

RootsMagic - Getting Started

- I. Launching RootsMagic – Double click the “Green tree” icon labeled RootsMagic 5
 - a. RootsMagic News and Updates window
 - i. If there is a **new update** click to install
 - ii. Read about updates, webinars, family history conference, etc | click Close
 - b. Welcome to RootsMagic window
 - i. Create – a new database
 - ii. Open – a previously created database
 - iii. Import – from: RootsMagic (v 1-3), Family Origins, Family Tree Maker, Legacy, PAF or GEDCOM
 - iv. Search – searches all the drives on the computer for a RootsMagic file
 - v. Open Recent file – Fast way to get back to a recent file
 - vi. Notes:
 1. The file extension of a RootsMagic file is: **.rmgc**
 2. The file extension of a RootsMagic backup file is: **.rmgb**
 3. Can do all of the above, Create, Open Recent, etc from the **File** menu
- II. Create a new file:
 - a. **Name** file - Personal preference: (Surname or full name of 1st person, root person, in the pedigree)
 - b. **File location**:
 - i. Create a specific place for the file and for the images
Hint: Create a **folder** named, "**Family History File and Images**" inside this **folder** put your RootsMagic file and a folder named, "**Images**"
 1. Create these folders in Documents if you do all your work at home
 2. Create these folders on your Flash drive if you work on the file at more than one computer: at home, at FHC, at FHL, etc
 - c. Choose the desired **Options** for the new file - **Append record #, LDS Support, "new" FamilySearch support**, etc
- III. Working with the RootsMagic file
 - a. Add people (they will show up in the Index sidebar after they are added)
 - i. The first person to add is the root person, by clicking the blue box "Click to add person"
 - ii. You can add other people by: clicking an empty slot that says: Click to add a father, a mother or a child, or
 - iii. Right click an individual | select **Add** | **Individual, Spouse, Parent, or Child**
 - iv. For each person:
 1. Add Name, birth, death, burial information, etc (as much as you know)

2. Add Places with as much information as you have: city, county, state, country (CountyCheck will suggest corrections)
 3. When you click OK and it goes to the Edit Person window
- b. Edit Person window
- i. If you are not in the Edit Person window, enter it by selecting a person then: double clicking that person OR right click the person | select **Edit person**
 - ii. Fill in or edit the fields associated with that Person: Given Names, Surname, Sex, Prefix, Suffix, Nickname, Living | click **Save**
 - iii. Select the **Spouse**, if there is one, and fill in, as desired, the associated fields: Husband label, Wife label, Proof, Private | **Save**
 - iv. Select the **Parents**, if they are shown, and fill in, as desired, in the associated fields: Relationship to father, Relationship to mother, Proof, Private | **Save**
 - v. **Tabs across the top:** Add a fact, Delete fact, Options, LDS facts, Address, ToDo, Research log
 - vi. **Add a fact** (65 facts and you can create new facts)
 1. Basic facts are: birth, marriage, christen, LDS baptism, not Baptism, (other LDS ordinances), death, burial, etc
 2. Obituary: More visible than Notes
 3. Alternate name: Name variations
 4. Census: to see at a glance the census years found
 5. Residence: date, place, place details, description, proof, sort date
 6. Can add more than one fact of a given type, as needed (ten Residences, two Graduations, two Censuses, etc)
 - vii. **Timeline** - Facts are sorted by the Age column which will show you a timeline for the facts. Also, in the main window click the Timeline view to see a timeline of the person and their family
 - viii. **Detail panel** (bottom right)
 1. For the **Person** or their **Spouse** or their **Parents** there will be two buttons: Notes and Sources,
 2. For a **Fact** there will be three buttons: Notes, Sources, Share
- IV. File Menu
- a. **Delete** - WARNING: deletes the database (the whole file)
 - b. **Copy** - Exact copy of the RootsMagic database (in place of Save as...)
 - c. **Import / Export** - Import from PAF, Legacy, GEDCOMs, etc. / Export to GEDCOM (File extension: .ged)
 - d. **Backup/Restore** - backup to home computer, restore **only if** main file is lost or corrupted (File extension: **.rmgb**)
 - e. **Properties** - facts about this RootsMagic database
- V. Working with a your file
- a. Type in the information or Import from another file; PAF, GEDCOM, etc
 - i. Hint if you do Import: Use Count Trees to find unlinked groups (Trees).
Tools menu | **Count Trees**

- b. Root Person: The one who is considered the starting person or central focus in the tree
 - i. Return to root person by selecting **Search** menu | click **Go to Root Person** OR press **Ctrl+Home**
 - ii. Change the Root Person by selecting the desired new root person | right click | select **Set as root person**
 - c. Index sidebar - List of people in your database
 - i. To find someone: Scroll to them OR select anyone in the sidebar and start typing the desired surname
 - ii. Collapse the sidebar or expand the sidebar by clicking the small black arrow on the right side of the sidebar
 - d. Information area: (Top of the window below the toolbar)
 - i. Information about the highlighted individual, includes the person's name and information about their birth, marriage, and death
 - ii. Rows on left in information area: Row 1: icons: note, source, media; Row 2: Spouses; Row 3: Parents; Row 4: LDS ordinances
 - e. Navigation views: (tabs at the top of the views)
 - i. **Pedigree View** - Click red arrow to move a generation, click a name in the Index sidebar list to move it to primary position, Ctrl+Home - back to Root person
 - ii. **Family view** - Click red arrow to move a generation, show the parents, the children and the grandparents
 - iii. **Descendants view** - 2-7 generations
 - iv. **People view** - Sort by column headings, Customize the view (can add up to 50 total columns), select who to show:
 - v. **WebSearch view** - Search online for information about the selected person. Click person in sidebar to search for information about them
 - vi. **Timeline view** - Lists all the events in the current person's life, and birth, marriage, and death events for family.
 - f. Icons above the Index sidebar
 - i. **Index** - Displays the Index sidebar
 - ii. **Family** - Displays the family of the highlighted person
 - iii. **Bookmarks** - To **bookmark** the highlighted person | click the + icon at the top of the Bookmarks sidebar. To use the bookmarks: click a person in the Bookmarks list | click **Go**
 - iv. **History** - The list of most recently visited individuals in your database which can be up to 200-300 people, with the most recent on top. Click the **Clear** button to start a new list
 - v. **Groups** - create or retrieve a filtered group of people
- VI. Extra helpful items
- a. Help: **F1** - brings up help on what you are working on now
 - b. **Problem List** – **Tools** menu | **Problems Search** | **Problem list...**
 - c. Print Pedigree chart
 - i. **Reports** menu | **Pedigree Chart**, or
 - ii. **File** menu | **Print a Report** | **Chart** | **Pedigree chart**

- d. **RootsMagic To-Go** program - Puts the full RootsMagic program on a flash (thumb) drive to use in any computer
 - i. Insert your flash drive | double click the RootsMagic To-Go icon on the desk top | select the **flash drive** letter | click **Install RootsMagic on...**
 - ii. To use from the flash drive: Insert and open your flash drive | double click **RootsMagic Launcher**
 - iii. **Remember** to redo **RootsMagic To-Go** after updating RootsMagic on your home computer

Tutorials:

- <http://www.rootsmagic.com/RootsMagic/Tutorials/> | Getting Started: (32:51 minutes)
- [rootsmagic.com](http://www.rootsmagic.com) | [Learn](#) | [RootsMagic](#)
- Webinar: <http://www.rootsmagic.com/Webinars>