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. Data Folder – This location should be set prior to using TreeShare with Ancestry or Restoring a Backup. This will enable RM to use "relative" paths for media files placed in the resulting media folders when performing these activities. Otherwise, RootsMagic will store "discrete" paths for media file links.

  b. Backup Folder – set to its own folder location to keep backup files separate from all other file types

  c. Media Folder – Starting with RootsMagic 8, media files are linked using "relative" paths from several locations (despite displaying full path names, including drive letter, to the user; implying all links are "discrete").

    i. All media files added after a Media Folder location is specified in the Folder Settings View on the SETTINGS Page will be "relative" to the Media Folder location, if the media file is located in the folder or a subfolder. Therefore, it is recommended that the Media Folder specified should be the "top level" folder where most/all media files being added are located, or in sub-folders. Ideally, the Media Folder location should be specified prior to linking any media files to information in the RM database file.

    ii. Changing the Media Folder location after already having linked media files will result in broken links that must be fixed after the change using the "Fix Broken Media Links" tool (MEDIA PAGE > 3 dots (more options)).

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)

GENERAL FILE INFORMATION:

1. The database engine used by RootsMagic is SQLite (www.sqlite.org). SQLite does not support multiple users. Therefore, it is important to only have one computer, with one computer program, accessing the database file at a time

2. RM Tech Support recommends not using ANY file syncing/sharing programs on your RootsMagic database file as it can cause database access errors and worst case, there is the possibility that it can corrupt the file, making it unrecoverable. This recommendation is just for the database file itself and does not apply to media, backups, or any other type of file that RM uses/creates. They are aware of situations where people have used file syncing/sharing for extended periods of time with no issues and then one day their database file becomes corrupted and is unrecoverable.

3. When strange things occur that may be the result of a corrupted database file, the following 2 steps should be tried to see if either will fix the issue:

  a. Run all of the Database Tools prior to reaching out for help: File > Tools > Then perform each Database Tool in the order listed (Test Integrity, Rebuild Indexes, Clean Phantom Records and Compact)

  b. If running the database tools does not fix the issue with the database, the next step is to Drag & Drop the entire database contents into a new, empty, file. Don't delete the

original file because you may need to reference it to manually migrate data that did not transfer (see end of this section)

4. File extensions:
    a. docx – Microsoft Word file (Publish Page output format)
    b. dup – An interim file created by RootsMagic when identifying duplicate entries. File is normally deleted by the program when complete. It is left behind when the program encounters a problem or the process was cancelled. This file can be deleted
    c. ged – GEDCOM file (used to transfer data between genealogy sites/software)
    d. lst – RM list file (text file created when a GEDCOM file is imported into RootsMagic. It will list any issues encountered during the import process)
    e. pdf – Adobe portable document format file (Publish Page output format)
    f. rmbackup – RM8 backup file (compressed .zip file)
    g. rmgb – RM7 backup file (compressed .zip file)
    h. rmgc – RM7 database file (also RM8 file exported to Dropbox for use by RM IOS App)
    i. rmtree – RM8 database file
    j. rmst – RM Custom Source Template file (Custom Source templates can be imported/exported from the Source Template List window)
    j.k. svg – Scalable vector graphic file ((Publish Page output format)
    k.l. txt – Text file (Publish Page output format)
    l.m. xlsx – Miscrosoft Excel file (Publish Page output format)
5. A database file deleted by RootsMagic IS NOT placed in the Recycle Bin/Trash Can, it just disappears.
    a. Archive (using RM Backup, with media if desired) a copy if you believe you may want to resurrect/use the file in the future.
6. Importing post-2014 Family Tree Maker (FTM) data to RootsMagic cannot be done directly due to FTM's proprietary file format. RM Tech Support recommends trying all of the following and evaluate which process works best with your specific set of data:
    a. Sync FTM data to an Ancestry Tree and then download Ancestry Tree data (including media) to RM via Treeshare function
    b. Export FTM data to a GEDCOM file and import into RM
    c. Export FTM data to FTM v2014.0 or earlier and import into RM (Per RM Tech Support, the RM7 import FTM 2014 tool works better than the current RM8 FTM 2014 import tool, this will be fixed in a future RM8 update)
    d. As you evaluate the results of the above options, in addition to looking at the file statistics on the HOME Page, you may want to use the File Compare function to help identify differences between the imported files.

CREATING A NEW DATABASE:

1. Before creating a new RootsMagic file, it is recommended that you first go to the Folder Settings View on the SETTINGS Page and specify at least the Data and Media folder locations because these are used by RootsMagic to determine whether "relative" or "discrete" path locations will be placed in the database to identify link paths to media files.
2. Create New, Empty, File:
    a. After creating a new file, do the following:

      i.   Go to the SETTINGS Page and review all the File specific settings in the General, Preparer, WebHints & LDS Views

3. Create New File by Importing Data or Downloading from an Online Tree:
   a. If importing data from a GEDCOM file exported from a RootsMagic file to create a new file, all limitations and cautions regarding using GEDCOM to exchange RootsMagic data (see end of this section) apply.
   b. After creating new file by importing data or downloading from an Online Tree, do the following
      i. Go to HOME Page and review the File Properties to confirm what you expected was imported
      ii. Just like creating a new, empty file, go to the SETTINGS Page and review all the File specific settings in the General, Preparer, WebHints & LDS Views
   c. Consider "Archiving" a copy of the original file that was imported and a copy of the file after it was imported for future reference in case you need to determine whether some erroneous information originated in the original import, or was added later using RM. It can also help you figure out if data was "lost" during the import process that you didn't notice until later.

OPENING AN EXISTING DATABASE:

1. The "Recent Files" section lists up to the last 8 files opened
2. The "Found Files" section only lists files found in the folder and subfolders specified in the SETTINGS Page, Folders Settings View for the "Data Folder". The list will contain both RM8 (.rmtree) and RM7 (rmgc) files.
   a. If looking for a "missing file" you are better off using the OS File Explorer/Search utilities and wildcard characters to try to locate where the file is located.

WORKING WITH MULTIPLE DATABASES

1. Up to 4 files can be open at the same time (only 1 in the free version)
2. If you have RootsMagic set to open the last file used, when working with multiple databases, close the database you believe you will want to use next time last.
3. The 1st file opened behaves a little different compared to the 2nd to 4th files:
   a. When the 1st file is minimized, all open file windows are minimized
   b. As long as the 1st file is not minimized, the 2nd to 4th files can be minimized and they are placed in the lower left of the desktop
   c. If you close the 1st file before any of the other open files, the behavior of the 1st open file transfers to the next file opened in the session that remains open
   d. Currently, there are a few popup windows that appear centered in the 1st file window, even if you are working in the 2nd to 4th file. Therefore, it is advised to NOT position the 1st file window so that the center of the window is not in the visible Desktop area. If you do, the Program appears to "freeze" because you cannot see/click the buttons on the Popup window, requiring the user to have to terminate the Program execution.
   e. Popups I have identified (so far) that center on the 1st file window are:
      i. The Spouse selection popup window when creating a Couple Fact (Marriage, Divorce, etc)

        ii.   The WebHint list for a Person

DRAGGING AND DROPPING PEOPLE

1. Drag & Drop data transfer limitations:
   a. This function is actually an internal GEDCOM export and GEDCOM import of the selected data between 2 RootsMagic database files.
   b. All limitations and cautions regarding using GEDCOM to exchange RootsMagic data (see end of this section) apply to Drag & Drop too.
   c. Remember: Changes you have made in the past regarding Fact Types to export/not export into a GEDCOM file should be reviewed to reflect which facts you want transferred to the destination database file.
   d. Unlike an actual import of a GEDCOM file, you are not given the option to add a Source Citation to the People and/or Facts "dropped" into the database to document where they came from.
   e. If the Drag & Drop data contains Source Citations based on Custom Source Templates, and those Custom Source Templates already exist in the destination file, they will be duplicated
2. Can be used to add people to master database, extract a portion of your master database, or create a set of data to be "further processed" using GEDCOM export capabilities (privatize living people, remove Fact Types, etc).

BACKING UP A DATABASE:

1. General Info:
   a. Closing a file by clicking on the "X" (or Mac equivalent) will cause the Backup popup window to appear, if this setting has been turned on in the SETTINGS Page, Program Settings View. Closing a file from the FILE Page will not cause the Backup popup window to appear regardless of this setting.
   b. Can be set to include associated media files. However, this consumes a significant amount of storage space and adds considerable amount of time to perform each RootsMagic Backup
      i. Primarily recommended when you want a complete set of information (database and linked media files) for the purpose of archiving a copy or perhaps sharing a copy of data and all linked media files
      ii. All media files are placed in a single media folder inside the backup file. When restored, the media files are all restored in a single media folder, any file/folder structure used to organize media files prior to the backup is lost.
      iii. If broken links exist in the database, the corresponding media files will not be backed up
   c. Are primarily intended to support "Undo" resurrection of corrupted database files, accidentally deleted data or files, view archived data to compare with current version of the database and/or to transfer a database to another computer
   d. RootsMagic Backup files are actually "zip files." If necessary, you can change the file extension to ".zip" and then use separate Zip file software to extract the compressed information
2. When to back up a database file:

    a. Anytime you have entered/changed data you would rather not re-enter should something unexpected occur to the file (for me, usually once per day of editing when closing the file)

    b. Prior to performing a major change that can affect multiple records in one action (Examples: cleaning up Place Names, Sources & Citations, Merging Duplicates, Search & Replace, Drag & Drop people into existing tree, importing GEDCOM data, downloading data from online sites, etc)

3. If creating a second (or more) Backup in the same day, add a dash number (or a, b, c…) to make the filename unique and also order the files sequentially

IMPORTING LISTS

1. When importing a Fact Type list, RootsMagic imports all Fact Types, except the default 64 Fact Types included in every RootsMagic file.

    a. Unlike the default 64 in a new file, these other Fact Types will be imported preserving all the settings as they are in the source file. This includes whether or not it will be exported to a GEDCOM file

    b. If a Fact Type list is imported into a file that already has data in it, duplicate Fact Types may be created that should be cleaned up.

Note: If you have an individual Custom Source Template file (*.rmst) that was exported from a RootsMagic file, these files are imported from the Source Template List window (see Working with Sources > Source Templates in Wiki).

2. When importing (Custom) Source Templates from a database file, if they already exist in the destination file, they will be duplicated.

IMPORTING/EXPORTING DATA FROM AN EXISTING FILE VIA GEDCOM

1. General information about working with GEDCOM files and data:

    a. GEDCOM files (pre-v7.0) are text files and do not contain media images or files. Only the drive, path and filenames pointing to where your linked media files reside can be included

    b. For reference, here is a technical post discussing what transfers, ~~and~~ what is lost and other issues that occur when transferring data between RootsMagic database files via GEDCOM and/or Drag & Drop: https://sqlitetoolsforrootsmagic.com/gedcom-dnd-transfer-losses/?fbclid=IwAR3kychhZq7qo7UNM1xohUbsdZ0SRYMNj6C7XuWQdznYkFHd4pEGa5y8cn8

    c. For reference, the GEDCOM website (specification can be found here, along with a list of "Validators") is: https://www.gedcom.org

    d. For Reference, the Family Tree Analyzer tool can be used to look at and analyze GEDCOM files: https://ftanalyzer.com

2. The Drag & Drop function is actually an internal GEDCOM export and GEDCOM import of the selected data between 2 RootsMagic database files.

    a. If you've made changes in the past regarding which Fact Types to not export via GEDCOM, you may want to review and change the settings back to have them included

    b. Unlike an import of an external GEDCOM file, you are not given the option to add a Source Citation to the People and/or Facts "dropped" into the file.

3. When importing data using a GEDCOM file:
   a. If you elect to add Source Citations to added People and/or Facts, the information you enter will appear in reports in the following form:
      i. Source Name: GEDCOM file imported on [DATE]
      ii. Footnote and Short Footnote: GEDCOM file submitted by [NAME], [ADDRESS INFO]. Imported on [DATE]
      iii. Bibliography: GEDCOM file, [NAME]
      iv. The corresponding Citation will be given the same Name as the Source Name and applied as a "reuse" of the Citation (change 1 Citation and all get changed).
   b. After performing a GEDCOM import, check the folder where the destination database file is located using a File Manager/Explorer program and open the LST file with the same name as the imported GEDCOM file (using a program that can read text files) and check for any issues encountered by the import tool
      i. You may need to open the GEDCOM file itself (using a program that can read text files) to analyze what the data issue is tagged to/located within the imported data set that the LST file is referring to.
4. When exporting data to a GEDCOM file, do the following first:
   a. If you intend on privatizing living people, run an Advanced Search to ID all living people in the Group you intend on Exporting first:
      i. Go to SEARCH Page and select Advanced Search View
      ii. Click on the Find button
      iii. Select "Living Flag" in the first "Select field" box and "Is True" in the Logic box, and then click on "OK"
      iv. The resulting list is all of the people in your Group that will be privatized. If you see people that should not be privatized, click on Edit button and make the necessary corrections
      v. Repeat until done with list
   b. The initial default setting for each newly created RootsMagic file is set to export all (default) Fact Types. Decide whether you want all, or only some Fact Types to be exported. Confirm export settings for each Fact Type is set as you want, as follows:
      i. Select People Page, click on 3 dots icon on the People Menu Bar and select Fact Type List
      ii. Note where the "Include GEDCOM: Yes/No" information is located on the Fact Type screen
      iii. Scroll through the list of Fact Types to confirm the desired Fact Types you want to include are set to "Yes" and any Fact Types you do not want to include are set to "No"

      Note: If you click on the first Fact Type, you can then scroll through the list by using the Down Arrow.

      iv. To change a setting, click on the EDIT button, check/uncheck the "Include when" Exporting GEDCOM files" box and click OK
      v. Continue to the end of the Fact Type list, then click OK

c. If exporting a subset of people in your database and you have not created a Group yet, you may want to create a new Group prior to starting the process to export the GEDCOM file

   i. Remember that Couple/Family Facts will only be included with the export if both people are included in the export

d. If the data you want to export contains links to media files, check & fix broken media links (Media Page > 3 dots > Fix broken media links).

e. Now you are ready to export the GEDCOM file

f. After exporting data to a GEDCOM, if you set some Fact Types to not export, you should decide whether to reset them to Yes now, or wait until the next time you perform a GEDCOM Export or Drag & Drop operation to review all their export settings.