ROOTSMAGIC 8 WIKI

(http://wiki.rootsmagic.com/wiki/RootsMagic_8:RootsMagic_8)

THE ROOTSMAGIC INTERFACE

(http://wiki.rootsmagic.com/wiki/RootsMagic_8:The_RootsMagic_Interface)

PEOPLE PAGE

1. Searching from the People Page Index and/or People List View:
   a. General search format is Surname, Given Name
   b. Anything entered prior to a comma is considered a Surname search phrase and anything entered after a comma is considered a Given Name search phrase
   c. Partial names can be entered, and it does not have to start with the first letter
   d. Given Names can be searched without entering anything prior to the comma
   e. The search will commence and refine the results as characters are entered in the search box
   f. Wildcard characters can be used in People Page Searches:
      i. Single character wildcard = "_"
      ii. Multiple character wildcard = "%"

SEARCH PAGE

1. The columns of information shown in the People and Advanced People search results are the ones selected to Customize the People List View on the People Page
2. Person Search View:
   a. Given Name or Nickname (partial or full) can be entered in Given name field
   b. Surname or Married Surname can be entered in the Surname field
   c. Partial names can be entered, and it does not have to start with the first letter
3. Advanced People Search:
   a. Some have reported that RM is "slow" after performing an Advanced Search as long as the filters results are present on in the Results area of the Search Page. It is recommended that once you are finished working with the results, that you click on the Clear Results button.
4. Web Search:
   a. The list of people in the database can be searched, similar to the People Page Index, using the format of: Surname, comma, First Name.
   b. Partial names can be used too, but Wild Card characters do not work on this Page

SETTINGS PAGE

1. The Settings Views:
   a. Program Level settings are set in: Program, Folder, & Display Views
   b. File Level settings are set in: General, Preparer, WebHint and LDS Views
2. Program Settings View:
   a. Ask for Backup when exiting RM – YES

b. Add date to backup – YES
c. Check for duplicates when adding people – YES
d. County Check – YES (unless you always use current day locations)
e. Date entry – USE SYSTEM SETTINGS
3. Folder Settings View:
a. Backup Folder – set to its own folder location to keep backup files separate from all other file types
4. General Settings View:
a. Database Color – Recommend selecting a different color for each of your database files/groups of files, especially if you work with more than 1 open at a time. Remember you must switch Pages to reflect the newly selected color.
b. Problem Alerts – YES
c. Problem Options – Review to make sure they meet your expectations for Alerts
5. Display Settings View:
a. Font scaling – remember to close RootsMagic and re-open to ensure all fonts are set to the new settings. Also, take note of the setting prior to making a change so that you can reset it if you decide you don't like the new setting
6. Preparer Settings View:
a. Name, Address, Phone and E-Mail are the only entries that will be included in reports when Preparer Data is selected to be included. Cell, Fax and Website entries are not used in reports.
7. WebHint Settings View:
a. Ancestry:
   i. For Ancestry Hints to work, you must be logged in and linked to a tree via RootsMagic Treeshare
   ii. Warning: DO NOT select "Disconnect from Ancestry Tree" unless you really want to permanently sever the Treeshare link between the Ancestry Tree and your RM file. THIS ACTION CANNOT BE UNDONE. If done in error, a recent Backup file from when Treeshare was still connecting to your tree must be restored, or a new Treeshare connection must be created with either a new Ancestry Tree or a new RM file. (You cannot "re-connect an existing Ancestry Tree to an existing RM database file).
   iii. Rather than "Disconnect from Ancestry Tree", use the "Reset Treeshare" function to force RM to rebuild the links between the connected Ancestry Tree and RM database file.
b. FamilySearch:
   i. For FamilySearch, hints are provided for people regardless of whether you have matched them to their corresponding person in the FamilySearch Family Tree
c. FindMyPast:
   i. Evaluating and dispositioning FindMyPast Hints is a completely manual process performed external to RootsMagic. Data from any Confirmed Hints must be manually entered into RootsMagic.
d. MyHeritage:

       i. Evaluating and dispositioning MyHeritage Hints is a completely manual process performed external to RootsMagic. Data from any Confirmed Hints must be manually entered into RootsMagic.

8. LDS Settings View: No recommendations

DATABASES

(http://wiki.rootsmagic.com/wiki/RootsMagic_8:Databases)