

# Moving Data from TMG to RootsMagic

## Introduction

This document covers moving data from The Master Genealogist (TMG) into RootsMagic. RootsMagic provides a direct TMG import which provides much better results than using a GEDCOM transfer. Still, it is not possible to get a perfect one-to-one transfer because of the vastly different data models, template languages, etc. used by both TMG and RootsMagic. You will need to expect to do some cleanup when moving your data from TMG to RootsMagic (or any other program), but this document is intended to help guide you through some of that cleanup.

RootsMagic's direct TMG import attempts to preserve not only the basic genealogical information like names, events, notes, and media, but to also preserve witnesses (with roles), source templates, and sentence templates.

## Known Issues

RootsMagic will attempt to import all information, but there will be some information which doesn't appear in RootsMagic exactly the same as it appeared in TMG.

- In TMG a single "tag" type can have 1 or 2 "principals", including individual facts like Occupation, Death, etc. RootsMagic on the other hand has 2 forms of fact types: individual or family. An individual fact type has 1 principal, and a family fact type has 2 principals. If a "tag" in TMG is used with 1 principal, RootsMagic will import it into an individual fact type. If a "tag" in TMG is used with 2 principals who are married or are the parents of one or more children, RootsMagic will import it into a family fact type.
- Tags that are in the TMG Marriage and Divorce tag type groups will be imported as family fact types irrespective of whether they have one or two principals in TMG.
- Event tags in TMG that have two principals who are not spouses will have the P2 changed to a witness using the role "Principal2" and will be imported as personal fact types.
- RootsMagic only supports the Principal role for principals. If you used other roles for principals in TMG, the Principal role for the fact types will need to be edited. You will also need to edit any sentences that use a role variable for a custom role that refers to the principal.
- History group tags in TMG aren't imported because they have no "principal" and therefore aren't attached to a person or family.
- If a TMG place has Detail data, the LatLong data will be imported to the Place Details Latitude/Longitude fields.
- Some fields in TMG sentence templates cannot be converted to RootsMagic fields. If a field doesn't affect the actual sentence structure (like font fields) RootsMagic will attempt to just remove the field. If deleting the field would make the sentence template incomplete (like removing a [PO] field from an individual fact that doesn't support a

secondary principal), then RootsMagic will just leave the field in the template to assist with cleanup after the import.

- RootsMagic will import the source and source template intact for every source, but if the source template is modified for an individual source in TMG, RootsMagic will use the global source template for that source type.
- DNA tests will be imported, but the actual markers are not mapped to the markers in RM. The markers will be imported into the note for the DNA test.

### **Before Importing Your TMG Data**

This section details clean-up items you should perform in TMG before importing into RootsMagic.

- Use TMG Utility to export any “internal” media items to “external” media items.
- The TMG project should be using "Custom" source categories (Preferences / Current Project Options / Other).
- Import can uncover hidden problems with TMG sources. If a source doesn't import correctly, the problem likely is the TMG source. For example, in TMG, the source type and the fields on the Source Definition / General tab don't match. In this case, select a different source type and then reselect the original source type. See **Example A** at the end of this document.
- The repository Name-Other field is not imported. Make sure you copy that to the Addressee field (if empty) or to the Memo field (if the Addressee field is used).

### **Importing Your TMG Data**

- The direct TMG import has been tested with TMG versions 7.04 and 9.03. The recommended TMG versions to use for import are 7.04, 8.08, or later.
- Before import, run the TMG maintenance routines - optimize, validate file integrity, optimize.
- Make sure TMG files are not open in any program before trying to import them into RM.
- Use several import cycles. Import. Check data. Make edits in TMG to improve import. Import again.

### **After Importing Your TMG Data**

Once you have done all possible cleanup in TMG and make your final import to RM...

- Check the roles and sentences that have been added to the standard RM fact types.
- Check all custom fact types and their roles and sentences.
- Check and edit any local sentences.
- Check all imported source templates and edit as necessary.
- Check all sources and edit as necessary.
- Check all repositories and edit as necessary. County has been added to the city field.

## Example A

*If a source doesn't import correctly, the problem likely is the TMG source. For example...*

The source didn't import correctly and the source type for the source was Book (Compiled Records). The data in the source fields after import don't match the source type fields (and there can be missing source data).

1. Open the project in TMG.
2. Select Tools / Master Source List
3. Select the source and click [Edit]
4. The 'Source Type' is 'Book (Compiled records)'
5. Click [Source Type] and select the 'Book (Authored) source type
6. Click [Source Type] and select the 'Book (Compiled Records)' source type.

This will correct any synchronization problem between the TMG source and the TMG source type.

Edit any fields that are incorrect. (Fields that are in the selected source type will have the field name starting with an uppercase letter. Fields that are not in the selected source type will have the field name starting with a lowercase letter. Make sure that the data is in the correct fields.)

Do this for all sources that have this issue.

Reimport to RootsMagic and see if the edits in TMG corrected the source import problems.