

Named Groups

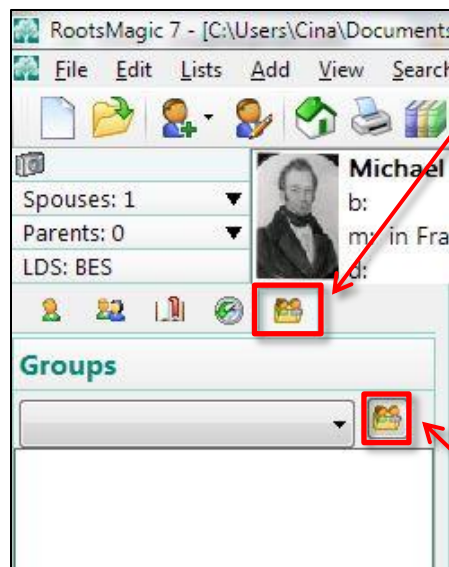
This Magic Guide covers:

- A. Why Create Groups?
- B. Creating a New Group
- C. Selecting People Using Mark or Unmark Group
- D. Finding People by Data Fields
- E. QuickGroups
- F. Editing Groups

A. Why Create Groups?

Whether you are starting a project which focuses on a specific family line, or find yourself repeatedly selecting the same people for reports, websites, or working with others, you can save time and effort by creating a “Named Group”. Groups allow you to filter people based on every search element in your database. They are simple to create, but extremely powerful.

B. Creating a New Group



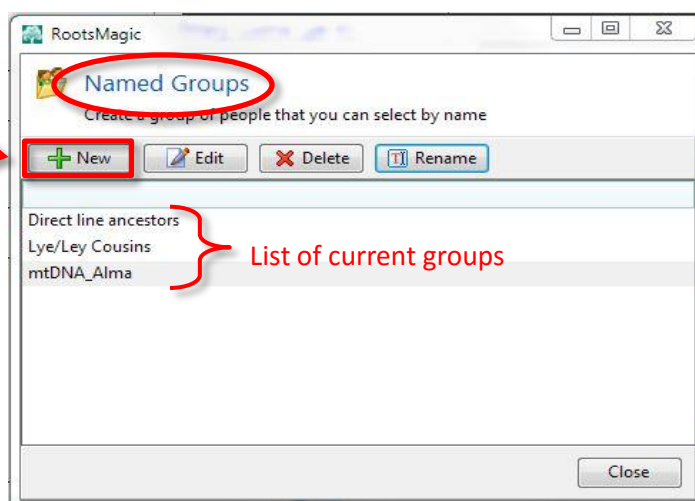
1. In the sidebar, select the “Groups” icon. The sidebar will be empty until you have created a group.

If you have created one or more groups, the dropdown menu will list them. Select the group you want to use. The name will appear on the button and the people in the group will be displayed in the list below.

2. Click on the “Groups” button to open the “Named Group” dialog window.

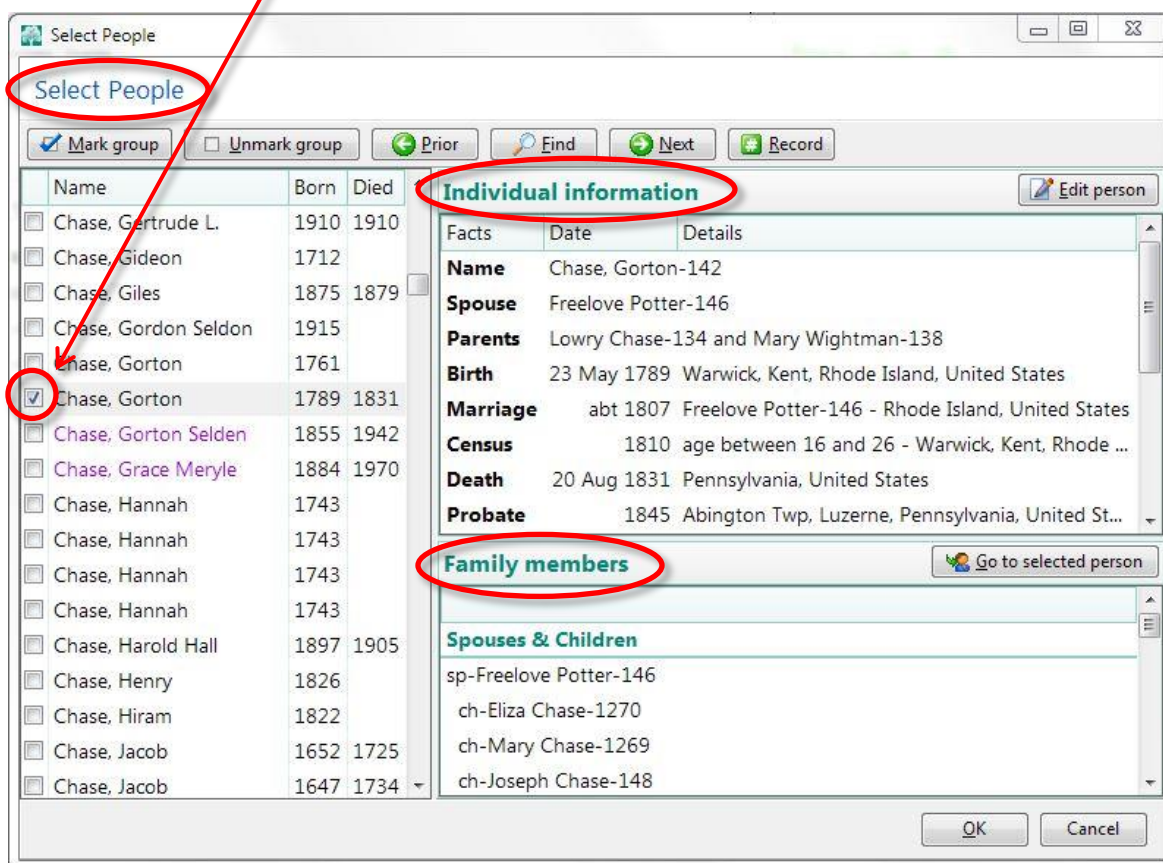


3. On the “Named Groups” window, click the “New” button to create the group.



4. The “Select People” window will open. (This window looks very similar to the “RootsMagic Explorer” window.)

To add a name to the group, check the box to the left of their name.



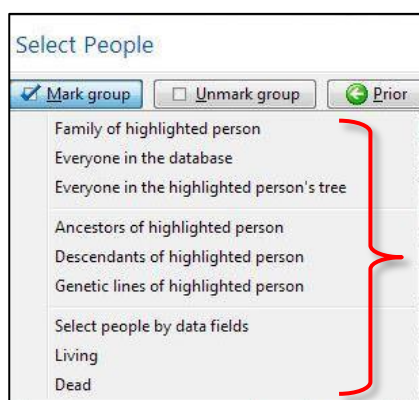
You can view more information about the highlighted person in the “Individual Information” panel, and see their “Family members” in the panel below.

C. Selecting People Using Mark or Unmark Group

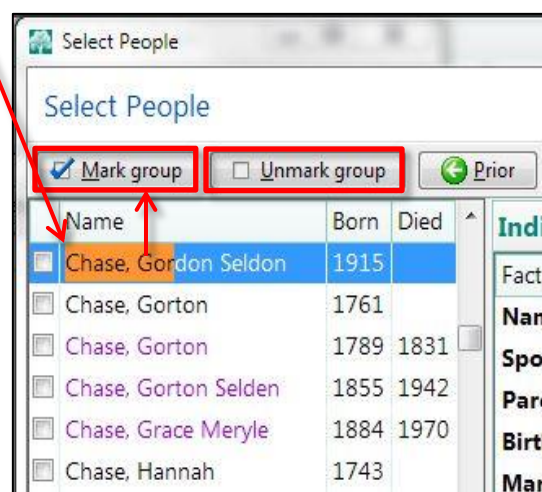
If you have a lot of people to add to your group, selecting each person individually would be time consuming and difficult to tract. Therefore, you can also select or deselect groups of people using the Mark or Unmark group buttons.

1. First, highlight the person you wish to start from, and then click the “Mark group” button.

2. The “Mark Group” button displays a list of options for selecting people to add to your group. Your options are as follows:



Family of highlighted person – . Selects everyone in this person's family. If the person is a parent or child in multiple families you will be asked to select which families to use. You can select either or all of the families that are listed.



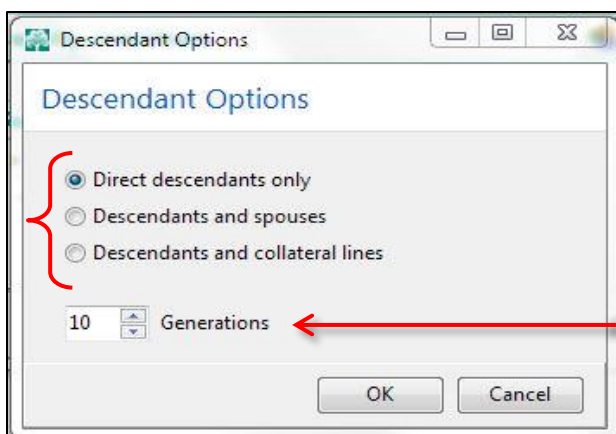
Everyone in the database – Marks everyone whether they are in the same tree or not.



Everyone in the highlighted person's tree – Marks everyone that is linked together in the same tree.

Ancestors of highlighted person – You have three options:

- “Direct ancestors only
- “Ancestors and descendants of ancestors” – Choose the number of descendant generations.
- “Ancestors and all collateral lines”



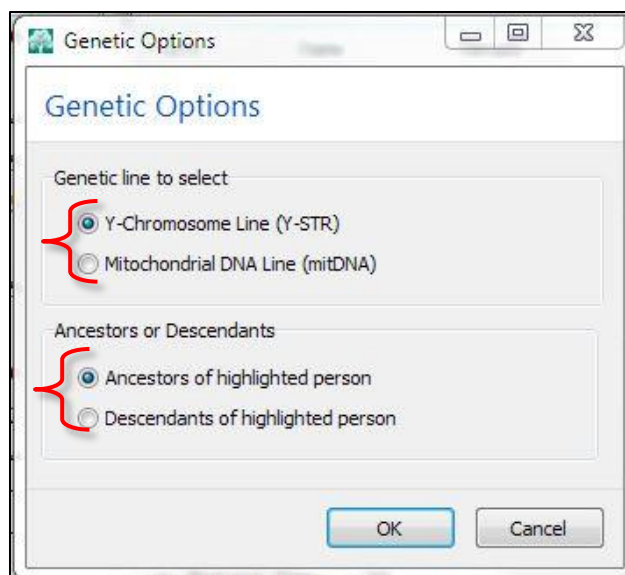
Descendants of highlighted person – You have three options:

- a. "Direct descendants only"
- b. "Descendants and spouses"
- c. "Descendants and collateral lines"

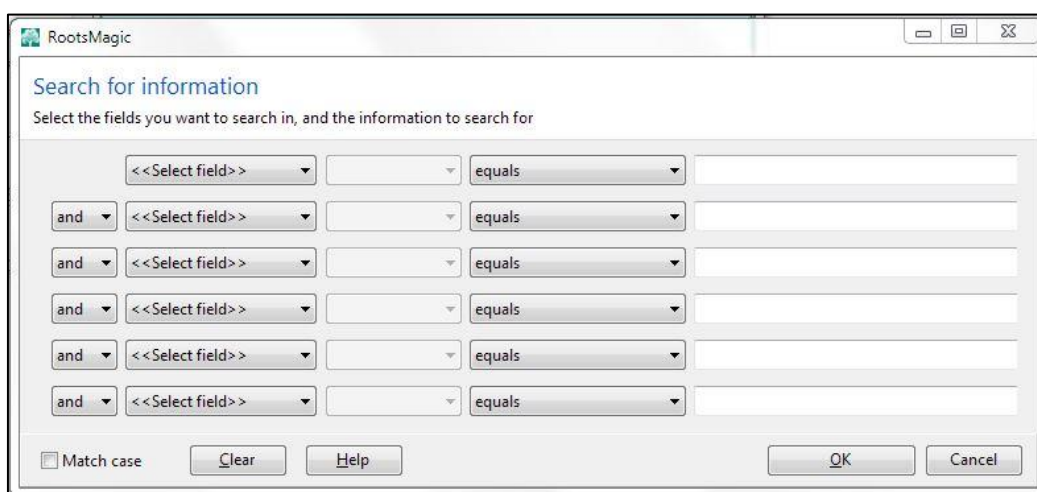
You can also select the number of generations to mark.

Genetic lines of highlighted person –

Mark the genetic lines of the highlighted person. You can choose whether to follow the Y-Chromosome (Y-STR) line or the Mitochondrial DNA (mtDNA) line, and also whether to follow that line in the ancestor or descendant direction.



Select people by data fields – This command uses the "Search for information" dialog window to find and select people by a variety of data fields. It works on the same principle as the "Find" window.



Instructions for this search option can be found in Section D.

Living – Marks everyone with the living flag checked on the “Edit Person” window.

Cancel “will return you to the first “Named Groups” window and all of your selections will be deleted!!!

Dead – Marks everyone who is not checked living on the Edit Person Window.

3. After selecting the option that you need and marking any additional selections in the dialog box, click “OK” to continue or “Cancel” to exit.

4. When you click “OK”, you will be returned to the “Select People” window.

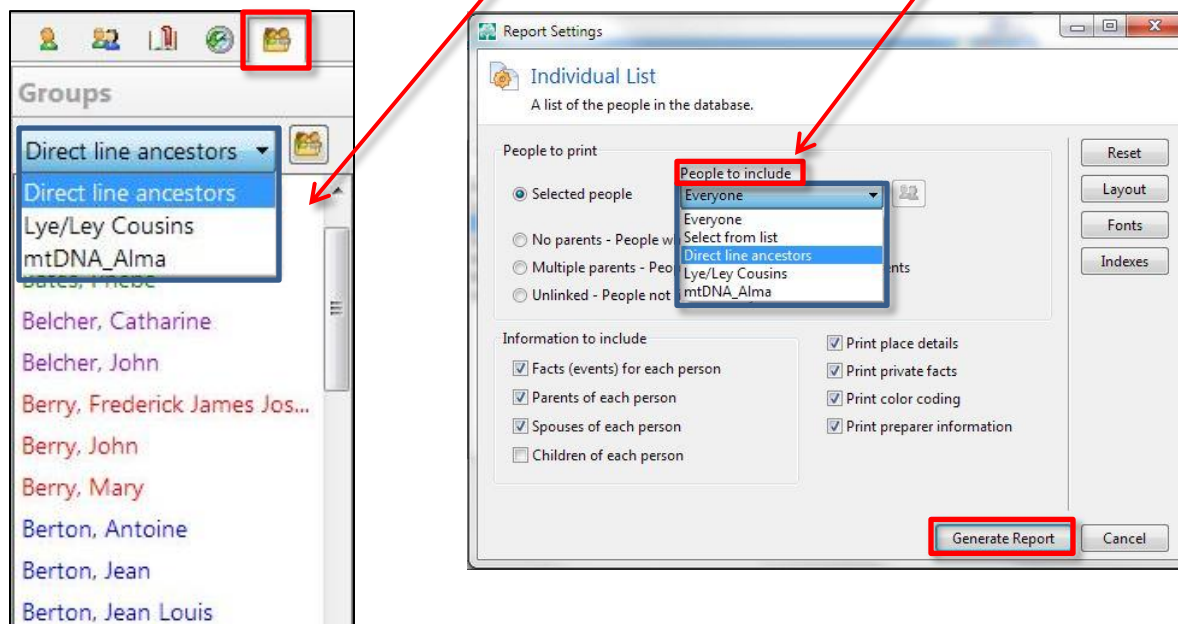
5. You can mark additional people by clicking “Mark Group” again and choosing other filters. You can also click “Unmark group” to remove people in the current group.

6. You can repeat this process until you have marked everyone that you want to have in this group. When done, click “OK”.

7. Enter a name for this group.

8. Click OK to create the group.

9. The new group will appear on the sidebar “Groups” tab or on the “People to include” list when creating reports or GEDCOM files.

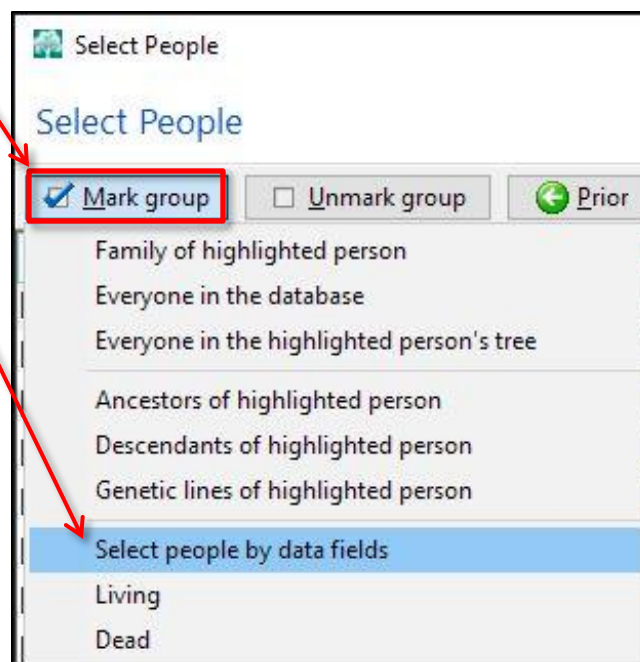


D. Finding People by Data Fields

Searching by data fields is simple, but powerful.

For a review of how to get to this point, review section B steps 1-3.

1. To select a group of people using specific parameters, click the “Mark Group” button and choose “Select people by data fields”.

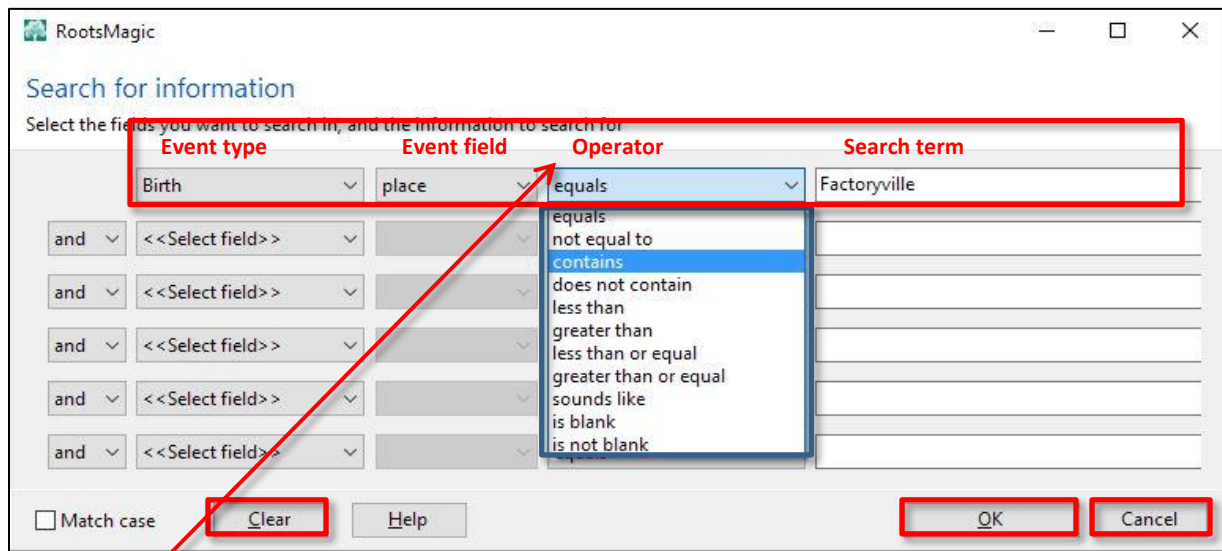


The "Search for information" window will open.

Simple Searches

1. Simple searches only look for information for one set of criteria. This example shows how to search for anyone in your database who was born in a specific place.

a. The event type, event field, and search term columns, tell RootsMagic what to look for.



b. The "Operator" refines the search. In this example, the operator will be changed from "equals" to "contains" which works best when looking for a specific word within a field verses an exact match. This is helpful when searching places if the place names were entered differently. EXAMPLE: Factoryville, PA and Factoryville, Wyoming, Pennsylvania, United States.

2. Click "OK" to perform the search, or "Cancel" to abandon the search and exit the dialog.

3. Click "Clear" to reset all of the fields, allowing you to start over.

4. After clicking "OK", a window will appear confirming how many names were marked.

5. Click OK to see the search results.



6. The people that match the search criteria will be checked

Select People

Mark group Unmark group Prior Find Next Record

Name	Born	Died
<input type="checkbox"/> REYNOLDS, Jennie Alav...	1875	
<input type="checkbox"/> REYNOLDS, Joanna	1769	1849
<input type="checkbox"/> REYNOLDS, Margaret ...	1874	
<input checked="" type="checkbox"/> REYNOLDS, Martin Nels...	1842	1902
<input type="checkbox"/> REYNOLDS, S. P.	1826	
<input checked="" type="checkbox"/> REYNOLDS, Solomon	1844	1924
<input type="checkbox"/> RICE, Elizabeth M.	1783	
<input type="checkbox"/> RICE, Elizabteh	1850	1923
<input type="checkbox"/> RICE, Elvira	1800	1878

Individual information Edit person

Facts	Date	Details
Name		REYNOLDS, Martin Nelson-2950
Spouse		Christianna CAPWELL-2534
Parents		Beriah REYNOLDS-3060 and Laura -2958
Birth	12 Sep 1842	Factoryville, Wyoming, Pennsylvania, United S...
Marriage	8 Apr 1865	Christianna CAPWELL-2534
Census (fam)	12 Jun 1880	Christianna CAPWELL-2534 - Factoryville, W...
Probate	26 Apr 1892	Wyoming, Pennsylvania, United States

Compound Searches

1. Compound Searches are powerful and let you combine up to 6 sets of search criteria. This example will look for everyone who was either born OR married in a specific place.

Search for information

Select the fields you want to search in, and the information to search for

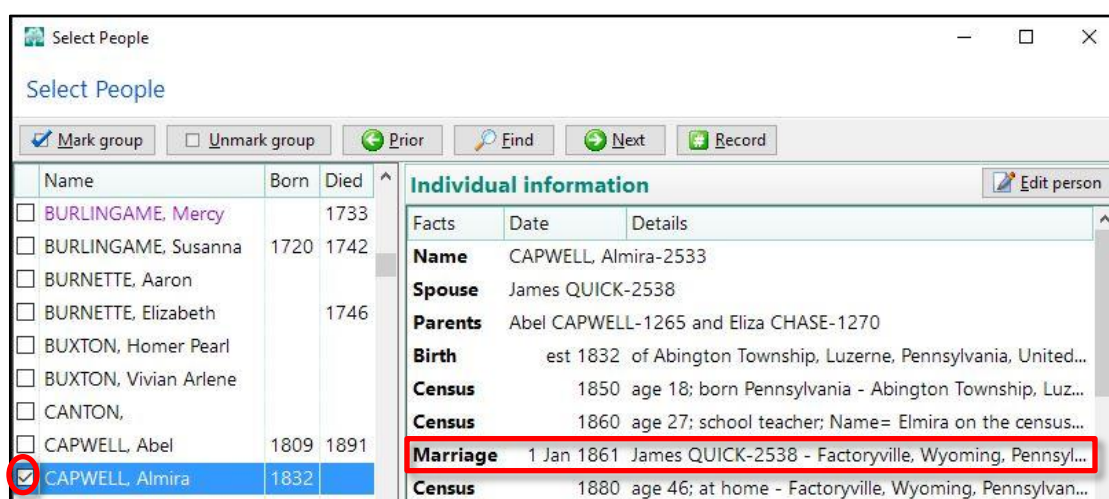
	Event type	Event field	Operator	Search term
	Birth	place	contains	Factoryville
or	Marriage	place	contains	Factoryville
and	<<Select field>>		equals	
and	<<Select field>>		equals	
and	<<Select field>>		equals	
and	<<Select field>>		equals	

☐ Match case

a. Compound searches, like in this example, can be created by entering multiple rows of search criteria, each separated by either "and" or "or".

b. "Or" will give you the broadest search results. "And" will narrow down the search based on both filters.

2. Work your way across the row, selecting what you want to search for and how the search should be filtered.
3. Click "OK" to perform the search, or "Cancel" to abandon the search and exit the dialog.
4. Click "Clear" to reset all of the fields, allowing you to start over.
5. After clicking "OK", a window will appear confirming how many names were marked.



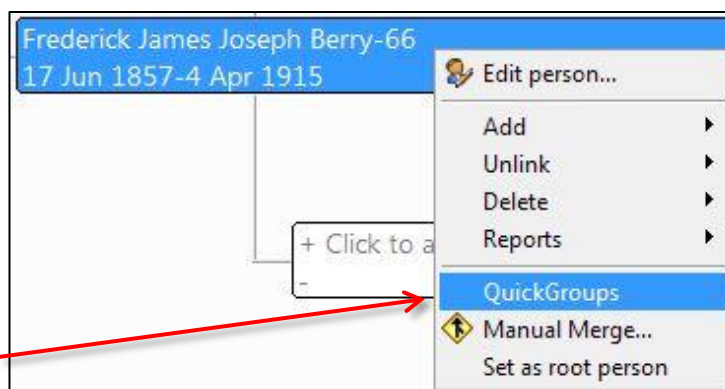
6. The people that match the search criteria will be checked

For more in depth instructions, Webinar #20 "Search Techniques in RootsMagic" found on <http://rootsmagic.com/Webinars/>

E. QuickGroups

While "Named groups" can be modified in bulk by selecting people from a list, QuickGroups allow you to add or remove a person from any or all groups.

1. Within any view, RIGHT click on a person and select "QuickGroups".

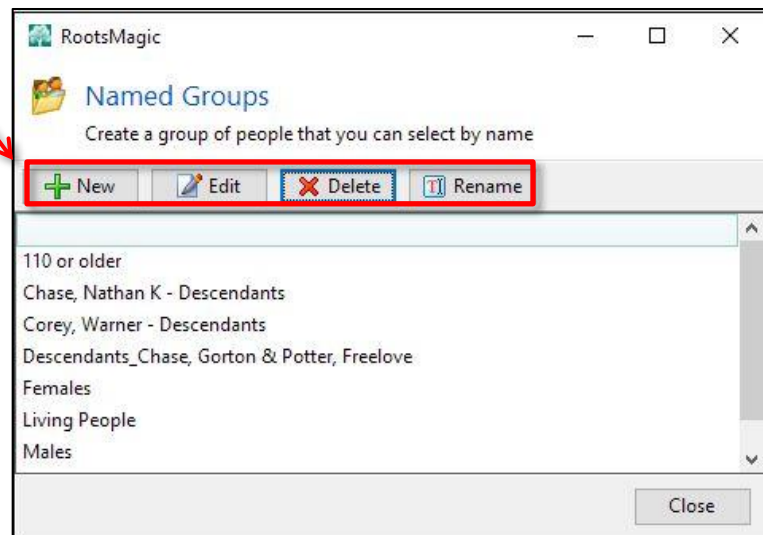
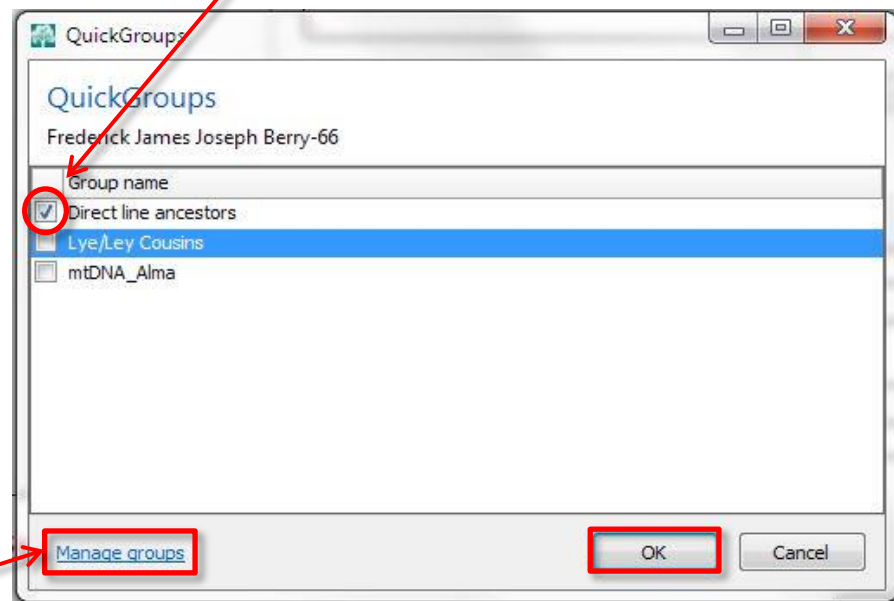


2. RootsMagic will display a list of all the groups that you have created. If the person is already in a group, that group name will have a check mark.

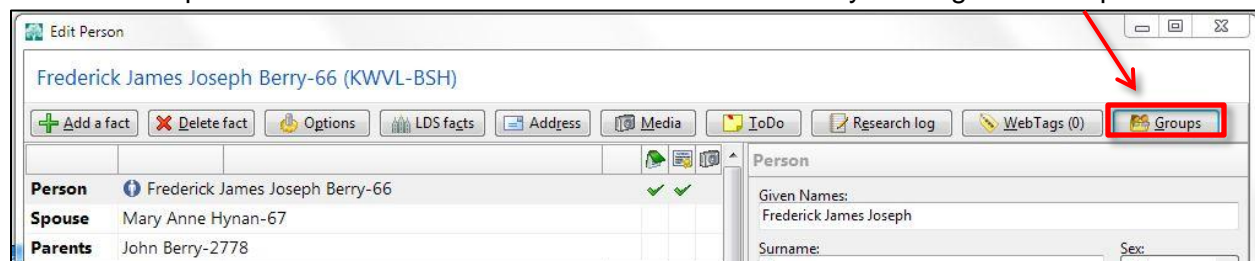
3. Check the boxes next to the groups you wish the person to belong to. Uncheck the box to remove the person from that group.

4. Click OK to save the changes and close the window.

5. The “Manage groups” link lets you add, edit, delete or rename groups.



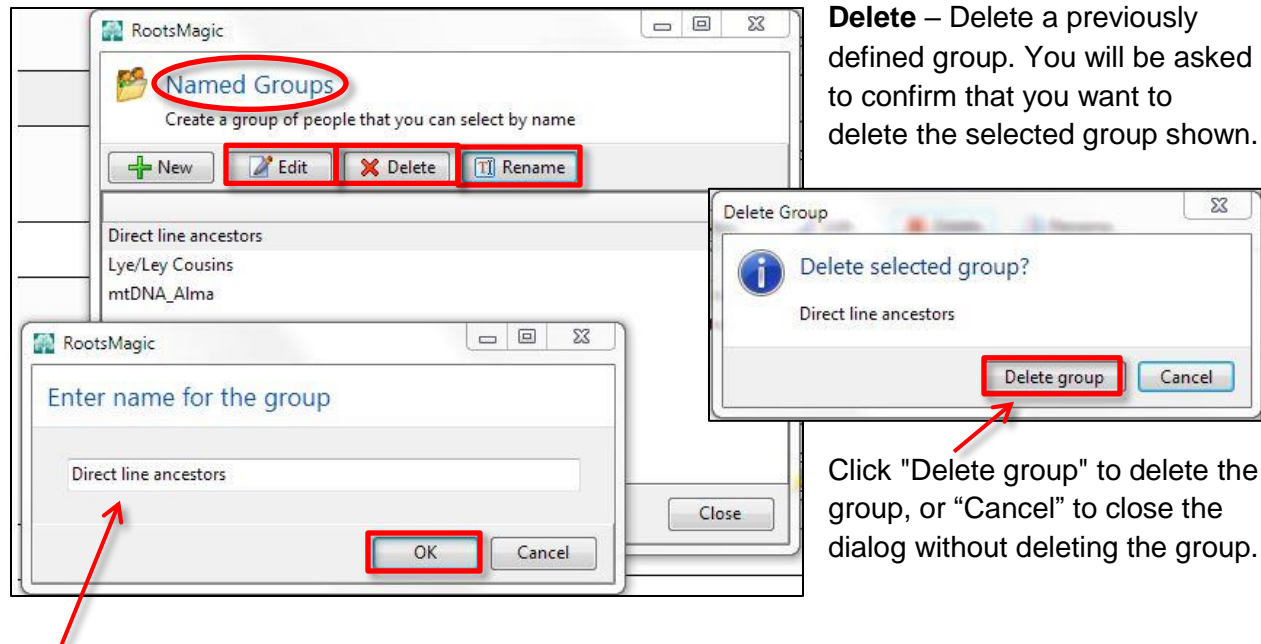
6. QuickGroups are also available from the Edit Person screen by clicking the “Groups” button.



F. Editing Groups

Groups are not automatically updated; therefore, you can edit your group from within the “Named Groups” window.

Edit – Modify the group of people using the “Select People” window (image on page 2 step #4). Check those who you want to add and uncheck those you wish to remove. You can also use the Mark or Unmark button. Click “OK” to save the changes, or “Cancel” to discard the changes.



Delete – Delete a previously defined group. You will be asked to confirm that you want to delete the selected group shown.

Click "Delete group" to delete the group, or "Cancel" to close the dialog without deleting the group.

Rename – Change the name of the group. A pop-up dialog will let you enter a new name. Click “OK” to save the changes, or “Cancel” to close the dialog without renaming the group.