, Lancs., England		
Hughes, Ann	F	Abt 1769			
Hurst, Johanna	F				
Illingsworth, Richard	M	1767	Illingsworth, Yorkshire, Engla...		
Jack, Edward	M	Abt 1787	Scot		
Jack, Margaret	F	17 Sep 1807	Largs, Ayrshire, Scotland	1880	Blyth...
Jackman, Christopher	M	Abt 1770	Blith, Northamptonshire, Engl...	1840	

At first glance the People page looks like just another list. There are a couple of differences though, the first being the “Customize this view” button. When you click the Customize button RootsMagic will let you select which columns you want to display in the list.



Select the column you want in the left list, then click the “Add to view” button (you can also just double click on a field to move it over). You can add up to 50 columns to the view, and you can change them anytime you want. Once you have selected the columns you want, just drag and drop them into the order you want them in the view.

Then comes the fun part. Any column you add to the People view is fully sortable. Want to see your people grouped by birth place? Just click the birth place header and your wish is RootsMagic’s command. Want to see everyone in death date order? Just click the death date column (just make sure you added that column first). Here’s an example of the People view sorted by birth place.

RootsMagic - [C:\Work\RootsMagic\test.rmgc]

File Edit Lists Add View Search Reports Tools Internet Window Help

Maria Howarth
 Spouses: 1 ▼ b: 1692 in Deane, Lancashire, England
 Parents: 0 ▼ m:
 d:

Pedigree Family Descendants People

Customize this view

Name	Sex	Birth Date	Birth Place	Death Date	Death Place
Clayton, Hannah	F	1815	Briesley Hill, Derbyshire, En...	30 Nov 1843	Upper...
Jackson, Harriet	F	17 May 1835	Briesley Hill, Eckington, Derb...	1 Aug 1905	Nept...
Ball, Harriet	F	Feb 1806	Brighton, Sussex, England	10 Feb 1855	Birm...
Wenmouth, Eliza	F	1815	Callington, Cornwall, England	18 Oct 1895	Edm...
Cottom, Susanna	F	1778	Carlton In Lindrick, Nottingha...	9 Dec 1819	Cart...
Burton, Mary Ann	F	5 Dec 1850	Codner Park, , Derbyshire, ...	5 Oct 1921	Kem...
Warren, Elizabeth	F	27 May 1874	Craghead, Lanchester, Durh...	23 Sep 1948	Prov...
Ellis, Evan	M	Jun 1703	DE Nant, B, , Wales		
Kay, Janet	F	25 Jan 1736	Dalmeny, West Lothian, Scot...		
Wentworth, Anne	F	8 Oct 1627	Dartford, Kent, Of London, L...	2 Jun 1695	Rock...
Howarth, Maria	F	1692	Deane, Lancashire, England		
Gregory, Ellen	F	1719	Deane, Lancashire, England		
Bullough, John	M	21 Dec 1715	Deane, Lancashire, England		
Howarth, Maria	F	1692	Deane, Lancashire, England		
Gregory, Ellen	F	1719	Deane, Lancashire, England		

Oh, and if you *do* add 50 columns, RootsMagic will let you scroll to see them all (obviously), and will even keep the person's name (in the first column) frozen on the screen so you don't lose track of what information belongs to who.

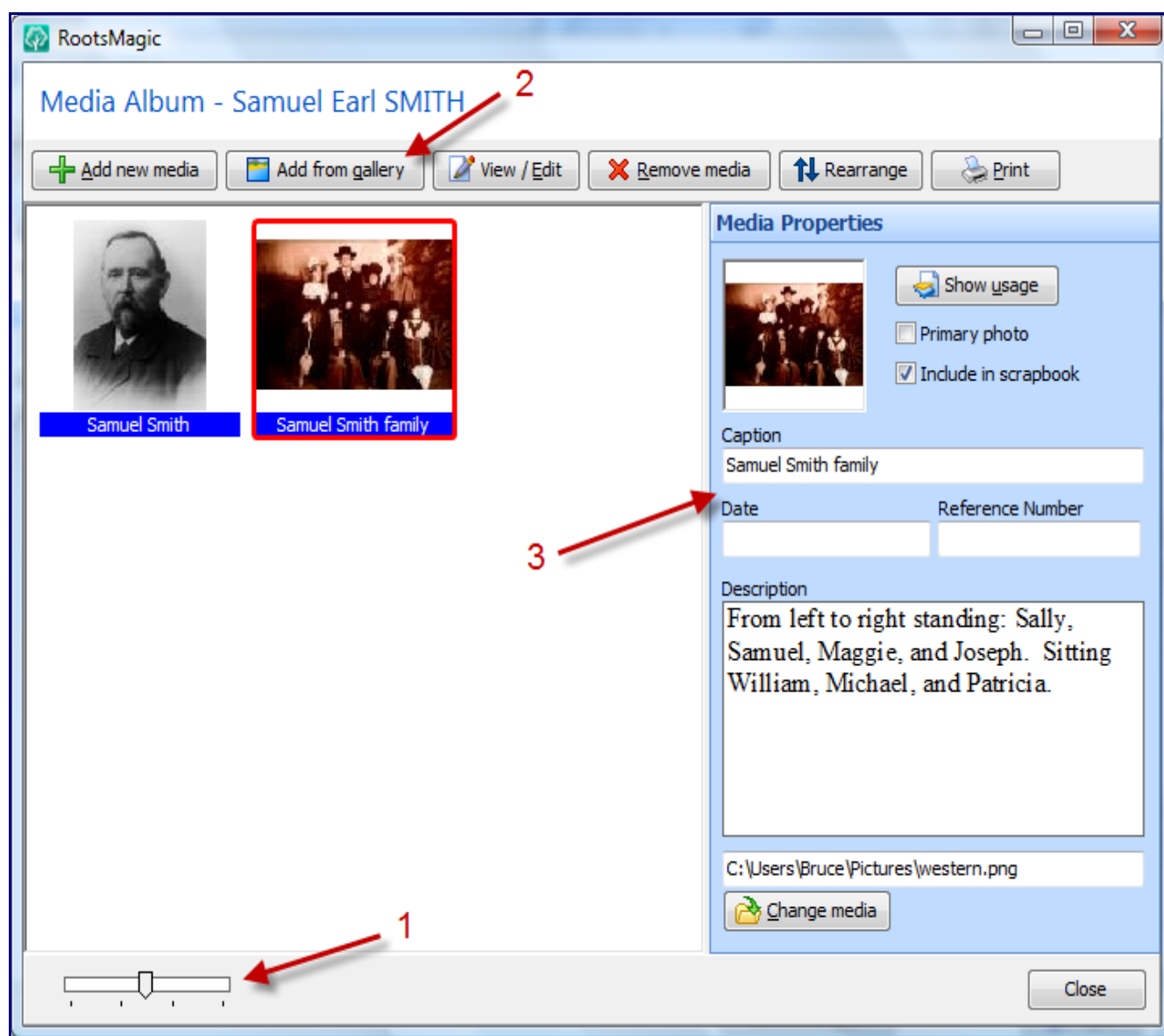
Well, back to programming. I've been hearing rumors that some users want us to get this released.

RootsMagic 4 Unwrapped - Multimedia is made to be shared

- Posted by [Bruce Buzbee](#)
- August 13, 2008

Media Album

An old adage says that a picture is worth a thousand words. So here are 3000 words worth of pictures about RootsMagic 4's new multimedia features. As in previous versions of RootsMagic, you can add pictures or other media to people, families, sources, citations, events, or places. Here's what the new Media Album looks like (click the image if you want to see it without squinting):



The first thing long time RootsMagic users will notice is that you aren't limited to viewing 6 pictures at a time for a person. Not only can you scroll to view all the pictures for a person, you can also adjust the

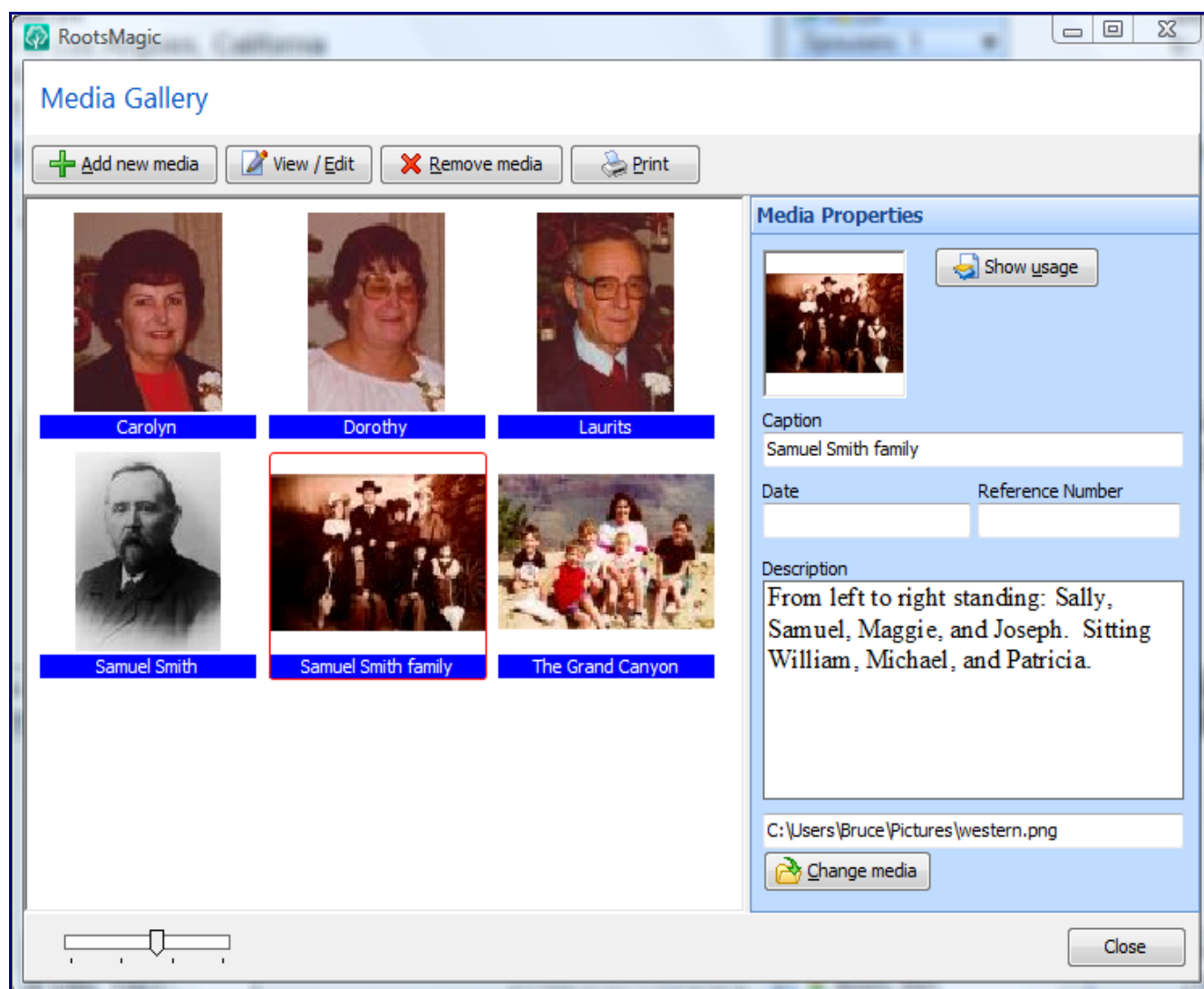
size of the thumbnails by simply (1) dragging the slider at the bottom of the album.

If you've ever added a family picture to each member of the family, and had to re-enter that nice detailed description over and over, you'll love the new RootsMagic 4 Media Gallery. Every time you add a picture to a person (or other item) RootsMagic 4 keeps track of the photo so that you can re-use the same picture along with its caption, description, and other information. When adding a new picture to a person, just click "Add from gallery" (2) to re-use an existing media item.

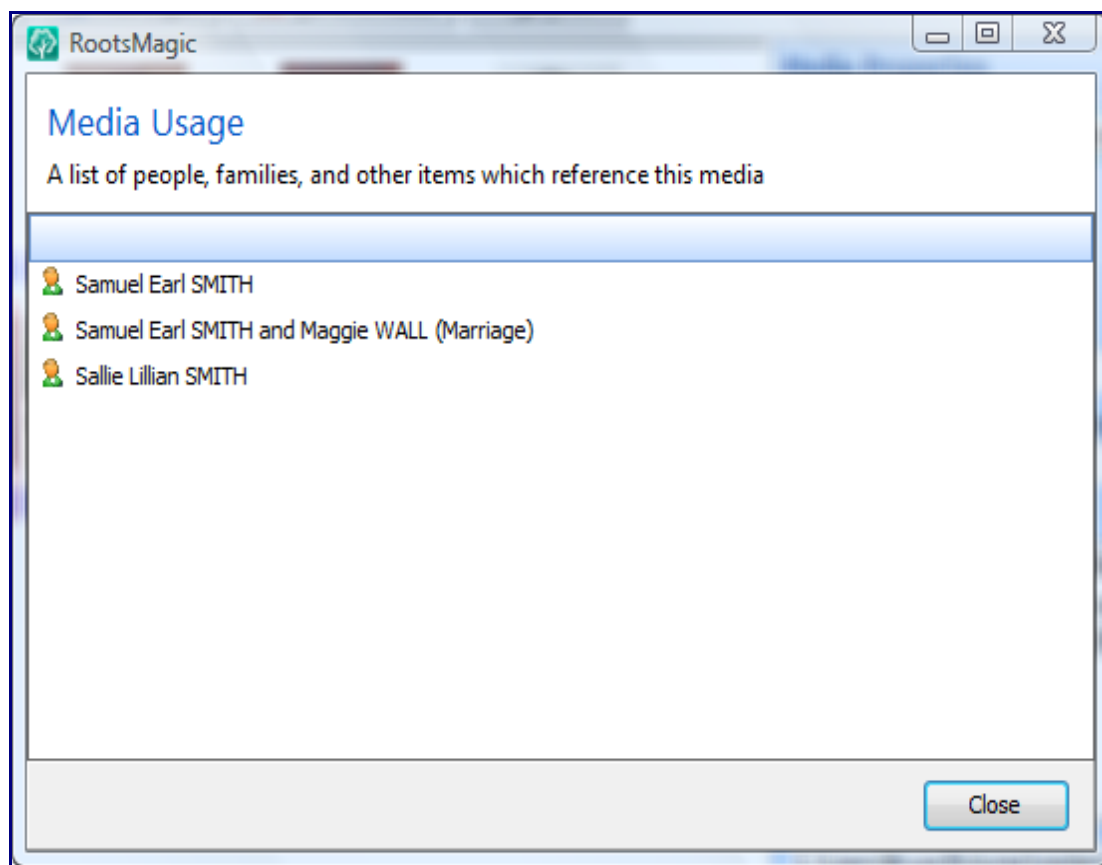
Selecting a media item will display its details (caption, description, file name, etc) in the (3) live edit panel.

Media Gallery

If you want to see all the pictures you have added, just bring up the master Media Gallery.



Not only can you see all your media, but you can also click the "Show usage" button to get a list of every place in your file that the highlighted media is referenced.



I'm on my way to Indianapolis for my third conference in 3 weeks (which I will attempt to pass off as my excuse for not spilling the beans as quickly as I would like). I will try to pick up the pace a bit. We still have a ton of cool new features to cover.

By the way, if you have a friend you've been trying to convert to RootsMagic, let them know about our blog. We'll help you out with that <g>.

RootsMagic 4 Unwrapped - Websites with style

- Posted by [Bruce Buzbee](#)
- August 15, 2008

Today's sneak preview is going to be short and sweet (and no screen shot on top of that). But don't worry, we still have plenty of new screen shots left to go.

While website creation in RootsMagic 4 is very similar to that in version 3, there *is* one big difference. RootsMagic 4 uses Cascading Style Sheets (CSS) when creating a website. If you don't create websites, or don't know what CSS is, you probably won't find this very exciting.

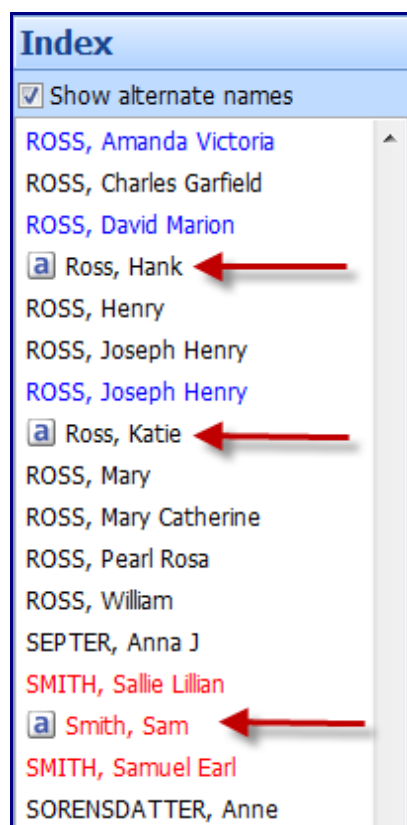
However, if you have ever had to modify fonts, colors or other settings in a RootsMagic generated website, I can hear you saying "yes" all the way from here. No more having to modify hundreds of individual html files. Just edit the single .CSS file and all your pages will use the modified styles.

So for all you html'ers, this one's for you. For everyone else, we'll be right back with more cool screenshots and features.

RootsMagic 4 Unwrapped - Alternate names

- Posted by [Bruce Buzbee](#)
- August 20, 2008

OK, so here's a feature we have gotten a lot of requests for, and in RootsMagic 4 we're going to deliver it.



If you have ever added alternate names for people in your database, you can now have those alternate names appear in lists of people (like the RootsMagic Explorer). If you think you might get confused having a person appear under their multiple names in the lists, just unmark the "Show alternate names" checkbox and it will only list each person once under their primary name.

Clicking on an alternate name in the list will take you to the same place that clicking on the primary name would. It's just that you can now find people by all those other names they may have been known as during their lifetime.

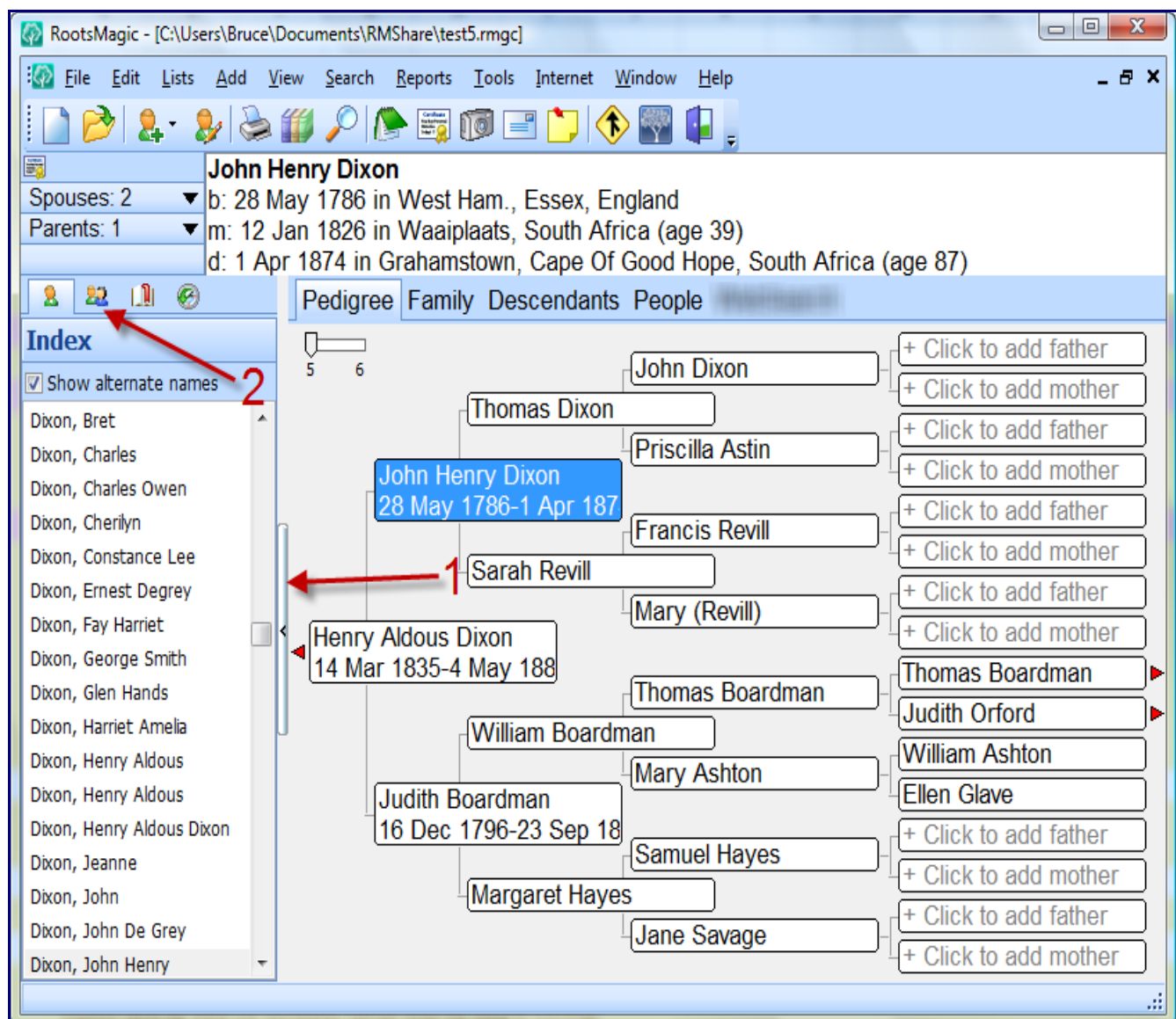
Stay tuned for more cool stuff. And thanks for telling your friends and families to check out what will be our biggest upgrade ever.

RootsMagic 4 Unwrapped - What is that button on the side?

- Posted by [Bruce Buzbee](#)
- August 27, 2008

I keep getting busy programming and forget to blog about all the great stuff coming in version 4, so I'm going to skip the rest of the little things and start sneak previewing the bigger stuff. I'll leave the little stuff for you to find on your own when we release version 4 before the end of the year (there... there's your first hint about the release date).

Back in a previous post, several people wondered what that button (1) on the left side of the screen was for. Of course I didn't tell, which led to a lot of rampant guessing and speculation. So let's put an end to the speculation. If you click on the image below you'll see RootsMagic 4's new collapsible side bar. Click the button to access the side bar, and again if you want it hidden. The side bar is available regardless of which main view you are using.



The side bar has four (count'em) 4 tabs. The Index tab shown above is a list of the people in your database. You have incremental search and alternate name support, and if you are using color coding it will show as well. Select a person from the index list and RootsMagic will select that person in the current view (pedigree, family, etc).

The screenshot shows the RootsMagic software interface. The title bar indicates the file path: [C:\Users\Bruce\Documents\RMShare\test5.rmgc]. The menu bar includes File, Edit, Lists, Add, View, Search, Reports, Tools, Internet, Window, and Help. The toolbar contains various icons for file operations and search. The main window is titled "John Henry Dixon" and displays his birth and death dates: b: 28 May 1786 in West Ham., Essex, England; m: 12 Jan 1826 in Waaipiaats, South Africa (age 39); d: 1 Apr 1874 in Grahamstown, Cape Of Good Hope, South Africa (age 87). The left sidebar shows a list of family members under "Spouses & Children" and "Parents & Siblings". The main window displays a pedigree chart for John Henry Dixon, with his family members listed on the right. The right sidebar shows a list of family members with buttons to add parents and children.

John Henry Dixon
 b: 28 May 1786 in West Ham., Essex, England
 m: 12 Jan 1826 in Waaipiaats, South Africa (age 39)
 d: 1 Apr 1874 in Grahamstown, Cape Of Good Hope, South Africa (age 87)

Family
 Go

Spouses & Children
 sp-Margaret Waldon
 sp-Judith Boardman
 ch-Henry Aldous Dixon

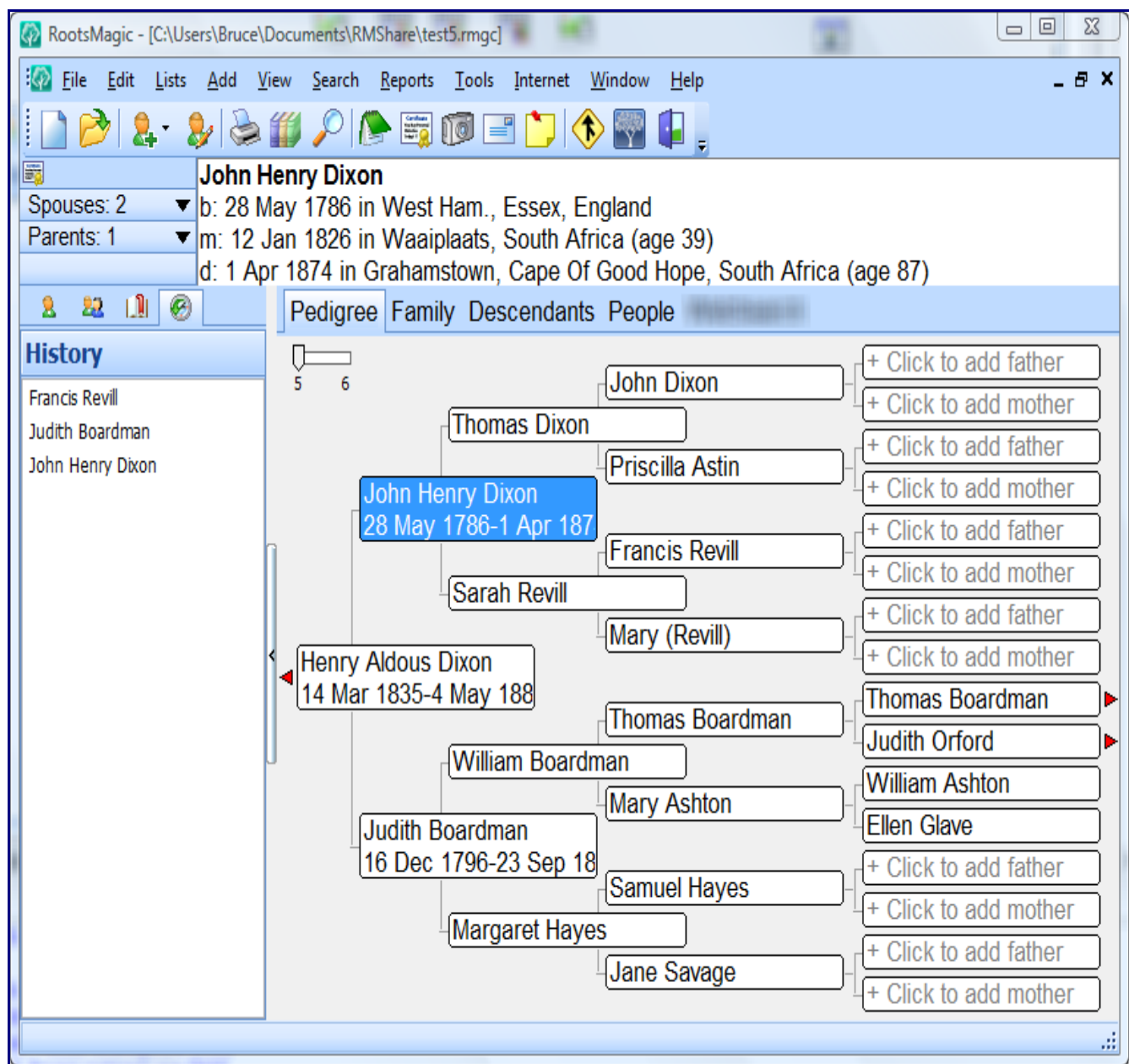
Parents & Siblings
 fa-Thomas Dixon
 mo-Sarah Revill
 sib-Thomas John Dixon
 sib-Richard Dixon
 sib-Joseph Dixon
 self-John Henry Dixon
 sib-Mary Ann Dixon
 sib-Charles Dixon

Pedigree Family Descendants People

John Dixon
 Thomas Dixon
 Priscilla Astin
 John Henry Dixon
 28 May 1786-1 Apr 187
 Francis Revill
 Sarah Revill
 Mary (Revill)
 Henry Aldous Dixon
 14 Mar 1835-4 May 188
 Thomas Boardman
 William Boardman
 Mary Ashton
 Judith Boardman
 16 Dec 1796-23 Sep 18
 Samuel Hayes
 Margaret Hayes
 Jane Savage

+ Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother
 + Click to add father
 + Click to add mother

Tab 2 is the family tab which will show you all the immediate family members (spouses, kids, parents, and siblings) of the person selected on the main screen. You can select any of those family members and click the Go button to switch to that person.



And tab 4 is the history tab. Every time you edit a person, RootsMagic will automatically add that person to the history tab. Need to get back to someone you edited half an hour ago? This is where you'll find them.

Oh, and just to make sure you can't stop speculating, I wanted to point out (if you hadn't noticed already), that there is another blurred tab that has magically appeared on the main screen. Where do those things keep coming from? Guess you'll just have to keep reading the blog.

RootsMagic 4 Unwrapped - Sentences

- Posted by [Bruce Buzbee](#)
- August 30, 2008

Have you ever wanted to tweak the sentence for a single fact without having to change the global sentence template for that fact type? RootsMagic 4 now lets you customize the sentence for any fact in your database. If you are happy with the default sentence for your fact, you don't have to do anything. Otherwise click "Customize sentence" and do your own thing.

Sentence	Customize sentence
Robert Warren was buried on 25 August 1884 in Tanfield, Durham, England.	

Here's the screen where you will customize your sentence.



The screenshot shows a Windows-style dialog box titled "RootsMagic" with a "Customize Sentence" header. Below the header, a message states: "Customize the sentence for this single fact. If you want to change the sentence template for all facts of this type, do 'Lists > Fact type list' from the menu instead." The dialog contains two text input fields. The first, labeled "Sentence Template", contains the text "[person] was buried [date] [place].". The second, labeled "This is the sentence that will be printed for this fact", contains the text "He was buried on 25 August 1884 in Tanfield, Durham, England.". At the bottom of the dialog are three buttons: "Reset to default", "OK", and "Cancel".

Just modify the sentence template for this one instance, or just type a sentence directly. It doesn't matter whether you change the sentence to:

[person] was buried with full military honors [date] [place].

or

John Doe was buried with full military honors on January 15, 1943 in Avon, Iowa.

Using the fields like [person], [date], and [place] means that the sentence for that fact will still update if

the person's info changes.

And speaking of fields (this is where readers who don't bother changing sentence templates might want to bail out <g>)...

We have completely rewritten the sentence template language. While there isn't nearly enough time or room in this blog to go into detail about all the enhancements available when creating sentence templates, let me just say you can now create sentences which contain:

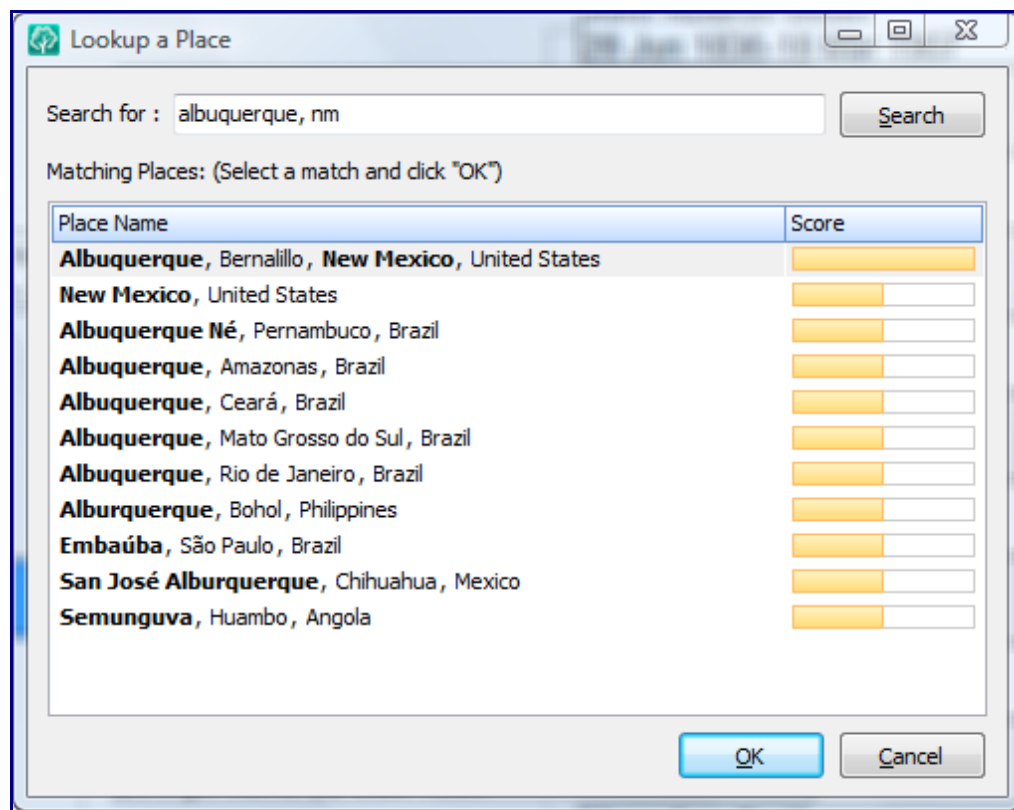
1. conditional parts which can change based on various criteria (like sex, whether the data exists, etc)
2. modifiers for fields (like [date:year] or [place:reverse])
3. and something else I'll talk about in a future entry (tease)

I just looked at the remaining sneak previews, and I guarantee you won't want to miss any of them. I've been having fun showing all these features so far, but like I said early on, I've been saving the best for last. There are still at least a dozen major features coming (we weren't kidding about this being the biggest upgrade in our 22 year history). Keep sharing this blog with your family and friends, and I promise you won't be disappointed.

RootsMagic 4 Unwrapped - Places and Geocoding

- Posted by [Bruce Buzbee](#)
- September 2, 2008

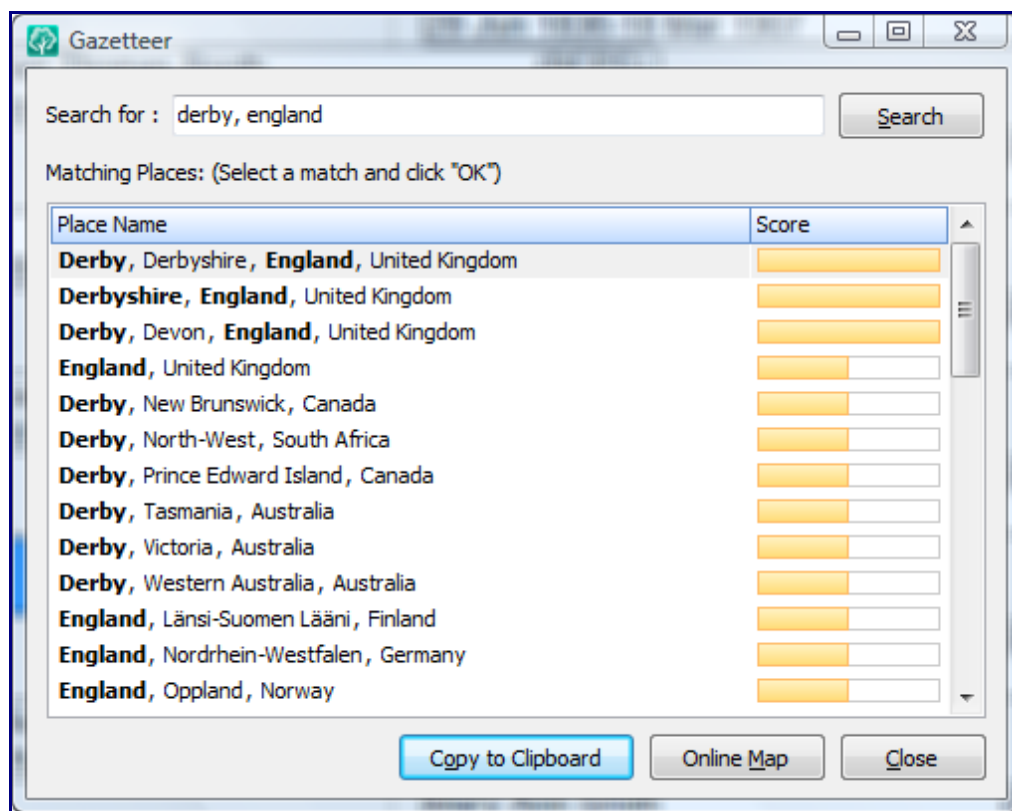
Have you ever been entering a place and wished you knew what county, province, state or country the place was in? RootsMagic 4 now provides a worldwide place database with 3.5 million places in it. Just pop up the place search and enter what you know about the place and RootsMagic will display matching places. Select a place and click OK and RootsMagic will paste the fully standardized place into the place field for you.



But what if you don't want a full "standardized" place (like if you have an historical place name)? When you edit a place from the master place list, you can enter the place 1) the way you want it normally displayed, 2) as a standardized place, and 3) as an abbreviated version of the place. Of course the standardized and abbreviated places are both optional.

I'm guessing a lot of you noticed the "GeoCode" button on the Edit Place screen above. Clicking that button in RootsMagic 4 will geocode your place for you. Geocode just means that RootsMagic will check its 3.5 million place name database to find a match for your place, and insert the latitude, longitude, and standardized place name for you. Now of course we won't make you geocode your database one place at a time. RootsMagic 4 can also geocode your entire database, and let you hand pick the places that are ambiguous.

And finally, RootsMagic 4 offers a gazetteer on the tools menu to look up any place in the world.



We know how much current RootsMagic users like the free PlaceFinder program we've included all these years. Think of the Gazetteer as a world-wide PlaceFinder on steroids. Like the Place Search above, just type in as much of the place as you know and click Search. The Gazetteer will show you all matches, and will even let you view an online map of any of those matching places (you need to be online to view the online map of course).

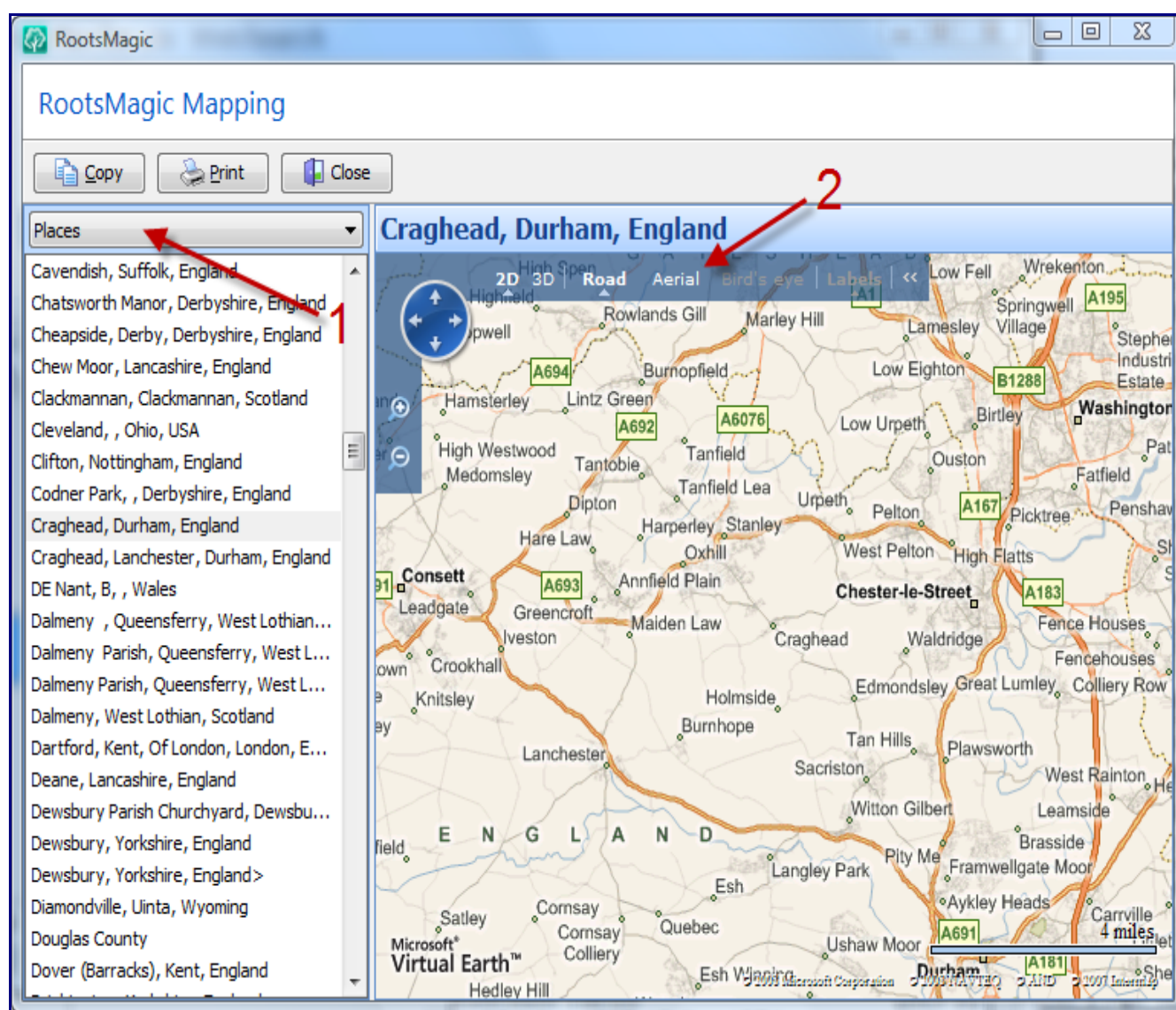
Think we're done with places? You'll need to check out my next blog entry to find out.

RootsMagic 4 Unwrapped - Mapping

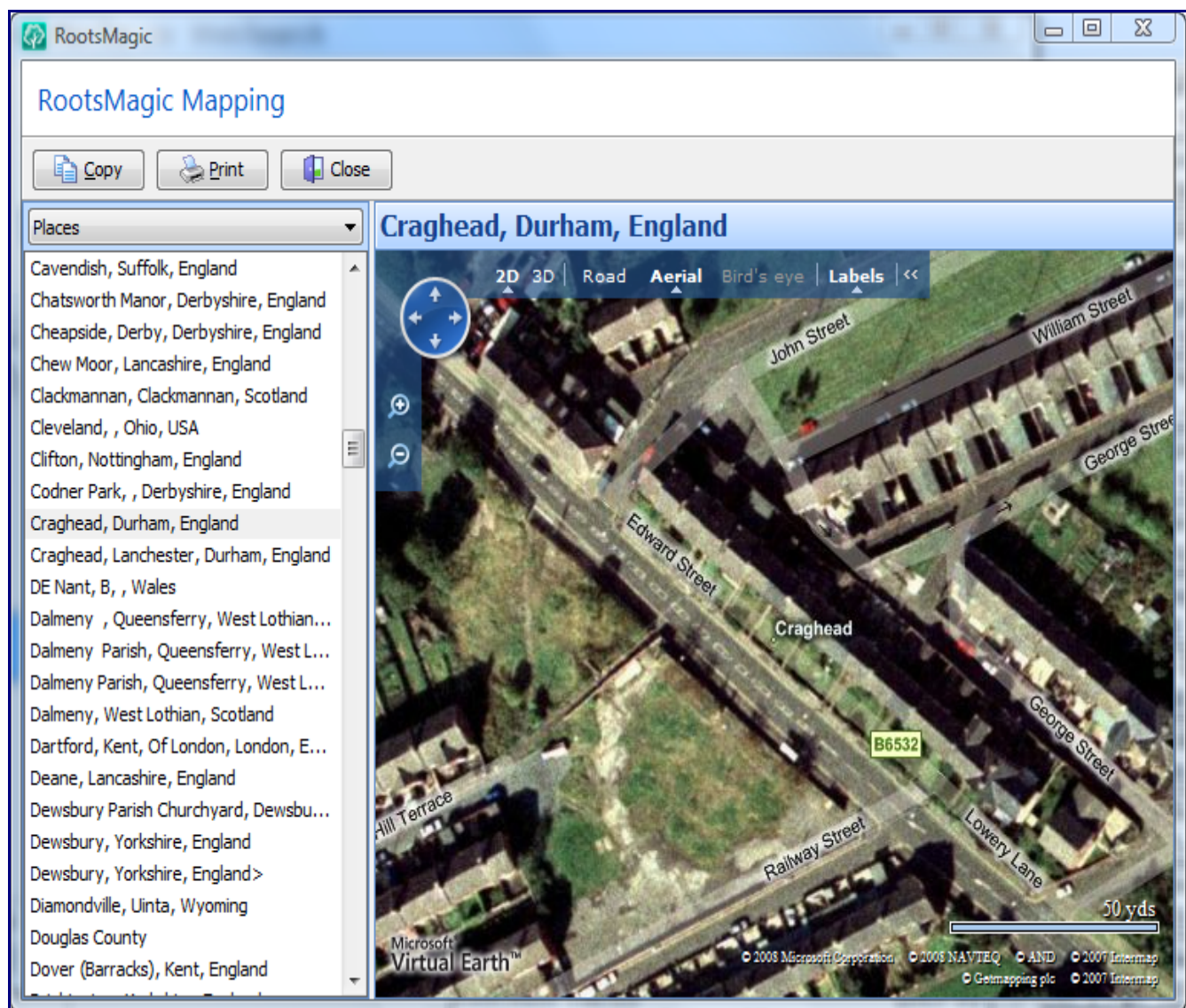
- Posted by [Bruce Buzbee](#)
- September 5, 2008

RootsMagic has long had the ability to display an online map for places in your database (it was even a recent “tip of the month” in the RootsMagic newsletter). We have expanded that capability in RootsMagic 4.

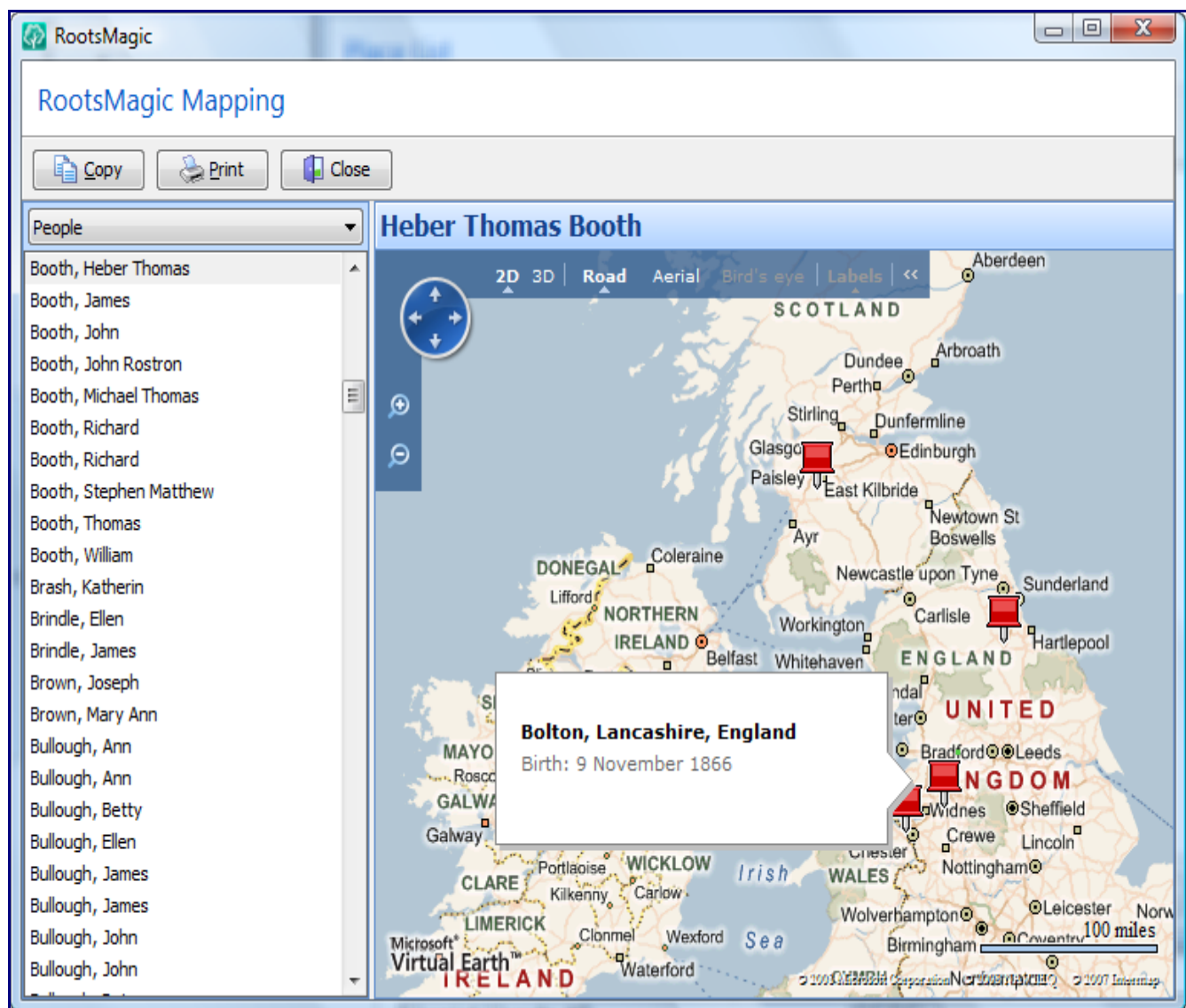
When you open the mapping feature in RootsMagic 4, you will have a list of (1) all the places in your database. Click on a place in the list and RootsMagic will display a map of the place for you. You can use all the Virtual Earth tools (zoom, aerial, birds-eye, etc). You can even print your map or copy it to the clipboard to paste into other programs.



If you select the Aerial option, you can view the satellite image of your map. You can view the satellite image either with or without the labels for towns, streets, etc.



The new RootsMagic 4 mapping makes it easy to see where the events in a person's life happened. Just switch (1) from "Places" to "People" and RootsMagic will display a list of the people in your database. Click on anyone in the list and RootsMagic will display a map showing that person's events.



You can move your mouse over any marker to see what events in that person's life occurred there. And of course you can see these markers on either the map or aerial view.

Stay tuned as we continue to map out the new features in RootsMagic 4 (my wife told me that was a dumb line, but I decided to run with it anyways)

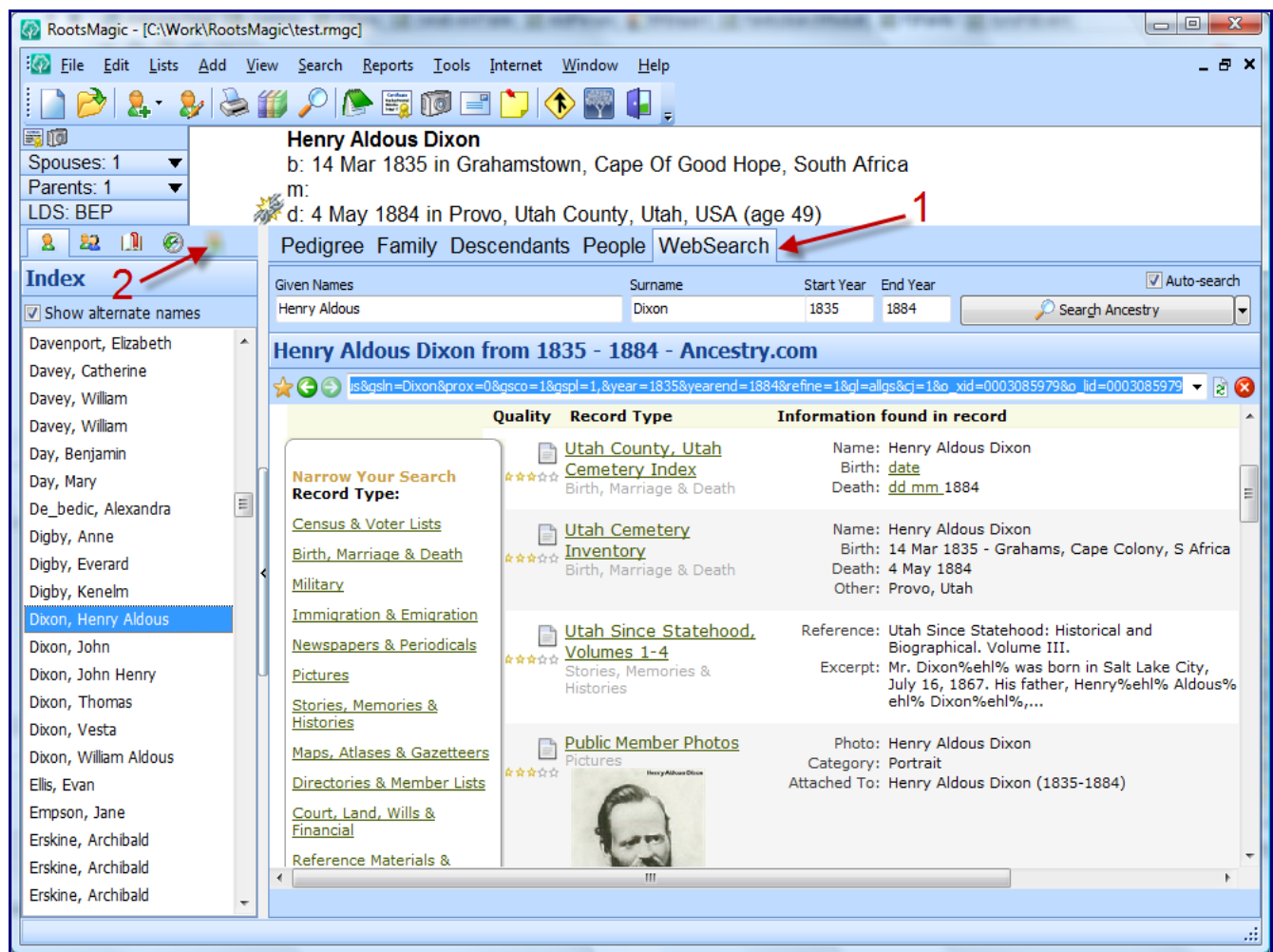
RootsMagic 4 Unwrapped - And the 5th tab is...

- Posted by [Bruce Buzbee](#)
- September 12, 2008

WebSearch.

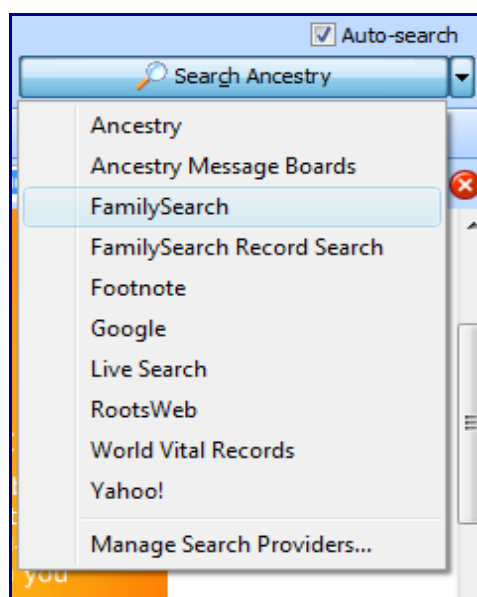
And why is it that every time a tab is disclosed another blurred one (2) appears?

RootsMagic 4 makes it easier than ever to search online for information about your family. Just switch to the WebSearch tab and RootsMagic will do an online search for the currently selected person. And if you want to find someone else just click their name in the side list and RootsMagic will automatically search for them on the selected site.



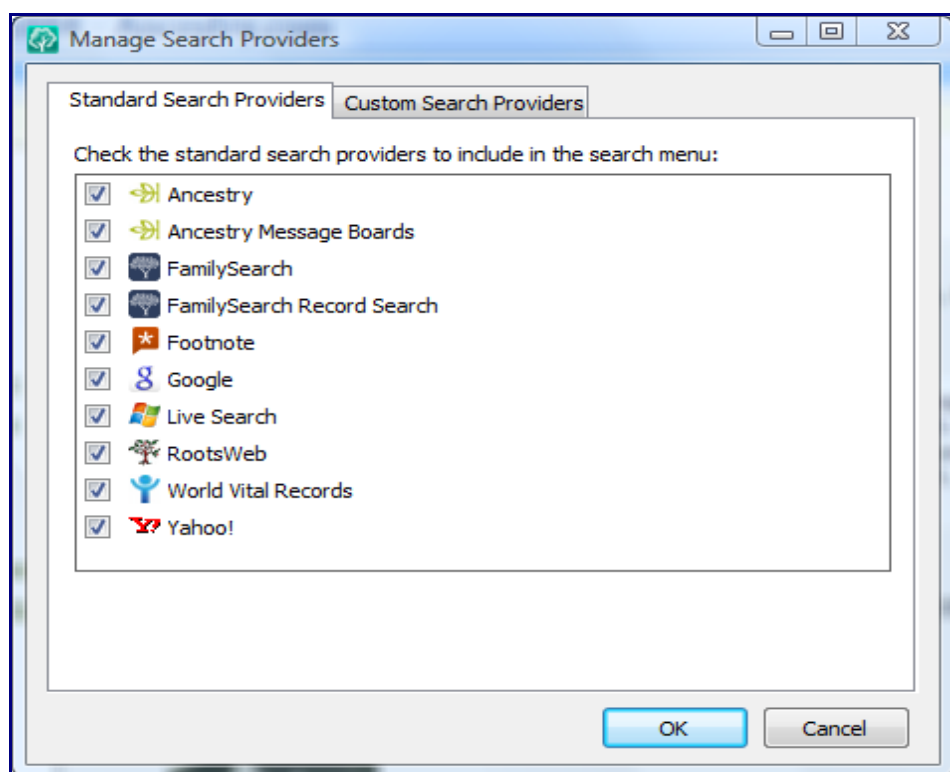
WebSearch

Of course nobody wants to search just one site, so RootsMagic lets you select which site you want it to use. Click the little drop arrow to the right of the search button and choose the site you want to search. If you want to add additional sites that we don't include (or if you want to hide some of the built-in sites), choose "Manage Search Providers..."



WebSearch Menu

Here you can uncheck any sites you are boycotting or just don't want appearing in the list. Or you can select the "Custom Search Providers" tab to add new search engines. I won't go into gory details about adding a new search engine here, but it really is quite easy to do, even for a non-programmer.



WebSearch Providers

Well, that's one more new feature, with at least 10 more to go.

Oh, and I'm pretty sure that last new blurred tab above is the last one (for now). I think we figured out what keeps causing them to appear and got it taken care of <g>.

RootsMagic 4 Unwrapped - New FamilySearch

- Posted by [Bruce Buzbee](#)
- September 18, 2008



And while we're on the subject of web searches, it's time to unwrap one of the features we get the most questions about...

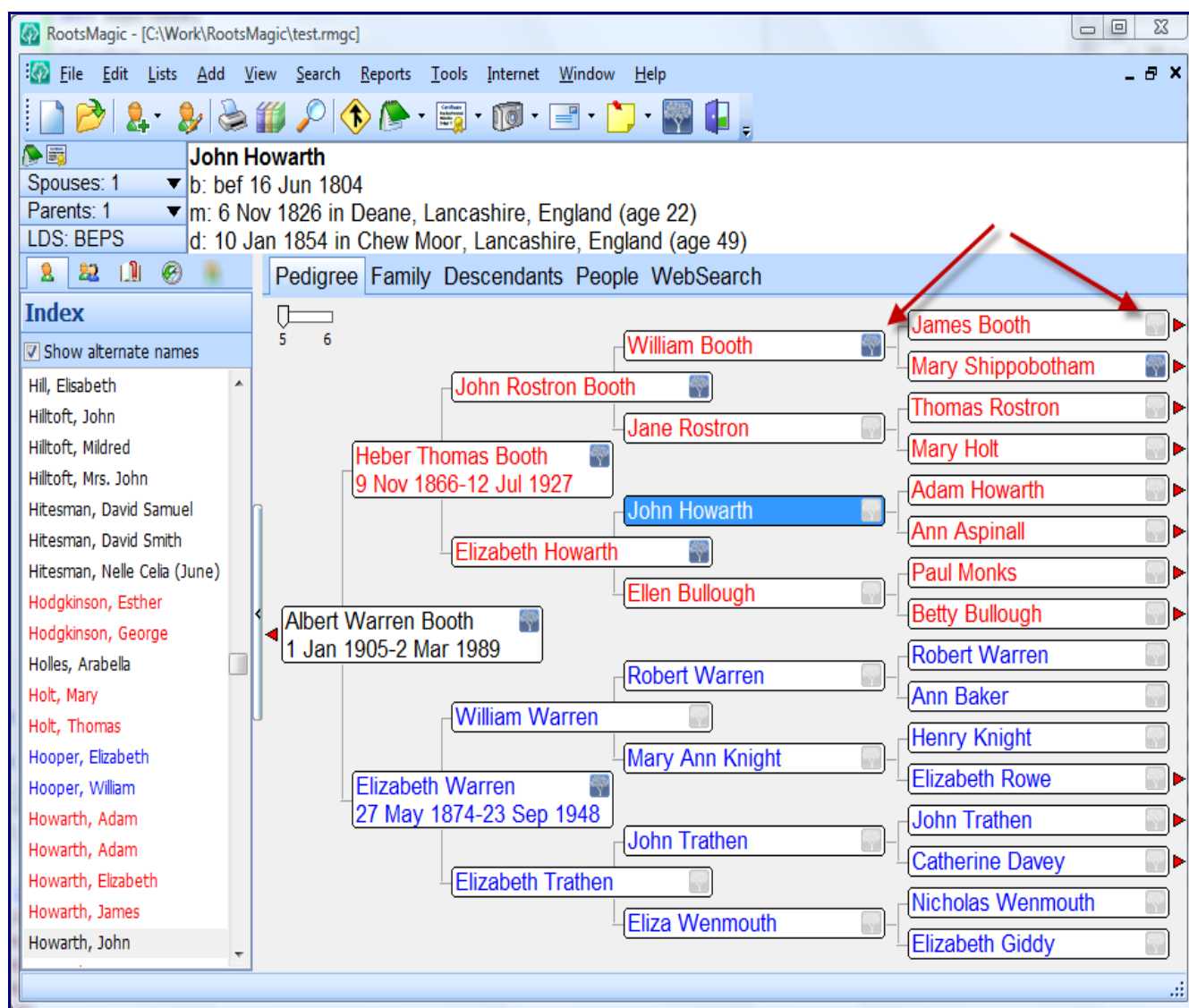
New FamilySearch support. First, go read about [New FamilySearch on Wikipedia](#) (you have to scroll down the Wikipedia article a bit to find out about "New" FamilySearch) and then come back and we'll continue. I'll wait...

Back already? So FamilySearch is a huge online project, part of which is a collaborative family tree where you can add and edit people and information, as well as dispute information you don't agree with. Think of it as a giant online family tree where you and others can work together on your common ancestors / relatives. In the future it will also include access to millions of digitized records.

Currently New FamilySearch is being released in phases to members of the LDS Church, but eventually free access will also be available to the general public. RootsMagic is a FamilySearch Affiliate, and RootsMagic 4 will be a FamilySearch Certified application when it is released later this year.

RootsMagic 4 will let you easily match up individuals in your database with the matching person out on New FamilySearch. This way RootsMagic can notify you when someone else changes information on that person out on New FamilySearch. It also makes it easy to copy information back and forth between RootsMagic and New FamilySearch.

It's simple to start linking your people to New FamilySearch. Just turn on the option and RootsMagic will display a light gray FamilySearch icon next to each person's name on any of the main views.



Just click on a person's FamilySearch icon and RootsMagic will display any matches from New FamilySearch. Possible matches will be color coded to make it easy to decide how close of a match they are to your person. Check any matches and click the link button and RootsMagic will automatically combine any duplicates and match your RootsMagic person to the person on FamilySearch.

RootsMagic

FamilySearch Matches

Check and select the records on FamilySearch that match your person

☒ Combine checked matches and link my person to them

My RootsMagic Person	Birth date	Birth place	Death date	Death place	Father	Mother	Spouse
Mary Hepworth	25 September 1811	Thornhill, Overton, Yorkshire, England	10 March 1867	Smithfield, Cache, UT	Richard Hepworth	Hannah Wilkinson	William Thornton
Possible Matches							
<input type="checkbox"/> Mary Hepworth	25 September 1811	Thornhill, Birstall, Yorkshire, England	March 1867	Smithfield, Cache County, UT	Richard Hepworth	Hannah Wilkinson	William Thornton
<input type="checkbox"/> Mary Hepworth	17 November 1811	Thornhill, Yorkshire, England		Smithfield, Cache, Utah	Richard Hepworth	Hannah Wilkinson	William Thornton

Close

Once you find a match on FamilySearch, the icon next to the person's name will turn blue, and clicking it will also let you see your RootsMagic person and the matched person side by side.

RootsMagic

Match Details

Detailed comparison between your RootsMagic person and this FamilySearch person

My RootsMagic Person

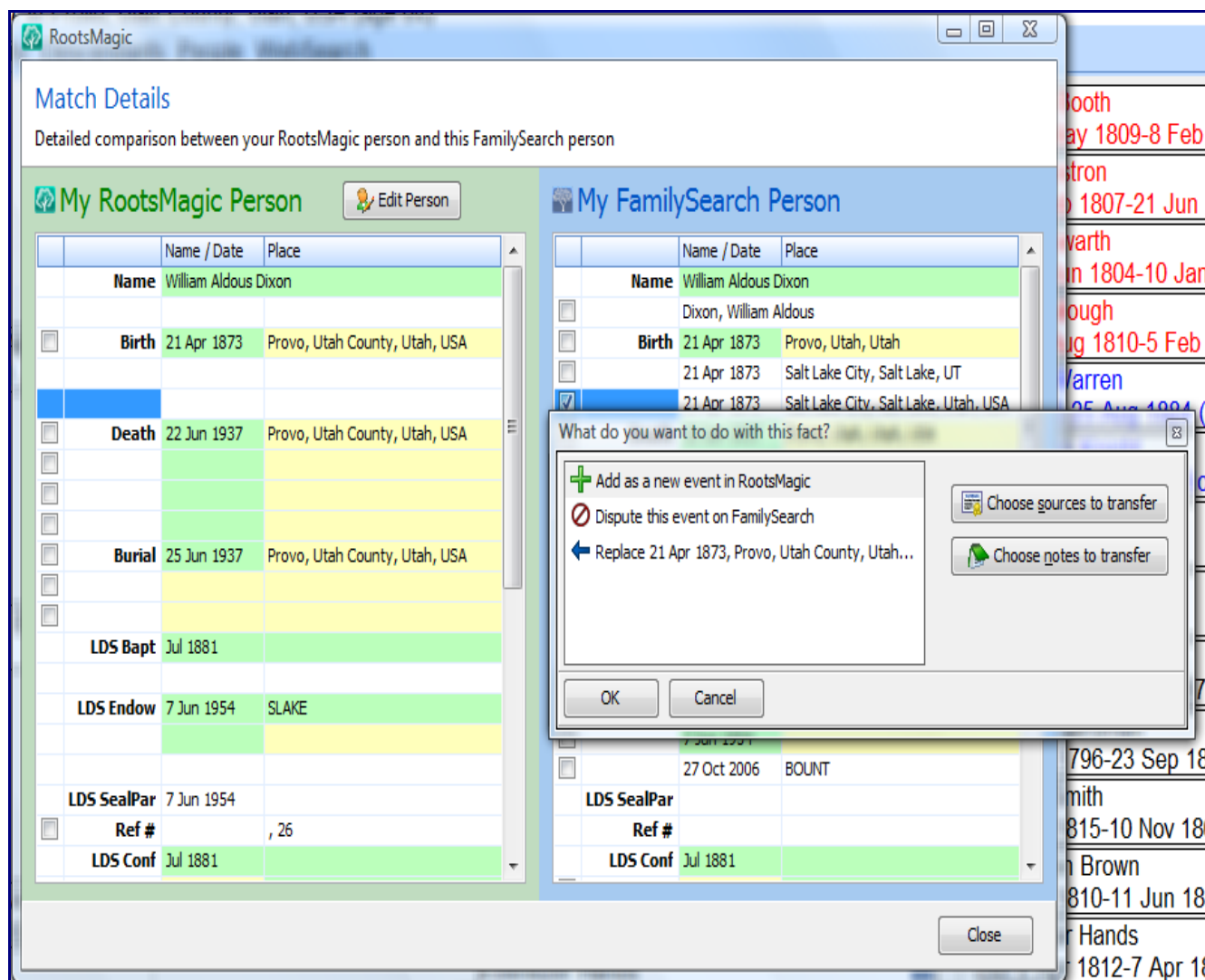
	Name / Date	Place
Name	William Aldous Dixon	
<input type="checkbox"/> Birth	21 Apr 1873	Provo, Utah County, Utah, USA
<input type="checkbox"/> Death	22 Jun 1937	Provo, Utah County, Utah, USA
<input type="checkbox"/> Burial	25 Jun 1937	Provo, Utah County, Utah, USA
LDS Bapt	Jul 1881	
LDS Endow	7 Jun 1954	SLAKE
LDS SealPar	7 Jun 1954	
<input type="checkbox"/> Ref #		, 26
LDS Conf	Jul 1881	

My FamilySearch Person

	Name / Date	Place
Name	William Aldous Dixon	
<input type="checkbox"/>	Dixon, William Aldous	
<input type="checkbox"/> Birth	21 Apr 1873	Provo, Utah, Utah
<input type="checkbox"/>	21 Apr 1873	Salt Lake City, Salt Lake, UT
<input type="checkbox"/>	21 Apr 1873	Salt Lake City, Salt Lake, Utah, USA
<input type="checkbox"/> Death	22 Jun 1937	Provo, Utah, Utah, USA
<input type="checkbox"/>	22 Jun 1937	Provo, Utah, Utah
<input type="checkbox"/>	22 Jun 1937	
<input type="checkbox"/>	22 Jun 1937	Provo, Utah Co, UT
<input type="checkbox"/> Burial	25 Jun 1937	Provo, Utah, Utah
<input type="checkbox"/>	Jun 1937	Provo, Utah, Utah, USA
<input type="checkbox"/>		Provo, Utah, UT
LDS Bapt	Jul 1881	
<input type="checkbox"/>	19 Apr 2005	PALMY
LDS Endow	7 Jun 1954	SLAKE
<input type="checkbox"/>	7 Jun 1954	
<input type="checkbox"/>	27 Oct 2006	BOUNT
LDS SealPar		
Ref #		
LDS Conf	Jul 1881	

Close

It's easy to copy data back and forth between RootsMagic and New FamilySearch. Just click the checkbox next to any information you want to copy. RootsMagic will display all the available options, including copying the information as a new event, replacing an existing event, or disputing the event. You can also choose which notes and sources you want to copy as well.



If you prefer to link from a list rather than from the main screens, RootsMagic 4 provides a batch FamilySearch screen. You can find matches and copy information all from a single screen.

FamilySearch

Close

My People

Everyone

Name

- Booth, Heber Thomas
- Booth, James
- Booth, John
- Booth, John Rostron
- Booth, Michael Thomas
- Booth, Richard
- Booth, Richard
- Booth, Stephen Matthew
- Booth, Thomas
- Booth, William
- Brash, Katherin
- Brindle, Ellen
- Brindle, James
- Brown, Joseph
- Brown, Mary Ann
- Bullough, Ann
- Bullough, Ann
- Bullough, Betty
- Bullough, Ellen
- Bullough, James
- Bullough, James
- Bullough, John
- Bullough, John
- Bullough, Peter
- Bullough, Peter
- Bullough, Robert

Find FamilySearch Matches

Select matches from this list to link your RootsMagic person to (duplicates will be combined on FamilySearch)

☒ Combine checked matches and link my person to them

My RootsMagic Person	Birth date	Birth place	Death date	Death place	Father	Mother
Heber Thomas Booth	9 November 1866	Bolton, Lancashire, England	12 July 1927	San Francisco, San Francisco, California	John Rostron Booth	Elizabeth

Possible Matches

- ☒ Heber Thomas Booth

My Matched Person

Copy information for this person between RootsMagic and FamilySearch

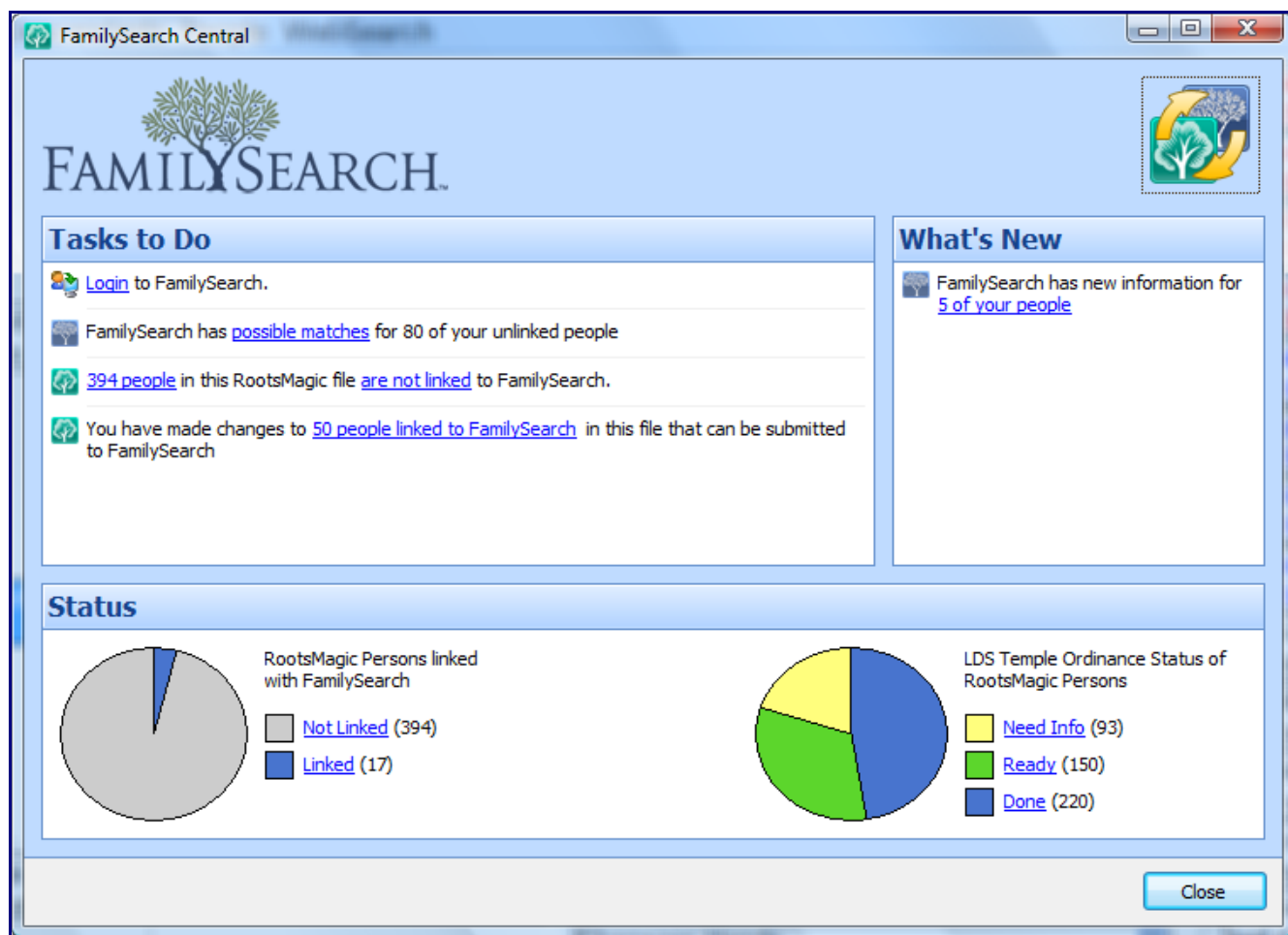
My RootsMagic Person

	Name / Date	Place
Name	Heber Thomas Booth	
Birth	9 Nov 1866	Bolton, Lancashire, England
Death	12 Jul 1927	San Francisco, San Francisco, Califo...
Burial	16 Jul 1927	Provo, Utah County, Utah, USA
Emigration	2 Sep 1874	Liverpool, Lancashire, England
LDS Bapt	10 Oct 1874	

My FamilySearch Person

	Name / Date	Place
Name	Heber Thomas Booth	
	Heber Thomas	
	Heber T. Booth	
Birth	9 Nov 1866	Bolton, Lancas., England
	9 Nov 1866	Bolton Le Moors, Lancashire, England
	9 Nov 1866	Bolton, Lncshir, England
	9 Nov 1866	Bolton, Lancaster, Eng.
	<1881>	Provo, Utah, Utah
Death	12 Jul 1927	San Francisco, San Francisco, Califo...
	12 Jul 1927	
	12 Jul 1927	San Francisco, S-Francisc, CA
Burial	16 Jul 1927	Provo, Utah, UT
Emigration		
LDS Bapt	10 Oct 1874	

Several sharp-eyed readers spotted the New FamilySearch button on the toolbar back in one of our earlier entries. That button brings up FamilySearch Central, a dashboard which provides a detailed summary of how your RootsMagic data relates to FamilySearch. FamilySearch Central will also display any ordinance information for LDS users. All LDS information can be hidden or displayed depending on the user's preference.



FamilySearch Central

Whew. This article barely touches the capabilities of RootsMagic 4's New FamilySearch support, but writing this did remind me of something else I meant to mention. When we release RootsMagic 4 we will be posting a set of video tutorials on our website. We realize that with this many new features there will be a lot of questions that simple screen shots just can't address. I will also be doing follow up blog entries on some of these new features as well.

So that's another big feature coming in RootsMagic 4, and there's still a lot more to come. Stay tuned.

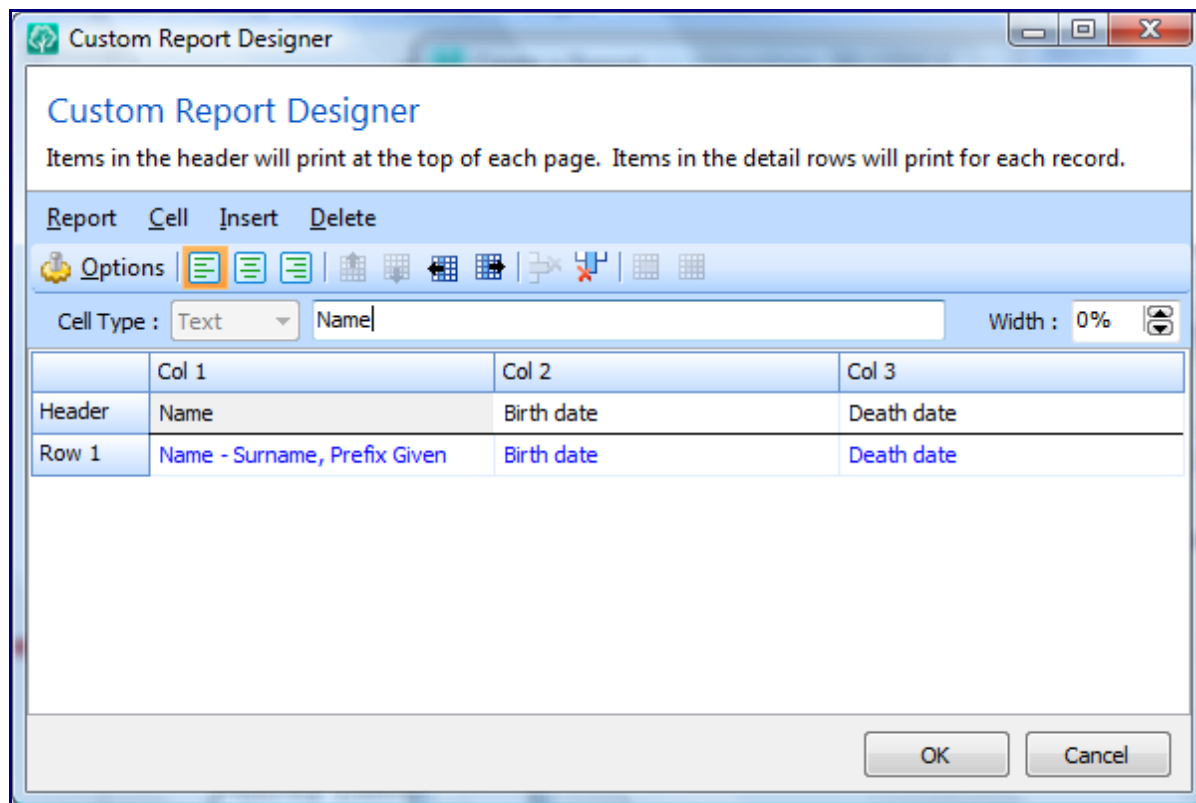
RootsMagic 4 Unwrapped - Custom Reports

- Posted by [Bruce Buzbee](#)
- September 24, 2008

RootsMagic has always been heads and shoulders above the competition when it comes to custom reports, but we have found ways to make them even better in RootsMagic 4.

Easier Design Screen

Anyone who has designed a custom report in RootsMagic knows that it takes special concentration and good hand-eye coordination to get fields to line up the way you want. RootsMagic 4's new custom report designer makes it easy for anyone to create professional looking custom reports.



For simple custom lists, just add the number of columns you want, and enter the header text and fields into the cells. The report will automatically size to fit the width of whatever page you print to, so just size the columns proportionally. If you want multiple rows, just add them and tell RootsMagic 4 what to print in them.

Including multiple facts of the same kind

Have you ever included a field like “Occupation” in a custom report and discovered that your report only included the first occurrence of that fact type? That’s because RootsMagic custom reports limited a field to only a single line on the page. We have zapped that limitation and now your custom reports will include all instances of a fact type in the report.

Name	Birth date	Death date
CORNELIUSSEN, Anders	January 1670 3 February 1670	27 April 1742
HANSDATTER, Giertrud	1703	1760
ANDERSDATTER, Ide Magdalene	1720	

Including notes

Zapping that single line limitation also let us add support for one of the most commonly requested custom report features... including notes in a custom report.

SCHMIDT, John Jacob Jingleheimer

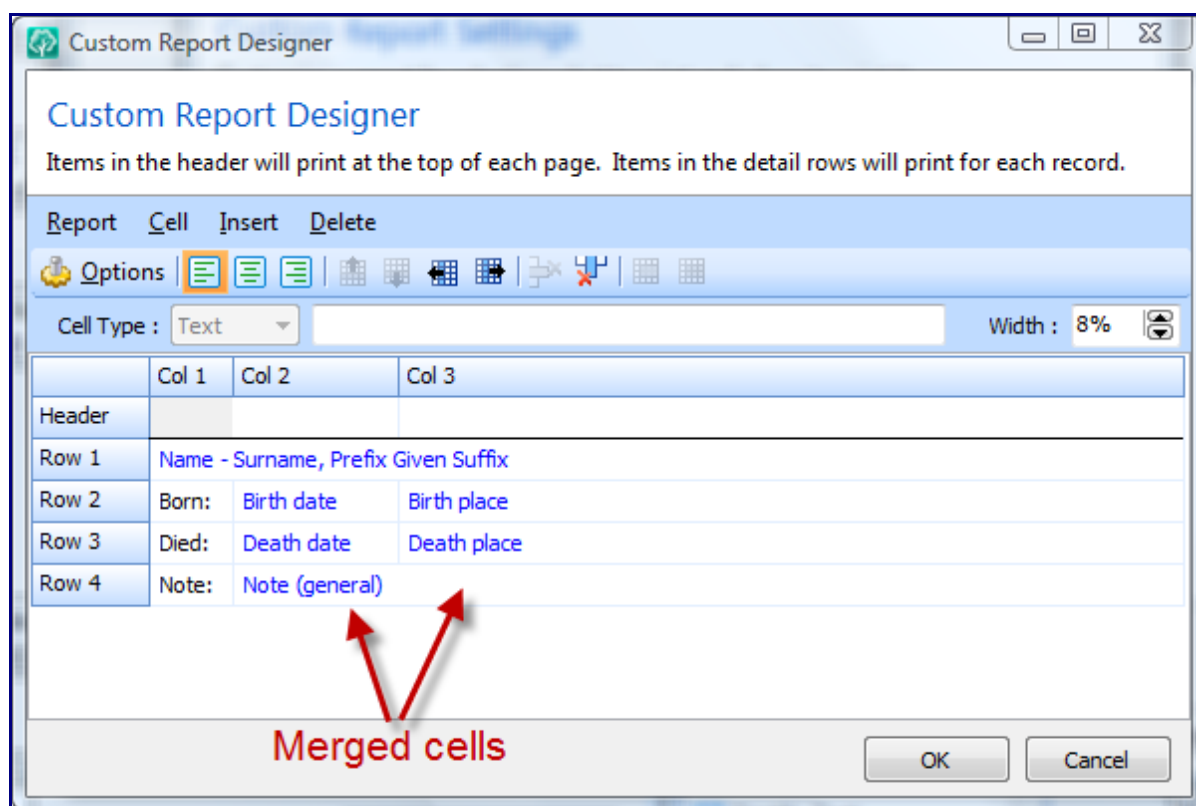
Born: 15 January 1890 Quinlan, Hunt, Texas, USA

Died: 8 August 1943 Albuquerque, Bernalillo, New Mexico, USA

Note: John was born during a driving blizzard. The doctor was unable to reach their home, so he was delivered by his older sister Sarah. She was given the honor of naming him, and she chose a name she had recently learned in a song at school.

More layout options

What if you wanted to mix and match simple fields with notes in a custom report? RootsMagic 4 lets you join fields in your custom report to get the layout you actually want. For example, you can join a row of fields into a single field to allow your note to print under multiple rows of simple fields, like this:



This is the report which created the note entry above. You can see that I merged the two cells which hold the note so it could span both the date and place columns. The 3 columns in row 1 have also been merged so that the name can span the full width of the report if necessary. You can also merge a column of fields in case you want the note to print to the side of several rows of fields.

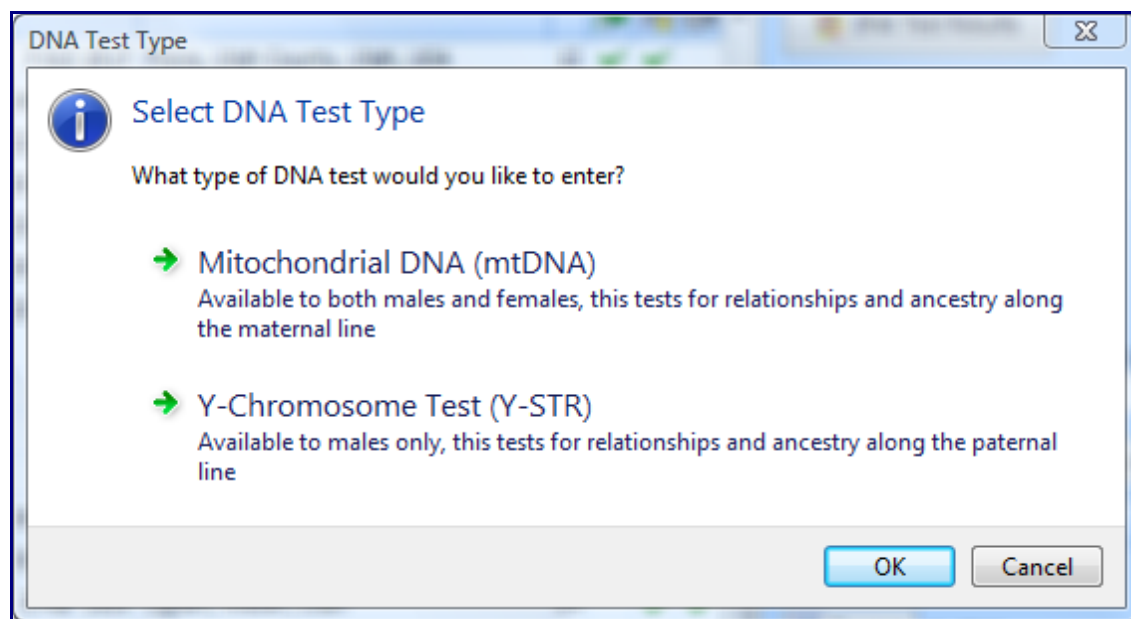
So that's a quick overview of some of the new custom report capabilities. The layout of your new RootsMagic 4 custom reports is limited only by your imagination.

And we're still not finished with the sneak previews.

RootsMagic 4 Unwrapped - All in the Genes

- Posted by [Bruce Buzbee](#)
- September 27, 2008

DNA anyone? By popular demand RootsMagic 4 now lets you track all those DNA tests you are spending so much money on. And unlike some programs, RootsMagic 4 will let you track both Y-Chromosome (paternal-line) and Mitochondrial (maternal-line) tests. Just choose to add a DNA test to a person and RootsMagic will ask you to select the test type.



Y-Chromosome DNA Tests

Y-Chromosomes are passed from father to son so they are useful for testing relationships and ancestry along paternal lines. Just pick a testing laboratory from the list and RootsMagic 4 will display the markers used by that lab. You can then easily record and retrieve the results. Combine this with our searching capabilities, and RootsMagic 4 is the perfect software for your surname project.

DNA Test (Y-STR)

DNA Test (Y-STR) for Albert Warren Booth
Enter the results of a Y-Chromosome test for paternal lineage

Testing Laboratory:

Laboratory Name:

Test Description:

Test/Kit ID:

Haplogroup:
 ☐ Confirmed

Haplotype

DYS385a	<input type="text"/>	DYS385b	<input type="text"/>
DYS388	<input type="text"/>	DYS389i	<input type="text"/>
DYS389ii	<input type="text"/>	DYS390	<input type="text"/>
DYS391	<input type="text"/>	DYS392	<input type="text"/>
DYS393/DYS395	<input type="text"/>	DYS19/DYS394	<input type="text"/>
DYS426	<input type="text"/>	DYS437	<input type="text"/>
DYS438	<input type="text"/>	DYS439/Y-GATA-A4	<input type="text"/>
DYS441	<input type="text"/>	DYS442	<input type="text"/>
DYS444	<input type="text"/>	DYS445	<input type="text"/>
DYS446	<input type="text"/>	DYS447	<input type="text"/>
DYS448	<input type="text"/>	DYS449	<input type="text"/>
DYS452	<input type="text"/>	DYS454	<input type="text"/>

OK Cancel

Mitochondrial DNA Tests

Mitochondrial DNA is passed from mother to child so they are useful for testing relationships and ancestry along maternal lines. Just pick the testing company and enter the results.

DNA Test (mtDNA) for Albert Warren Booth
Enter the results of a mitochondrial DNA test for maternal lineage

Testing Laboratory: Other Laboratory ▼

Laboratory Name:

Test Description:

Test/Kit ID:

Haplogroup: ☐ Confirmed

Haplotype

HVR1	HVR2	HVR3
<input checked="" type="checkbox"/> Tested	<input type="checkbox"/> Tested	<input type="checkbox"/> Tested
Location 1		
Location 2		
Location 3		
Location 4		
Location 5		
Location 6		
Location 7		
Location 8		
Location 9		
Location 10		

OK Cancel

RootsMagic 4 supports more testing laboratories and testing markers than any other software currently available... so if you're ready to dive into the world of genetic genealogy, we've got you covered.

Well, I'm off to sail the seven seas (or at least one of them) on the RootsMagic cruise. If I have a chance to get a post up during the week I will do so, if not it may be a week before the next major feature is unveiled (and it's a good one). I have my laptop with me, and promise that the team and I will continue to work on getting RM4 ready. My wife Laurie has already warned me not to have any fun until RM4 is released, so she continues to look out for you. See you next week.

RootsMagic 4 Unwrapped - Named Groups

- Posted by [Bruce Buzbee](#)
- October 1, 2008

If you have ever selected a group of people for a report or search and wished you could save that group of people to use again later, then your wish has been granted. The fifth (and final) tab of the side list is the Groups tab.

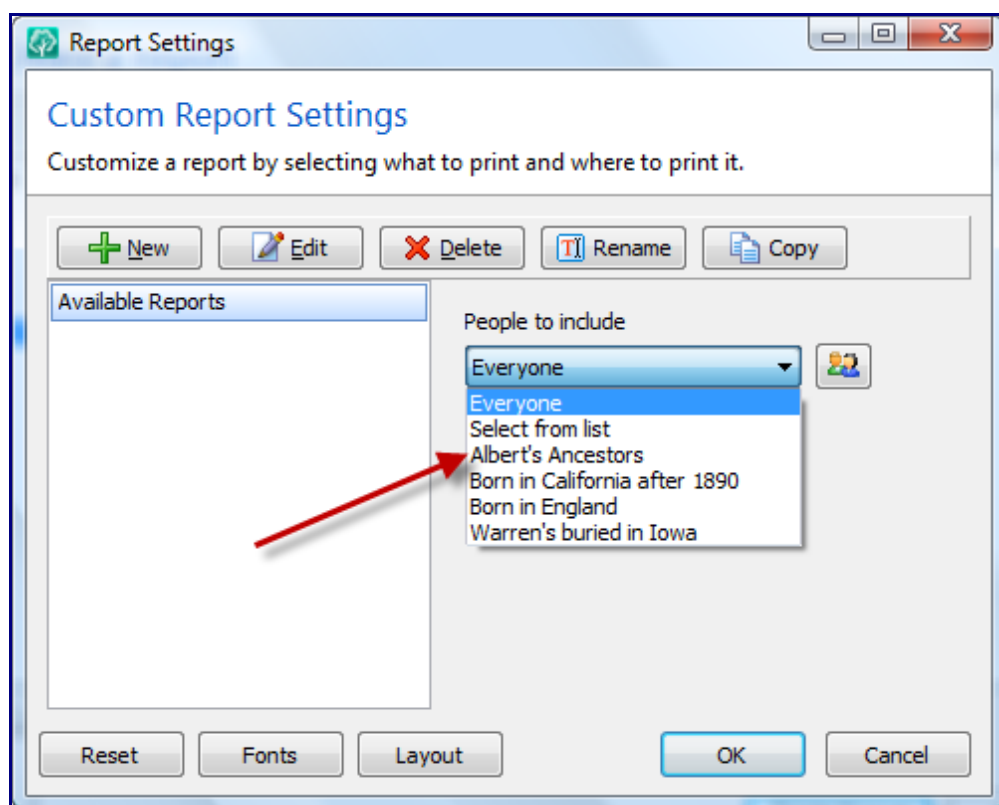
The screenshot displays the RootsMagic 4 application window. The top menu bar includes File, Edit, Lists, Add, View, Search, Reports, Tools, Internet, Window, and Help. Below the menu is a toolbar with various icons. The main window is divided into several sections. On the left, there is a 'Groups' tab selected, showing a list of named groups under the heading 'Born in England'. The list includes names like Ann, Susanna, Elizabeth (Halliwell), Mary (Orford), Mary Aspinall, Ann Aspinall, William Aspinall, Harriet Ball, James Boardman, Judith Boardman, Heber Thomas Booth, James Booth, John Rostron Booth, Thomas Booth, William Booth, Mary Ann Brown, and Ellen Bullough. In the center, a pedigree chart is displayed, showing a family tree with names and dates. A red arrow points to the 'Groups' button in the top toolbar. On the right, there is a list of names, including James Booth, Mary Shippobotham, Thomas Rostron, Mary Holt, Adam Howarth, Ann Aspinall, Paul Monks, Betty Bullough, Robert Warren, Ann Baker, Henry Knight, Elizabeth Rowe, John Trathen, Catherine Davey, Nicholas Wenmouth, and Elizabeth Giddy.

Click the Groups button to add, edit, or delete groups of people. You can select any group of people from the selection screen, and then give that group of people a name (like “People born in England” or “Ancestors of John Smith”). You can then select from these names in the side list to show the people in that group.



You can create new groups, edit groups (change which people are in the group), or delete groups. You can also change the name of a group.

Once you have some named groups created, the fun begins. Any time you are asked whether you want to include all or some people (such as when printing a custom report), RootsMagic will also let you select any of the named groups as well.



Of course there is no limit to the number of groups you create, and since you can name them anything you want there is no need to remember cryptic tag or flag numbers. Using named groups is fun and easy.

In case you are wondering how I wrote this article during the middle of the RootsMagic cruise, the secret is I didn't. I am sitting here Saturday night before the cruise writing this and will have the blog magically publish it during mid-week. And then it is back to live blogging and unwrapping!

RootsMagic 4 Unwrapped - The New Edit Screen

- Posted by [Bruce Buzbee](#)
- October 15, 2008

Well, I'm finally caught up from the RootsMagic cruise, and ready to wrap up the last 5 or 6 new features coming in RootsMagic 4.

Welcome to the new edit screen. Now, before you say "It's different so I hate it", let's talk a little bit.

One big problem in most genealogy programs is all the screens required to enter information.

Currently in RootsMagic (versions 1-3), there are 3 different edit screens... 1) Edit Person, 2) Edit Fact, and 3) Edit Family. I bet there are some RootsMagic users who didn't even know about the Edit Family screen (found by doing Edit > Family from the main menu). And most other programs split a person's information among even more screens.

Let's take a look at RootsMagic 4's new edit screen. The left half of the edit screen is a list of every piece of information about the person: their name(s), spouses, parents, facts, events, and even DNA tests. The right half of the screen is a "live edit" panel for the currently highlighted row.

Edit Person

John Rostron Booth

Add a fact Delete fact Options

Person		John Rostron BOOTH		
Spouse		Elizabeth HOWARTH		
Parents		William BOOTH and Jane ROSTRON		
Facts	Date	Details	Age	
Birth	28 Jun 1836	Bolton, Lancashire, England	0	
Chr	18 Dec 1836	Bolton, Lancashire, England	0	
Residence	30 Mar 1851	Bolton, Lancashire, England	14	
Occupation	1851	Marsellier Quilt Weaver - Bolton, Lancashire, ...	15	
Marriage	11 Sep 1865	Elizabeth HOWARTH - Bolton, Lancashire, En...	29	
Emigration	2 Sep 1874	Liverpool, Lancashire, England	38	
Death	18 Mar 1907	Provo, Utah County, Utah, USA	70	
Burial	21 Mar 1907	Provo, Utah County, Utah, USA		

Person

Given Names: John Rostron

Surname: Booth Sex: Male

Prefix: Suffix:

Nickname: ☐ Living

Save Cancel

Additional Details

Note **Information from John Rostron Booth's**

Sources **5 general sources**

Media **2 general media items**

Address No general address

ToDo No general to-do items

Close

Select the “Person” row, and the live edit panel lets you edit the person’s name and sex. Select a different row (like the “Emigration” fact in the screen below), and the live edit panel lets you edit the details for that piece of information.

Edit Person

John Rostron Booth

+ Add a fact - Delete fact Options

Person	John Rostron BOOTH			✓	✓	✓
Spouse	Elizabeth HOWARTH			✓		
Parents	William BOOTH and Jane ROSTRON			✓		
Facts	Date	Details	Age			
Birth	28 Jun 1836	Bolton, Lancashire, England	0	✓		
Chr	18 Dec 1836	Bolton, Lancashire, England	0			
Residence	30 Mar 1851	Bolton, Lancashire, England	14	✓		
Occupation	1851	Marsellier Quilt Weaver - Bolton, Lancashire, ...	15	✓		
Marriage	11 Sep 1865	Elizabeth HOWARTH - Bolton, Lancashire, En...	29			
Emigration	2 Sep 1874	Liverpool, Lancashire, England	38	✓	✓	
Death	18 Mar 1907	Provo, Utah County, Utah, USA	70	✓		
Burial	21 Mar 1907	Provo, Utah County, Utah, USA				

Emigration

Date: 2 Sep 1874

Place (City, County, State, etc): Liverpool, Lancashire, England

Place details:

Proof: ☐ Primary Sort date: 2 Sep 1874

☐ Private Save Cancel

Additional Details

Note: On Wednesday, Sept. 2nd, at 2 p.m., the

Sources: 2 emigration sources

Media: No emigration media

Sentence: [Customize sentence](#)

John Rostron Booth emigrated on 2 September 1874 from Liverpool, Lancashire, England.

Close

In addition to the live edit fields, RootsMagic 4 also shows whether there are any notes, sources, media, or XXXXX for that piece of information (looks like Bruce got ahold of the blurring tool again).

And if you select one of the family rows (like the parents in the screen below), you can edit details about that family (like the relationship to each parent). And don’t worry about losing those shortcuts you have gotten used to... you can still click the little green checkmarks to directly edit notes, sources, and media.

Edit Person

John Rostron Booth

Add a fact
Delete fact
Options

Person	John Rostron BOOTH			✓	✓	✓
Spouse	Elizabeth HOWARTH			✓		
Parents	William BOOTH and Jane ROSTRON			✓		
Facts	Date	Details	Age			
Birth	28 Jun 1836	Bolton, Lancashire, England	0	✓		
Chr	18 Dec 1836	Bolton, Lancashire, England	0			
Residence	30 Mar 1851	Bolton, Lancashire, England	14	✓		
Occupation	1851	Marsellier Quilt Weaver - Bolton, Lancashire, ...	15	✓		
Marriage	11 Sep 1865	Elizabeth HOWARTH - Bolton, Lancashire, En...	29			
Emigration	2 Sep 1874	Liverpool, Lancashire, England	38	✓	✓	
Death	18 Mar 1907	Provo, Utah County, Utah, USA	70	✓		
Burial	21 Mar 1907	Provo, Utah County, Utah, USA				

Father: William BOOTH
Relationship to father: Birth
Proof:

Mother: Jane ROSTRON
Relationship to mother: Birth
Proof:

☐ Private

Save
Cancel

Additional Details

Note
No family note

Sources
1 family source

Media
No family media

Address
No family address

ToDo
No family to-do items

Close

So there you have it. The ultimate edit screen. The one-stop place for a person's names (primary and alternate), families, events, facts, DNA tests, and more. And we'll have more fun next time when I break out the un-blurring tool.

RootsMagic 4 Unwrapped - Sharing Events

- Posted by [Bruce Buzbee](#)
- October 22, 2008

Can I get a witness?

Here is that new edit screen from the last preview, and I've unblurred the new magic button.

The screenshot shows the 'Edit Person' window for John Rostron Booth. The left pane displays a list of facts for the person, including Birth, Chr, Residence, Marriage, Emigration, Death, and Burial. The right pane shows the details for the selected 'Emigration' fact, including Date (2 Sep 1874), Place (Liverpool, Lancashire, England), and Proof options. A red arrow points to the 'Share' button in the 'Additional Details' section.

Facts	Date	Details	Age	
Person		John Rostron BOOTH		✓ ✓ ✓
Spouse		Elizabeth HOWARTH		✓
Parents		William BOOTH and Jane ROSTRON		✓
Birth	28 Jun 1836	Bolton, Lancashire, England	0	✓
Chr	18 Dec 1836	Bolton, Lancashire, England	0	
Residence	30 Mar 1851	Bolton, Lancashire, England	14	✓
Marriage	11 Sep 1865	Elizabeth HOWARTH - Bolton, Lancashire, Eng...	29	
Emigration	2 Sep 1874	Liverpool, Lancashire, England	38	✓ ✓
Death	18 Mar 1907	Provo, Utah County, Utah, USA	70	✓
Burial	21 Mar 1907	Provo, Utah County, Utah, USA		

Emigration

Date: 2 Sep 1874

Place (City, County, State, etc): Liverpool, Lancashire, England

Place details:

Proof: Primary ☐ Private ☐ Sort date: 2 Sep 1874

Additional Details

Note: "DEPARTURE OF THE FIFTH COMPAN"

Sources: 2 emigration sources

Media: No emigration media

Share: Share this fact

Sentence: John Rostron Booth emigrated on 2 September 1874 in Liverpool, Lancashire, England.







Last edited: 17 Mar 2007

“Share”. This feature (sometimes called “witnesses”) lets you share a person’s fact or event with other people in your database. Click the Share button for a fact and RootsMagic 4 lets you select any group of people in your database who will share that fact. You can even say what each person’s “role” in that event is.

RootsMagic

People who share this fact

Select any other people who were involved in this event

 Add a person  Add multiple people  Edit  Remove person  

Person	Role
Elizabeth HOWARTH	Spouse
Heber Thomas BOOTH	Child

OK Cancel

So what happens when you look at the edit screen of one of those people sharing that fact? Here's what:

Edit Person

Heber Thomas Booth

+ Add a fact - Delete fact Options

Person	Heber Thomas BOOTH			✓	✓	✓
Spouse	Elizabeth WARREN					
Parents	John Rostron BOOTH and Elizabeth HOWARTH			✓		
Facts	Date	Details	Age			
Birth	9 Nov 1866	Bolton, Lancashire, England	0			
Emigration	2 Sep 1874	John Rostron BOOTH - Liverpool, Lancashi...	7	✓	✓	
Marriage	7 Apr 1899	Elizabeth WARREN - Salt Lake City, Salt La...	32			
Moved to	1922	San Francisco, San Francisco, California	56		✓	
Death	12 Jul 1927	San Francisco, San Francisco, California	60		✓	
Burial	16 Jul 1927	Provo, Utah County, Utah, USA				

Last edited: 22 Oct 2008

Shared - Emigration (John Rostron BO...

Date: 2 Sep 1874

Place (City, County, State, etc)
Liverpool, Lancashire, England

Place details

Proof: ☐ Primary Sort date: 2 Sep 1874

☐ Private Save Cancel

Additional Details

Note "DEPARTURE OF THE FIFTH COMPAN"

Sources 2 emigration sources

Media No emigration media

Share 2 people share this emigration fact

Sentence [Customize sentence](#)

Heber Thomas Booth emigrated on 2 September 1874 in Liverpool, Lancashire, England.

Close

The fact or event will show just like it does in the event owner's screen, except that you will see a pair of binoculars to indicate this person is sharing the event rather than owning it. If you don't want to see the shared events, click the Options button and tell RootsMagic to hide those shared events.

So how might you use this Share button? Here are a couple of examples...

1. **Witnesses to an event** - You've entered a marriage event for a couple, but would like to link other family members who were in attendance. Just click the Share button for the marriage event and you can select those family members and even enter any specific roles they may have played ("best man", "maid of honor", "witness", or anything else).
2. **People sharing a fact** - One great example of this is a census fact. Let's say you find a family in the census. Just add that census fact to the head of the household, then click the Share button for the census fact and add the other family members found in the census. Not only can you add the people to that fact, but you can also enter a role (like "Spouse", "Child", "Boarder", etc) of the person in that census record. You can also use Shared facts for family members in a residence fact also.

Pretty cool, eh? Still a few more to go, then we'll start making some announcements.

RootsMagic 4 Unwrapped - Evolution

- Posted by [Bruce Buzbee](#)
- October 29, 2008

Way back when I first started previewing RootsMagic 4, several eagle-eyed readers noticed that the file extension of the RootsMagic database had changed from .RMG to .RMGC. There was some speculation (quite accurate speculation I might add) about what that simple change actually means.

One thing that it means is that RootsMagic 4 has been rewritten from the ground up (now you know why it has taken so long). After the release of version 3 several years ago, we realized that it was time to take RootsMagic to the next level. And we weren't content with just cobbling a few new features onto old code like is done so often in the software world. But we also wanted to make sure we didn't leave out any of the existing features that have made RootsMagic so popular all these years. We've shown you a lot of the new stuff we've written, but here are just a few of the non-visual reasons we have spent so many long hours rewriting RootsMagic.

Unicode Support

So what is Unicode? Basically Unicode support means that RootsMagic isn't limited to just "western European" languages anymore. RootsMagic 4 can now handle Polish, Cyrillic, Kanji, and most any other language you can throw at it.

And while many of us don't use these other languages every day, there are times where we may want to enter the name of an ancestor in their native language, or keep a transcription of an old document in its original language.

If you would like to learn more than you could ever possibly want to know about Unicode, check out this [Wikipedia article](#).

Localization

Shortly after the release of version 4.0, we will be releasing tools to allow the translation of RootsMagic into other languages. We will provide more information about this then, and will be looking for volunteers interested in helping out with this important project.

Single File Database

And after 18+ years of Family Origins and RootsMagic using over 30 files for each and every database, one of my favorite features in RM4 (and our tech support people concur) is the new single file RootsMagic database. I know most people probably don't even care about this, but for those of us who have ever had to copy or move a database, it's nice to know I won't accidentally leave a piece of my database behind.

There are still 3 more features I want to tell you about before we light this candle. There are actually a lot of things I haven't had time to show, but I figure I'll just leave a few things for you to find out about by experimenting.

RootsMagic 4 Unwrapped - The New Report Engine

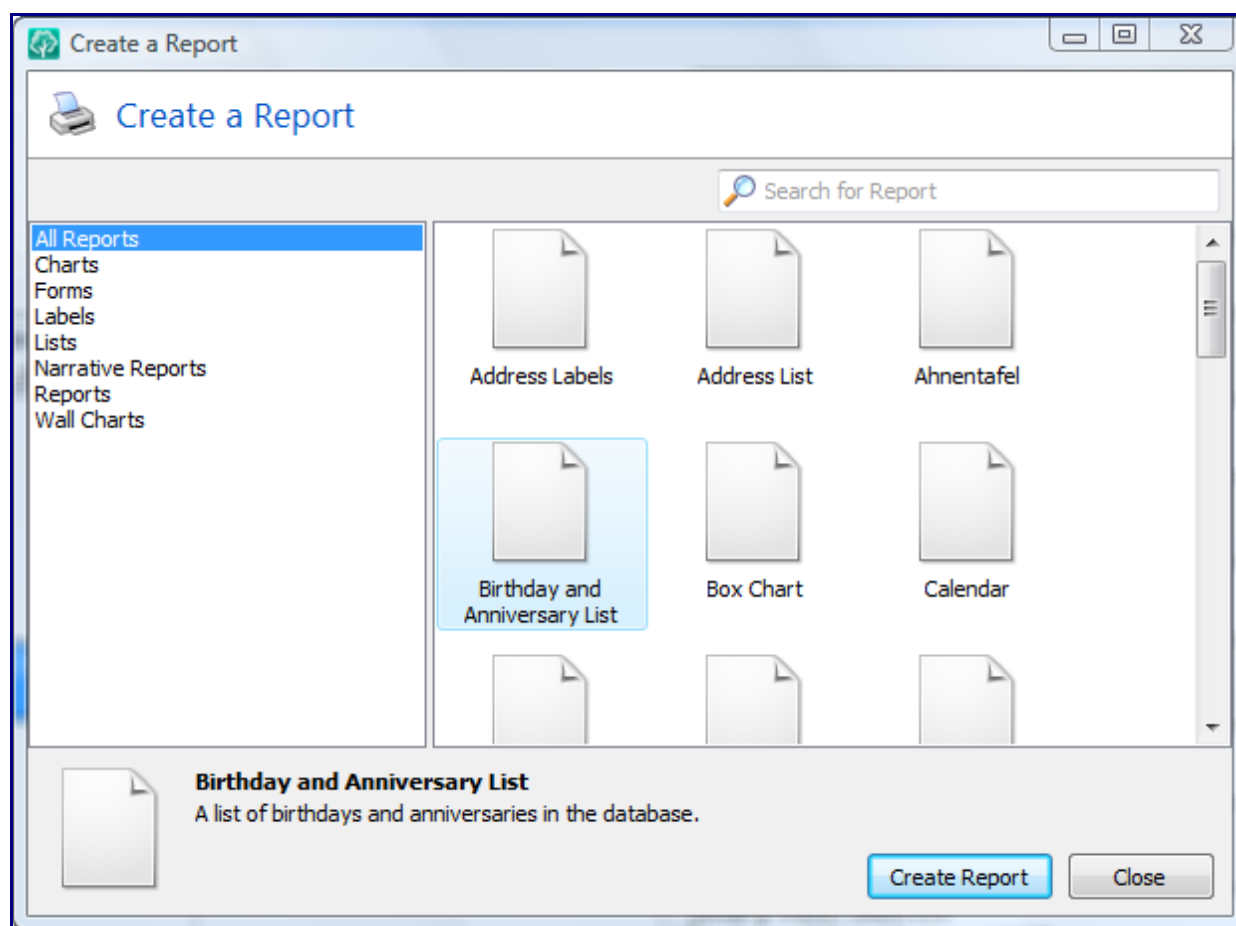
- Posted by [Bruce Buzbee](#)
- November 10, 2008

Sorry about the delay since the last blog entry. I've been swamped with programming and presentations so I'll try to get these last few features out a bit quicker.

As with the rest of RootsMagic 4, the report engine has received an overhaul to not only add new functionality, but to make it easier to share your reports as well.

Choosing A Report

Here's where you select the report you want to print. Select a category and choose the report you want (the little report icons will actually have images of the report on them in the final release... not just a bunch of white papers). The categories are also subject to a few changes before release as well.

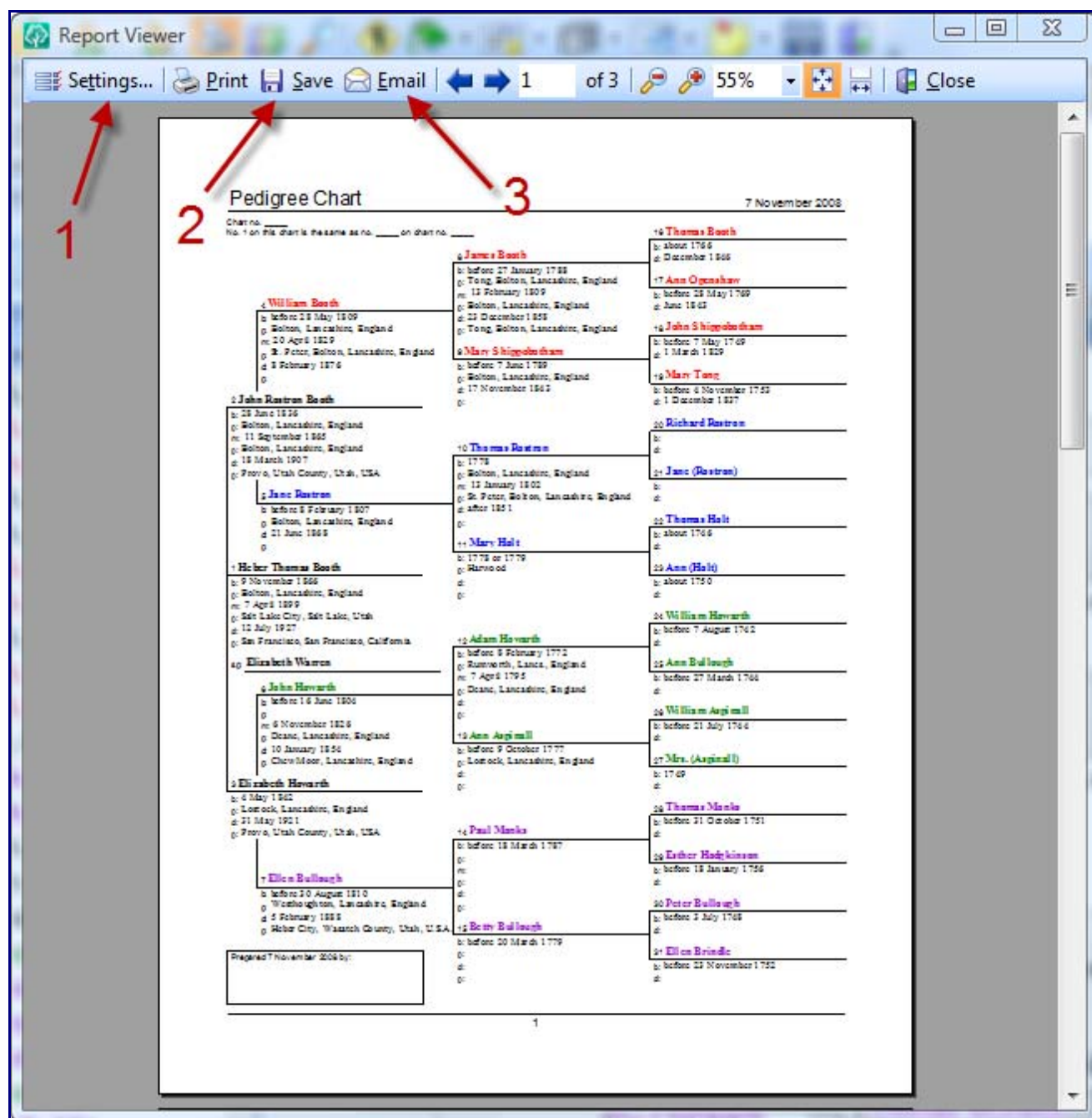


When you highlight a report RootsMagic will display a brief description of that report. You can also type in search terms to find a report if you aren't sure what it is called. For example, if you type "ancestor" into the search box you will see all the ancestor reports, regardless of which category they are in.

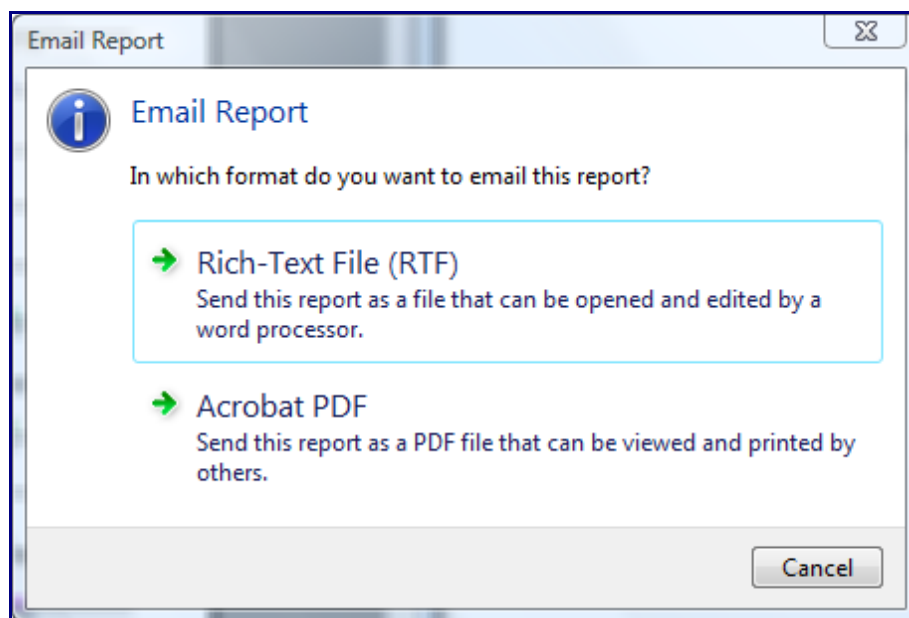
Report Viewer

The Report Viewer (or “Print Preview”) has been significantly beefed up. Rather than individual pages which require you to click Next or Previous, the report viewer lets you easily scroll up and down the preview. And if you need to change one of the options for the report, just click the Settings button (1), make the change and RootsMagic will regenerate the report right there.

You no longer have to choose the destination up front (screen, PDF, RTF, etc). Just click the Save button (2) from the Report Viewer, choose the format you want to use, and save your report directly from the viewer.



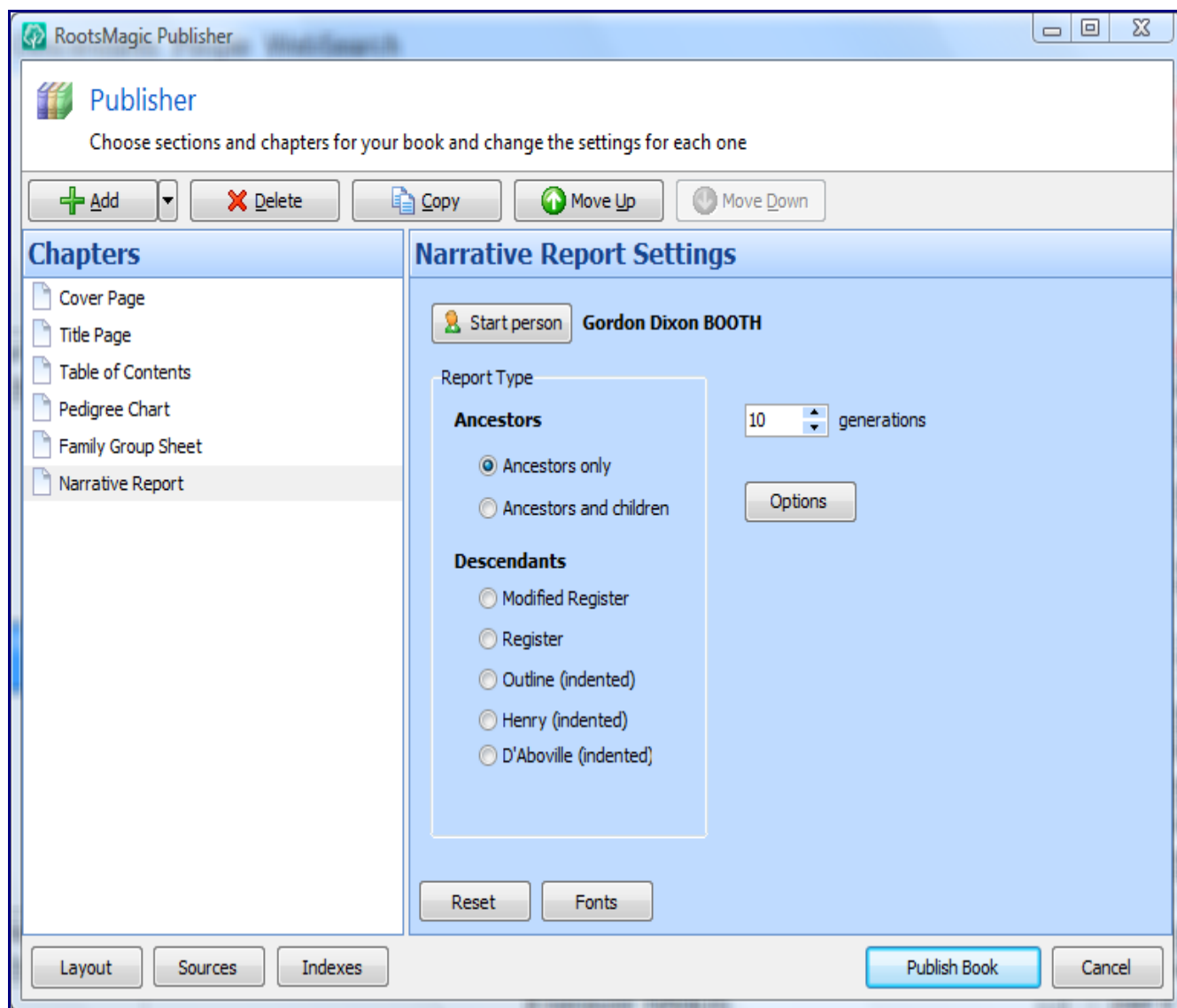
And it is now easier than ever to share a report with your family and friends. Just click the Email button (3) and RootsMagic will let you choose what format you want to send the report as.



Select one and RootsMagic will create the report file, attach it to an email, and all you have to do is type in the email address (and a message to the person if you want).

Publisher

And of course the Publisher has been enhanced and simplified to make it easier to combine those multiple reports into a single book.



Other Enhancements

Most the of “graphical” reports (like pedigree chart, group sheet, box charts, etc) are not limited to just PDF anymore. You can now save them as Rich Text (RTF) files as well (including in the publisher).

And on reports which provide an index, you can now have both a name index *and* a place index. The place index can be printed with the places either as-is, or reversed to group them together geographically.

And here’s a cool new feature. When you print a report or book with an index or table of contents, the page numbers in the index will hot-link to the page in the report. Just click on a page number in the index and RootsMagic will jump to that page. This works both in the print preview and when exporting your reports to PDF.

Well, we’re almost there. Just a couple more features to go. Next up is sources. And oh what we’ve done with sources. I may not be able to fit all the amazing new source stuff into a single blog entry, but I’m sure you won’t be disappointed if I have to stretch it out into a couple

RootsMagic 4 Unwrapped - A Brief Note About Reports

- Posted by [Bruce Buzbee](#)
- November 11, 2008

After my last article on the new report engine in RootsMagic 4, I noticed we were getting a lot of questions and comments regarding individual reports, mainly whether we have enhanced or added a particular report. Let me clarify a couple of things about RootsMagic 4 and reports.

As I have previously mentioned (and as you have seen from all the new features we have shown), RootsMagic 4 is a complete rewrite. Many, many hours have gone into its design and development.

Beyond the enhancements in the report engine, it has also been in our plans to add new reports, and enhance existing reports. While you will see some of these enhancements in version 4, there are many new unfinished reports and enhancements that we are having to temporarily remove in order to get this version out. These new reports and options will be released in future updates. We would be happy to put them in before version 4, if you are willing to wait another 6 months for us to release this new version

RootsMagic 4 Unwrapped - Supercharged SourceWizard

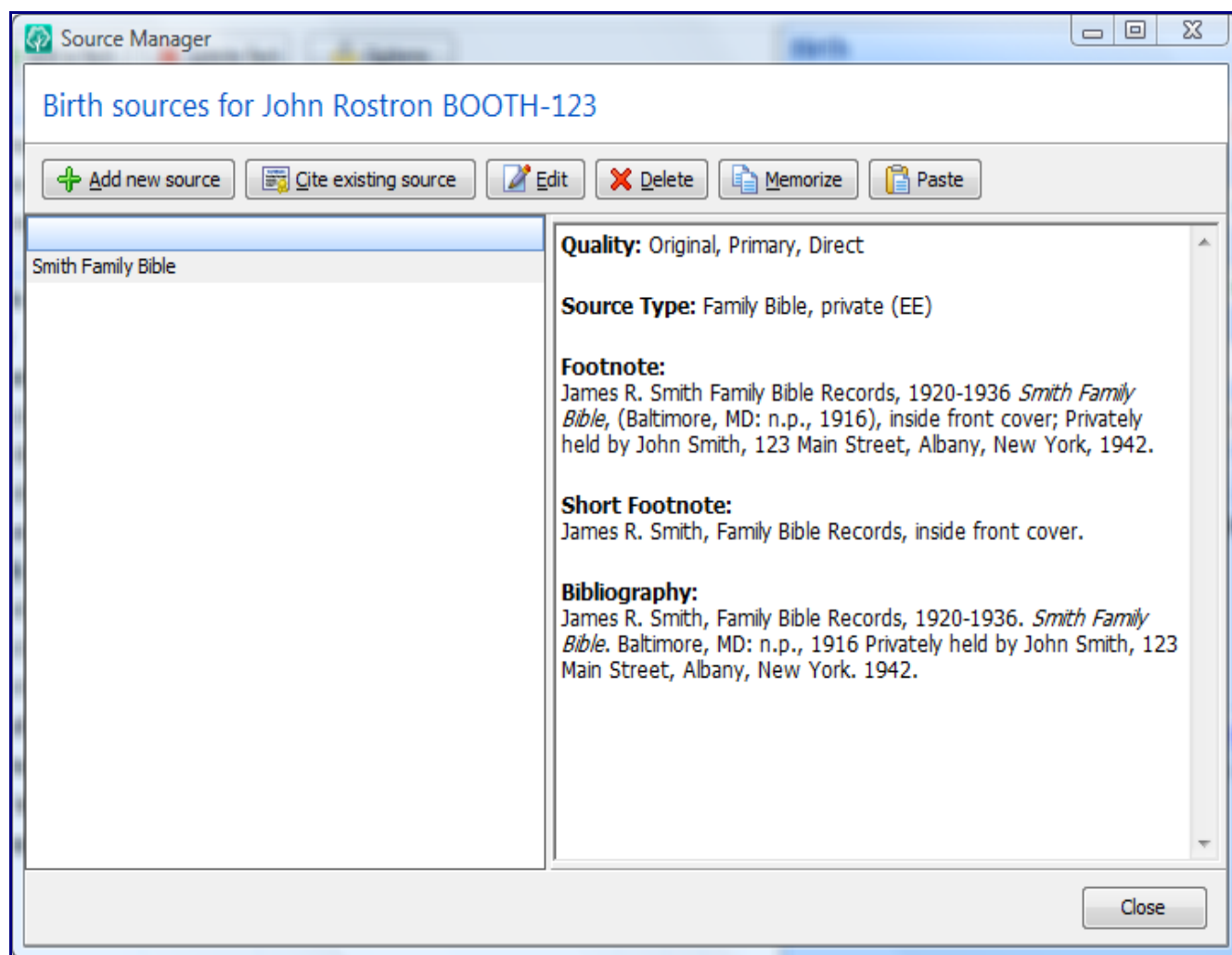
- Posted by [Bruce Buzbee](#)
- December 3, 2008

Sources are awesome. They are the lifeblood of the genealogist, and sometimes a frustration we would just as soon skip. But we all know how important they are. Documenting our family history is the greatest genealogical gift we can give our family. Sure we can pass down a bunch of names, dates and places, but if we don't say where we got that information they will just have to verify it all over again.

RootsMagic has always made it easy to enter your sources with its groundbreaking SourceWizard released back in 2003, which let you select a source type and then fill in the blanks. The SourceWizard then wrote the properly formatted source for you.

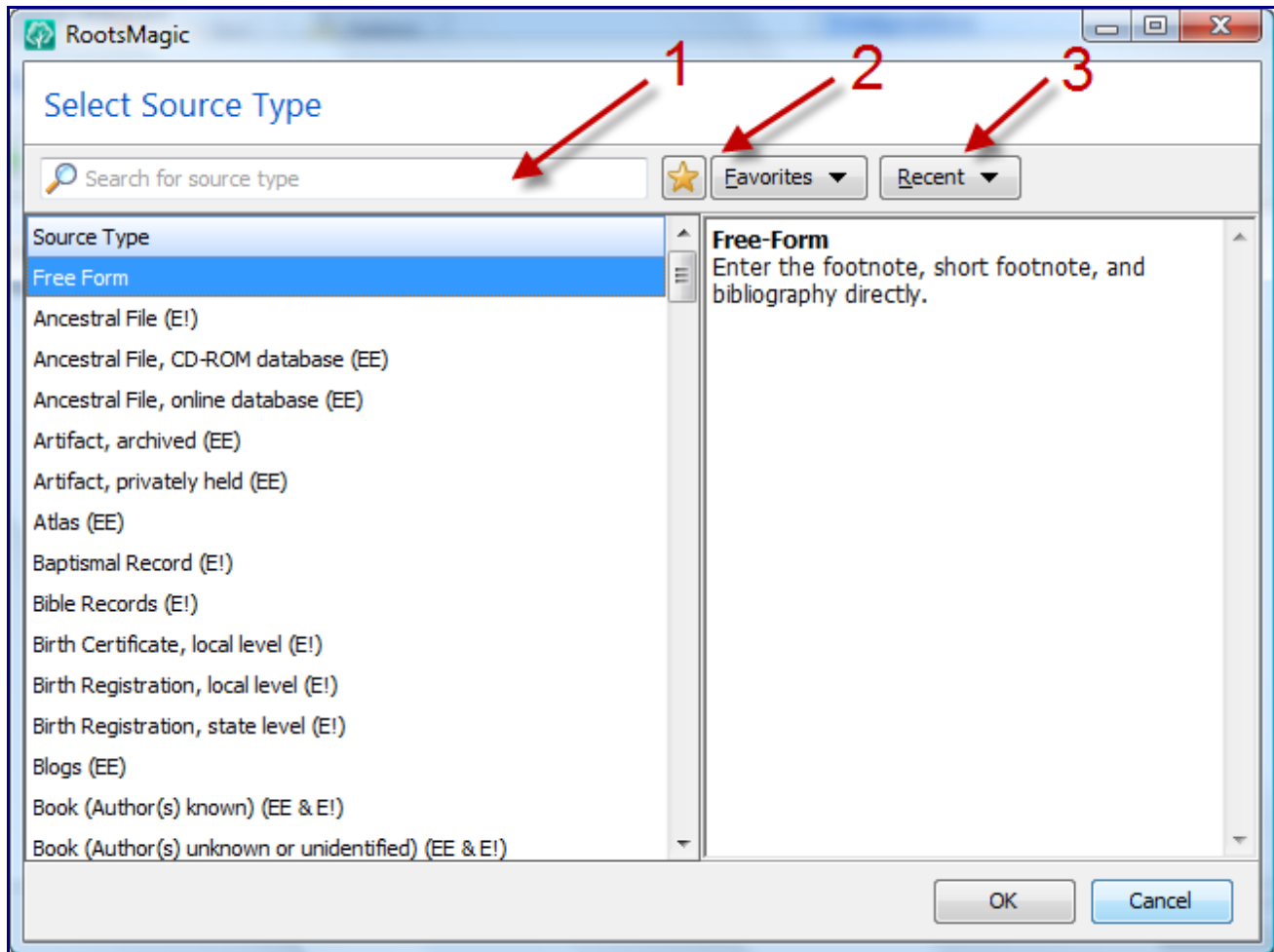
And now the SourceWizard is better than ever.

Now some things work much the same as they did in version 3. When you bring up the list of sources for a person, fact, or family, you can still add a new source, use (cite) an existing source, memorize / paste citations, etc.

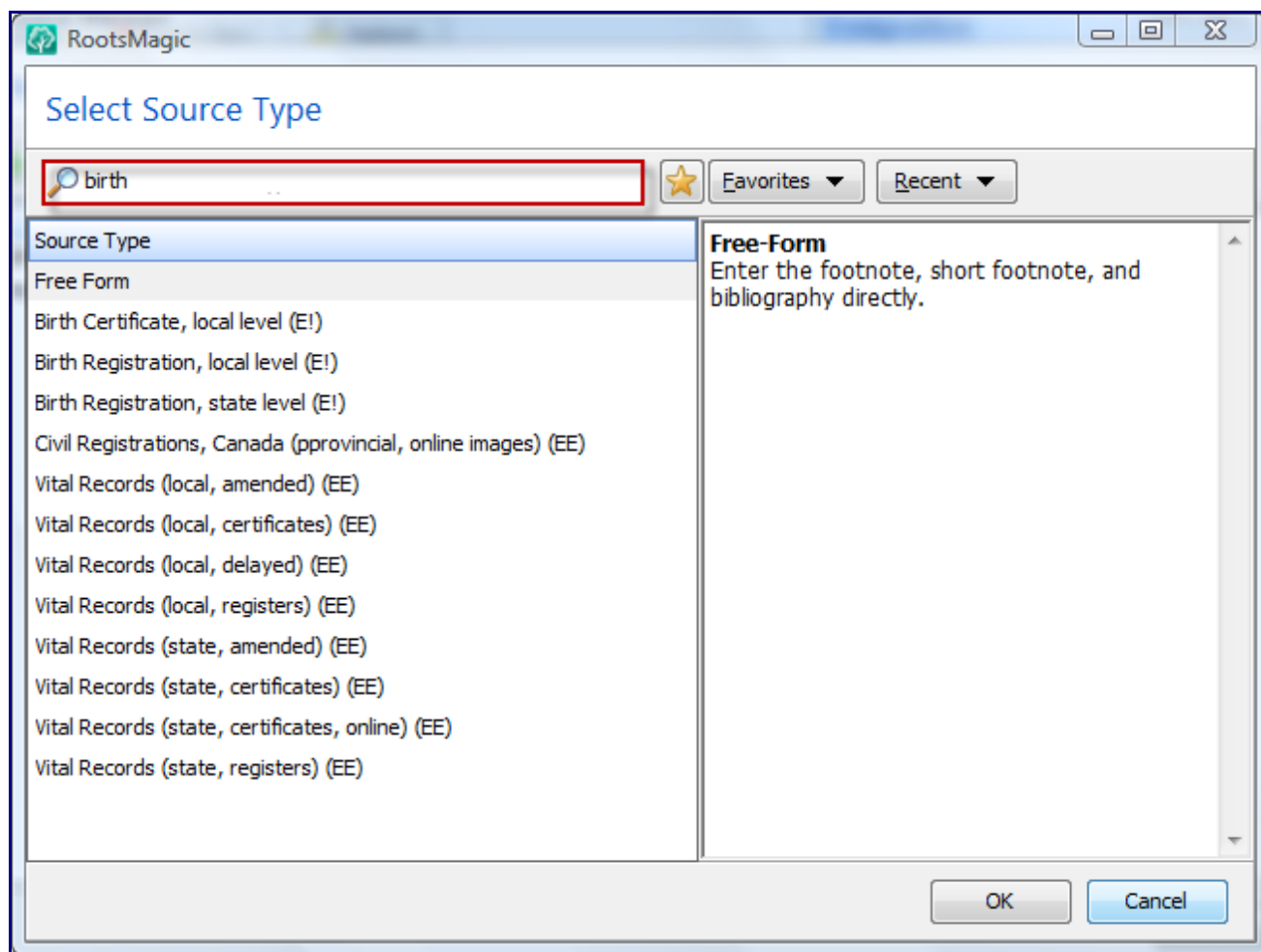


But when you choose to add a new source, that's when things start getting fun. You are no longer

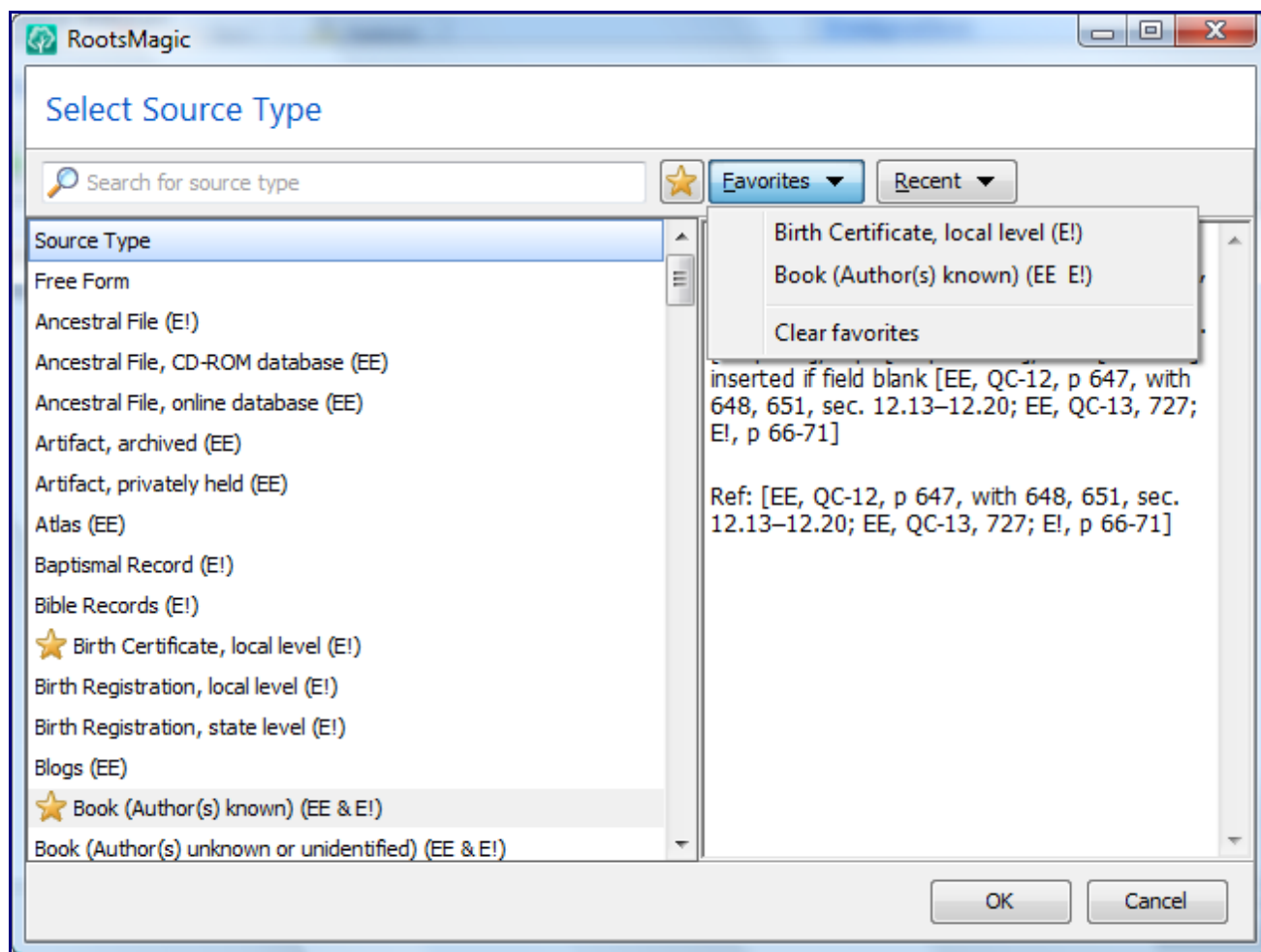
limited to the 25 or so source types offered in version 3. You can now select source types from Evidence!, Evidence Explained, Cite Your Sources (Lackey), or the Evidence QuickSheet. Or you can just use a default “free-form” template to enter the footnote, short footnote, and bibliography directly. Now that’s a lot of source types, so of course we needed to make it easy to find the one you are looking for.



Of course you *could* just scroll down through the list of sources, but we have added a search / filter where you can type in words relating to the type of source you have. For example, type the word “birth” and RootsMagic will display a list of source types with “birth” in their name or description. Or type multiple words and RootsMagic will show you the entries with all those words in it. RootsMagic 4 even gives you details about each source type and tells you where that format is from.



If you are like me, you tend to work with just a few different source types at any one time. So we've added a favorites list where you can put those commonly used source types. Just highlight any source type in the list, click the star button on the toolbar, and it is now a favorite. You can easily spot your favorites (they have a star next to them in the list), or you can click the Favorites button and instantly select from there. RootsMagic also keeps track of the source types you use, and adds them to a recently used source type list as well.



Once you select the type of source you want to enter, RootsMagic 4 will open the new “Edit Source” screen. The first thing many of you probably noticed is that the master source and source (citation) details are together at last. No more switching back and forth to edit the different parts of a source citation. And yes, sources are still reusable... when you cite an existing source you will get this same screen with the source (citation) details ready to fill out.

Just begin filling in the blanks and RootsMagic will write the properly formatted source citation for you. As always, the SourceWizard provides hints as to what it is asking for in each field.

RootsMagic

Edit Source

★ Quality 📁 Repository

Master Source Source file #

Dates

Title

Edition

Publisher

Publish place

Publish date

Year Owned

Owner

Quality: Original, Primary, Direct

Footnote:
James R. Smith Family Bible Records, 1920-1936 *Smith Family Bible*, (Baltimore, MD: n.p., 1916), inside front cover; Privately held by John Smith, 123 Main Street, Albany, New York, 1942.

Short Footnote:
James R. Smith, Family Bible Records, inside front cover.

Bibliography:
Smith, James R., Family Bible Records, 1920-1936. *Smith Family Bible*. Baltimore, MD: n.p., 1916 Privately held by John Smith, 123 Main Street, Albany, New York. 1942.

Source Details Details file #

Original owner

Page or section

Provenance

Family Bible, private (EE) [change](#)

And of course you can still enter the actual text, comments, and media for both the master source and source (citation) details. Just click the “More” button next to the master source or the details.

Footnote:
James R. Smith Family Bible

Alt+T

Alt+C

Alt+M

Now of course this only barely touches the power of the new SourceWizard. Most people can just select a source type, fill in the blanks, and go. Others can use more advanced features like entering both a long and short version of the data in a field to be used in the citations. And there is another new feature of the SourceWizard that I’m going to write about in my next blog entry. Not because I’m trying to tease you, but because I need to get back to fixing bugs to get RM4 ready to go

RootsMagic 4 Unwrapped - Sources... Have them your way

- Posted by [Bruce Buzbee](#)
- December 16, 2008

Sorry... got carried away fixing bugs again.

In our last episode I promised that there was a little more I wanted to mention about the new SourceWizard in RootsMagic 4. We told you that the new SourceWizard supported Evidence!, Evidence Explained, Cite Your Sources, and the Evidence QuickSheet. Several readers were concerned about whether our source templates would be slanted towards US sources, or UK sources, or Canadian sources, or whatever.

So what way do RootsMagic 4 source templates slant? Any way you want them to. That's right, in addition to the built-in templates you can now create your own custom source templates.

Source Template

Name of this source type
Book (Author(s) known) (EE & E!) Details

+ Add Field Edit Field ✗ Delete Field ↓ ↑

Field Name	Display Name	Type	D	Hint
[Author]	Author	Name		the author(s) of the book
[Role]	Role	Text		ex. compiler, editor, transcriber, abst...
[Title]	Title	Text		the title of the book short title (if n...
[SubTitle]	Sub-title	Text		sub-title for the book, if applicable
[Edition]	Edition	Text		the edition (full abbreviated), i.e. "...
[PubPlace]	Publish Place	Place		the place the book was published, if k...
[Publisher]	Publisher	Text		the publisher of the book, if known; n...
[PubDate]	Publish Date	Text		the date the book was published, if k...
[Page]	Page	Text	X	the page number(s) where the inform...

Templates

Footnote Template
[Author] <, [Role] >, <i>[Title] <: [SubTitle] ></i> <,
[Edition:Abbrev] > (<[PubPlace] | N.p. >: <[Publisher]
| n.p. >, <[PubDate] | n.d. >), [Page].

Short Footnote Template
[Author:Last], <i>[Title:Abbrev] </i>, [Page].

Bibliography Template
[Author:Reverse] <, [Role] >. <i>[Title] <: [SubTitle]
></i>. <[Edition:Caps]. ><[PubPlace] | N.p. >: <
[Publisher] | n.p. >, <[PubDate] | n.d. >.

OK Cancel

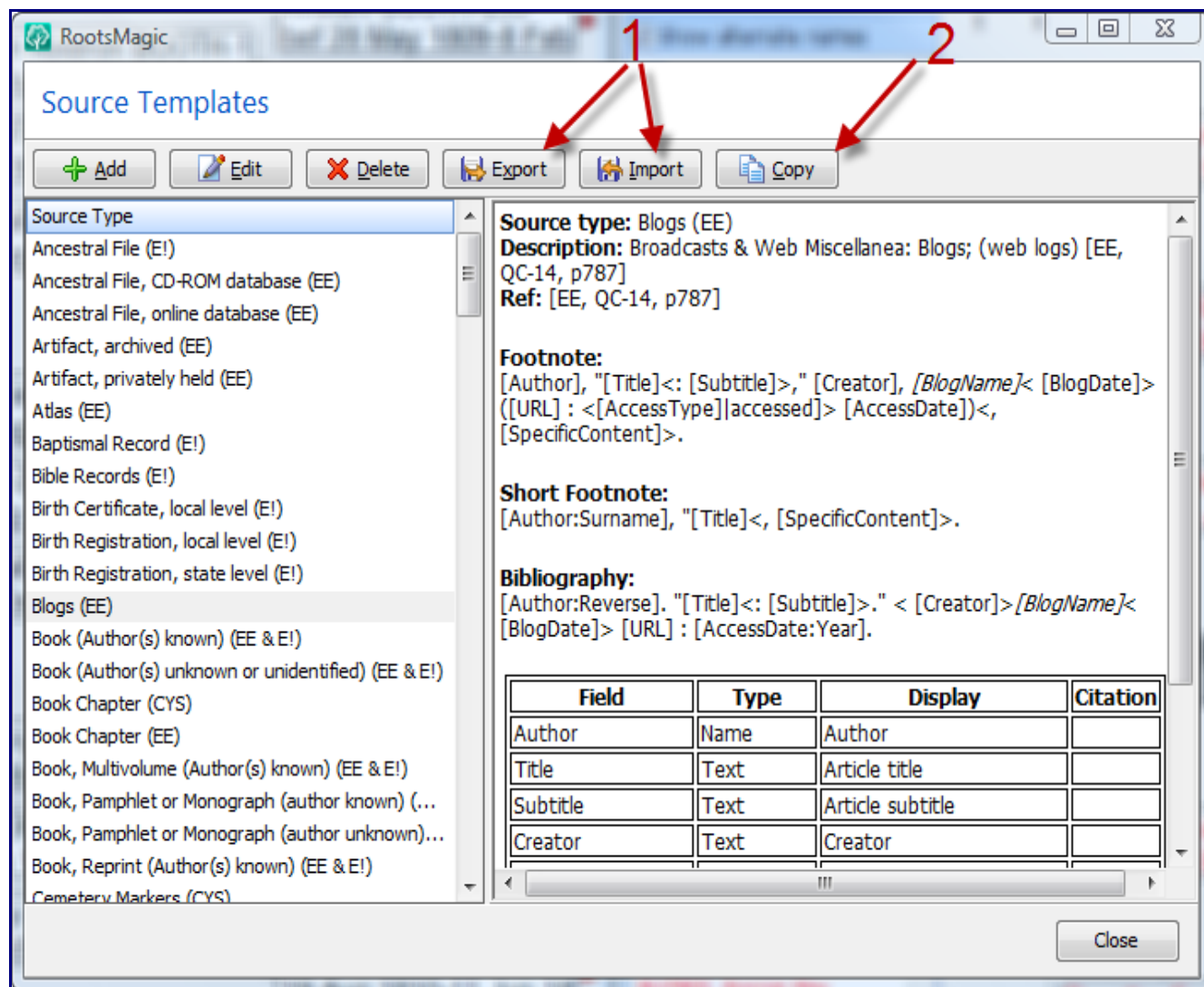
Now don't let that screen scare you. To create a source template you just add the fields you want RootsMagic to ask for, then tell RootsMagic how to put those fields together to make the footnote, short footnote, and bibliography. Yes, the template language is very powerful, but it isn't overly complicated.

And don't worry if you aren't the type of person who would normally venture into creating a custom template. I suspect there are some RootsMagic users who would be happy to help you create a template just the way you want.

RootsMagic 4 Unwrapped - More on source templates

- Posted by [Bruce Buzbee](#)
- December 19, 2008

We got a couple of interesting questions the other day after I wrote about RootsMagic 4's customizable source templates. The first two questions can be answered with this screen, which is the list of source templates available in RootsMagic 4.



1. Will we be able to take a pre-made template and add or take away fields to make a custom template?

YES. There is a **Copy** button (2) which will make an exact copy of the highlighted source template. You can then go into that new template and modify it to your liking.

2. You mentioned that someone could help create a template, does that mean we will be able to somehow send a template to another user?

YES. There are **Export** and **Import** buttons (1). The Export button will save the highlighted source

template to a file which can be imported into another database using the Import button.

3. Will there be the ability to create a field for a web link, so we can link directly to an online source document from within our source citation?

Not initially in 4.0, but this *is* an item on our todo list.

4. Will there be the ability to link to a source document in a folder on our computer from the source citation?

YES. This is actually already available in version 3 (and will still be available in v4). Every source and/or citation has its own media album where you can add pictures, sound or video clips, or links to any other file on your computer.

RootsMagic 4 Unwrapped - RootsMagic To Go

- Posted by [Bruce Buzbee](#)
- December 26, 2008

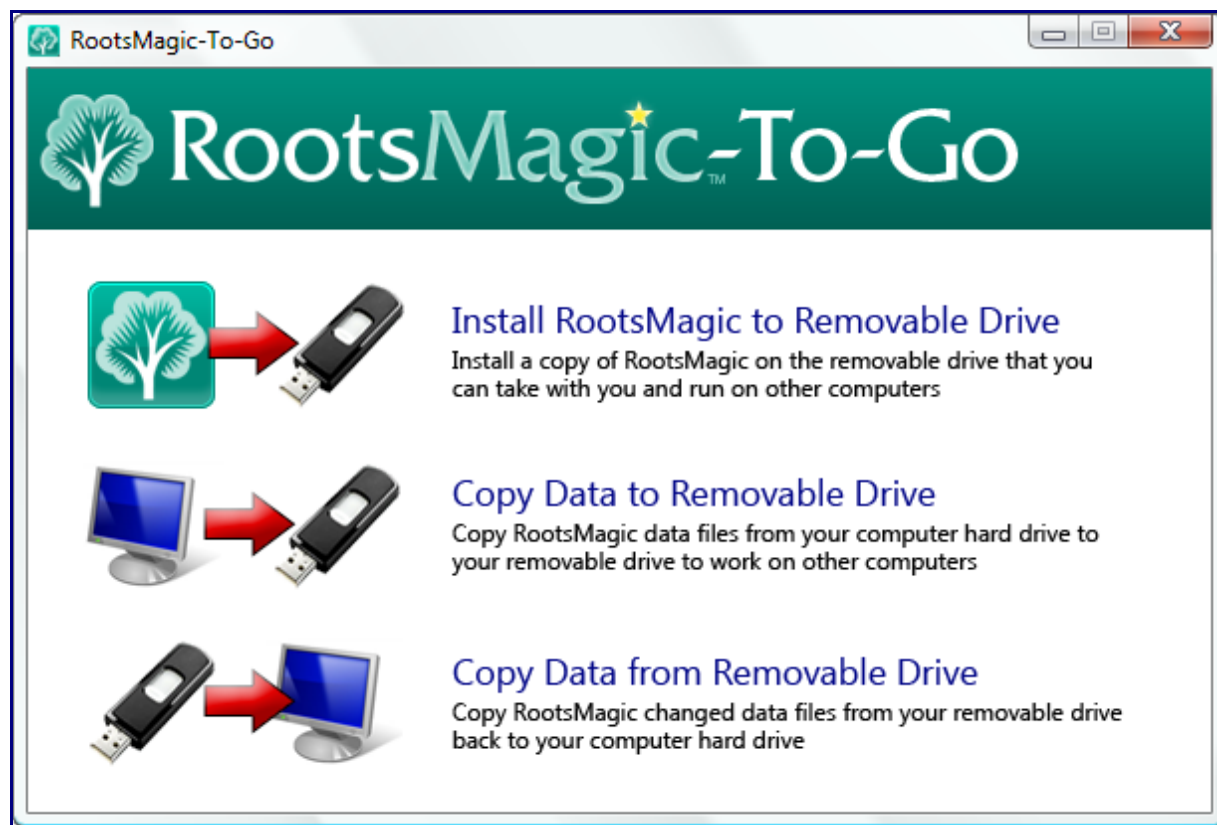
Well, we've reached the end of this long journey... the final sneak preview. As we all know, I have mentioned several release dates which have come and gone. I admit that I underestimated the amount of time needed for a release of this magnitude. It's easy to predict a release date if you are just modifying existing code... but writing everything from scratch to use the latest technologies is a different story. So I'm not going to predict release dates anymore, but I will discuss some product release information at the end of this post.

And now for the final sneak preview...

One of the most common comments we've seen (after "When is this going to be released?") has to do with the size and speed of the new version. We've all seen (and probably bought) programs that claimed to be the next great thing, only to find that it was bloated and slow because it was based on a framework like .NET, or based on some huge database engine that had to be installed on the computer before the program could run. (Note to .NET programmers... we know there is a place for .NET and large database engines... it just isn't in genealogy software.)

Well, we don't roll that way here at RootsMagic. RM4 is a native Windows program (no .NET bloat), and uses an embedded database engine (no huge database engine required to be installed on your computer).

So what does this programming jargon mean to you? It means we are able to add one extra feature that other bloated programs will never be able to copy... RootsMagic-To-Go.



That's right. Not only can you have your data on a flash drive, but you can run the full RootsMagic program and your data directly from the flash drive.

Are you going to a library that doesn't have RootsMagic on their computers? Don't worry. Just use RootsMagic-To-Go to install RM4 and your data on your flash drive, and take it with you. When you get to the library just plug your flash drive into the computer and get to work. When you get home just move the data right back onto your computer.

So what comes next?

Next week we will release a community preview to those RootsMagic users who have signed up. This will let us get RM4 into the hands of thousands of RM users who can help us track down any of those issues that pop up in a completely rewritten program.

After the community preview we will release a public beta to anyone (RM user or not) who is interested in taking a look at RootsMagic 4 before the official release.

As soon as RootsMagic 4 is stable we will begin taking orders and release it as a download, followed a few weeks later by the CD version (it takes a few weeks to get CDs duplicated and packaged). When we begin taking orders you will be able to pre-order the CD and get the download early if you want to do that as well.

So that's the schedule. Keep checking the blog as we announce these various steps towards the release of the most exciting product in our company's history.