RootsMagic

Magic Guide

Welcome to RootsMagic!

Whether you are new to using a genealogy software program or moving from another program to RootsMagic, welcome! This Magic Guide is designed with a new user in mind. It assumes that you have already downloaded and installed RootsMagic. If you haven't, you can use the "Downloading and Installing RootsMagic for Windows/for Mac" Magic Guides found at http://rootsmagic.com/guides/.

This Magic Guide covers:

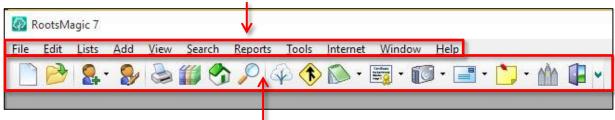
- A. Getting Started Create a File
- B. Importing a File
- C. Navigating the Main Screen
- D. Editing Your Data
- E. Customizing RootsMagic
- F. Training Materials



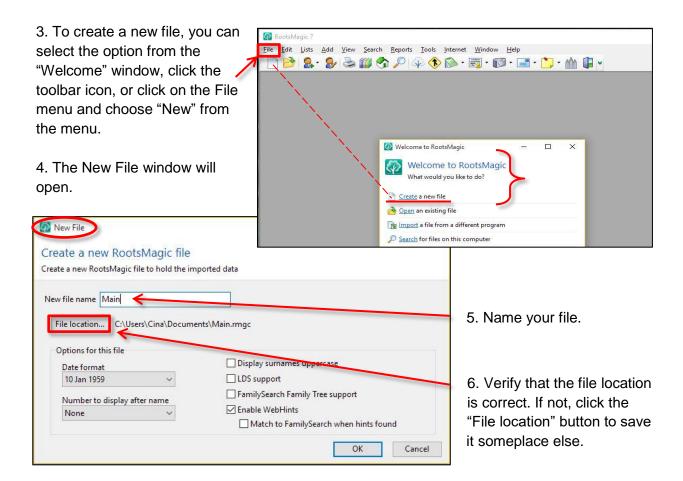
A. Getting Started - Create a File

Upon starting RootsMagic for the first time, you will see the "Welcome Screen". You can select Create a new file, Open an existing file, or Import a file from a different program. If you close the window without selecting anything, you are left with a big gray window, the Main menu, and the Tool bar.

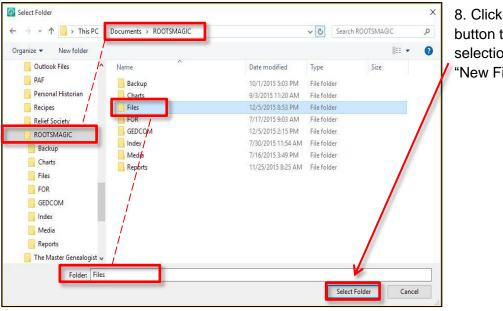
1. **Main Menu:** Gives access to the main features of RootsMagic.



2. **Toolbar:** Gives access to the most commonly-used RootsMagic features. To add your own favorite features to the toolbar, right-click on the toolbar and choose "Customize" from the popup menu.

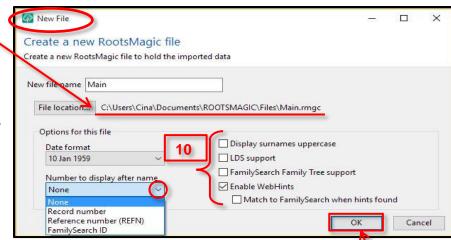


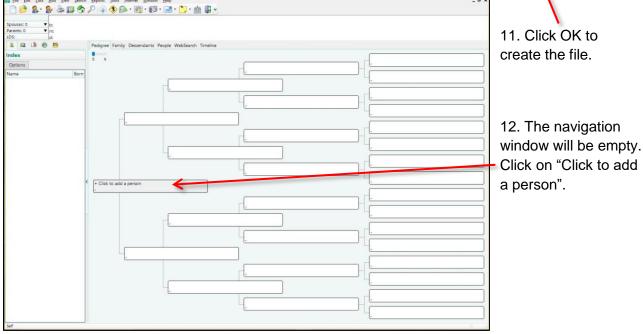
7. Choose where you want to save the file. This example shows that the file will be saved to Documents>ROOTSMAGIC>Files.



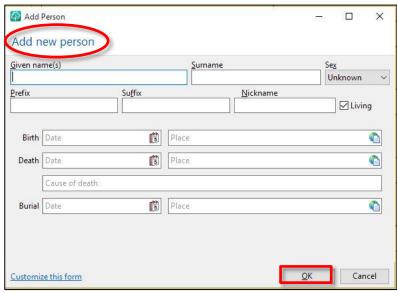
8. Click the "Select Folder" button to save the selection and return to the "New File" window.

- 9. The File location reflects the desired placement for the file.
- 10. Select the file options you want applied to this file.

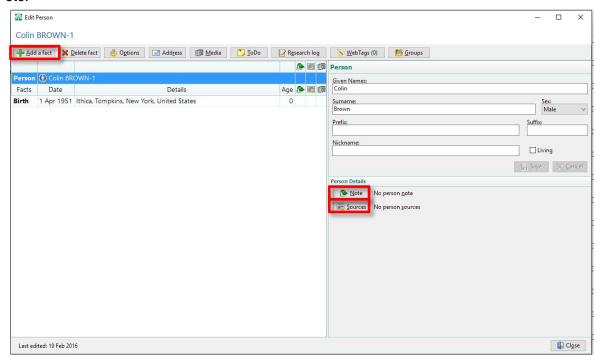




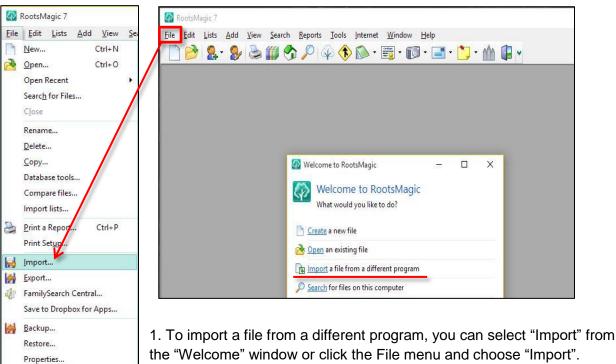
- 13. The "Add new person" window will open. The person you enter will be assigned record number (RIN) 1. Generally, this is your record.
- 14. When you finish filling in basic information on the form, click OK.



15. The Edit Person window will open. From here, you can add facts, notes, sources, media, etc.



B. Importing a File



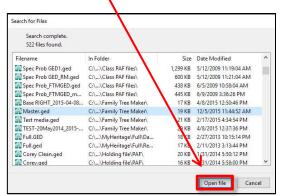
the "Welcome" window or click the File menu and choose "Import".

2. On the Import File window, you can choose from a list of programs for direct import or select

"GEDCOM (Other programs)". In this example, GEDCOM is selected.

3. If you do not know where the file is, click "Search for files". RootsMagic will look for all of your .ged files.

4. Choose the file you want from the list then click "Open file".



New File

New file name

File location...

Date format

10 Jan 1959

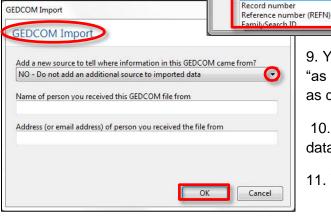
None

Create a new Roots Magic file

Create a new RootsMagic file to hold the imported data



- 5. If you know where the file is stored on your computer, click "I know where the file is". Find and select your file.
- 6. Another window will open. Enter the name that you want to give this file. The name can match the GEDCOM file name or be completely different.
- 7. Under "Options for this file", you can select the "Date format", "Number to display after name", and several other options. These options can be modified after the file is created by going to Tools > File Options.
- 8. Click "OK" when done.



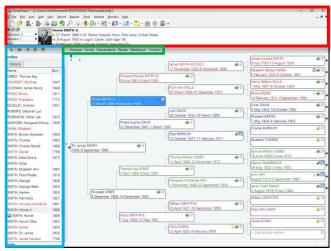
- C:\Users\Cina\Documents\ROOTSMAGIC\ Options for this file Display surnames uppercase LDS support FamilySearch Family Tree support Number to display after name ▼ Enable WebHints Match to FamilySearch when hints found Cancel
 - 9. You can leave the GEDCOM Import window "as is" or change the option and fill in the blanks as desired.
 - 10. Click "OK" to finish creating a RootsMagic database from the imported file.
 - 11. Your file is now ready to use in RootsMagic.

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C. Navigating the Main Screen

Like many desktop programs, the Main Screen of RootsMagic has a Main Menu, Toolbar, Status Bar and tabbed "views". These features appear in every view.

- 1. **Directory or File Path**: Shows where your file is stored.
- 2. **Main Menu:** Gives access to the main features of RootsMagic.





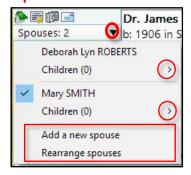
3. **Toolbar:** Gives access to the most commonly-used RootsMagic features. To add your own favorite features to the toolbar, right-click on the toolbar and choose "Customize" from the popup menu.



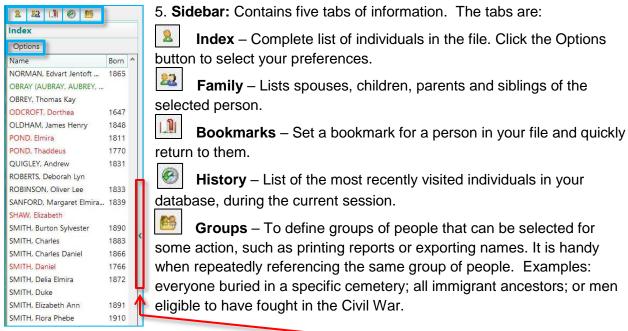
4. **Info Area:** Displays comprehensive information about the **highlighted person**. Photos and vital information appear on the right side of the Info Area.

At the far left side of the Info Area, the top bar shows icons indicating specific items that have been attached to the person, such as notes, sources and media.

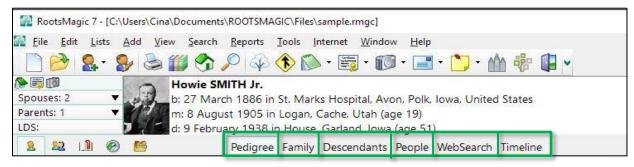
The bottom bar displays LDS-related data, when the LDS option is enabled.



The center two bars show the number of spouses and parents of the selected person. Click on these buttons to see a list of spouses with their children or the subject's parents and siblings. You can also add a new child or arrange children (not shown), or add a new spouse or rearrange spouses, or add parents from these menus.

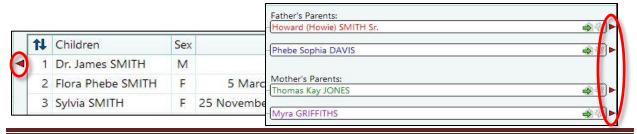


- 6. The Sidebar can be hidden by clicking on the button with a tiny arrow along the right edge of the sidebar.
- 7. **Navigation Views:** The main body of the screen displays one of six views. The tabs let you switch between the different views.



Pedigree View: A generation tree of ancestors for the selected person. The slider in the upper left corner adjusts from 5 to 6 generations. The tree can be color-coded (Tools>Color Code People).

Family View: Displays a single family with father, mother, and children. When available, parents of the father and mother are shown. A red arrow, to the left of the children or to the right of grandparents, indicates the line continues. Click the red arrow to move to the next generation.



Descendants View: Shows multiple generations of descendants for the highlighted person. The slider in the upper left corner adjusts from 2 to 7 generations. When available, you can maneuver to other generations by clicking the red arrow next to a name.

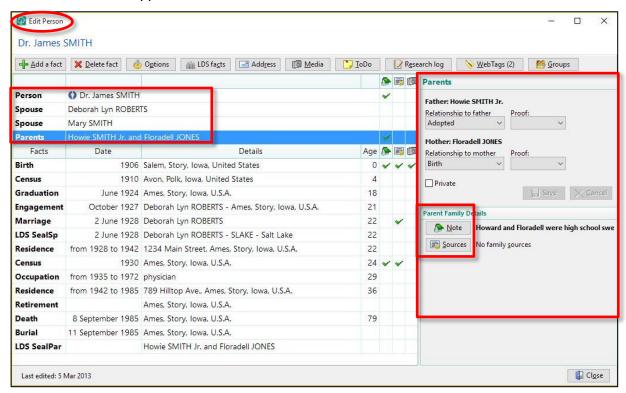
People View: Displays a customizable set of facts for the people in the database. Sortable based on preference, by name or any column header. This can be filtered to show everyone or individuals in a group.

WebSearch View: Automatically searches specified websites for the currently selected person.

Timeline View: Chronological listing of events from the currents person's life, as well as vital events of the person's immediate family members.

D. Editing Your Data

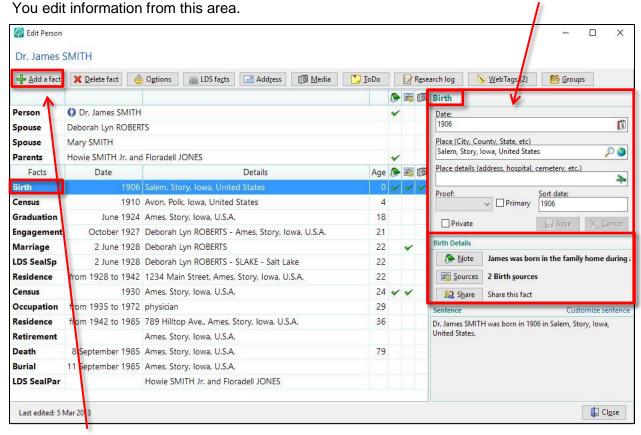
1. To add or edit information about a person, simply double-click on their name on the Main Screen. You may also press the Enter key to edit the currently selected person. The "Edit Person" screen will appear.



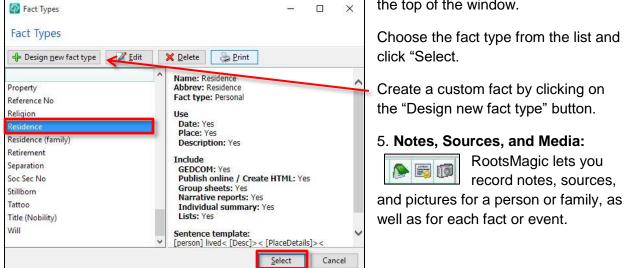
2. **Names and Relationships:** The first row is labeled "Person". Clicking on this row will allow you to edit the person's name. Editing is done in the upper part of the right panel. Relationship rows will appear as the Person is linked to Spouses and sets of Parents. In the upper-right panel you will be able to set relationships. In this example, the relationship indicator shows that the father adopted the child and the mother was the birthmother.

In the lower right panel, you can add notes and sources for the person or family.

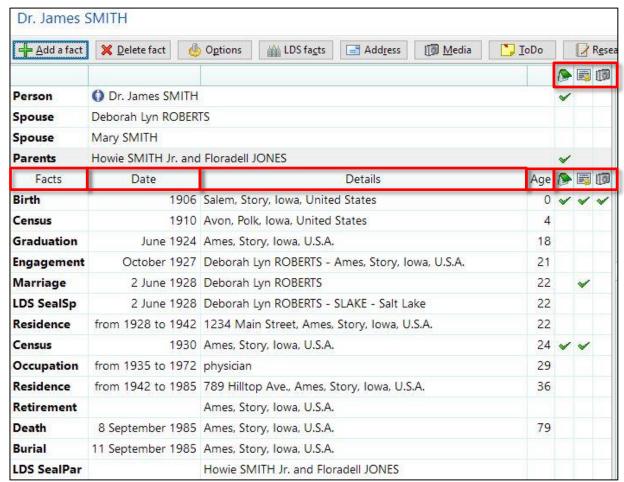
3. **Editing Facts and Events:** Next are all the facts and events for the person, sorted chronologically. The list shows the date, place, description, and the person's age for each fact and event. When you highlight an event on the left, the details will appear in the right panel.



4. **Adding New Facts and Events:** To add a new fact or event, click the "Add a fact" button at the top of the window.



6. Details of the facts or events are placed into columns in the left side of the Edit Person window. Column headings are Facts, Date, Details and Age [of person at the time of the event]. The three right-most columns represent notes, sources and pictures. A check in any of these



columns tells you that a note, source, or picture exists for that fact. Clicking in the corresponding column lets you add or edit that item. Hovering over a checkmark in the note or source column will display a preview of it. You can also preview it by hovering over the note or source button in the right panel. Clicking on the buttons will allow you to add or edit the notes or sources.

The right panel also includes the Share button, so that you can share an event with another person.

E. Customizing RootsMagic

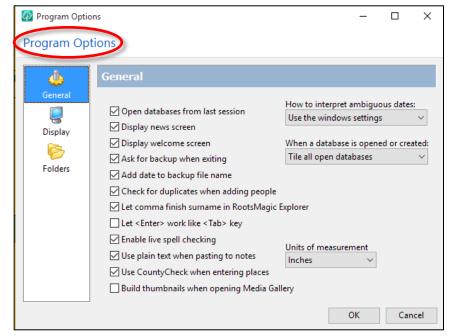
RootsMagic lets you customize how you view and interact with the program and your database. With a few tweaks, RootsMagic can be made to behave in a more familiar fashion.

1. To access the Program options, go to the Tools menu and choose Program Options from the bottom of the list.

General: Options specific to the program as a whole.

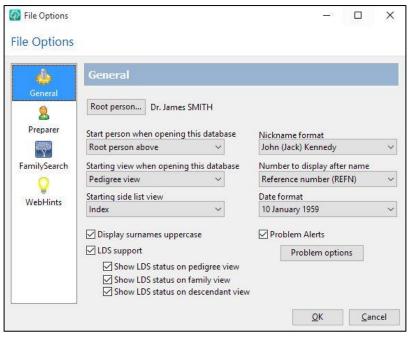
Display: Choose the color scheme, fonts, and font size for various parts of the program.

Folders: Allows you to specify default folders (directories) for the various types of files used by RootsMagic. Whenever you select a feature that accesses one of these file types, RootsMagic will first look in the designated folder.



For more details, go to Help>Contents>Index tab and search for Program Options.

2. To access the File options, go to the Tools menu and choose File Options from the list.



(These settings are database specific.)

General: Options specific to the database itself, including setting the Root (home) person, number to appear by a name, date format, etc.

Preparer: Some reports, as well as the GEDCOM export, have an option to print the preparer's name and contact information. This is where you enter or edit it.

FamilySearch: Lets you enable FamilySearch support.

WebHints: Enables record hinting notification from MyHeritage, FamilySearch and Findmypast. (Ancestry hinting is coming soon!) You can enable the feature separately by provider. Once enabled, you will see a lightbulb appear next to a person's name telling you that record hints are

available. **NOTE:** In order to see hints from FamilySearch, you must enter your FamilySearch username and password on this option screen.

For more details, go to the Help>Contents>Index tab and search for File Options.

F. Training Materials

RootsMagic offers a variety of FREE training materials to help you learn to use the program.

- Help file: Click on Help in the Main menu of RootsMagic. (Help>Contents>Contents or Index tabs) Note to Mac users: use the Menu options within the RootsMagic window and not the Apple menu bar. All Help features are not currently available in the Mac version.
- Webinars: http://rootsmagic.com/Webinars/
- Short videos (under 10 min): https://www.youtube.com/user/RootsMagicTV
- Magic Guides (handouts) for specific topic: http://www.rootsmagic.com/guides/
- Request to join our Facebook "RootsMagic Users" group: https://www.facebook.com/groups/RootsMagicUsers/
- Additional Help options: http://rootsmagic.com/Help/?