Genealogical Forum of Oregon (GFO)
RootsMagic Special Interest Group (SIG)
Handout

Recommendations and Supplemental Information
for use with the RootsMagic Online Help

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ABOUT THIS DOCUMENT

- This Handout is intended to be used in conjunction with the RootsMagic Online Help, accessible from within the RootsMagic program using the F1 key from anywhere in the program, from the HOME Page and/or by selecting Help in the Options Menu found in the upper right corner of the Program Window.
- This Handout is the official repository for the supplemental information and personal recommendations I've provided at monthly GFO RootsMagic SIG meetings and is provided as a reference for GFO SIG members.
- I don't currently, and may never, use all of the features discussed in our SIG meetings in my personal family research database. The purpose of this Handout is to supplement the information found in the RootsMagic Online Help to make GFO SIG Members aware of ALL RootsMagic features and how they can be used, along with any undocumented limitations.
- Recognizing one of the GFO RootsMagic's SIG's Operating Principles: "There is no single, correct, way to do genealogy;" the evaluation of each feature's usefulness and the decision to utilize it as part of each GFO SIG Member's individual quest to do family research, is left to each SIG Member, given their specific use case.
- There may be errors in this Handout and some information may conflict with how each SIG Member has decided to use RootsMagic. Therefore, use of the information in this Handout is at your own risk.
- This is a living document that is periodically updated as new topics are discussed in the monthly SIG meetings, the software changes, the Online Help changes and/or new information about how the existing version of the program works (or doesn't). Since this is intended to be a supplement, very little information found in the Online Help is repeated in this Handout.
- When information included in this document is incorporated in the Online Help, it will be deleted from this Handout. Currently, this document covers information for RootsMagic versions 9 & On.
- The latest version of this document can be found at the GFO RootsMagic SIG webpage

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TABLE OF CONTENTS

This Table of Contents is a combination of the contents of the latest RootsMagic Online Help and the supplemental information contained in this Handout.

- The black entries identify sections and subsections found in the Online Help. The red entries identify Handout subsections not found in the Online Help.
- Clicking on the primary section headings will open the webpage for the corresponding section of the Online Help your default browser. The listed subsections can be navigated to from the online section webpage.
  - RM9 to 11 ~~& 10~~ , ~~If using an earlier version of RootsMagic,~~ to view the corresponding Online Help webpages for these earlier versions; once the selected Online Help section has opened, edit the URL by changing the "RM12~~1~~" portion to the desired earlier version #
  - When a new version is released, in addition to ceasing issuing updates to the prior version of the software, RootsMagic also stops updating the prior version's Online Help webpages.
  - Therefore, the information in the current version's Online Help may contain updated information that is applicable to the earlier version as well, or the differences may be the result of enhancements released in the newer version of the program
- Clicking on the Page numbers will take you to the corresponding supplemental information in this Handout.
  - Section entries without page number hyperlinks indicate the SIG has not covered that section of the Online Help yet
  - Subsection entries without page number hyperlinks indicate there isn't any supplemental information on that topic in the Handout and you should refer to the corresponding Online Help subsection webpage
  - Due to the method used to create the hyperlinks, as changes are made to this Handout, the listed Page numbers for Handout supplemental information may be incorrect. However, the hyperlink will still take you to the correct location in the Handout

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GETTING STARTED

GENERAL INFORMATION

1. RootsMagic doesn't provide telephone support. Any information you find online about phone support is a scam
2. RootsMagic Help is available via several means; all of these are accessible from the HOME Page:
   a. Online Help:
      i. The F1 Key opens the Online Help based on where you are in the program
      ii. The Table of Contents of this Handout contains links to each primary section in the Online Help in addition to the hyperlinks to the supplemental information in this Handout
   b. Technical Support
      i. Online Chat (M-F during normal work hours, Mountain time)
      ii. Online Help Request submittal
   c. RootsMagic Online Community
      i. A public user community, administered by RootsMagic where registered users can post questions and/or answers
      ii. Non-registered users can view all posts
3. Help is also available via:
   a. The private FaceBook Group: "RootsMagic Users", administered by RootsMagic
   b. The GFO RootsMagic SIG meetings and email (rootsmagic@gfo.org)
4. The following general data entry and navigation guidelines apply to many different areas in RootsMagic:
   a. Whenever an "arrow" left, right, up and/or down symbol) is displayed, it's indicating the ability to:
      i. On all sub-menu bars, the "left arrow" is used to navigate "back" to the previous screen
      ii. Data fields that display data and have a "right arrow" at the far right, can be navigated by clicking anywhere in the data field to access the next screen of data, or options
      iii. On PEOPLE Page > PEOPLE Views: You must click on the "left/right arrows" to shift the data displayed up or down one generation
      iv. On PEOPLE Page > SIDEBAR > BOOKMARKS and (RM9 & 10) FAMILY Views: You must click on the "right arrow" on the far right in order to change the PEOPLE View to the selected Person
      v. RM 9 & 10, On PEOPLE Page > SIDEBAR > INFO View: On the PARENTS and SPOUSES Tabs, you can click anywhere in the "Children" row displaying the "right arrow" at the far right to display a list of their children
      vi. ~~On a Person's EDIT PERSON Window: On the PARENTS and SPOUSE rows, you must click on the "down arrow" to view the list of People in the Family that you can switch to without leaving the EDIT PERSON Window~~Some data rows/fields have a "down arrow" indicating the field can be opened up to view a pick list of options, or the text entered in a Note
   b. Pre-RM12, Whenever "number" data fields with a slider input are displayed:
      i. Numbers can be set by moving the slider

   ii. Or, numbers can be directly entered by clicking the number data field and entering it
c. Some data fields without "arrows," when clicked on, display a pre-defined list of choices or tool icons may appear on the far right that will open relevant tools that can assist in deciding what to enter in the data field

5. If you're new to RootsMagic, in addition to the Online Help, you may find the following YouTube videos produced by RootsMagic helpful in learning the basics and newest features:
   a. "Getting Started with RootsMagic 12: Install, Create a Tree, and Add Your Family" (4 min)
   b. "Webinar: What's New in RootsMagic 12" (73 min)
   c. "Getting Started with RootsMagic 11" (70 min)
6. If the RootsMagic program appears to "freeze" and nothing appears to work for some reason, but other programs continue to work as normal on the computer, do the following:
   a. First, check to see if a Popup window is hidden behind the main Program Window:
      i. Click on the RootsMagic program icon in the Windows Task Bar (Dock icon on a Mac). The currently active RootsMagic Window will be brought to the front
   b. If there wasn't a hidden window causing the program to "freeze," terminate the RootsMagic program, which can be done as follows:
      i. For Window PCs:
         1. Press Ctrl, Alt & Delete keys at the same time
         2. Select Task Manager
         3. On the Processes Tab, locate the program and select it
         4. At the bottom right, click on "End Task" to terminate the program
         5. Close Task Manger
         6. Restart RootsMagic
      ii. For Macs:
         1. Press Option, Command & Escape at the same time to open Force Quit, or select it from the menu
         2. Locate the program and select it
         3. Force Quit the program
         4. Close Force Quit
         5. Restart RootsMagic
7. RootsMagic database files must be opened from within the program. Database files will not open by double-clicking on them.
8. When any type of error message is encountered while using RootsMagic, shut down RootsMagic and restart the program. Proceeding without restarting the program risks the possibility of database corruption of follow-on work
9. Pre-RM12, If a RootsMagic database file is moved between Mac and Windows computers, the first thing that should be done after opening the file is to run the TOOLS > DATABASE TOOLS > REBUILD INDEXES tool

MOVING TO ROOTSMAGIC 12

1. All Pre-RM12 Source Templates, including those that came with earlier versions of RootsMagic will be converted to a version 12 database file. As part of the conversion process, all converted Source Templates will have 3 new template data fields that can be edited:

a. Source Name – You can insert a "Source Name" template using the Source Template Language, if you want RootsMagic to auto-name your Sources when initially created
b. Citation Name - You can insert a "Citation Name" template using the Source Template Language, if you want RootsMagic to auto-name your Citations when initially created
c. Keywords – You can enter words or phrases which can be searched for in addition to text in the Source Template Name and Description that were searched in earlier versions

2. Refer to the "UPGRADING FROM EARLIER VERSIONS OF ROOTSMAGIC" section for more detailed information regarding moving from an earlier version

THE ROOTSMAGIC INTERFACE

COMMAND PALETTE

1. The COMMAND PALETTE can be opened by clicking on the artist palette icon in the upper right corner, or pressing the F2 key
2. If the command you plan on searching for requires selecting a Person, the Person must be selected BEFORE selecting and executing the command

HOME PAGE

1. If you see the HOME Page Tab flashing Yellow/Gold, it's indicating a new (free) update has been issued for the version you are using
2. The right arrows in the Current Tree section will take you to the corresponding Page (PEOPLE, PLACES, etc
3. The "Continue with ..." right arrow will take you to the last Person, in the last PEOPLE Page View, that you were on when you last closed the file
4. The "File Properties" right arrow will select and run the File Properties tool, which requires one less click than doing it from the TOOLS Page

PEOPLE PAGE

1. RootsMagic uses the following terminology when referring to People displayed in the various Views on the PEOPLE Page:
   a. Primary Position Person – The key position when viewing the following Views:
      i. PEDIGREE VIEW: The left-most position resulting in the Person's direct ancestors displayed to the right
      ii. RM12 & On, FAMILY VIEW: The Mother/Father position resulting in displaying the Person's children with their most recently viewed spouse and the Couple's Parents
      iii. DESCENDANTS View – The top-row position, from which all descendants (and their spouses) are depicted
      iv. RM12 & On, TREE VIEW: The position that the Tree View is drawn from, which is colored faint yellow
      v. Note: The "Move to Primary Position" function is only accessible by right-clicking over the Selected Person to move them to the Primary Position
   b. Relationship Person – The designated Person to calculate and display the relationship to in the PEOPLE PAGE VIEWS when the "Set Relationships" tool is used
      i. Note: When using the Relationship Calculator to select people, it doesn't change who the current Relationship Person is in the database file
   c. Root Person – The Person RootsMagic goes to when:
      i. The Home Person (house) icon is clicked
      ii. If "Start Person" in SETTINGS Page >GENERAL View it set to "Root Person", the Selected/Primary Person when RootsMagic opens the database file
   d. Selected Person – The currently highlighted person whose information is displayed in the SIDEBAR > INFO View
   e. Starting Person – The Person currently designated as the Primary Person

2. Searching from the PEOPLE Page > SIDEBAR > INDEX View and/or PEOPLE Page PEOPLE List View:
   a. General search format is: “Surname, Given Name”
   b. Anything entered prior to the comma is considered a “Surname” search phrase and anything entered after the comma is considered a “Given Name” search phrase
   c. Partial Name text can be entered, and the text does not have to start with the first letter of the Name
   d. Given Names can be searched without entering anything prior to the comma
   e. The search will commence as characters are entered in the Search Box. The results refine as additional search text is entered
   f. Wildcard characters can be used in PEOPLE Page Searches:
      i. Single character wildcard = “_”
      ii. Any number of characters, including none, wildcard = “%”
      iii. Although intended for searching for People’s names, some of these wildcard characters may also work when searching other lists in RootsMagic, such as Places, Sources, Source Template List and Fact Types
   g. If a Surname search is prefaced with a double quote (“), search results will only include surnames that start with the text entered.
      i. This special character does not work for Given Name searches (text entered after a comma).
      ii. Although intended for searching People’s Surnames, this special character also works when searching the Fact Type List, Sources List, Citations List and Source Template List
   h. Searches on the Couple List View:
      i. Results include Married Surnames
      ii. RM10 & On, You can search for either, or both, Father and Mother names by using an ampersand (&). Anything entered before the symbol is applied to the first column (Father) and anything entered after is applied to the 2nd column (Mother).
   i. If known, you can also enter the complete RIN (Record ID Number) for a specific Person.
3. RM12 & On, TREE View:
   a. You can Zoom In/Out using the +/- icons or the mouse scroll wheel
   b. Whatever the Zoom level is set to when the file is closed is “remembered” the next time the file is opened
4. PEOPLE ~~LIST~~ View:
   a. When customizing the number of columns to show; the maximum number that can be added is 42. Adding a 43rd column will cause the program to crash and the database file will be corrupted and can only be recovered by restoring a Backup File
5. ASSOCIATIONS View:
   a. Associations allow you to define a Non-Family relationship between 2 People in a database
      i. Both People must be entered in the database file
      ii. Unlike Facts, Associations can’t be shared with other People; nor can they be copied or moved
      iii. There are 16 built-in Association Types, which can’t be deleted. You can’t edit the Association name or the names of Role 1 & Role 2 for the built-in Association Types.

iv. RM10 & On, Associations can be transferred to another file via Drag & Drop, if both People are selected. Otherwise, the Association is dropped, similar to Family/Couple Facts when the Spouse is not selected

b. Creating an Association between two People in separate trees within the database file DOES NOT "connect" the trees together into a single tree.
   i. They remain treated as separate trees when using the "Count Trees" tool or selecting "Everyone in a tree" while performing a Drag & Drop, Color Coding, Advanced Searches or defining Group Rules
   ii. The only way to "connect" separate trees is by adding Parent/Child or Spousal Family links to define the family tree relationship
c. Adding an Association:
   i. There are five ways to add an Association to a Person:
      (1) Click on ADD to add a Fact, and then select "Association"
      (2) Hover over a Person, right click and select "Add Association"
      (3) Open the COMMAND PALETTE and select "Add Association"
      (4) From the Person's EDIT PERSON Window:
         (a) Click on the +(Add) icon to add a Fact, then select "Association"
         (b) Hover over the Fact list area, right-click and select "Add New Fact", then select "Association"
   ii. Then select the Association Type and fill in the rest of the data fields
   iii. Data entered in the Note field will be appended to both People's sentences, if Notes are included in the Report Settings
d. Editing an Association:
   i. An existing Association can be edited from either a Person's open EDIT PERSON Window, or from the PEOPLE Page > ASSOCIATIONS View:
      (1) From the EDIT PERSON Window, select the Association and edit it. Edits affecting the Narrative Sentence will be shown in the Sentence area
      (2) From the ASSOCIATIONS View, you can:
         (a) Select and open either, or both, EDIT PERSON Windows by clicking on the corresponding EDIT Button. Then make edits as described above
         (b) Clicking on the EDIT RELATIONSHIP Button should be avoided. It opens the EDIT ASSOCIATIONS Window:
            (i) There's no advantage to using this Button. All Association data can be edited from either Person's EDIT PERSON Window.
            (ii) There are significant limitations:
               1. You can't see the impact of edits reflected in the resulting Narrative Sentences.
               2. Plus, you can't navigate anywhere else while this Window is open
e. Association Sentence Templates can't be customized for individual Associations
f. To view each Associate's resulting sentence generated from their Role's Sentence Template, you must view the Association from each Person's EDIT PERSON Window
g. Association Types:
   i. Association Types can be created, edited and deleted in a manner similar to Fact Types by opening the Association Type List.

ii. The decision to modify an existing Association Type vs creating a new one follows the same decision process outlined for Fact Types
iii. Unlike Fact Types, there aren't individual Association Type settings to select which outputs to include them in. Instead, the inclusion of all or none is made as part of defining the settings for the selected type of output being generated

SEARCH PAGE

1. The Columns of information shown in the BASIC SEARCH and ADVNACED SEARCH Views can be customized:
   a. The maximum number that can be added is 42. Adding a 43rd column will cause the program to crash and corrupt the database file. Once corrupted, the file can only be recovered by restoring a Backup File
   b. RM9 & 10, The columns of information shown in the PERSON SEARCH and PERSON SEARCH - ADVANCED search results are the same ones selected when the PEOPLE LIST View is Customized on the PEOPLE Page
2. BASIC SEARCH View:
   a. Partial names can be entered, and it does not have to start with the first letter
   b. Wildcards and the double quote (") character DO NOT work for name searches
3. ADVANCED SEARCH View:
   a. Some have reported that RootsMagic is "slow" after performing an ADVANCED Search as long as the filtered results are present in the RESULTS area of the SEARCH Page. It's recommended that once finished working with the results, click on the CLEAR RESULTS Button.
   b. Wildcards and the double quote (") character DO NOT work for name searches
   c. Search Rules:
      i. RM9 & 10, The following table contains all the data fields that can be used for ADVANCED SEARCHES based on Criteria and all other functions (like ROOTSMAGIC EXPLORER Mark/Unmark "By Data Fields") that utilize the Boolean Logic/Criteria Filter Window:

Each Fact in the database	Number of children
Any Fact	Number of sets of parents
Association	RM10 & On, Number of shared facts
Color Coding	Number of siblings
Current Age	Number of spouses
Date Edited	Prefix
FamilySearch ID	Record number
Given name(s)	Sex
Given or Nickname	Source (family)
Living flag	Source (general)
Married Surname	Suffix
Nickname	Surname
Note (family)	Surname (Birth or Marr)
Note (general)	

ii. Be aware that searches using the "Date Edited" attribute are based on the Date that is displayed in the lower left of the EDIT PERSON Window. There are many changes to data linked to the Person that do not cause the Person's "Date Edited" date to be updated

iii. RM11 & On, Enhanced Rules-Based Searches:
   (1) This RootsMagic video demonstrates how to use it: "Better Search in RootsMagic 11 (Search Enhancements)"
   (2) Associations can be searched based on specific Association Types

iv. RM10, Rules-Based Searches:
   (1) This RootsMagic blog article provides an example of how to use it: "Memorial Day Preparation: Finding My Ancestors One Cemetery at a Time"
   (2) RM9 & 10, Associations can't be searched or filtered based on specific Association Types, only the presence of an Association can be determined.

v. RM10, A handy application of the Saved Search feature combined with a Rules-Based Group can be set up as follows:

   Note: (RM11 & On) This handy application is not necessary since the ability to create a Group directly from an ADVANCED Search exists

   (1) Decide on a common name to use for both the Saved Search and Group. Consider assigning a simple name that starts with a special character that cause them to sort to the top of the Saved Searches and Group Listings
   (2) From the PEOPLE Page, create a Rules-Based Group, with one Criteria set to: "Unselect Everyone In File"
   (3) From the SEARCH Page > PERSON SEARCH - ADVANCED, create a Saved Search with one Rule: "Group - Select a Group of People" and set it to the Group just created
   (4) This can now be used to:
      (a) Manually add People to the Group, like People listed on a Census
      (b) Use the "Saved Searches" option found under the MARK/UNMARK Buttons on the ROOTSMAGIC EXPLORER Window to select the People defined in the associated Group
      (c) Perform the operation that opened the ROOTSMAGIC EXPLORER Window to MARK/UNMARK the desired People, like: "Copy Selected Fact"
      (d) After completing the operation involving that set of People, "Refreshing" the Group, will "Unselect" everyone that had been manually added to the Group.
      (e) The Group is then ready for the next set of People to be manually added in support of the next operation

4. WEBSEARCH View:
   a. The list of People in the database can be searched, similar to the PEOPLE Page > SIDEBAR > INDEX View, using the format of: Surname, comma, First Name.
   b. Partial names can be used too
   c. Wildcards and the double quote (") character work for name searches
   d. RM11 & On, The EDIT Button opens the EDIT PERSON Window of the Person selected in the lower list of People, which may not be the Person the WebSearch was performed on, if the data was pre-loaded with the currently selected Person on the PEOPLE Page

5. FIND EVERYWHERE View:
    a. When searching for an item that may appear multiple times, possibly in different areas of the database, the hyperlink in the search results will open the location where the data resides so it can be edited. Any edits will be reflected everywhere that the data is used. To see where the data is being used, view the list of links by clicking on the Used field for the item.

TOOLS PAGE

1. For each tool with a red "Important" Warning, you should perform a database Backup prior to using the tool in case the results are not as expected.
2. FACT TOOLS:
    a. When using the "Change Fact Type for Everyone" tool:
        i. I recommend first checking all of the Fact Type Property settings, including the Sentence Template, for both the "before" and "after" Fact Types
            (1) Data entered in data fields not active in the "new" Fact Type is still in the database, just not displayed
            (2) Data fields not active in the "old" Fact Type that are active in the "new" Fact Type will be blank until populated
        ii. Any Property setting differences may require follow-on cleanup work in every affected Fact and/or the Fact Type Sentence Template after changing Fact Types.
            (1) If this a possibility, consider creating a Group containing everyone with the original Fact Type prior to changing it.
            (2) This would become a "To-Do list" of People to review after changing to the new Fact Type to make sure all newly active data fields contain the needed information

SETTINGS PAGE

1. The SETTINGS Views:
    a. Program-Level settings are set in: PROGRAM, FOLDERS, & DISPLAY Settings Views
    b. File-Level settings are set in: GENERAL, PREPARER, WEBHINT and LDS Settings Views
2. The following are my recommendations for key Settings on each of the SETTINGS Page:
    a. PROGRAM Settings View:
        i. Ask for Backup (when exiting RootsMagic) – YES
        ii. Add date to Backup – (RM12 & On) DATE AND TIME/(Pre-RM12) YES
        iii. Check for duplicates (when adding People) – YES
        iv. County Check – YES (unless you've decided to always use Current Day locations)
        v. Date entry – USE SYSTEM SETTINGS
    b. FOLDERS Settings View:
        i. Data Folder
            1. This tells RootsMagic which folder to initially open/look in when Opening, or Creating a database file.
            2. This location should be set prior to using TreeShare with Ancestry or Restoring a Backup. This will enable RootsMagic 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.

ii. Backup Folder – Set to its own folder location to keep Backup Files separate from all other file types
iii. 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").
    1. All Media Files added after a Media Folder location is specified in the SETTINGS Page > FOLDERS Settings View will be "relative" to the Media Folder location, if the Media File is located in the folder or a subfolder. Therefore, it's 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 RootsMagic database file.
    2. Changing the Media Folder location after already having linked Media Files may result in broken links that must be fixed after the change using the "Fix Broken Links" tool (TOOLS Page).
iv. GEDCOM and Report Folders – When saving these types of files, these locations will be the default location displayed when prompted to select where you want a new file saved
v. Help Folder
    1. Leave blank to ensure you always view the latest Help information available online unless you have a unique circumstance where internet access is limited.
    2. If you do decide to download the Online Help, enter the location here AFTER downloading and extracting the Help data to your desired folder location on your computer.

c. GENERAL Settings View:
    i. Number to display – Recommend selecting to RIN
        1. This aids in quickly determining whether you have a duplicate entry for a person, or a linking issue.
        2. Knowing the RIN of key people allows you to search for them by entering their RIN
        3. When running reports that you don't' want the RIN to be included, return to this setting and temporarily turn it off
    ii. Database Color – Recommend selecting a different color for each database file/groups of files, especially if work is done with more than 1 open at a time.
        1. Reminder: You must switch Pages to reflect the newly selected color.
    iii. Problem Alerts – YES
    iv. Problem Options – Review to make sure they meet your expectations for Alerts
d. DISPLAY Settings View:
    i. RM12 & On, Background Color – This color selection is used in the PEDIGREE, FAMILY and TREE Views
    ii. Font scaling:
        1) Take note of the current setting prior to making a change so that it can be reset if the new setting isn't desired
        2) This setting accepts values from 70% to 150%
        3) You must restart RootsMagic to ensure all fonts are set to the new settings.

e. PREPARER Settings View:
   i. 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. If any of this excluded information is desired to be included as report Preparer Data, the information will need to be added to one of the data fields that is included.
f. WEBHINT Settings View:
   i. Ancestry:
      4) For Ancestry WebHints to work, you must be logged in and the file linked to an Ancestry tree via RootsMagic Treeshare
      5) The "Clear on Accept" setting controls how TreeShare works, not WebHints.
         (a) When selected, and the "Only Show Changed People" checkbox is selected in the TreeShare Window, after the highlighted Person's changes are accepted in TreeShare, the Person is removed from the list of People displayed and the new highlighted Person becomes the first Person in the list
         (b) It's recommended that this combination of settings only be used when working the TreeShare list from top to bottom to avoid having to scroll through the list to find the next Person after each set of changes are accepted.
      6) Warning: DO NOT select "Disconnect from Ancestry Tree" unless it's desired to permanently sever the Treeshare link between the Ancestry Tree and the database file. THIS ACTION CAN'T BE UNDONE.
         (a) If done in error, a recent Backup File from when Treeshare was still connected to the Ancestry tree must be Restored, or a new Treeshare connection must be created with either a new Ancestry Tree or a new RootsMagic file. An existing Ancestry Tree can't be "re-connected" to an existing RootsMagic file
      7) Rather than "Disconnect from Ancestry Tree", use the "Reset Treeshare" function to force RootsMagic to rebuild the TreeShare links between the connected Ancestry Tree and database file.
   ii. FamilySearch:
      1) For FamilySearch WebHints to work, you must be logged into FamilySearch
      2) FamilySearch WebHints are only provided for People that have been Matched to their corresponding Person in the FamilySearch Family Tree
   iii. FindMyPast:
      1) Evaluating and dispositioning FindMyPast WebHints is a completely manual process performed external to RootsMagic. Data from any Confirmed WebHints must be manually entered into RootsMagic.
   iv. MyHeritage:
      1) Evaluating and dispositioning MyHeritage WebHints is a completely manual process performed external to RootsMagic. Data from any Confirmed WebHints must be manually entered into RootsMagic.
g. LDS Settings View:
   i. No recommendations

DATABASES

GENERAL INFORMATION:

1. The database engine used by RootsMagic is SQLite (www.sqlite.org). SQLite does not support multiple users. Therefore, it's important to only have one computer, with one computer program, accessing the database file at a time
2. **Warning: Tech Support recommends not using ANY file syncing/sharing programs (i.e. Onedrive, Dropbox, Google Drive) with database files (rmtree & rmgc) as they can cause database access errors.** The worst-case scenario is the possibility they can corrupt the database 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 RootsMagic 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:
      i. FILE Page > TOOLS (also found on TOOLS Page); then perform each of the Database Tools (Test Integrity, Rebuild Indexes, Clean Phantom Records and Compact), the order is not important.
   b. If running the database tools does not fix the issue, the next step is to Drag & Drop the entire database contents into a new, empty, file. Don't delete the original file because it may be needed as a reference to manually migrate data that did not transfer (see Databases > Dragging and Dropping People)
   c. If Drag & Drop doesn't resolve the issue, the only other option is to Restore the last Backup File that doesn't demonstrate the symptoms being experienced
4. File extensions:
   a. ADP & ADP-journal– Interim files created by RootsMagic when the TreeShare Window is open. These files are normally deleted by the program when the TreeShare Window is closed. They're left behind when RootsMagic encounters a problem or the process is cancelled while the TreeShare Window is open. These file types can be deleted.
   b. csv – Comma-Separated Values file (PUBLISH output format)
   c. docx – Microsoft Word file (PUBLISH Page output format)
   d. DUP & DUP-journal – Interim files created by RootsMagic when identifying duplicate entries and/or file compare. These files are normally deleted by the program when complete. They're left behind when RootsMagic encounters a problem or the process was cancelled. These file types can be deleted
   e. ged – GEDCOM File (used to transfer data between genealogy sites/software)
   f. lst – RootsMagic list file (text file created when a GEDCOM File is imported into RootsMagic. It will list any issues encountered during the import process)
   g. pdf – Adobe portable document format file (PUBLISH Page output format)
   h. rmbackup – RM8 & On Backup File (compressed .zip File)
   i. rmgb – RM7 Backup File (compressed .zip File)
   j. rmgc – RM7 database file (also RM8 & On files exported to Dropbox for use by RootsMagic IOS App)

k. rmtree – RM8 & On database file
l. rmtree-journal – Interim journal file created by RootsMagic. File is normally created & quickly deleted multiple times while performing tasks that require progressing through a lot of data in the file, such as TreeShare and building Thumbnail images. If left behind due to a task not running to completion, it may prevent follow-on RootsMagic tasks from running error free. This file type should be deleted.
m. rmst – RootsMagic Custom Source Template file (Custom Source templates can be imported/exported from the Source Template List Window)
n. svg – Scalable vector graphic file ((PUBLISH Page output format)
o. txt – Text file (PUBLISH Page output format)
p. xlsx – Microsoft Excel file (PUBLISH Page output format)

5. A database file deleted from within RootsMagic IS NOT placed in the Recycle Bin/Trash Can, it just permanently disappears.
   a. Before deleting, archive (using the Backup function, with media if desired) a copy if you might want to resurrect/use the file in the future.

CREATING A NEW DATABASE:

1. Before creating the 1st new RootsMagic file in the program, my recommendation is to first go to SETTINGS Page > FOLDERS Settings View 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 the database file and Media Files added later.
2. Create New, Empty, File:
   a. After creating a new file, do the following:
      ii. Go to the SETTINGS Page and review all the File specific settings in the GENERAL, PREPARER, WEBHINTS & LDS Settings 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 Databases > Importing Data) apply.
   b. Pre RM12, Importing data from post-2014 Family Tree Maker (FTM) software files to RootsMagic can't be done directly due to FTM's proprietary file format. RootsMagic Tech Support recommends trying all of the following and evaluate which process works best with your specific set of data:
      i. Sync FTM data to an Ancestry Tree and then download Ancestry Tree data (including media) to RootsMagic via Treeshare function
      ii. Export FTM data to a GEDCOM File and import into RootsMagic
      iii. Export FTM data to FTM v2014.0 or earlier and import into RootsMagic (Per Tech Support, the RM7 import FTM 2014 tool works better than the RM8 & On FTM 2014 import tool, this will be fixed in a future update)
      iv. The results of the above options are evaluated, in addition to looking at the "File Properties" and "Enhanced Properties" on the HOME Page, you may want to use the FILE Page > TOOLS > COMPARE tool to help identify differences between the imported files.

c. Pre-RM12, Direct import of Legacy software files and pre-2008 FTM files to RootsMagic can only be accomplished using the 32-bit version of RootsMagic installed on a Windows PC (Pre-RM9 is only available in 32-bit, but RM9 & On are available in both 32- & 64-bit Windows versions). A direct import will have better results than using a GEDCOM File due to the improved mapping of data types used in the import tool.
d. After creating a new file by importing data or downloading from an Online Tree, do the following
    i. Go to the HOME Page and review the "File Properties" to confirm what was imported is what was expected
    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 Settings Views
    iii. Be aware that imported/downloaded data may result in:
        (1) New Custom Facts being created for Fact Types that don't match existing RootsMagic Fact Types
        (2) Sources and Citations created using the Free-form Template, rather than any preferred Source Template type
        (3) Place Names and Place Details that do not conform to your naming and/or structure conventions.
    iv. Depending on the intended use of the new file, the imported/downloaded information may need to be cleaned up to meet your standards/conventions.
e. 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 it's needed in the future to determine whether some erroneous information originated in the original imported data, or was added later. It can also help to figure out if data was "dropped" during the import process because RootsMagic couldn't determine what the data was and it wasn't noticed that data was missing 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" and the common Operating System folder and subfolder locations for documents (i.e. Documents folder in Windows), (RM12 & On) along with the Desktop. The list will contain RM8 & On (.rmtree) and RM7 (rmgc) files in these locations.
    a. If looking for a "missing file" it's best to use the Operating System File Explorer/Search utilities and wildcard characters to try to locate where the file is located
3. RM12 & On, You can view key information about each file to ensure you are selecting the correct one. Be aware of the following when viewing version information:
    a. Empty files (containing no People) are listed as "Empty File" and don't indicate which version they were created in
    b. Files created in RM 6 & RM7 are listed as Version 6 files
    c. Files created in RM8 files by importing Pre-RM8 files are listed as being the version that was imported, even though they are now RM8 files

WORKING WITH MULTIPLE DATABASES

1. Up to 4 different files can be open at the same time (only 1 in the free version).
   a. If you want to view information in different parts of a single database file at the same time, other than viewing individual EDIT PERSON Windows; you must make a "Reference" Copy of the database file and assign a different name to it. Make sure you only make changes in the "Master" File, not the "Reference" Copy. I recommend also giving the "Reference" Copy a unique "Database Color" that reminds you that it's not the "Master" File for making changes (SETTINGS Page > GENERAL Settings View).
2. If you have RootsMagic set to open the last file used (SETTINGS Page > PROGRAM Settings View), when working with multiple databases, close the database you 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 all the other open files, the behavior of the 1st open file transfers to the next file opened in the session that is still open
   d. Currently, there are a few Popup Windows that appear centered in the 1st File Window, even if you're working in the 2nd to 4th file. Therefore, it's 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 can't see/click the buttons on the Popup Window, requiring you to terminate RootsMagic via the Operating System.
   e. Popups I've 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 WebHints list for a Person

DRAGGING AND DROPPING PEOPLE

1. Drag & Drop data transfer limitations:
   a. 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
   b. Pre-RM10, This function is actually an internal GEDCOM export and GEDCOM import of the selected data between 2 RootsMagic database files.
      i. All limitations and cautions regarding using GEDCOM to exchange RootsMagic data apply to Drag & Drop too (see Databases > Importing Data).
      ii. Reminder: Changes you've made in the past regarding Fact Types to export/not export into a GEDCOM File should be reviewed to confirm which facts you want transferred to the destination database file.
      iii. Unlike an actual import of a GEDCOM File, you're 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.
   c. RM10 & On, This function is a direct database transfer of RootsMagic data, bypassing the GEDCOM limitations that existed in earlier versions.
      i. All tagged data is transferred, except:

(1) Family Facts involving a Spouse that is not also being transferred.
(2) Shared Facts when the Person with the original Fact is not also being transferred.
(3) When the matching Person is not being transferred, DNA Match data entered on the Person's EDIT PERSON Window DNA Matches Page,
(4) The latest identified limitations of performing a Drag & Drop operation can be found in this RootsMagic Community: "RM 10 Drag and Drop Findings" post

ii. If retaining the original RINs in a new, empty, file is desired; a GEDCOM File export/import of the data must be performed with the associated checkbox selected.
iii. RM10 & On, RootsMagic DOES NOT check for duplicate People beyond the Person being dragged and the Person they are Dropped onto (Pre-RM10 limitations can be found in GEDCOM Import/Export section).
(1) So, after the new data is "dropped" into the file and more than one Person is involved in the operation:
(a) Check for duplicate People:
(b) When duplicate People are found, each Person must be Merged and reviewed for:
a. Duplicate/similar Facts with different information
b. Duplicate/similar Source Citations for the same Fact

2. New Custom Facts are created for Fact Types that do not match existing Fact Types.
3. If the Color Coding Set labels from the source file are desired in the destination file, use the FILE Page > IMPORT DATA > IMPORT LISTS function to import them after the Drag & Drop has been completed.
4. Add Parent, Spouse and/or Child links, where appropriate, between the newly added People and those already in the database.
5. Can be used to add People to your "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, etc).

DATABASE TOOLS

1. Sometimes the Birth & Death dates listed in the PEOPLE Page > SIDEBAR > INDEX View are not automatically updated when a Person's corresponding Facts are edited. The "Rebuild Indexes" Database Tool will re-sync the INDEX View dates with the current dates for each event.
2. Sometimes you'll notice a completely empty entry for a Person (no RIN displayed, but otherwise looks like it's an existing Person record in the database) in a PEOPLE Page View. These are referred to as "Phantom Records." The "Clean Phantom Records" Database Tool will remove these non-existent entries from the database
3. There's no recommended frequency to run the database tools. The decision of whether to wait until you notice a discrepancy, do it once a year, a month, a week or after significant work has been done is left is up to you. I tend to wait until I experience an issue
4. When you decide to run a Database Tool, I recommend that you run all 4 Database Tools since each tool runs very quickly.
5. The order in which the Database Tools are run does not matter
6. The Database Tools can be accessed from the FILE and the TOOLS Pages

7. If running the Test Integrity/Integrity Check tool doesn't result in an "OK," run the database tools a 2nd time. If the result is still not "OK" the database file has an internal integrity issue that can't be corrected. The only option is to locate and Restore a Backup File that does pass the Test Integrity/Integrity Check tool with a result of "OK."

BACKING UP A DATABASE:

1. General Info:
   a. Backups can be initiated 3 different ways:
      i. 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 (SETTINGS Page > PROGRAM Settings View).
         (1) Reminder: Closing a file from the FILE Page will not trigger the Backup Popup Window to appear regardless of this setting.
      ii. Selecting FILE Page > BACKUP function
      iii. Selecting TOOLS Page > BACKUP DATABASE Button
   b. Can be set to include associated Media Files. However, this consumes a significant amount of storage space and adds a considerable amount of time to perform the 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 into 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 prior to creating the Backup File, the corresponding Media Files with broken links will not be backed up
   c. Regardless of what's selected, Media Files not linked to anything and those with broken links WILL NOT be backed up
   d. 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
   e. 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've entered/changed data you'd 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)
   c. Prior to using any of the following Tools found on the TOOLS Page:
      i. Rearrange children or spouses across the whole database, Delete everyone in a group, Change fact type for everyone, Remove a fact type from everyone, (RM10 & On) Add a fact to everyone in a group, and DataClean

3. RM12 & On, You have the ability under SETTINGS > PROGRAM View to have RootsMagic record both the day and time of each Backup as part of the filename.
4. Pre-RM12, plus RM12 & On users that have not set "Add date to backup " to "Date and time" on the SETTINGS Page, if creating a second (or more) Backup in the same day, add a differentiator (dash number or a, b, c…) at the end of the filename to make it unique to prevent overwriting earlier Backups, and also order the files sequentially when sorted alphabetically by filename
    a. If you've made a Backup earlier in the same day and have RootsMagic set up to prompt you for a Backup prior to closing the program, RootsMagic asks if you want to overwrite the existing Backup:
        i. If you respond "Yes," the earlier Backup is overwritten
        ii. If you respond "No," the program closes without making a Backup
        iii. The only way to avoid this situation is to make the final Backup before closing the program (FILE Page > BACKUP) and changing the filename.

RESTORING A BACKUP

1. General Info:
    a. If you have an RM7 Backup File and don't have the corresponding database file, you can migrate the Backup File data into later versions of RootsMagic by using the Restore function.
    b. When you Restore a Backup File, the Restored File will have the filename of the original database file and can't be changed prior to restoring it. **If you don't want your current version of the database file to be overwritten, you must either Restore the Backup File to a different folder, or move and/or rename your current database file prior to restoring the Backup File.**
    c. If your Backup File includes Media Files, all linked Media Files will be placed in a single folder created in the location where the File is Restored to and any Media File organization structure you're using will be lost.

COMPARING DATABASES

1. General Info:
    a. The % Match value is the result of comparing "all" information in the database about the Person, not just what is displayed in the Compare Files Window. A match of 98% or more should be considered the same.
    b. The EDIT PERSON Window can be opened for the selected Person in the "Primary" File (the open file from which the File Compare function is initiated). The EDIT PERSON Window can't be opened for the Person's record in the other file being used for comparison.
    c. When selecting Notes, Sources or Media, whichever file you click on becomes the "source" for any selected items to be moved to the other file.
    d. For Sources, you can only view the full Source Citation from one file at a time
    e. When a Person is only present in one file, a "Copy To File" Button appears to allow copying of all of the Person's information to the other file. However, the copied Person will not be linked to anyone or contain any Family Facts (which depend on linking to other People). Any required linking or addition of Family Facts must be done as a separate action.
2. Given the limitations on editing People, viewing Source Citations and Media Files while using the File Compare function, if you expect to be moving a lot of information, or copying People

between files using the Compare function, consider taking notes on things that need to be done afterwards. Some options are:

a. Take screen shots
b. Create an Individual List Report with all "Information to include" & "Other" options unchecked and save it to a Word or Excel File so you can search and insert notes, etc and things to do after exiting the Compare function

IMPORTING LISTS

1. RM10 & On, You can select individual items within a List Type to import
2. Pre-RM10, Only entire Lists can be imported.
3. When importing a Fact Type List, RootsMagic imports all Fact Types, except the default 64 built-in Fact Types included in every file.
   a. Unlike the default 64, all other Fact Types will be imported preserving all the settings as they are in the Source File. This includes whether or not the Fact Type will be exported to a GEDCOM File and/or included in the other various outputs from the database
   b. If a Fact Type List is imported into a file that already has data in it, duplicate Fact Types may be created that will need to be cleaned up.
4. RM10 & On, When importing an Association Type List, RootsMagic imports all selected Association Types, except the default 16 built-in Association Types included in every file. The same caveats for preserving settings and duplicates also apply to Association Types.

   Note: If you have individual Custom Source Template Files (*.rmst) that were exported from a RootsMagic file, these individual files are imported from the Source Template List Window (see Working with Sources > Source Templates in Online Help).

5. When importing a list of (Custom) Source Templates from a database file, if they already exist in the destination file, they will be duplicated.
6. RM10 & On, Lists of Addresses can be imported.
7. Importing Color Code Sets will import the labels for each Color Code Set and corresponding Color labels.

IMPORTING DATA (via GEDCOM)

1. General information:
   a. RootsMagic currently supports v5.5.1 GEDCOM Files
   b. GEDCOM Files are text files that (Pre-v7.0) don't contain media images or files. Only the drive, path and filenames pointing to where linked Media Files reside can be included
   c. For reference, the GEDCOM Website contains the specification for each version along with a list of "Validators"
   d. For Reference, the Family Tree Analyzer tool (Windows only) can be used to look at and analyze the data in GEDCOM Files
2. Pre-RM10, The Drag & Drop function is actually an internal GEDCOM export and GEDCOM import of the selected data between 2 RootsMagic database files.
   a. 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. For reference, "SQLite Tools for RootsMagic: GEDCOM & DnD transfer losses #gedcom" is a technical post discussing what transfers, what is lost and other issues that occur when transferring data between RootsMagic database files via GEDCOM and/or (Pre-RM10) Drag & Drop
4. When importing data using a GEDCOM File:
    a. If you elect to add a GEDCOM Import Source Citation to the 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 Name will be the same as the Source Name and applied as a "Reuse" of the Citation (if the Citation is edited, all uses of it 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.
    c. When a group of People are brought directly into an existing file via GEDCOM import (or Pre-RM10 Drag & Drop):
        i. RootsMagic DOES NOT check for duplicate People. So, after the new data is inserted:
            (1) Check for duplicate People
            (2) When duplicate People are found, each Person must be Merged and reviewed for:
                (a) Duplicate/similar Facts with different information
                (b) Duplicate/similar Source Citations for the same Fact (note that most imported Source Citations not added via Drag & Drop will be imported using the Free-form Source Template)
        ii. New Custom Fact Types are created for Facts that don't match existing RootsMagic Fact Types
        iii. Sources and Citations are created using the Free-form Template, rather than your preferred Source Template type(s).
        iv. Place Names and Place Details will reflect what was in the GEDCOM File and may not conform to your naming and/or structure conventions.
        v. Add Parent, Spouse and/or Child links where appropriate between the newly added People and those already in the database.
    d. Check for Broken Media Links in imported data (Media Files are not included in a GEDCOM File, only drive, path and filename location information).
    e. Depending on your intended use, you may need to clean up the imported information to meet your standards/conventions.
    f. Consider whether you want to make a Backup of your database file to archive a snapshot of what it looked like immediately after your importation of this new set of cleaned up data.

EXPORTING DATA (via GEDCOM)

1. General information:
   a. RM9 & On, GEDCOM Files exported from RootsMagic using the "Extra Details (RM specific)" setting contain all established TreeShare and/or FamilySearch ID mapping established in the Source database. When imported back into a RootsMagic file, this mapping is preserved
      i. Pre-RM10, This includes transfer via Drag & Drop
      ii. When transferring TreeShare ID mapping from one file to another that's been mapped to a different Ancestry tree using TreeShare, there'll be mapping issues. To correct these issues, the "Reset TreeShare" function on the SETTINGS Page > WEBHINTS View must be used
2. Pre-RM10, 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 in order to include them
3. When exporting data to a GEDCOM File, do the following first:
   a. If Living People need to be privatized, run an Advanced Search to identify all People currently identified as living in the Group you intend on Exporting first:
      i. SEARCH Page > ADVANCED Search View
      ii. Click FIND Button
      iii. RM11 & On, Add Rule: "Individual Attribute," set "Living" to "Is True", and then click on "OK"
      iv. Pre-RM11, Add Rule: "Criteria," "Edit Criteria," set "Select field" to "Living Flag" and "Is True" in the Logic box, and then click on "OK"
      v. The result is a list of all the current People that will be privatized. If you see People that shouldn't be privatized, select them and click on EDIT Button to make the necessary corrections
      vi. Repeat until review is complete
   b. The initial default setting for each newly created RootsMagic file is set to export all built-in (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, and open Fact Type List
      ii. Note where the "Include GEDCOM: Yes/No" information is located on the Fact Type screen
      iii. Scroll through the Fact Type List to confirm the desired Fact Types you want to include are set to "Yes" and any Fact Types you don't 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 Key

      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 you're exporting a subset of People in your database and you haven't created a Group yet, you may want to create a new Group prior to starting the process to export the GEDCOM File

   i. Reminder: Couple/Family Facts will only be included in the export if both People are included in the export

d. If the data you want to export contains links to Media Files, check for & fix, broken media links (TOOLS Page > MEDIA TOOLS > Fix broken links) first.
e. If you want the colors assigned for each Color Code Set to be included in the export, you must ensure that "Extra details (RM specific)" is selected on the GEDCOM Export Options Window. Only the color assignments are included, the Color Code Set and Color labels are not included in the resulting GEDCOM File.
f. Now you're ready to export the GEDCOM File
g. After exporting data to a GEDCOM File:
   i. If some Fact Types were set to not export, decide whether to reset them to "Yes" now, or wait until the next time you perform a GEDCOM Export (or Pre-RM10, Drag & Drop) operation to review all Fact Type export settings.
   ii. RM9 & On, If you exported color coded data and want to also transfer the Color Code Sets and Color Labels from the source file, you can import the Color Code List from the Source RootsMagic File (FILE > IMPORT DATA > IMPORT LISTS and select the desired Color Code Sets) to another RootsMagic file, after the GEDCOM File is imported

WORKING WITH PEOPLE

GENERAL INFORMATION:

1. After importing data from other sources, you may discover multiple "Primary Name" Facts for a Person, when there should only be one:
   a. To reset the Primary Name, create a new, temporary, Alternate Name Fact and designate it (temporarily) as the Primary Name. This will reset all other Primary Names to Alternate Name Facts. Then, select the desired "real" Primary Name and finally, delete the temporary Alternate Name Fact that was created.
2. Sometimes you'll discover a Person has an unexpected "Unknown Spouse" listed in the DESCENDANT View. This is not a record for a Person in the database. It's an indication of a Family/Couple relationship created either by linking a Child to just 1 parent or a Family Fact that requires a Couple (like Marriage) and only 1 Person is associated with it.
   a. If one of these relationship situations actually does exist in the family, then there is nothing to "fix"
   b. There are situations that can occur where the original cause was corrected, but the Family/Couple with an unidentified Spouse still exists in the database. These can be corrected by following the Resolving "linking issues" steps listed in the Problem Solving Information section at the end of this document.
   c. If caused by data imported from another source, when possible, it's best to return to the source, correct the problem there and then re-import the information
3. Information on dealing with sensitive Family situations such as transgender Relatives can be found here:
   a. Yvette Hoitink's "Ask Yvette – How to Record Transgender People?" Blog
   b. Stewart Traiman's "Six Generations" website
4. General information on what and where to enter People's names can be found here:
   a. Tamura Jones blog: "Modern Software Experience – Genealogy Name Basics"
5. Naming convention information for different areas of the world can be found here:
   a. Personal Names – "Wikipedia: Personal Name"
   b. Dit Names – "Wikipedia: Dit Names"
   c. Dutch Farm Names - "Yvette Hoitink Blog: Farm Names"
   d. Scandinavian Family Names – "Wikipedia: Scandinavian Family Name Etymology"
   e. Patronymic Names – "Wikipedia: Patronymic [Names]" and "FamilySearch: How do I enter Scandinavian names into Family Tree?"

ADDING PEOPLE

1. Selecting "Add an Individual" adds a Person to the database with no relationship to anyone else. The other Add options (Spouse, Child & Parents) establish the selected relationship to either a new, or Existing Person.
2. It's a best practice to add People from a PEOPLE Page View that ensures you're establishing the correct relationship links:
   a. When known, "Add Parents" to a Child as a Couple, rather than adding Mother and Father separately.

i. **Caution:** If the Couple has already been established in the database, don't use the individual "Add Father" and "Add Mother" Buttons on the PEDIGREE View to add additional Children to the Couple. Doing so will result in the Child being assigned to its own unique set of Parents/Couple (even though they may be the same 2 People), and need to Resolve "linking issues" to properly link all the Children to the same Family/Couple in the database.

b. When adding Children to a Couple already established in the database, the best practice is to add them from the FAMILY, ~~or~~ DESCENDANT or (RM12 & On) TREE View, where you can ensure you're linking the Child to the correct Existing Couple and immediately see the result

3. People can be added by:
   a. Clicking on "ADD" on any PEOPLE Page View and then selecting the type of relationship being added
   b. Clicking on the "+ Add Child, Spouse, Mother or Father" Boxes found on the PEDIGREE and FAMILY Views
   c. Hover over a Person and right-clicking
   d. Keyboard shortcuts
   e. Click on COMMAND PALETTE Icon
   f. From the selected Person's PEOPLE Page > SIDEBAR > (RM11 & On) LIFE SUMMARY/(RM8 to 10) INFO View
4. The minimum data that must be entered for a new Person to be added to the database is:
   a. Something entered in either the Given or Surname data fields. All other information is optional
   b. If desired, you can create a record for a Person with no name by:
      i. Step 1: Create a Person with a Temporary Name entry
      ii. Step 2: In the newly created Person's EDIT PERSON Window, delete their Temporary Name. I highly recommended that the RIN (Record ID Number) display be turned on (SETTINGS Page > GENERAL Settings View) to aid in differentiating multiple records with no name entered
5. If 2 People are siblings, but their parents are unknown, you can connect them by creating a record for their Father with the same Surname as a placeholder. Once created, link the siblings to the Father to establish their relationship to each other

EDITING A PERSON

1. You may want to position the EDIT PERSON Window so that part of it is outside the area of the main program Window so that it can be clicked on it to bring it to the front should it get hidden
2. You can have up to 3 open EDIT PERSON Windows (1 in the free version) and still switch between Pages and database file Windows.
3. To close an EDIT PERSON Window, click on the "X" (Windows) in the corner
4. You can change the Father & Mother labels to be displayed when viewing the Couple's Family by editing the labels to be used on the Parent's "Spouse row" in their EDIT PERSON Window.
5. You can define the Parent's relationship to their Children by editing the type of relationship on the Child's "Parents row" in their EDIT PERSON Window
6. Deleting linked/attached information (Source Citations, Media, etc) from a Person, or a Person's Fact, does not delete the information from the database. Only the link is deleted. To

permanently delete the data, it must be done from the corresponding Page (SOURCES, MEDIA, etc)

UNLINKING PEOPLE

1. Unlinking can be performed from any PEOPLE Page View. However, it's a best practice to perform unlinking from a View that ensures both you and RootsMagic clearly understand which relationship link you are about to unlink.
   a. The best View to use to understand "All" of the family relationships is the DESCENDANTS View and the best View to use for unlinking people in a family is the FAMILY or (RM12 & On) TREE View, where Children are shown with only 1 set of Parents and when a Parent has multiple Spouses, which one is part of the Family/Couple involved in the unlinking.
2. When a spouse is unlinked, if the Couple had children linked to them, the children remain linked to the spouse and their other parent will then be identified as "Unknown Spouse."

DELETING PEOPLE

1. In most cases, deleting a Person is not the way to correct a problem you're trying to fix. Prior to proceeding with a deletion ask yourself:
   a. Should I Manually Merge the People instead?
   b. Should I leave this Person (or Family/Couple) floating in my database file as a separate tree to preserve what I already know about them?
   c. If the answer to both questions is no, then it's time to delete the Person
2. Reminder: When a Person is deleted:
   a. Any links the deleted Person (or Family/Couple) had with other People in the database are also deleted. This includes:
      i. Links to the Person's Parents, Spouses and their Children
      ii. Association links to other People in the database
      iii. Shared Facts, shared with other People in the database
      iv. DNA Match data they have with other People in the database
      v. Links to Source Citations, Media, Tasks, etc are deleted
   b. Reminder: Even though links to Source Citations, Media, Tasks, etc are deleted, the actual Source Citations, Media, Tasks, etc ARE NOT DELETED from the database. They are just used in fewer places in the database.
      i. RM10 & On, After deleting a Person, you can review the reported number of data types that are "Unused" (TOOLS Page > (RM12 & On) FILE PROPERTIES/(RM10 & 11) ENHANCED PROPERTIES LIST) and decide if you want to select and delete them as well.

ROOTSMAGIC EXPLORER

1. The ROOTSMAGIC EXPLORER Window can be utilized when using the following functions:
   a. Creating and editing "Simple" Groups
   b. One of several options to apply Color Coding
   c. RM10 & On, Copying a Fact
   d. Selecting People from list to include in some PUBLISH Page > REPORTS AND CHARTS
2. The MARK/UNMARK capability allows very creative ways of "Selecting" a set of People.
   a. There is no limit to the number of MARK/UNMARK operations that can be performed to create the final list of People you want to "Select"

b. However, if you perform multiple MARK/UNMARK operations, they can't be saved to be repeated again later. Therefore, it's important to record each step, and the order the steps are performed, in order to be able to recreate the same selection criteria in the future:
   i. RM10 & On, As an alternative, you can create and save a "Rules-Based" ADVANCED SEARCH, which can record multiple Select/Unselect (MARK/UNMARK) operations that can be reproduced in the future. The saved search can then be used to Mark the People using the "Saved Search" Mark option in the ROOTSMAGIC EXPLORER Window
      (1) RM11 & On, Reminder: You can also save a Rules-Based ADVANCED SEARCH as a Group
   ii. RM10 & On, As another alternative, you can create a "Rules-Based" Group that can be refreshed. A Rule can be created for each MARK/UNMARK operation, applied in the desired order.

c. RM9, If you plan to select People using a single application of the "By Data Fields" option, it's recommended that you create a Group using the Saved Criteria option instead. This will allow you to quickly refresh the group membership in the future.

GROUPS

1. **Caution:** Be careful when naming Groups. RootsMagic will allow 2 different Groups with the same name to be created
2. Group membership is not updated as information about People is changed and saved, membership only gets updated when each Rules-Based Group is "Refreshed"
3. When People that are members of different Groups are "Merged," only the Group membership of the Primary Person is retained. All Group memberships of the Person that ends up being removed is not passed on to the surviving Primary Person's record.
4. RM10 & On, This RootsMagic blog article: "Memorial Day Preparations: Buried Twice?" provides an example of how to use Rules-Based Groups
5. Using Rules-Based Groups based on Custom Facts is a powerful way to define collections of People for work, reporting, etc. Custom Facts can be privatized to prevent them from being included in reports, etc
6. When large Groups (>1,000 People) are created using "Rules" and the Group is used to filter the list of People shown in the PEOPLE List View or SIDEBAR > INDEX View, the performance of RootsMagic is known to slow down its response time for other actions.

COLOR CODING PEOPLE

1. Consider reserving one of the 10 Color Sets for "Temporary" color coding in case the need to color code while performing a specific task you are working on arises
2. Unless you plan to "Select" People using the ROOTSMAGIC EXPLORER Window or a pre-defined Group, color coding will be based on the Person selected prior to opening the Color Coding tool
3. For reference, "SQLite Tools for RootsMagic: Colorcoding #RM8 #RM9" is a technical post discussing color codes and color selection

SET RELATIONSHIPS

1. The Person set as the "Root Person" and the Person selected to "Show Relationships To" are two different designations in the database file.

2. Set Relationships does not automatically update relationships when relationship links are changed or new People are added to the database. The Set Relationships function must be re-run to update the information displayed.

WEBHINTS

General Information:

1. WebHint Icon Legend in Online Help
2. Per RootsMagic Tech Support, each company decides when to update their WebHint information:
   a. RootsMagic sends a WebHint request for each Person currently being displayed on the PEOPLE Page including the latest data in the database file about each Person. RootsMagic then waits for each company to respond with their updated set of WebHints for each Person.
   b. The number of WebHints for any Person can change at any time due to:
      i. Changes made to the Person's information in the RootsMagic database
      ii. The addition of new online records or a new catalog collection applicable to the Person
      iii. Other online users finding and associating record information about the same Person to their family tree
3. RootsMagic does not store WebHint information in the database file. It relies on each company sending WebHint responses requested every time a new Person is displayed on the PEOPLE Page
4. After changing the status of a WebHint, it will not be reflected in a Person's WEBHINTS Summary Window until the Window is closed and re-opened. Re-opening the Window triggers sending the updated information back to the company's hinting system and waiting to receive updated WebHints sent back to RootsMagic (in some cases, this can take several minutes. Sometimes it takes much longer, or never completes searching. I believe FindMyPast is the only hinting system that causes this. FYI, you can still open and view the WebHints that have been reported back to RootsMagic even if it indicates it is still searching

Ancestry WebHints:

1. Ancestry generates Hints for the People and their Profile information contained in the Ancestry Tree connected to the RootsMagic file and passes (mirrors) these as WebHInts to RootsMagic via the TreeShare connection.
   a. Reminder: In addition to the general list of reasons listed above, Ancestry tends to also generate new Hints based on the areas of the connected Ancestry tree that are viewed by the user
2. Ancestry WebHints can only be seen while logged into Ancestry via TreeShare.
3. Unlike the TreeShare function which provides transfer of information in both directions, processing Ancestry WebHints only results in changes to the RootsMagic database.
   a. If changes are desired to be made to the linked Ancestry Tree, TreeShare must be used to select which changes you want to incorporate into the connected Ancestry Tree.
4. Regardless of where you click on the Ancestry WebHints row in the WEBHINTS Summary Window, the ANCESTRY HINTS Window opens, showing all WebHints grouped by type (Records, Other Member Trees & Photos and Stories) and sorted by status (Undecided, Accepted, Rejected).

5. Users without an Ancestry subscription that provides access to Records & Other Member Trees can still view records that Ancestry makes available for free and all User uploaded Photos and Stories. Since you can't tell which records are free from within RootsMagic, you may find it useful to look at each WebHint while looking at the detailed field information contained in the WebHint compared to the information entered in the RootsMagic database
    a. In order to view Photos and Stories files, Users without a subscription must first attach the file to the Person and then open/view the file from the Person's EDIT PERSON Window
6. Unlike from within Ancestry, Users without a subscription can change the status of WebHints (Undecided, Accepted or Rejected), and revise the status in the future, if needed.
    a. Status changes made to RootsMagic WebHints are passed back to the connected Ancestry Tree list of Ancestry Hints.
7. Processing of Ancestry WebHints involves the following basic steps:
    a. View WebHint, when possible
    b. View highlighted data differences between Ancestry Hint and RootsMagic Person
    c. Decide whether sufficient information is available to decide:
        i. WebHint is applicable and should be Accepted
        ii. WebHint is not applicable and should be Rejected
        iii. Further information is needed before deciding applicability and should be left as Undecided
    d. When a WebHint is accepted, decide whether to transfer data from the WebHint to the RootsMagic Person and/or click on EDIT ROOTSMAGIC PERSON Button to open the Person's EDIT PERSON Window to manually make the changes
        i. Data can be transferred from the Ancestry WebHint to RootsMagic as a new Fact or replace data in a current Fact
    e. Decide whether to add/modify the Ancestry Source Citation in RootsMagic
    f. When done working WebHints for the Person, decide whether any of the changes in the RootsMagic Person from the WebHint review should be "pushed" back to Ancestry Tree using TreeShare

FamilySearch WebHints:

1. FamilySearch WebHints can only be seen while logged into FamilySearch via RootsMagic
2. FamilySearch provides Record Hints for the FamilySearch Family Tree (FSFT) based on the information entered for the People in the RootsMagic database and whether or not they have been matched to the corresponding Person in the FSFT.
3. Processing these WebHints does not change any information about the Person in the RootsMagic file, it only affects the Hints for the People in the FSFT and whether or not the hinted record gets attached to the FSFT Person.
    a. When the RootsMagic Person has been matched to a Person in the FSFT, both Pending and Confirmed WebHints are provided (not sure if Rejected WebHints show in updated status or just disappear from the WebHints Window).
        i. Confirmed WebHints means they are attached to the FSFT Person.
        ii. Not all Record Sources attached to a Person in the FSFT are presented as WebHints in RootsMagic.

   b. When the RootsMagic Person has not been matched to a Person in the FSFT, WebHints ARE NOT provided.
4. Evaluation and processing of each WebHint consists of:
   a. Starting at the FamilySearch webpage linked to the WebHint entry in RootsMagic
   b. Using the established FamilySearch process for dispositioning FSFT Hints.
5. After processing Hints in the FSFT you may want to add data to the RootsMagic database from the FSFT (see Online Features > FamilySearch in Online Help)

FindMyPast WebHints:

1. FindMyPast provides only Record WebHints, based on a Person's information entered in the RootsMagic database.
2. Regardless of where you click on the FindMyPast WebHints row in the WEBHINTS Summary Window, a Browser Window opens showing all the FindMyPast WebHints for the Person.
   a. Each listed WebHint identifies the FindMyPast Record database, with very limited specific information about what the record contains
   b. If you have a free FindMyPast account and log in, you can't use the Review and Accept functions, but you can Reject a WebHint
      i. In some cases, you may still be able to go into the FindMyPast site and search for the Person, locate the Record WebHint and see the complete database index transcription
   c. If you have a paid FindMyPast subscription and log in, you can Review, Accept and/or Reject each WebHint
      i. The ability to change the status of a WebHint is done from within FindMyPast and can't be done from RootsMagic.
3. Since there is no data exchange capability between RootsMagic and FindMyPast, any valid WebHint information must be manually entered into the RootsMagic database, regardless of whether you have a subscription or not.
4. Issues using the FindMyPast WebHint webpage linked to from RootsMagic may get resolved by clearing browser history

MyHeritage WebHints:

1. MyHeritage provides Record and Smart Match (Member Tree) WebHints, based on a Person's information entered in the RootsMagic database.
2. Regardless of where you click on the MyHeritage WebHints row in the WEBHINTS Summary Window, a Browser Window opens showing all MyHeritage WebHints for the Person, grouped by WebHint type (Records and Smart Matches).
   a. Each listed WebHint identifies some, but not necessarily all information contained in the WebHint.
   b. If you have a free MyHeritage account and log in, you can't use the Review and Accept functions, but you can Reject a WebHint
      i. However, if the Record dataset containing the WebHint is marked as "Free", you can Review,Accept and/or Reject the WebHint
      ii. Similar to FindMyPast, you may find that you can access and review some WebHint Record datasets by logging into your MyHeritage account, search for the Person, locate the Record WebHint dataset and see the complete database index transcription entry.

   c. If you have a paid MyHeritage subscription and log in, you can Review, Accept and/or Reject each WebHint.
      i. Tracking of Accepted and Rejected WebHints is done within your MyHeritage account.
      ii. The ability to change the status of a WebHint is done from within MyHeritage and can't be done from RootsMagic.
3. MyHeritage can suppress WebHints that you've already attached to your MyHeritage family tree associated with the e-mail account entered on the SETTINGS > WEBHINT Settings View. If activated, once a WebHint is dispositioned in the MyHeritage account, it will be suppressed and not sent to RootsMagic as a WebHint. As a result, when filtered, I believe all MyHeritage WebHints listed will be listed as Pending in RootsMagic.
4. Since there is no data exchange capability between RootsMagic and MyHeritage, any valid WebHint information must be manually entered into the RootsMagic database, regardless of whether you have a subscription or not.
5. Issues using the MyHeritage WebHint webpage linked to from RootsMagic may get resolved by clearing browser history

SET LIVING

1. Since this tool can change multiple People at one time, it's recommended that a Backup File be created before proceeding
2. If sharing data with Online Sites, care must be taken to correctly flag all Living People to ensure the Online Sites properly protect information about Living People.

RM10 & On, HEALTH HISTORY

1. General Information:
   a. Health data can't be searched, nor filtered, using any of RootsMagic's Search tools
   b. Health data can't be exported out of RootsMagic via Ancestry, FamilySearch or GEDCOM File export
   c. Health data can be transferred to another RootsMagic file using Drag & Drop.
2. The Health Condition "Details" data field is limited to 102 characters. However, the "Health Note" data field, like all Note fields in RootsMagic, has no character limitation.
3. Health information entered in the EDIT PERSON Window > HEALTH History Page is kept separate from all Facts and other information used to create typical genealogy reports. This allows the separate tracking of health-related issues that might have hereditary connections without having to be concerned about inadvertently publicizing personal/private information regarding a Person's health history.
4. Similar to entering Addresses for living People to create/manage an address book of People, entering/tracking health history is optional data that has no impact on outputting standard genealogical information from RootsMagic. But, RootsMagic does generate the Health History specific reports (Family Health History & Health Conditions).

RM10 & On, DNA TESTS

1. General Information:
   a. RootsMagic provides 3 different built-in features specific to recording DNA Match data in the database file:

i. "DNA Test" Fact Type:
   (1) The default configuration doesn't use the Description field. Like other Fact Types, it can be activated and added to the Sentence Template, if desired.
   (2) Defining Supporting Roles and Sharing the Fact with others may be useful, depending on your overall approach to adding and managing DNA Test and Match data.
      (a) Pros:
         i. A single DNA Test Fact assigned to the Tester could be "Shared" with all DNA Matches.
         ii. All relevant DNA Match data can be entered in the Supporting Role's Note field.
         iii. RM11 & On, Reminder: You can create Rules-Based Advanced Searches and Groups based on Shared Fact information
      (b) Cons:
         i. Reminder: Shared Facts may not be able to be exported to other sites or programs
         ii. Pre-RM11, Reminder: You can't create Advanced Searches or Groups based on Shared Fact information
   (3) Reminder: Facts can be:
      (a) Searched and filtered.
      (b) Exported out of RootsMagic via Ancestry (TreeShare), FamilySearch and GEDCOM File export, but Shared Facts aren't recognized in most other programs
      (c) Additional Custom Fact Types can be created

ii. "DNA Match" Association Type:
   (1) The default configuration uses the Description field.
   (2) Associations can't be shared, so an Association is required for each DNA Match being recorded, potentially leading to 100's or 1,000's of entries for a Person.
      (a) The display of Associations in the EDIT PERSON Window can be turned off. Unfortunately, it will apply to all Associations, not just the DNA Match Association Type.
   (3) Reminder: Associations:
      (a) Can be searched and filtered
         (i) Pre-RM11, You can't search for specific Association Types
      (b) Can be transferred to another RootsMagic file using Drag & Drop, but only if both People forming the Association are included in the D&D operation.
      (c) Can't be exported out of RootsMagic via Ancestry (TreeShare), FamilySearch or GEDCOM File export
      (d) Additional Custom Association Types can be created.
   (4) RootsMagic reports (including Custom Reports):
      (a) RM11 & On, Can be limited to just the DNA Match Association by using a Rules-Based Group
      (b) Pre-RM11, Can't be limited to include just the DNA Match Association. The reports can only be set to include all Associations, or none

iii. EDIT PERSON Window > DNA Matches Page:
   (1) DNA Matches Page data can't be searched, nor filtered, using any of RootsMagic's Search or Group tools
   (2) DNA Matches Page data can't be exported out of RootsMagic via Ancestry (TreeShare), FamilySearch or GEDCOM File export
   (3) DNA Matches Page data can be transferred to another RootsMagic file using Drag & Drop, but only if both People forming the DNA Match are included in the Drag & Drop operation.
   (4) RM10 & On, If DNA Match Associations were created in RM9, as part of the initial database file "Conversion" process to a later version database file, in addition to converting the DNA Match Associations, a DNA Match Page entry for the 2 People identified in each DNA Match Association was created.

b. User submitted ideas for managing DNA Match data in RootsMagic:
   i. Include URLs for the Profile Page at DNA sites using a WebTag, the Description field, or the Note field. Reminder:
      (1) WebTags are only included in the WebTag List Report
      (2) URLs placed in the Description field cannot be used as hyperlinks
      (3) When placed in a Note:
         (a) The URL can be accessed by pressing the Crtl-Key and clicking on URL
         (b) It can be treated as Private data by enclosing it in curly "{ }" brackets
      (4) Can be placed in a Custom Fact Type that can be enabled/disabled for additional control over inclusion in database outputs
   ii. Use Tasks to tag a DNA Fact or Association and rely on Task Research Log folders to track progress in identifying Most Recent Common Ancestors (MRCA).
   iii. Use Sources for each DNA testing company to place DNA Match details, notes and Match Profile URLs in the Citation Details for each DNA Match (which can be tagged to both People)
   iv. Use a DNA (🧬), or other colored symbol, Emoji for visibility purposes.

c. There are no provisions for adding DNA Match data using bulk/automated methods. All DNA Match data must be manually entered
   i. Ancestry controls the TreeShare interface capabilities. This interface does not allow access to any AncestryDNA data
   ii. Some Tech Savvy Users are exploring methods using external 3rd-party tools to externally bulk load DNA Match data into a database file for access via the EDIT PERSON Window > DNA Matches Page

d. Time should be spent developing a consistent "Overall DNA Strategy" that weighs the Pros & Cons of each of the approaches mentioned above, and any other ideas you may develop, to document DNA Test and Match information that supports your:
   i. Desired output reporting capabilities
   ii. Desired searching, filtering, grouping and color-coding capabilities
   iii. Desired research/analysis capabilities
   iv. Desired post-research/analysis capabilities
   v. Willingness to expend the time and effort to include it in your database vs manage DNA research separately

2. EDIT PERSON Window > DNA Matches Page
    a. DNA Match information entered in the EDIT PERSON Window DNA Matches Page is kept separate from all Facts and other information used to create typical genealogy reports. This allows the separate tracking of DNA Match-related information without having to be concerned about inadvertently publicizing personal/private information regarding a Person's DNA Matches.
    b. Similar to HEALTH History Page data, entering/tracking DNA Match data on the EDIT PERSON Window > DNA Matches Page is optional information that has no impact on outputting standard genealogical information from RootsMagic, but does allow the generation of DNA specific reports (DNA Kinship List & Leeds Method Report).
    c. Depending on your specific situation, entering DNA Match information from multiple companies into one place may be useful when attempting to view and analyze all information available (including having RootsMagic perform Leeds Method analysis rather than doing it manually, in a spreadsheet or other DNA 3rd-party software) in order to solve, or confirm, family tree relationships.
    d. If unfamiliar with DNA and/or DNA analysis techniques, I recommend considering joining the GFO DNA Q&A Special Interest Group
    e. DNA Notes entered on the EDIT PERSON Window > DNA Matches Page can't be included in any of the RootsMagic DNA reports. DNA Notes are only viewable when viewing the Tester or DNA Match's information on the Person's DNA Matches Page
        i. Reminder: The contents of any Note can be viewed by hovering over the visible text in the Note field
    f. Every DNA Match entry that does not have a known "Tree Relationship" when initially created will start as a floating tree containing only one Person.
        i. RootsMagic does not automatically update the "Tree Relationship" data for DNA Matches after their initial entry
        ii. After adding new links that connect a DNA Match to the Primary Tree, in order to update the "Tree Relationships" on the DNA Match Page, you must select each affected DNA Match and click on the blue "Update" Button in the lower right to force RootsMagic to re-evaluate the DNA Match's "Tree Relationship."
    g. Consideration should be given to establishing a "System" for being able to discern floating trees containing DNA Match individuals from People added to the database for Non-DNA reasons (FAN club, One Name Studies, etc) without having to open the Person's EDIT PERSON Window to review their detailed information. Some possible options include:
        i. Entering something in Name Suffix field
        ii. Using the Reference Number Fact Type
        iii. Using Emojis
        iv. Etc

WORKING WITH FACTS

THE EDIT PERSON WINDOW

1. (Not in RM9 Online Help) You can switch to Close Relatives of the current Person in the EDIT PERSON Window without leaving the Window by clicking on the down arrow for the appropriate Spouse or Parent to pick the desired Spouse, Child, Parent or Sibling you want to switch to
2. Checking the "Show Relative Events" check box:
   a. Shows Events for the Relatives selected on the OPTIONS Window that occurred during the lifetime of the Person being edited.
      i. Note that when a Relative's Marriage Fact is selected to view, the sentence displayed in the Sentence area will only include the Relative and not their Spouse. To view the complete sentence that will appear when a Narrative Report is generated, you must view the Fact from the Relative's EDIT PERSON Window.
   b. If the Person being edited does not have a Birth or Christen Fact date, then no Relative Events are displayed because RootsMagic can't determine whether they occurred while the Person was alive.
3. When the "Slide-In Workflow" checkbox is checked on the SETTINGS Page > PROGRAM Settings View, clicking on the corresponding column location for a Fact causes the selected information to appear on the left side and the additional detail information on the right side.
4. Proof:
   a. The Proof data field can be found for each Spouse, Parents and Fact entry
   b. Each Proof data field has a drop list and can be set to: blank, Proven, Disproven, Disputed or (RM11 & On) Proposed
      i. RM11 & On, When the "Proof" data field is set to anything other than blank, a corresponding "Proof" icon is displayed after the Fact name in the Facts Column
      ii. Pre-RM11, When the "Proof" data field is set to either Disproven or Disputed, the Fact entry in the EDIT PERSON Window timeline list is shown in **red** ~~with a strike through~~ line across the text
   c. Proof status is not included in any of the RootsMagic reports, it's only an internal visual reference. If external reporting is desired, an enhanced approach to documenting Proof needs to be implemented that utilizes data that can be included in reports
   d. If you decide to use the Proof data field, this "FamilySearch Wiki - Genealogical Proof Standard [GPS]" article may help you decide how you want to define the application of each of these choices

ADDING FACTS

1. Facts can be added by clicking on the Add Fact (+) icon, or hover over a Fact and right clicking.
2. When selecting the Fact Type, you can:
   a. Use partial word searches and/or use the wild cards "_" and "%"
   b. Use the quote (") to indicate the name must start with the text that follows
3. When entering the:
   a. Date: The Calendar and Date Calculator Tool icons appear at the far right of the Date data field

b. Place: The Gazetteer tool and Select Place (already in the Place List) icons appear at the far right of the Place data field
c. Place Detail: The Select Place Detail (in Place Detail List) icon appears at the far right of the Place Detail field

4. Sometimes Users have trouble deciding which Fact Type to use when they encounter a new type of record:
   a. The following questions and answers may help guide you to consistent decisions:
      i. Is the information a Fact or an Association (Non-Family relationship) that needs to be recorded; or is it information to be used to "prove" a Fact or an Association already recorded?
         (1) If proving something already entered, then it probably should be treated as a Source Citation, not a new Fact Type
      ii. How often is this situation going to occur in your database?
         (1) If rare, consider using the Miscellaneous Fact Type and customizing the sentence for each specific use
         (2) If many, consider creating a Custom Fact Type instead
      iii. Regardless of how often it occurs in your database, do you envision wanting to use filter/search criteria for this Fact in the future?
         (1) If yes, consider creating a Custom Fact, even if used only a few times. Unless you intend on consistently using different text strings in the Description data field of the Miscellaneous Fact Type that can be searched for
         (2) If no, consider using the Miscellaneous Fact, or create a Custom Fact, depending on how often it will be used in the database file.
   b. After reviewing the above questions and answers on how to handle the new record, the following may help evaluate your decision prior to implementing it:
      i. First, recognize that there isn't always a single correct answer. In the end, it's left to each genealogist to decide, based on their approach and philosophy to documenting their Family History Research, how to proceed
      ii. Do you plan to transfer your RootsMagic information with external sites and/or other software programs?
         (1) If yes, to avoid the risk of major re-work in the future, be sure to test how your decision to proceed transfers to other sites and/or software programs
         (2) FYI, despite my full embracement of RootsMagic, to keep my options open in the future, I still confirm anything I decide to do is exportable via GEDCOM and I understand whether or not it transfers to Ancestry via TreeShare and to FamilySearch
      iii. Do you plan to output Narrative Reports?
         (1) If yes, be sure to test how your decision to proceed appears in Narrative Reports:
            (a) Does the information appear in the desired section of a Person's report? If not, refine the solution until it meets expectations
         (2) Does the Sentence Template produce text that fits with other Fact sentences, without repeating information found in other Facts?

iv. If you decide to both create a Fact and use the record as a Source Citation, the extra effort of doing both should be "Value Added" towards what you want to accomplish in your documented research?

Date Formats

1. RootsMagic supports four Date Formats. The following image shows how each is displayed when the SETTINGS Page > GENERAL Settings View > Date Format is set to "10 Jan 1959." When set to a different option, these formats will be presented slightly different:

-	**Birth**	12da 1mo 1588	Quaker Date Example					-
-	**Birth**	15 Feb 1675/6	Double Date Example					-
0	**Birth**	Mar Q 1888	Quarter Date Example					-
0	**Birth**	8 Sep 1888	Standard Date Example					-

2. Double Dates – Additional double date info can be found here: "Wikipedia: Old Style and New Style dates"
3. Quarter Dates – This date format is currently not mentioned in the Online Help:
   a. Quarters can be entered in a variety of recognizable formats which are converted into the form of: March Quarter, June Quarter, September Quarter & December Quarter
   b. In addition to entering the resulting format, various combinations of "first" or "1" and "quarter", "qtr" or "q" are recognizable data entry formats
   c. Quarter dates are sorted as if they occurred in between the last day of the prior quarter and the first day of the listed quarter.
      i. For example, "March Quarter" would be sorted and placed after events that occurred on 31 December of the prior year and before 1 January of the current year
4. Directional modifiers – RootsMagic will recognize the following entered text and convert it to the indicated modifier:
   a. Enter either "b" or "bef" and RootsMagic will convert it to "before"
   b. Enter "untl" and RootsMagic will convert it to "until"
   c. Enter either "f" or "fr" or "frm" and RootsMagic will convert it to "from"
   d. Enter either "a" or "aft" and RootsMagic will convert it to "after"
   e. Entering a space after the modifier is optional, RootsMagic will automatically add one if it's left out during data entry
5. Date Ranges - RootsMagic will recognize the following entered text and convert it to the indicated range:
   a. Between/And:
      i. Enter "bet" and RootsMagic will recognize it as "Between," but the word "and" is still required for it to be a recognizable date format
      ii. As long as the word "and" or "&" is inserted between the two dates, or partial dates, RootsMagic will recognize that it's supposed to be in the form of "Between date1 and date2"
   b. From/To:
      i. As long as the word "to" is inserted between the two dates, or partial dates, RootsMagic will recognize that it's supposed to be in the form of "From date1 to date2"

   c. A hyphen can be entered and RootsMagic will convert it to an “en” dash, which is the proper character to use when placed between dates
6. Date qualifiers - RootsMagic will recognize the following entered text and convert it to the indicated date qualifier:
   a. Enter “abt” and RootsMagic will convert it to “about”
   b. Enter “est” or “estimate” and RootsMagic will convert it to “estimated”
   c. Enter either “cal” or “Calc” and RootsMagic will convert it to “calculated”
   d. Enter either “c” or “ca” or “cir” or “circ” and RootsMagic will convert it to “circa
   e. There aren’t standard genealogical definitions for these Date Qualifiers. Therefore, it’s important that each User clearly document somewhere how they are being used in their database. The same is true for Date Qualitative Modifiers

Date Tools

1. Both the Calendar and Date Calculator Tools utilize today’s Gregorian Calendar. They do not have the ability to switch to, or account for, the earlier Julian Calendar. When working with People that lived in areas and times that were using the Julian Calendar, you will need to account for this by “translating” the tool result to account for the differences in the Calendars. “Wikipedia: Adoption of the Gregorian calendar” discusses when the transition took place for specific areas around the world

Description

1. Certain functions can result in truncating or moving extra text to other places, thus the Online Help recommends limiting Description entries to 100 characters or less.
   a. Exporting Descriptions to a GEDCOM File, or using (Pre-RM10) Drag & Drop to move data between RootsMagic files will result in the Description data field being truncated when longer than 100 characters.
   b. Using TreeShare to transfer Descriptions to an Ancestry tree will result in the Description being truncated when longer than 256 characters. The remainder will be placed in a Note
2. The text entered in the Description data field is inserted into a Sentence Template when a Narrative Report is created. Therefore, a final period should not be included as part of the data entry. The ending sentence punctuation should be included as part of the Sentence Template and not required in the data entry field

Notes

1. Pre-RM12, When entering and editing Notes, be aware that if you click on the More Options (3 dots) icon and only see 2 entries in the list that appears, the vertical height of the window you are working in needs to be made taller so the entire list can fit within the window below the icon
2. Notes can be added to many different items in the database.
   a. When developing a plan on how to use Notes in support of your research, time should be spent understanding how & where Notes can be added to the various items in the database and when & where they appear, or don’t appear, when outputting data to one or more of the options (Reports, Websites, Online Sites and/or GEDCOM Files).

b. For an individual Person's Profile, Notes can be added to several different areas (Person, Spouse, Parents, Facts, Shared Facts and Associations). Here are sample reports showing where each type of Note appears:
   i. Reference file: Narrative Report Note Placement Example
   ii. Reference file: Family Group Sheet Note Placement Example
   iii. Since Notes are inserted after the sentence generated by a Fact's Sentence Template, it's possible to design a Sentence Template that does not end with a period, with the expectation that the Fact Type will "always" have a Note following it:
      (1) The Note would be entered with the expectation that it's the end of the resulting sentence in a Narrative Report
      (2) Reminder: Footnote/Endnote superscripts will be placed at the end of the sentence generated by the Sentence Template and prior to the Note text

c. Although not all are called Notes, Notes can also be added to:
   i. For Places, Place Details, Addresses and Repositories; they are called "Note"
   ii. For Sources:
      (1) They are called "Source Text" and "Source Comment"
      (2) The Footnote, Short Footnote and Bibliography data fields in the Free-form Source Type are also Note fields
   iii. For Citations, they are called "Research Note" and "Detail Comment"
   iv. For Media Files, they are called "Description"
   v. For Tasks, they are called "Goal/Details" and "Results"
   vi. RM10 & On, For Health History, they are called "Health Note"
   vii. RM10 & On, For DNA Matches, they are called "DNA Note"

3. Note formatting:
   a. Formatting of Note text can be done using:
      i. RM12 & On, Right-clicking while in the Note area
      ii. The Bold, Italics and Underline icons.
      iii. The formatting codes found in the Online Help topic "Working With Facts > Fact Sentences > Sentence Template Language" for Bold, Italics, Underline, Small Caps, Superscript and Subscript
   b. Blank lines can be inserted by using the Enter Key to insert a carriage return.
   c. Portions of Note text can be designated as Private by enclosing the text within curly "{ }" brackets
   d. All unsupported formatting copy/pasted into the Note field will be lost when the Note is saved to the database
   e. Reminder: If using TreeShare to pass Note data to an Ancestry tree, upon receipt by Ancestry, extra line feeds and spaces are stripped out
4. **If a Note is opened in its own, larger Note Window; you must click on the "Save Note" Button to save changes. Closing the larger Note Window without saving will result in all changes made while in the Window being lost.**
5. When creating large Notes, you may find using an external Note Editor program (like Windows Notepad) more convenient than working in the larger Note Window.
   a. When done, just copy/paste the text into the Note field

   b. A key advantage of using an external Note Editor is eliminating the risk of accidentally closing the Note Window without clicking on the Save Note Button first, resulting in the loss of all edits made.
   c. Plus, you can freely navigate within RootsMagic, if necessary, rather than being forced to close the Note Window first
6. There is no character limit for Notes, but each item can only have one Note
7. While hovering over a Note field that contains data, a Popup Bubble will show a significant portion of the Note ((RM12 & On) ~1,000/(Pre-RM12) ~2,000 characters) without having to open up and then close the Note Window
8. Note editing:
   a. There are some Note editing capabilities only available via keyboard shortcuts
   b. Double-clicking anywhere in a word selects the word
9. Pre-RM9, The Replace (Ctrl+R) function listed in the RM9 Online Help does not work. This misleading information has been removed in the RM10 & On Online Help.
10. URL hyperlinks inserted in a Note field, can be opened by pressing the Ctrl-Key (Cmd-key on Macs) and then clicking on the URL.

RM10 & On, MOVING OR COPYING A FACT

1. Facts can be Moved, or Copied, by either selecting the Fact and then clicking on the Options Icon; or hovering over the Fact and right-clicking
2. For Facts that have been Shared with other People:
   a. The original Fact, shared with others, can be:
      i. Moved, and all People it has been shared with are retained
      ii. Copied, but all People it has been shared with are not copied
   b. The Shared Facts assigned to People with Supporting Roles can't be Moved or Copied using these tools
3. In order to create multiple copies of a Fact for the same Person, temporarily place a copy of the Fact with another Person. Then:
   a. If only 1 additional copy is desired, use the Move Fact tool to move it to the original Person
   b. If multiple copies are desired, use the Copy Fact tool to repeatedly create an additional copy for original Person until only one more copy is needed, and then Move the last one

FACT TYPES

1. There are 64 built-in Fact Types, which can't be deleted, plus 16 built-in Associations Types. The name or abbreviation for the built-in Fact Types and Associations Types can't be edited.
   a. Reference file: List of the 64 built-in Fact Types and their default information
2. When data is imported from another data source that contains Facts and Events that do not exactly match the built-in Fact Types, RootsMagic automatically creates a new Custom Fact and adds it to the Fact Type List.
   a. As a new Custom Fact Type, it will have an undefined Sentence Template.
   b. After importing data, it's always a good practice to review the Fact Type List to see if new Fact Types were created that are "similar to" existing Fact Types in which case they should be reassigned to the existing one

3. Reminder: A Fact Type List from another RootsMagic file can be imported (see Databases > Importing Lists). If a Fact Type List is imported into a file with existing Custom Fact Types, RootsMagic does not check for duplicates. The resulting list must be reviewed and duplicates cleaned up. Cleanup is best done by:
   a. Editing the name of one Fact Type to easily differentiate it from the other
   b. Decide which to keep
   c. Use the TOOLS Page > FACT TOOL > "Change Fact Type For Everyone" to change the Fact Type to be eliminated to the Fact Type to be kept
4. Deciding when to create a Custom Fact:
   a. You want to capture more granularity in recorded information for searching, filtering, grouping, color coding, etc
   b. You want to exercise more control over Output formats and data content such as:
      i. Narrative Report sentence templates for printed vs website output
      ii. Separating Fact information to be included in output reports from information to be excluded
   c. You can't modify an existing Fact Type to support what you want to record because one or more of the following apply:
      i. The desired change(s) would negatively impact the pre-existing uses of the Fact Type
      ii. The existing Fact Type is one of the "Special Fact Types" and it makes more sense to address this situation by using a combination of the "Special Fact Type" and a new Custom Fact Type
      iii. The existing Fact Type can be modified, but you plan on using the modified version in multiple database files and want to be able to easily add it to new files using the FILE Page> IMPORT DATA > IMPORT LISTS function
   d. You decide the "Miscellaneous" Fact Type is not good enough because one or more of the following apply:
      i. When viewing the Person's EDIT PERSON Window, you want to see something other than "Misc" in the "Facts" column to convey what the Fact is about
      ii. You expect to use it many more times and want to use a common Sentence Template specific to the Custom Fact
      iii. In the future, you want to be able to perform searches, apply Color Coding and/or create Groups based on the Custom Fact
   e. If your Custom Fact is only used once in your database, you should consider using the Miscellaneous Fact Type to avoid growing the Fact Type List unnecessarily
5. Creating a new Custom Fact Type:
   a. The Fact Type List can be accessed in the following ways:
      i. PEOPLE Page > (RM11 & On) LISTS/(Pre-RM11) More Options > Fact Type List
      ii. EDIT PERSON Window > Add Fact (+ icon)
      iii. EDIT PERSON Window > Hover over area on the left > right-click > select Add New Fact
      iv. TOOLS Page > FACT TOOLS > "Add or Modify Fact Types"
      v. COMMAND PALETTE > "Fac"
   b. When naming a new Fact Type, thought should be given to where it will show up in the Fact Type List and how many letters must be entered in the Search Box to find and select it

c. **Caution:** RootsMagic does not prevent you from re-using an existing Fact Type name, which would result in 2 different Fact Types with the same name
d. When creating a Fact Type; the Date, Place and Description data fields are optional choices that determine whether these data fields are displayed in RootsMagic when viewing Facts based on the selected Fact Type
e. If a Sentence Template is not entered when a new Fact Type is created, RootsMagic automatically creates one in the form of:
    i. "[NEED TO DEFINE SENTENCE: FACTTYPENAME]"
    ii. Fact Types missing a Sentence Template can be identified using the TOOLS Page > (RM12 & On) FILE PROPERTIES/(RM10 & 11) ENHANCED PROPERTIES LIST tool
f. New Fact Types are only created in the currently open database file. If you have other database files you want to use it in, you must use the FILE Page > IMPORT DATA > IMPORT LISTS function to add it to your other file(s)

6. If you edit a built-in Fact Type and you want to make the same changes in another file, because the IMPORT LISTS function doesn't work on built-in Fact Types, you will need to either:
    a. Manually make the same changes in the other files
    b. Or, if the changes aren't being made to one of the "special" Fact Types listed below, create a Custom Fact Type with the desired settings and use the TOOLS Page > FACT TOOLS > "Change Fact Type For Everyone" tool to replace the use of the built-in Fact Type with the new one
7. If a Custom Fact Type that has Facts based on it is deleted, all of the Facts based on this Fact Type will be deleted too, if you acknowledge the Warning.
    a. Any links to Sources, Media and/or Tasks linked to the deleted Facts will also be deleted from the database.
    b. However, any Sources, Media and/or Tasks that are no longer linked to other information will still remain in the database file and can be found in the list on their respective Pages
8. Wildcards (_ and %) and the double quote (") character work for Fact Type searches
9. Several of the built-in Fact Types have "special" uses in RootsMagic. They are:
    a. Birth, Christen, Marriage, Death & Burial Fact Types are used:
        i. In standard reports that include Birth, Marriage and Death information
        ii. To calculate age - requires a date entered in a Person's Birth or Christen Fact
            (3) Note: Some Users that have People with no Birth or Christen Fact, but have a Baptism Fact for the Person have decided to use the Christen Fact instead of a Baptism Fact and modify the Principal Sentence Template for the Christen Fact Type (or customize individual Facts) to state that the Person was Baptized
        iii. To automatically uncheck a Person's "Living" checkbox – requires a Person to have:
            (1) A Death or Burial Fact
            (2) Or, a Birth or Christen Fact with a date that is at least 105 years ago
        iv. To flag Problem Alerts (red dot with exclamation point) and include them in the Problem List Report
        v. If more than one of these Fact Types are entered for a Person, RootsMagic may not properly perform the actions listed above. To avoid this, one of the Fact entries must be identified as the "Primary" Fact by checking the checkbox for that Fact.

b. Primary Name Fact Type:
   i. Each Person can only have 1 Primary Name Fact and it's automatically created when a Person is added to the database
   ii. It's not available to choose from the Fact Type List
   iii. All the information about a Person's name that is used by RootsMagic is recorded here
   iv. There is no Sentence Template for this Fact Type. The Primary Name Fact information can be used in all other Fact Sentence Templates defined for all other Fact Types assigned to the Person
c. Alternate Name Fact Type:
   i. The data fields are the same as those for the Primary Name Fact Type
   ii. An Alternate Name Fact can be designated to become the "new" Primary Name Fact for a Person. This automatically makes the "previous" Primary Name Fact an Alternate Name Fact
   iii. Can't be shared with other People
   iv. Can't be used as a "Criteria" for use in Searches, Groups or Color Coding
   v. Has a Sentence Template and therefore can be included in Narrative Reports
   vi. Is treated like a Fact in standard reports
   vii. Can't be included in Custom Reports
d. Association:
   i. Although Association appears in the Fact Type List, Associations are different:
      (1) Facts tend to be event-based information recorded about a Person
      (2) Associations tend to be used to record, non-event-based, Non-Family relationships between 2 People in the database
   ii. Pre-RM11, Can't search for specific Association Types
   iii. Can't be shared with additional People
   iv. Can't be copied or moved like Facts.
e. Reference No (Ref #):
   i. By default, this Fact Type only uses the Description and Sort Date fields
   ii. Since the RIN (Record ID Number) is not guaranteed to remain permanently assigned to a specific Person, the intended use of Ref # is to allow the assignment of a User-Defined preferred/permanent numbering/coding scheme to People in the database
   iii. The Ref # can be displayed appended to the end of a Person's name within RootsMagic similar to the RIN or FSID by going to SETTINGS Page > GENERAL Settings View and setting "Number To Display" to "REFN"
   iv. Some other possible uses are:
      (1) This RootsMagic blog article: "Memorial Day Preparations: FAN Clubs and Grave Neighbors" provides an example of how this Special Fact Type can be used to visually enhance the information about People in a database
      (2) The assignment and display of Ahnentafel numbers
      (3) Differentiate unlinked People resulting from documentary vs DNA research
      (4) A place to assign Emojis
      (5) Unlike RIN and FSID, Ref # can be transferred to an Ancestry tree as a Fact using TreeShare or exported in a GEDCOM File as a Fact

f. Adoption:
    i. In addition to the Date and Place data fields, this Fact Type also has a data field called "Parents". Clicking on the Parents data field presents a list of all the Parent Couples already identified for the Person that the Fact is being added to.
    ii. The identified Parents are not part of the default Sentence Template and there isn't a way to add them since the Sentence Template Language does not define a variable for "Parents".
    iii. Although disabled in the default configuration, if desired, the User can enable the Description data field by editing the Fact Type, allowing the [Description] Sentence Template Language variable to be added to the Sentence Template.
g. LDS specific Fact Types:
    i. Used to interface with LDS specific information at FamilySearch by Church Members

10. Sample uses of Custom Fact Types:
    a. To manage status (work completion, level of documented Facts, group membership) of People in the database:
        i. An example would be to track each Person's research status based on Yvette Hoitink's "Six Levels of Ancestral Profiles - Level-Up Challenge!",. or any other defined set of levels and criteria for each level
    b. You want to modify the default Sentence Template of a built-in Fact Type (that isn't one of the "special Fact Types" listed in this Handout) and be able to replicate the changes in additional database files using the IMPORT LIST function
    c. You want more granularity for a Fact Type to: search, filter, group, color code, etc,
        i. An example would be creating separate "Census 1900" & "Census 1910" Fact Types instead of using the built-in "Census" Fact Type so that filtering can be performed for each different Census Fact Type
    d. Once created, these Custom Fact Types can be added as additional columns on the PEOPLE Page > PEOPLE List View, on the SEARCH Page > BASIC & ADVANCED Search Results, used to assign Color Coding, etc
        i. An example showing one User's Census completion status grid in the People List View is shared in this RootsMagic Community post: My People List View Grid, dated Oct 2024

ADDING ROLES

1. In order to Share Facts, Supporting Roles must be created for the affected Fact Type.
    a. Refer to the Working With Facts > SHARING FACTS section for information on the tradeoffs to consider between sharing and replicating Facts with other People.
    b. Although it requires more time and effort to implement, a third option is to do both:
        i. Use Shared Facts to enhance Narrative Reports, including relocating sentences for Family/Couple Facts to the Individual/Person section of the Narrative Report Fact timeline
        ii. AND, create copies of the Fact for the same People to ensure no data will be lost in data exports.
        iii. To implement this option and avoid duplication in Narrative Reports:

(1) A Supporting Role should be created that will be "shared" with the Principal. This Role will contain the Sentence Template to be used for the "Supporting" Principal Role
(2) The Fact's Principal Role Sentence Template should be deleted, thus preventing a sentence from being generated for this Role when a Narrative Report is generated
(3) The end result is everyone involved will have 2 Facts for the same event.
(a) One as a Supporting Role assigned from the original Fact entered for the Primary Person, including the Primary Person.
(b) The second Fact is a copy of the Primary Person's Fact, since the Principal Role does not have a Sentence Template for the Principal Role, all sentences will be generated using the assigned Supporting Role Sentence Templates

2. When creating a Custom Fact Type, it must be created and saved before Supporting Roles can be added
3. If Supporting Roles exist for a Fact, they do not have to be used
4. You can assign a Person not in the database to a Shared Fact Supporting Role
5. When Sharing a Fact, the list of Supporting Roles to choose from is listed in the order they were created, not alphabetically.
   a. When creating many Supporting Roles for a single Fact Type, advanced planning of the desired order to list them is recommended
   b. In an existing list, if you want to change the order of the Supporting Role list, you must:
      i. Create new Supporting Roles for each Role currently listed above the one you want to be first
      ii. Switch all affected People to the newly defined Role(s). You can do this by:
         (1) RM11 & On, Make a Group of all people in the database that have the Fact Type shared with them
         (2) RM10, Make a Group of all People in the database that have the "Number of Shared Facts" > 0
         (3) Pre-RM10, Make a Group of all People that have the Fact Type containing the affected Supporting Role(s)
      iii. Filter the Index List to only show People in the Group just created
      iv. Open each Person's EDIT PERSON Window and check to see if the Fact Type being modified has been Shared, and if so, whether the Supporting Role that is being changed was Shared with them
         (1) If it was Shared, change the assigned Role to the newly created one
         (2) If a Supporting Role Note was entered previously, it remains after changing the Role
      v. Once every Person has been checked, then delete the "old" Supporting Roles from the Fact Type which should result in the Supporting Roles being in the desired order
      vi. To avoid doing the above, as soon as you decide to Share Facts:
         (1) Spend time thinking through what the desired order of Supporting Roles to choose from should be and create the Supporting Roles in that order
         (2) If you don't want the built-in Supporting Role (usually "Witness") to be the default choice at the top, delete it and recreate it when desired

6. Reminder: When crafting Sentence Templates for Supporting Roles:
   a. [Person] always refers to the Principal Person, even when working with a Family Fact
   b. [ThisPerson] refers to the Person assigned to a Shared Supporting Role
      i. Note: The ":Age" Person Option does not work with [ThisPerson]
   c. [OtherPersons] is everyone that is assigned to any of the Shared Supporting Roles
      i. Note: The ":Age" Person Option does not work with [OtherPersons]
   d. [Role] where "Role" is the Supporting "RoleName" is:
      i. Everyone assigned to the specified Shared Role when used in the Principal Sentence Template
      ii. Everyone assigned to the specified Shared Role, except the Person the Fact is Shared with. To include them as well, [ThisPerson] must also be included.
   e. [ThisPerson:Role] results in the Role Name being inserted in the sentence rather than ThisPerson's Name
   f. [Field#] allows you to specify specific People's names that have a Shared Role when more than one Person has been assigned the same Supporting Role. Caution must be exercised when using this if you're trying to single out specific People in the template since the # is based on the order People are assigned the Supporting Role
   g. Only People assigned Supporting Roles that are mentioned in the Principal Sentence Templates are listed in the Narrative Report Name Index. This can be an import way to include important People that aren't otherwise related to the family line the report is being generated for
7. When adding a new Supporting Role to a Fact Type, stop and ask yourself:
   a. Do you need to modify the Sentence Template for the Principal Role, or any other Supporting Role Sentence Templates for this Fact Type to include the People that get assigned to this new Supporting Role?
   b. Are there People in the database that you want to go back and decide whether this new Shared Fact Supporting Role is applicable to their Fact?
      i. If yes, you may want to make a Group of everyone currently in the database with this Fact Type to use as a "To Do" list of People to check now, or in the future. If doing it later, consider creating a Task describing what needs to be done to refresh your memory when you're ready to proceed
8. Reminder: If the Name of a Supporting Role for a Fact Type is modified, review the Sentence Templates for the Principal and all other Supporting Roles to see if the previous Role Name was used in any of the other templates. If it was used, they must be edited to match the revised Supporting Role Name

CUSTOMIZING SENTENCES

1. If the "Customize Sentence" function is used on a Person's EDIT PERSON Window for a specific Fact, be aware that currently there isn't a way in RootMagic to locate them in the future other than opening each Fact assigned the Fact Type in question and comparing its Fact Sentence with the default Fact Type Sentence Template
2. If the Fact's Sentence Template is deleted, you will get the same result as if the "Reset To Default" Button was clicked:
   a. The default Fact Type Sentence Template will be inserted

3. Things to consider before customizing a Fact Type Sentence Template:
   a. Is the change being considered just a one-off situation, or only applicable to a few People? If yes:
      i. Just customize that specific Fact's Sentence Template
      ii. Copy/paste the revised sentence format to the few other People it applies to
      iii. If you want to locate these customized Fact sentences in the future, consider making a list of who and which Facts were customized in a separate log file, or tag each modified Fact with a common Task so they can be easily found again in the future
   b. Is this change something you'll want to apply to several People's Facts? If yes:
      i. Consider the possibility of modifying the Fact Type Sentence Template using the Sentence Template Language
      ii. Or, as long as it's not one of the "Special" Fact Types; create a similar, but different, Custom Fact Type allowing you to select one or the other depending on which Sentence Template is more appropriate for the Fact being entered.
   c. If the customization involves People the Fact is being shared with, ask yourself whether the changes should appear in the Sentence Template for the Principal, a particular Supporting Role, both or maybe a new Supporting Role needs to be created for this unique situation
   d. When customizing a Sentence Template for a Fact that has been Shared with a Person assigned a Supporting Role, be aware that the resulting sentence in the lower portion of the Window will only include [Person], if used. [Date], [Desc], [PlaceDetails] and [Place] from the Principal's Fact will not be shown. To see the complete resulting sentence, click OK and view it in the "Sentence" area on the Person's EDIT PERSON Window.

SENTENCE TEMPLATE LANGUAGE

1. The Online Help topic "Working With Facts > Fact Sentences > Sentence Template Language" covers all the Template Language Data Field Names, Field Options, Formatting Codes and Switches that can be used along with some examples of their use
   a. The Online Help incorrectly states that the "Private Switch" can be used for Fact Sentence Templates. Actually, it can only be used with Source Templates.
2. The following RootsMagic video demonstrates the creation and customization of Sentence Templates using an older version of RootsMagic. The User interface is different, but the details of how the Sentence Template Language works has not changed:
   a. "48. Sentence and Source Templates in RootsMagic"
3. Blank lines can be inserted in a Sentence Template by adding Carriage Returns (pressing the Enter key) where blank lines are desired. This only works for Fact Type, not Association Type, Sentence Templates
4. Reminder: Modified Sentence Templates for built-in Fact Types must be manually transferred to other RootsMagic database files you want to use them in. Neither the Drag & Drop, nor Importing Fact Type List functions will modify the default Sentence Templates of built-in Fact Types in the destination file.
5. My recommended **9-step approach to crafting a Fact Type Sentence Template**:
   a. When planning to create, or modify, multiple Role Templates for a Fact Type, you may find it easier to focus on developing one at a time, starting with the Principal Role and then moving to any desired Supporting Roles. This keeps the focus on a single goal which can then be

leveraged if there are common elements in subsequent iterations to develop other Role Templates

b. Reference file: "Nine Step-by-Step Examples Using the 9-Step Process"

Step 1: Draft a sample of how you want the resulting sentence to read

Step 2: Replace the pieces of the sentence where the specific information will come from one of the Fact Type Data Fields with the Data Field name

Step 3: Confirm the needed Optional Data Fields are active for this Fact Type

Step 4: Determine if there are additional People and/or Supporting Role names that need to be included in the Sentence Template.

i. If the only other Person is the Principal's Spouse, then the Custom Fact Type should be created as a Family Fact Type. Or, create as an Individual Fact Type, with a Supporting Role to share with the Spouse.
ii. If People other than the Spouse are to be included, their Supporting Roles must be created so they can be assigned to these People and identified in the Sentence Template
    1. Reminder: There are a variety of Field Names when referring to People other than the Principal Person and sometimes they are different when referring to them in the Principal Sentence Template vs a Supporting Role Sentence Template. They are listed in the Online Help
    2. When generating a Narrative Report that includes the Principal, People assigned Supporting Roles and included in the Principal Sentence Template will be included in the Narrative Report Index, even if the report does not include the Supporting Role Person
iii. For each Supporting Role created, this 9-step process should be repeated to craft each corresponding Supporting Role Sentence Template

Step 5: Evaluate the default verbiage that RootsMagic automatically adds to determine whether some Field Options need to be specified to get the desired result.

Step 6: Determine whether, and where, conditional brackets are needed to address situations when one or more of the specified Data Fields are blank

Step 7: Decide whether any Switches are needed due to different verbiage needed depending on a Value, Gender, Number of People or whether the Person is Living or not.

i. Reminder: Switches can be "nested" inside of other switches allowing very powerful and flexible sentence templates to be created, when needed

Step 8: Decide whether any text formatting is desired (Bold, Italics, All Caps, etc)

Step 9: Trial & error testing:

i. Reminder: "Trial & error" is part of the process of crafting the desired Sentence Template, as long as what is desired isn't more sophisticated than what the Sentence Template Language can support

ii. Since RootsMagic processes Templates left to right, when issues are encountered, work left to right through the Template to identify & correct issues.

c. If there are additional Sentence Templates to develop for the Fact Type, repeat the 9-step process for each one
d. Once all Templates have been developed and tested, they need to be inserted into the Fact Type as the default Sentence Templates for their respective Roles
e. Lastly, ensure that the People's Facts that were being used for Template development & testing by Customizing their specific Sentences have their Customized Sentence Templates "Reset to Default" by either clicking on the Button, or deleting the entire contents of the Sentence Template area

SHARING FACTS

1. The quandary (Pros & Cons) between using/not using Shared Facts by assigning Supporting Roles:
   a. For reference, "SQLite Tools for RootsMagic – Facts – Split Shared to Individual #Facttypes #events #sharedevent #RM9" is a technical post, whose first part discusses the "Quandary of Shared Events"
   b. RM10 & On, **The Copy Fact tool eliminates the earlier version tradeoff of using Shared Facts to save data entry time & effort vs re-entering the same Fact for multiple People as a consideration of whether or not to use Shared Facts**
   c. Use Shared Facts to create more complex narratives about People's lives and relationships with others. But don't plan on:
      i. Exporting Shared Fact information to other sites and software, many of these other locations can't extract the Shared Fact information contained in a RootsMagic generated GEDCOM File
      ii. Neither Ancestry (via TreeShare) nor FamilySearch accept Shared Facts from RootsMagic
      iii. Tagged Media Files and Tasks being shared with People assigned Supporting Roles
      iv. Pre-RM11, Being able to manage Shared Facts like Facts, since you can't create reports that include them (other than generating Narrative Reports and exporting them to a My RootsMagic Website) or (Pre-RM11) search for or group them
   d. Don't use Shared Facts when wanting to:
      i. Preserve maximum flexibility in exporting data to other sites and software
      ii. Pre-RM11, Manage them the same as all other Facts
   e. Tech Savvy Users can use external 3rd-party tools to manipulate either a RootsMagic database file or GEDCOM export file to try and convert Shared Facts to Individual Facts
2. When viewing the list of Facts in a Person's EDIT PERSON Window, the Shared Facts column:
   a. A blank entry indicates the Fact can't be shared because it's "special"
   b. A "-" indicates the Fact can be shared, but has not been shared with anyone yet
   c. A number indicates the Fact has been shared with the indicated number of People
3. When viewing a Shared Fact in a Person's EDIT PERSON Window:
   a. The information displayed in the EDIT PERSON Window's list of Facts is the information that applies to the Principal Person, not the Person assigned the Supporting Role

        i. Editing any of this data will change the information for the Principal Person, not the Person the Fact was shared with
    b. To view the data applicable to a Person assigned a Supporting Role (Supporting Person, assigned Supporting Role and their Note), view the “Shared With” List and select the Person
4. When Sharing a Fact and assigning the same Supporting Role to more than one Person, when the names of People with this Supporting Role are listed, they are in the order the Supporting Role was assigned to each Person
    a. When a Fact is Shared with multiple People at the same time, the order in which they will be listed is unpredictable
5. Reminder: When assigning a Supporting Role to a Person not in the database:
    a. You can only enter a Given name and Surname.
        i. Also, if the SETTINGS Page > GENERAL Settings View > “Surname Uppercase” checkbox is checked, RootsMagic DOES NOT capitalize the Surnames of People not in the database. If that’s your desired format for reports, you’ll need to enter the Surnames in all uppercase
    b. If you enter a Role Note, it will never appear in a report since these People aren’t in the database, there won’t be a Narrative Report entry for them, which would be the only location where the Note would be used
6. If you want to switch an assigned Supporting Role from a Person in the database to someone not in the database or vice versa, it can’t be done by editing the existing assignment. A new Shared Fact entry must be created and the old assignment deleted

WORKING WITH PLACES

GENERAL INFORMATION

1. Entering Place data:
   a. Place data is entered from smallest to largest geopolitical divisions. Even if you have elected to display "Reverse Place Names"
      i. RootsMagic doesn't enforce a maximum number of levels that can be entered
         (1) Reminder: If selected, PlaceClean will flag all places with more then 4 levels as having "Misplaced Place Details"
      ii. Specific data, like street address and/or building/cemetery name is typically entered as a Place Detail. Some users decide to enter it as the smallest division of the Place
      iii. Place Detail entries are specific to a Place entry. If the same Place Detail exists for more than one Place, it must be entered and managed separately for each Place
   b. As a Place or Place Detail is entered, RootsMagic shows up to 5 entries already in the database that match what has been typed so far. Selecting an entry in the displayed list:
      i. Eliminates the need to type the full Place Name
      ii. Avoids the introduction of typos, which would result in the creation of a new Place entry in the database containing the typo, requiring cleanup later
   c. Generally accepted practices regarding Places are:
      i. Enter the historical location name where each event occurred.
      ii. Avoid the use of abbreviations in Place names, spell everything out
      iii. Avoid the use of place division descriptors, like "county"
   d. Additional data entry topics to consider:
      i. Whether to enter foreign Place names in English, or native language
      ii. What are the proper geopolitical divisions to record in each foreign country
   e. The above aren't "rules," many genealogists elect to deviate from the above generally accepted practices.
      i. Being as consistent as possible within a database file is the most important decision
      ii. Regardless of how consistent you try to follow whatever "rules" you settle on, most likely exceptions will be encountered that must be recorded (for example, a city in a state that is not part of a county and the same state has a county with the same name as the city…)
2. Management of Place data should be done from the PLACES Page, not an individual Person's EDIT PERSON Window
   a. When an existing Place or Place Detail entry is modified from the PLACES Page, the change will be reflected in every Fact that uses it
      i. TreeShare users should be aware that these changes WILL NOT be identified by TreeShare as changes that need to be shared. If desired, they will need to be made directly in the Ancestry Tree, or by manually locating every affected Person's Events in TreeShare
   b. When an existing Place or Place Detail entry for a Fact is modified from the EDIT PERSON Window, the existing data is not modified. Instead, a new Place/Place Detail entry is created and stored in the database
      i. TreeShare users should be aware that these changes WILL be identified by TreeShare as changes that need to be shared

3. People that have Facts and Associations without a Place entry can be identified by performing a Rules-Based ADVANCED Search or creating a Group:
   a. Search Rules > Add A Rule >
      i. RM11 & On, Event > OK
      ii. Pre-RM11, Criteria > Edit Criteria
   b. "Any Fact" "Exists" and "Any Fact" "Place" "Is Blank"
   c. The result will be People that have at least one Fact missing a Place entry
   d. Each Person's EDIT PERSON Window must be opened to review their list of Facts and Source Citations to determine whether or not the Place is known and should be entered, or not
4. For the Tech Savvy familiar with SQLite, some of the topics and scripts regarding Places found here may be of interest: "SQLite Tools for RootsMagic: Places – Count People and Events for a Group #places #statistics #events #namedgroup"
5. For those interested in Visualizing Place Data using 3rd-Party tools, this post: "RootsMagic Community: Other Visualizations" discusses the use of Google Earth Pro (being discontinued June 2027) and RootsMapper

PLACE LIST

1. The number shown in the "Details" column indicates the number of unique Place Details that exist for the Place. The number shown in the "Used" field indicates how many links to the Place exist in the database.
2. When viewing a selected Place, if RootsMagic confidently recognizes it, the small map on the right will display a marker and the Place Name, even if it's not currently Geocoded (lat/long entered). If the map remains blank, it means RootMagic can't confidently recognize the location of the Place
3. The "Standard" data field:
   a. Is typically used to identify the "Current Day" Place Name. If the Geocoding tool is used, the tool will populate this field with the Place Name in its Place Database File
   b. It's not used for anything else:
      i. It can't be used for Searches, Groups or Color Coding
      ii. It can't be included in any reports
      iii. There isn't a Sentence Template Language variable for it either
4. The "Abbrev" data field:
   a. Determines what will be used as the "Shortened Place Name" when Sentence Templates that include "[Place:Short]" are encountered while generating a Narrative Report
   b. Application of this Field Option must be carefully planned out. When applied in a Fact Type's Sentence Template:
      i. The full Place Name will only be included for the associated Fact sentence if each specific Fact sentence is individually customized
      ii. Or, only use the ":Short" Field Option in specific, customized, Fact Sentences; rather than including it in the Fact Type Sentence Template
   c. Tech Savvy Users familiar with SQLite developed an external script using 3rd-party tools that can modify a Person's Fact Sentences to include the full Place Name at first occurrence and the Abbrev name for subsequent uses. It's discussed here: "SQLite Tools for RootsMagic: Places – first name exploit for improved narratives #places #reports"

5. The “Note” data field:
    a. The information entered as a Place Note is displayed when the “Select Place (Globe Icon)” tool is opened from the Place data field for a Person’s Fact or Association and a Place Name is selected from the list
    b. This could be used as a way to annotate the date range a particular Place Name existed when dealing with a location that had different Historical Place Names over time, compared to the current day and avoid future reminders from the CountyCheck tool
    c. This could even be expanded to include Historical Place Names for before and after the annotated period applicable to the currently selected Place Name
6. Media, Tasks and WebTags attached to a Place can’t be viewed from a Person’s EDIT PERSON Window. You must switch to the PLACES Page and select the Place to view them
7. A new Place can be entered on the PLACES Page by either:
    a. Clicking on “ADD”
    b. Or, hovering over the Places list area, right-click and select “Add”
8. An existing Place can be deleted from the PLACES Page by:
    a. Unless already known, it’s always a good idea to check what the Place is currently linked to by clicking on the “Used” field, if it’s not “0” (unused)
    b. Select the Place, then click on “DELETE”
    c. Or, Hover over the Place, right-click and select “DELETE”
    d. Pre-RM11, Or, Select the Place, then click on the “More Options (3 dots)” icon and then select “Delete Selected Place”

PLACE DETAILS LIST

1. When viewing a selected Place Detail, if RootsMagic confidently recognizes the Place, the small map on the right will:
    a. Display a marker along with the Place Detail and Place Name. Be aware that, unless the Place Detail has been geocoded, what is actually being displayed is based on just recognizing the Place.
    b. Remains blank, it means RootMagic can’t confidently recognize the Place associated with the Place Detail
2. The following topics described above in the Place List section also apply to Place Details:
    a. Standard, Abbrev and Note data fields
    b. Media, Tasks and WebTags

MERGING PLACES

1. When multiple entries in the Place List are discovered that are actually the same Place, like most data in RootsMagic, don’t delete & re-enter the data, “Merge” the data
2. Before performing a Merge, consider the following:
    a. Depending on the extent of the Merging to be done, consider making a Backup before proceeding with the Merge tool
    b. Only the “Surviving” Place Name, Standard and Abbrev data fields survive the Merge. The data entered in these data fields in the other selected Places will be gone
    c. If the Lat/Long data fields for the “Surviving” Place:
        i. Contain data, any Lat/Long data entered in the other selected Places will be gone.
        ii. Are blank, and there is Lat/Long data entered for the Place selected to be Merged, the Lat/Long data is transferred to the “Surviving” Place.

   d. When Place Notes exist:
      i. If the Place Notes are 100% identical to each other, only one copy is retained
      ii. If there are any differences, they are appended together into a single, surviving Place Note.
   e. All Media, Tasks and WebTags from all Places selected to be Merged are retained
   f. All Place Details from all Places selected to be Merged are retained:
      i. If the same Place Details Name exists in more than one of the selected Places being Merged, they are not merged as part of a Place Merge and must be Merged using the "Merge Place Details" tool.
3. Merge Places tool:
   a. The Merge Places tool can be initiated by either:
      i. Select the "Surviving" Place, then select "Merge Places"
      ii. Or, Hover over the "Surviving" Place, right-click and select "Merge Places"
   b. After Merging Places, I recommend checking:
      i. Review the resulting Note data field and cleanup Merged Notes as desired
      ii. Review the resulting Place Details for the "Surviving" Place for any duplicate (exact, or typos) or unused entries needing cleanup
4. The Merge Place Details tool works the same as the Merge Places tool, except that it can only be initiated by clicking on Merge Place Details, right-clicking does not work for this tool
5. Using Drag & Drop to move Everyone in the database to a new, empty, database will cause any Place entries that are "identical" to be merged.
   a. However, any subtle differences will result in the "similar" Places not being merged.
   b. Before attempting this, be sure to review all the known Drag & Drop data loss issues with performing a Drag & Drop using the version of RootsMagic being used

MAPPING

1. RootsMagic only displays a location marker on the Mapping View map when:
   a. Places have their Lat/Long entered or, when the Lat/Long fields are blank and RootsMagic has "confidence" it knows what the location is
      i. Although RootsMagic may be confident it knows what the Current Day location is, be aware that it's still possible RootsMagic is wrong
   b. Place Details are only displayed when:
      i. The Lat/Long data has been entered
      ii. RootsMagic has "confidence" it knows what the Place is
2. Navigating within the Map
   a. Location markers are labeled with the smallest geopolitical division entered for the Place Name
      i. Hovering over the location marker will display the full Place Name
      ii. Clicking on the marker opens a Popup Window that lists the Year, Event Name and Person.
         (1) The Events are listed in chronological order, based on the Fact Sort Dates, for all Events that occurred at that Place location
         (2) Entries with a blank Year listed above the last Date entry, have a Sort Date entered

(3) Entries with a blank Year listed at the bottom don't have a Date, and may not have a Sort Date entered

b. You can zoom in/out by either:
   i. Using "Zoom-In"/"Zoom-Out"
   ii. Or, the mouse scroll wheel, if you have one
c. You can move the Map to view areas not being displayed by clicking on the Map & dragging it to a different location within the display area

3. When using the "Map People (Events)", when using the Edit Person (pencil) icon to open the Person's EDIT PERSON Window, unlike when opening it from the PEOPLE Page, this Window must be closed before you can do anything else within RootsMagic

GEOCODING PLACES

1. For non-USA-based users, be aware that:
   a. Pre-RM12, If your computer system language setting uses a decimal comma instead of a decimal point for Lat/Long entries, RootsMagic won't recognize the data as Lat/Long data. The decimal commas need to be changed to periods prior to saving the data
   b. RM12 & On, Although recognized on data entry, exporting to a GEDCOM file will result in decimal commas being used
2. When Geocoding Non-USA Places, I recommend refreshing your memory by re-reading the "Approximating Places Not Found" portion of the Geocoding webpage found in the Online Help
3. Geocoding Places can be performed two ways in RootsMagic:
   a. Using the built-in tools
   b. Or manually, using 3rd-party tools
4. Geocoding Place Details must be done manually using 3rd-party tools
5. Built-In Geocoding tools:
   a. The built-in tools rely on the internal Place Database File that is installed with the RootsMagic program to recognize Historical Place Names and correlate them to their Current Day Place (Standard) Names and Latitude and Longitude data
      i. The Place Database File is dated 2006 and has not been updated since:
         1. The "Current Day" Place Names may not be current, if the local geopolitical divisions have changed since the 2005/2006 time period
         2. Errors found in the data have never been corrected.
      ii. So, there's always the low probability of an error in the information for a Place you are working with.
         1. I recommend becoming familiar with the history of the localities you work with so you can evaluate the results while using the tools to ensure they are identifying the correct, Current Day location for each Historical Place in the database file
      iii. Therefore: "Trust, But Verify"
   b. The "Geocode Selected Place" tool:
      i. This tool only works successfully if the selected Place appears in the small map on the right side
      ii. The tool can be initiated by either:
         (1) Select the Place Name, then select (RM11 & On) TOOLS/(Pre-RM11) MORE OPTIONS Icon >"Geocode Selected Place"

(2) Or, hover over Place Name, then right-click and select "Geocode Selected Place"

iii. Using this tool with a Place that has already been Geocoded will cause RootsMagic to attempt to Geocode the Place again.

iv. If RootsMagic doesn't enter Geocode data into the Standard and Lat/Long data fields, it means the Place's Current Day location couldn't be determined with "confidence"

v. If the Place doesn't get Geocoded and the Historical Place Name is correct, the next steps are to:

(1) Look up the Place Name in the Gazetteer as follows to see what the "confidence" scoring results are for the Places that might be the correct location but RootMagic didn't have the "confidence" to make the decision on its own:

(a) Copy the Place Name in the Name data field

(b) Open the (RM11 & On) TOOLS/(Pre-RM11) MORE OPTIONS > " Gazetteer"

(c) Paste the Place Name in the Search Box

(d) Determine if any of the listed places are the Current Day Place

(2) Manually Geocode the Place

c. The "Geocode All Places" tool:

i. Places that already have Lat/Long data entered are skipped when using this tool

ii. Since a lot of data may be modified when this tool is used, I recommend making a Backup before proceeding with the "Geocoding All Places" tool

iii. After running the tool, the "Match Places" Window opens listing all Places that are not Geocoded:

(1) A counter showing the number of Unmatched Places is in the upper left

(2) As Unmatched Places in the list are selected, the Place Name is loaded in the Search Box and the right-side lists all the possible Current Day locations stored in the Place Database File that "might correspond" to the selected Place Name along with a "confidence" score of how close RootsMagic thinks it matches the Place being searched.

(3) The list of possible Current Day Places is sorted alphabetically, grouped by "confidence" score

(4) If the "correct" Current Day Place is found, select it and click the "Accept Match" Button. The associated Lat/Long data will be saved to the Place entry along with the Current Day Place Name being saved to the "Standard" data field

(5) If not found, try modifying the Place information in the Search Box to see if the "correct" Current Day Place Name can be identified

(6) If the "correct" Current Day Place Name can't be found "with confidence":

(a) It's best to leave the Place "Unmatched" by selecting it and clicking on the "Ignore Place" Button since:

(i) Once a Place has Lat/Long data entered, the "Geocode All Places" tool will assume it's properly Geocoded and skip it in future runs of the tool

(ii) Manual Geocoding will need to be performed to determine the proper Current Day Name and Lat/Long data to record for the Place

(b) Re-running the "Geocode All Places" tool will result in all "Ignored Places" re-appearing in the new "Match Places" Window

(7) When the "Close" Button is clicked, all remaining "Unmatched Places" are "Ignored" and the tool must be re-run to generate the latest list of "UnMatched Places"

6. Manually Geocoding using 3rd-party tools:
   a. If you want to refer to the list of possible Current Day Places and "confidence" scoring that's used by the built-in Geocoding tools, either:
      1. Open the "Gazetteer" tool and enter the Place Name into the Search Box one at a time
      2. Or, run the "Geocode All Places" tool and use the "Match Places" Window that appears. This is probably the preferred way, if planning to work through the list one after the other
   b. If you just want a list of Places requiring Geocoding, plus visibility to their Place Notes: TOOLS Page > (RM12 & On) FILE PROPERTIES/(RM10 & 11) ENHANCED PROPERTIES LIST > "Places Not Geocoded"
      1. This list, without Place Notes, can be printed or saved to a file for reference
   c. The following steps reference using "Google Maps":
      1. These steps are describing steps that need to be done using your preferred 3rd-party mapping tool(s)
      2. The 3rd-party mapping tool does not have to be "Google Maps"
   d. Manually Geocoding a Place or Place Detail requires two steps:

      Step 1: Determine the Current Day Name of the Historical Place to be Geocoded:
         i. Start by pasting the Historical Place Name into Google Maps to see if it recognizes what the Current Day location is
         ii. Next, try just searching for the smallest geopolitical division to see what results are presented
         iii. If multiple results are identified that may be the Place, switch to Wikipedia and FamilySearch Wiki to learn about the history of each potential Place that's been identified
         iv. In order to determine the correct geopolitical divisions, turn to Wikipedia and the history of the local geopolitical division changes over time to confirm they are correct for identifying both the Historical and Current Day Place Name
         v. When the Place is in a foreign country, use the Wikipedia site available in the native language for the country of interest. The history of the location is more likely to be thoroughly explained by current local people in their native language:
            (1) Rely on translation tools to translate the native language text rather than selecting the "English" version of a website. In many cases, the "English" version is an abbreviated version of what is provided in the native language, rather than a translation
         vi. Once identified, enter the Current Day Place in the "Standard" data field, including the Current Day geopolitical divisions

      Step 2: Determine the Latitude and Longitude for the Current Day Place or Place Detail and enter it in the Lat/Long data fields:

i. Once the Current Day Place has been determined, use Google Maps to view the location:
   (1) If manually recording individual cemetery burial plots, or other small locations not uniquely identifiable using a 3rd-party mapping tool:
      (b) You may need to determine the Lat/Long data using a handheld GPS device:
         (i) Similar to online 3rd party mapping tools, cell phones are typically accurate to ~10-30 ft
         (ii) Handheld GPS devices are typically accurate to ~10 ft
      (c) Treating individual burial plots as Place Details can result in a large number of Place Details being created. Alternative approaches to consider:
         (i) Use a Place Detail to Geocode the cemetery and place the burial plot Lat/Long data in the individual's Burial Fact Note
         (ii) Create a Custom Fact for Burial Plots and place the Lat/Long in the Fact Description
         (iii) Although not currently utilized beyond the program's current mapping display and Place List Report, placing Lat/Long data anywhere other than the Place and Place Detail Lat/Long data fields will result in future versions of RootsMagic not being aware of these alternate locations of Lat/Long data in the database

ii. Zoom-In as necessary, especially when Geocoding a Place Detail for a specific street address, building name or cemetery to locate the exact map location you want to use for Geocoding purposes

iii. Right click on the screen location desired to be the Current Day Place to display the Lat/Long data. Clicking on the Lat/Long data copies it to the Clipboard

iv. To add the Lat/Long to the Place or Place Detail data field:
   (1) If the Lat/Long data fields are both blank:
      (a) Paste the copied data into the "Latitude" data field. Then either:
         i. Click on the Checkmark icon, or click on another Place and the data will be properly split into the two data fields and saved
         ii. Or, press the Enter key, which causes the data to be split into the two data fields. But the data isn't be saved until the checkmark is clicked or another Place is selected
   (2) If there's existing data in one, or both, of the Lat/Long data fields:
      (a) The existing data won't be replaced until new data is entered in the data field
      (b) Paste the Lat/Long data into both data fields and save it. RootsMagic will enter the Latitude data in the Latitude data field and the Longitude data in the Longitude data field

7. To record a hyperlink that opens your default 3rd-party online mapping tool and displays the Geocoded location, consider the following:
   a. The Lat/Long data fields are not accessible for use within RootsMagic, except in the Place List Report

b. When using Google Maps, to properly capture the Map URL click on the Share Button and copy the link from there.
    1. Don't use the URL displayed for the browser webpage because it doesn't capture enough Place specific information to directly open to the currently displayed location
c. A WebTag containing the Map URL can be attached to Places, Place Details, Fact Source Citations and/or Persons.
    i. Reminder: WebTags are not included in any reports except the WebTag List Report
d. The Map URL can be inserted in the appropriate Fact Note (i.e. Burial Fact for cemetery plot locations) so it can be included in Narrative Reports
    i. A Map URL placed in a Note, inside curly brackets, is flagged as Private Note Data and will only be included in reports if Private Data is selected to be included when the report is generated
    ii. Reminder: URLs contained in Notes can be opened by pressing the Ctrl-key (Cmd-key on Macs) and clicking on the URL

8. To create a list of all Places NOT Geocoded, run the TOOLS Page > (RM12 & On) FILE PROPERTIES/(RM10 & 11) ENHANCED PROPERTIES LIST tool and locate the "Places Not Geocoded" entry, then click on "View"
9. A list of Place Details that are currently NOT Geocoded can't be created. The only way to check the Geocoding status of Place Details is to view each Place's Place Details list on the PLACES Page

SPLITTING A PLACE

1. When the "Split Place" tool is used and the resulting Place and Place Details already exist, you'll end up with a duplicate Place Detail for the Place. Each Place Detail will be used by the items that tagged to it prior to using the "Split Place" tool. The duplicate Place Details will need to be merged together using the "Merge Place Details" tool
2. There isn't a built-in tool to perform the reverse (merge a Place Detail with a Place).
    a. A Tech Savvy User developed an external script using 3rd-party tools that can perform this outside of RootsMagic: "SQLite Tools for RootsMagic: Places – Conversion of Place Details to Places #places #placedetails #update"

GAZETTEER

1. The Gazetteer uses the same Place Database File used for Geocoding.
    a. The file is dated 2006.
    b. No updates or corrections have been issued
    c. I recommend becoming familiar with the history of localities you work with so results can be evaluated to ensure they are identifying the correct, Current Day Place geopolitical divisions for the Historical Place searched for in the Gazetteer
2. The Gazetteer can be accessed four ways:
    a. On the PLACES Page > PLACE LIST View > (RM11 & On) TOOL/(Pre-RM11) MORE OPTIONS (3 dots) Icon and select Gazetteer
    b. Or, open it from the TOOLS Page > PLACE TOOLS > Gazetteer
    c. Or, when entering a Place for a Fact or Association, clicking on the Place data field displays a small Gazetteer icon (magnifying glass with a map) at the far right of the data field

   d. Or, COMMAND PALETTE Icon > “gaz”
3. As a Place Name is entered in the Search Box, the list and “confidence” scores appear below. The list updates as the Place Name is entered with the possible Current Day Names and their “confidence” scores
4. After selecting a Place from the list:
   a. Clicking on the VIEW ONLINE Button opens up “Bing Maps” in the default browser and displays the selected Place
   b. Clicking on the PASTE TO PLACE Button while on the PLACES or TOOLS Page does nothing. However, when on a Person’s EDIT PERSON Window, entering a Fact or Association, clicking this Button will enter the selected Place into the Place data field

COUNTYCHECK

1. Although introduced with the release of v5 in 2011, I believe the same Place Database File used for the Geocoding and Gazetteer tools, dated 2006, is also used for the CountyCheck Explorer tool.
   a. No updates or corrections have been issued
   b. Any geopolitical division changes that have occurred after the 2005/6 timeframe will not be identified
   c. When recording Facts/Events that occurred in 2005, or later, CountyCheck can’t be relied on to perform an accurate assessment of the geopolitical divisions entered for the Place. Additional historical research may be necessary
2. Reminder:
   a. CountyCheck only evaluates the Historical geopolitical divisions down to the County (third) level
   b. CountyCheck only works for locations in the United States, United Kingdom, Canada and Australia
   c. Over the years, a few errors have been identified, which as I’ve mentioned have not been corrected with an update to the Place Database File
3. The CountyCheck Explorer can be initiated by either:
   a. On the PLACES Page > PLACE LIST > (RM11 & On) TOOLS/(Pre-RM11) MORE OPTIONS (3 dots) icon and select CountyCheck Explorer
   b. Or, from the TOOLS Page > PLACE TOOLS > CountyCheck
4. The COUNTYCHECK EXPLORER Window Search Box:
   a. Only provides a list of possible Places AFTER the complete geopolitical division has been entered.
   b. If more than one division is entered, CountyCheck evaluates each division entry separately and together. It returns a list of possible Places that contain one or more of the divisions being searched:
      i. Common location abbreviations are recognized
      ii. Alternative names of some locations are recognized
      iii. Even though only Places down to the third level are supported, if more than three levels are entered in the search, each separately entered division is still evaluated as a possible level 1 to 3 division

5. COUNTYCHECK EXPLORER Window data provided for each listed Place:
    a. Place: Possible result based on Search entry
    b. Type: Division level of selected Place
    c. < & > icons: Used to navigate back and forth through the history of Places viewed in CountyCheck
    d. Created: Date selected Place was established
    e. From: What division the selected Place was created from
    f. Contributed To: Indicates what divisions were created from the selected Place
    g. Eliminated: Indicates when the selected Place ceased to exist
    h. Known As tab: Lists in chronological order what the selected Place was called over time, what type of Place it was and from and to what dates
    i. Belongs To tab: Lists what the selected Place's next higher division is
    j. Contains tab: Lists what divisions make up the selected Place, what Type of division it was and from and to what dates
    k. Info Button: Opens the FamilySearch Wiki page for the currently selected Place in the default web browser
    l. Map Button: Opens one of several different websites in the default web browser to view map data for the selected Place. I've seen links to: Newberry Library, Wikipedia and FamilySearch Map of English Jurisdictions
6. CountyCheck can also be activated to evaluate Place Names based on the event date as they are about to be saved while entering Facts and Associations in a Person's EDIT PERSON Window:
    a. To activate: SETTINGS Page > PROGRAM Settings View > "Use CountyCheck When Entering Places" checkbox
    b. The 1st three divisions of Fact or Association Place Name entry are evaluated based on the Event Date, as it's about to be saved
    c. When CountyCheck believes there may be an issue with the Place Name about to be saved, the COUNTYCHECK SUGGESTION Window opens
    d. Recommended changes identified by CountyCheck are presented for consideration prior to saving the Place Name
    e. Additional information can be viewed by selecting a suggestion and clicking on the MORE INFO Button, or clicking on the hyperlink for one of the divisions to open the COUNTYCHECK VIEWER Window which is similar to the COUNTYCHECK EXPLORER Window, without the search capability
    f. The decision to keep the original Place Name as entered, or accept the recommended change, is always left to the User

UNUSED PLACES

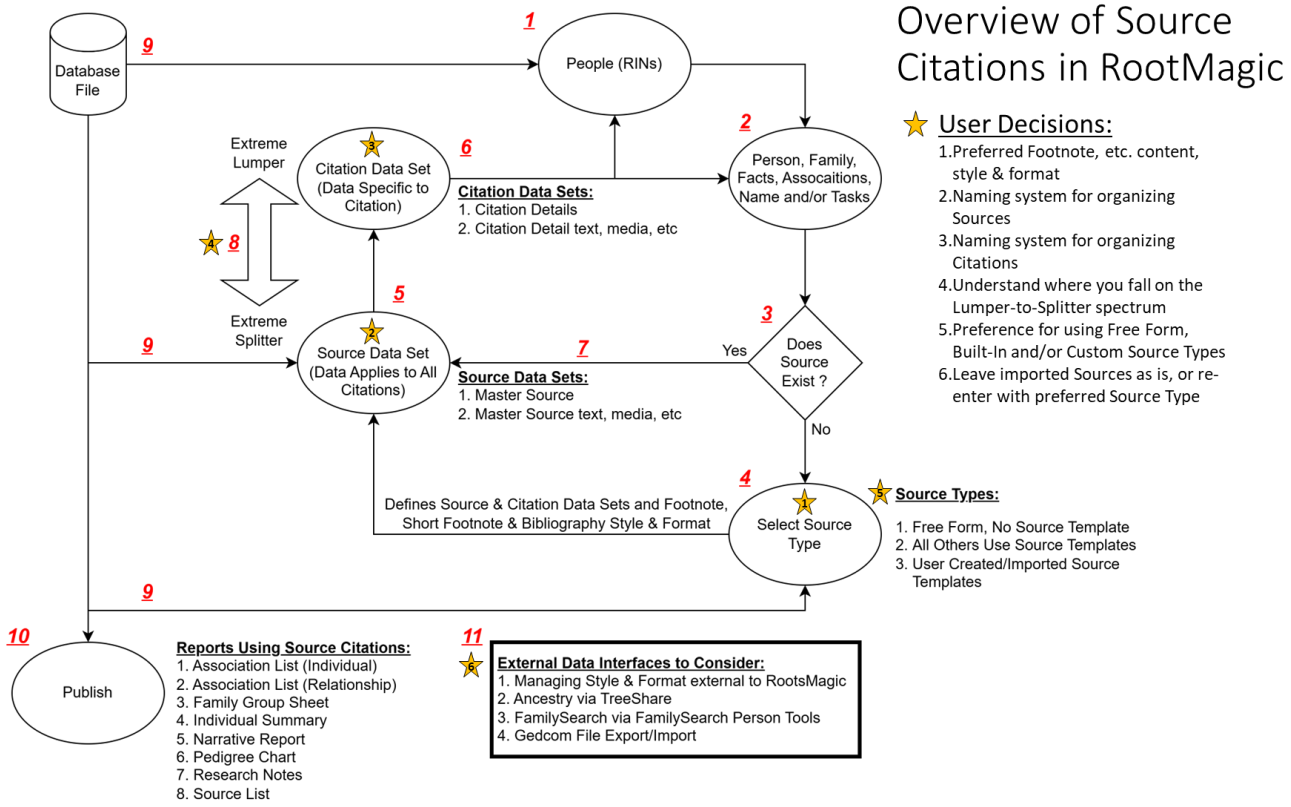
1. When "Show Unused Places" has been selected, all Places listed and any Place Details that exist for the listed Places are not used anywhere in the database file and can be safely deleted, if desired
2. If many unused Places are going to be deleted, it may be a good time to run the TOOLS Page > DATABASE TOOLS > "Compact Database" tool

3. RM10 & On, Multiple unused Places can be deleted at one time from: TOOLS Page > OTHER TOOLS > (RM12 & On) FILE PROPERTIES/(RM10 & 11) ENHANCED PROPERTIES LIST > PLACES: UNUSED PLACES > "View"
4. Pre-RM10, Unused Places must be deleted one at a time
5. Place List Report:
    a. The Place List Report can be generated from:
        i. PLACES Page > PLACE LIST View > (RM11 & On) TOOLS/(Pre-RM11) MORE OPTIONS (3 dots) Icon > Print Places
        ii. The PUBLISH Page > ALL REPORTS AND CHARTS > Place List
    b. The Unused Places List can only be generated from the File Properties/Enhanced Properties List tool:
        i. TOOLS Page > OTHER TOOLS > (RM12 & On) FILE PROPERTIES/(RM10 & 11) ENHANCED PROPERTIES LIST > PLACES: UNUSED PLACES > "View"
        ii. There isn't a capability to generate a list of Unused Place Details since all Unused Places only have Unused Place Details associated with them

WORKING WITH SOURCES

GENERAL INFORMATION

1. This document contains a compilation of general "Genealogy Source Citation Reference Materials" collected over the years
2. An interactive, self-paced, source citations training tool called "Citations Coach" is hosted at the Evidence Explained website. This tool focuses on the proper structure of a source citation, not the specific use in RootsMagic
3. This document "Working With Sources - User Decision Worksheet" can assist the User in identifying key topics necessary to address in order to define the User's approach to implementing Source Citations in RootsMagic
4. Refer to the User Decision Worksheet for Decisions #1 & #2



5. This diagram summarizes the interdependencies between People, their Facts, the creation and linking of Source Citations, inclusion of Source Citations in Published reports and considerations when exchanging Source Citation data externally:
    1. People: First, you need a Person already created in the database file
    2. Person, Family (Couples), Facts, Associations, Name (Primary & Alternate) and/or Tasks: With the exception of Tasks, all of these items are created for a specific Person in the database file. Source Citations are attached to one, or more of these items for one, or more, People or Tasks in the database file
    3. Does Source Exist? When attaching a Source Citation, you either select one that already exists, or create a new one

4. Select Source Type: The first step in creating a new Source is to select the Source Type. The Source Type defines the data fields to be used for data entry and how they will be used to create the resulting Source Citations:
5. Source Data Set:
   a. Pre-RM12, Is made up of 2 Parts called Master Source & Master Source text, media, etc.
   b. RM12 & On, Is made up of 4 Parts called Source Name, Master Source, Source Text & Source Links
6. Citation Data Set:
   a. Pre-RM12, Is also made of up 2 Parts called Citation Details & Citation Detail text, media, etc.
   b. RM12 & On, Is made up of 4 Parts called Citation Name, Citation, Citation Text & Citation Links
7. When the Source exists already (The "Yes" path from Decision block #3): You select the existing Source Data Set. Then you either create a new or select an existing Citation Data Set
8. Extreme Lumper vs Extreme Splitter: As you define your approach to creating Source Citations, you'll be able to determine where you fall on the spectrum of RootsMagic "Splitters" vs "Lumpers"
   - Extreme Splitter –Every Source Citation is separately listed on the SOURCES Page, each with a single, required, Citation Detail
   - Extreme Lumper - The minimum number of Sources possible are listed on the SOURCES Page and the rest of the Source Citation data is entered as Citation Details grouped under each Source entry
9. Once saved to the database file, you can access and edit the data for:
   - People – you access Facts from the People
   - Sources – you access Citations from the Sources
   - User created Source Types
10. Publish: The reports that include Source Citation data, mostly in the form of Footnotes/Endnotes are listed
11. External Data Interfaces to Consider: These interfaces and how they work may influence your approach to using Source Citations in RootsMagic

6. **Caution:** Be careful when naming Sources and Citations. RootsMagic will allow 2 different Sources and/or Citations with the same name to be created
7. For those using TreeShare:
   a. Be aware that Ancestry records that are attached to your Ancestry tree and then added to RootsMagic by TreeShare; and Ancestry WebHint records that are attached to RootsMagic first and then TreeShared to your Ancestry tree are linked to each other using a hidden "AncestryID."
      i. If you modify the Source Citation in RootsMagic, the changes are not passed back to the Ancestry tree because the AncestryID has not changed and still "points" to the Ancestry record, which will still be used in the Ancestry tree
      ii. If you modify the Citation in the Ancestry tree, the changes are not passed back to RootsMagic because the AncestryID has not changed and still "points" to the Ancestry record

b. If you make changes to Source Citations in RootsMagic from the EDIT PERSON Window, they will be flagged in TreeShare as a change to be reconciled
c. If you make changes to Source Citations in RootsMagic from the SOURCES Page, similar to Places, they won't be flagged as changes in TreeShare.

Extreme Splitter vs Extreme Lumper Source Type Tradeoff Matrix							
Source Type:	**Free Form**			**Built-In**			**User Created**
User Spectrum:	**Extreme Splitter**	**More Splitter than Lumper**	**Lumper or Extreme Lumper**	**Extreme Splitter**	**More Splitter than Lumper**	**Lumper or Extreme Lumper**	**All**
Choosing an appropriate Source Type	+++	+++	+++	---	---	---	+++
Customizing every Source Citation	+++	+++	+++	---	---	---	---
Transfer Source Citations to other sites and export to Gedcom file	+++	+++	+++	---	---	---	0
Deciding what to enter in each data field	+++	0	0	---	---	---	+++
Entering Citations From online sites and/or 3rd party tools	+++	0	0	---	---	---	---
Deciding what data to enter in Citation Details	0	0	0	+++	+++	+++	+++
Modification of a Source Type	---	---	---	Not Possible	Not Possible	Not Possible	+++
Maintaining a consistent style & format of Source Citations	---	---	---	+++	+++	+++	+++
Maintaining compliance with a Style Guide	---	---	---	0	0	0	+++
Length of Source List	---	0	+++	---	0	+++	Same as Built-In Source Type
Dispositioning duplicate Source entries	---	0	+++	---	0	+++	Same as Built-In Source Type

8. This table summarizes the relative Pro (+++) and Con (---) tradeoffs of each listed criteria for the three categories of Source Types depending on where the User falls on the Extreme Splitter vs Extreme Lumper user spectrum

RM12 & On, SOURCEWIZARD

1. This tool can be used in several ways:
   a. Suggest Source Citation/Source Template options by entering text describing what you are working with
   b. Copy/Paste a complete Source Citation to create a Free-form-based Source Citation
   c. Use the "Help Me Choose" (light bulb) icon and answer several questions about what you looked at and where you found it to identify the appropriate Evidence Explained 4th edition Source Template to use to create a template-based Source Citation

SOURCE LIST

1. Refer to User Decision Worksheet decision #3 and this list of "Considerations & Ideas."
2. The number shown in the "Citations" column indicates the number of unique Citations that exist for the Source. The number shown in the "Used" field indicates how many links to the Source exist in the database.
3. Clicking on a row, in the Citations column, opens the Citation List for the selected Source
4. Wildcards (_ and %) and the double quote (") character work for Source List searches

ADDING A SOURCE

1. Refer to User Decision Worksheet decisions #4, #5 & #6
2. A Source can be added from:
   a. The SOURCES Page by clicking on Add in the Menu Bar, or right-clicking and selecting Add while hovering over the main window area
   b. The EDIT PERSON Window by clicking on the Source ~~cell~~ data field for the ~~Fact~~selected item, or the Sources data field on the right side, or (RM11 & On) the EDIT PERSON Window > Sources Page
   c. The TASKS Page by clicking on the Sources data field for the selected Task
3. Once a Source Type is assigned to a new Source, it cannot be changed by editing the Source
4. RM12 & On, The SourceWizard opens providing the option to help choose a template, or proceed to Adding a new source by selecting a Source Type from a list
5. When searching for an appropriate Source Type:
   a. Wildcards (_ and %) work for Source Type searches
   b. The ~~key word~~ text entered into the Search Box is used to search ~~both~~ the Source Type Name, ~~and~~ Description and (RM12 & On) Keywords.
   c. Pre-RM12, It's important to keep in mind that the terminology used for both the Source Type and the Description was transcribed from the corresponding Style Guide reference when the Source Type was created. Therefore, to get the best results, it's recommended that you:
      i. Only search for single words and perform multiple searches if, depending on the Style Guide, more than one term may be applicable
      ii. Avoid making the text unintentionally too narrow. For example, making a word plural instead of just the text that matches for both the singular and plural forms
   d. RM12 & On, With the addition of the Keywords capability and the SourceWizard, more complex searches can be performed, if desired

RM12 & On, SOURCE TEMPLATE CONVERTER

1. RootsMagic provides 2 converter tools. One converts a template-based Source Citation to a Free-form-based Source Citation and the other converts a Free-form Source Citation to a template-based Source Citation
2. Post-conversion, each Master Source and Citation Details must be reviewed for proper punctuation and data field content since the converters preserve the Citation entered data, but do not attempt to convert it into properly formatted Citation information for the new Source Type
3. When converting from Free-form to template-based, any Master Source data not identified to be placed in a data field is placed in the Source Text Note
4. When wanting to migrate Source Citations from one Source Template to another Source Template, the following options can be used:
   a. When the 2 Source Templates have identical data fields, such as when a copy is made of a Built-In Source Template:
      i. Create the new Master Source using the copied Source Template. Make sure it is 100% complete before proceeding since nothing in the other Master Source will survive the merge

ii. Use the Merge Sources tool to manually merge the other Master Source into the one using the preferred Source Template
iii. All Citations created for the old Source will now be part of the new Source

b. When the Source Template data field names are not identical:
i. Use the Change Source Template tool to change it from a template-based Source Citation to a Free-form-based Source Citation
ii. Then use the Change Source Template tool to change the Free-form-based Source Citation to the preferred template-based Source Citation
iii. The Master Source and every Citation must be reviewed for proper punctuation and data field content
iv. Review the Source Text Note contents since any Master Source data not identified to be placed in a template data field was placed there

EDITING A SOURCE

1. Refer to User Decision Worksheet decision #7
2. Changes made to a Source will appear everywhere the Source is Used
3. It is recommended that regular Source maintenance be performed from the SOURCES Page, where all Sources in the database file can be viewed
4. Sources can be edited from:
   a. The SOURCES Page by selecting the Source and editing the data displayed on the right
   b. The EDIT PERSON Window by clicking on the Source ~~cell~~ data field for the Fact, or the Sources data field on the right side or (RM11 & On) the EDIT PERSON Window > Sources Page
5. A Source can be copied from the SOURCES Page by:
   a. Select the Source, select Tools > Copy Selected Source from the Menu Bar; or hover over the Source, right-click and select Copy Selected Source, then click OK
   b. The new copy has "(copy) added to the Source Name and no Citations are created as part of creating the copy
   c. The feature is useful when it is desired to create a slightly different Source by editing a copy the original

CITATION LIST

1. Refer to User Decision Worksheet decision #8
2. Wildcards (_ and %) and the double quote (") character work for Citation List searches

ADDING A CITATION

1. Refer to User Decision Worksheet decisions #9 & #10
2. RM12 & On, A Citation Name is no longer required to be entered by the program.
   a. This is intentional to allow Extreme Splitters to paste complete Source Citations into a Free-form Source Type and not get an error message regarding the lack of a Citation Name
   b. All other Users should ensure a Citation Name does get entered in order to differentiate multiple Citations of the same Master Source
3. A Citation can be added from:
   a. The SOURCES Page while viewing the Citation List for a specific Source by clicking on Add in the Menu Bar or right-clicking and selecting Add while hovering over the main window area

   i. When done from here, the Citation isn't linked to anything
   b. The EDIT PERSON Window by clicking on the Source ~~cell~~ data field for the Fact, or the Sources data field on the right side or (RM11 & On) the EDIT PERSON Window > Sources Page
   c. The TASKS Page by clicking on the Sources data field in the Edit Task area on the right side of the selected Task
4. The "Add This Citation to Multiple People" tool is located on the Citation List menu Bar under Tools. It:
   a. Allows you to add the selected Citation to all the people you select using the ROOTSMAGIC EXPLORER Window that opens when the tool is selected
   b. Be aware that this tool only attaches the selected Citation to the Person (General) entry on the Person's EDIT PERSON Window. It cannot attach Citations to Facts, etc

EDITING A CITATION

1. Changes made to a Citation will appear everywhere the Source is "Reused." Prior to editing the Citation, it is recommended to:
   a. Confirm whether or not the Citation is "Reused" (the Used data field is greater than "1")
   b. If it is "Reused" determine whether the changes apply to all uses of the Citation
   c. If not, a copy of the Citation should be made so the old version and the changed version can be attached to the appropriate items in the database
2. When making edits to the Citation Details portion of a Citation, you can observe how the changes affect the resulting Source Citations in the lower right portion of the Citation data area. If you don't see the changes as they are made, it's an indication that the Citation was previously Customized
3. Citations can be edited from:
   a. The SOURCES Page by selecting the Source, switching to its Citation List, selecting the Citation and editing the data displayed on the right
   b. The EDIT PERSON Window by clicking on the Source ~~cell~~ data field for the Fact, or the Sources data field on the right side or (RM11 & On) the EDIT PERSON Window > Sources Page; then selecting the Citation from the Citation List and editing the data displayed on the right
   c. The TASKS Page by clicking on the Sources data field for the selected Task
4. A Citation can be copied from:
   a. The EDIT PERSON Window and TASKS Page by:
      i. Selecting the Citation, then click on the Copy (Memorize) icon
      ii. While viewing the Source Citation list for the item you want to add the Citation to, click on the Paste Citation icon:
         1. Select Make Copy if you want to create an identical copy of the original Citation (normally with the intent to edit it slightly)
         2. Select Reuse if you want to attach the same Citation to an additional item in the database
   b. The SOURCES Page (only recommended if the plan is to create multiple copies that will all be edited prior to attaching them to items in the database) by:
      i. Hovering over the Citation in the Citation List, right-click and select Copy Selected Citation

ii. Or selecting the Citation from the Citation List and then clicking on the Copy (Memorize) icon, or click on Tools > Copy Selected Citation on Menu Bar
iii. When the Copy (Memorize) icon is used, the copied Citation resides in memory and can be applied as a copied or reused Citation anywhere it can be "Pasted." The other 2 methods add the copy to the Citation List

c. When an item has more than one Citation attached to it, you can modify the order they are listed:
   i. Normally, Citations are listed in the order they were attached to the item
   ii. The order can be modified from the EDIT PERSON Window > Sources Page:
      1. Click on the "All Citations" list box and select the Event with Citations to be re-ordered
      2. Click on the Rearrange Citations (Up/Down Arrows) icon
      3. Rearrange the listed Citations

CITATION QUALITY

1. Refer to User Decision Worksheet decisions #11
2. Note: The Citation Quality data fields and the available choices are based on E.S. Mills' "Process Map for Evidence Analysis" which is discussed in "QuickLesson 17: The Evidence Analysis Process"

USING SOURCES AND CITATIONS

1. Refer to User Decision Worksheet decisions #12 thru #17

MERGING SOURCES AND CITATIONS

1. When using the Merge All Duplicate Sources (or Citations) tool:
   a. Make a Backup file before proceeding
   b. RootsMagic only compares the text entered in the data fields.
   c. The text entered must be 100% identical (no typos, extra spaces, etc) in order for it to be considered a duplicate
   d. The tools are case insensitive
   e. The tool DOES NOT evaluate the links to Media files, Repositories or WebTags when identifying duplicates
      i. If using TreeShare to add Ancestry records to RootsMagic:
         1. Be aware that some record collections at Ancestry have Citations with 100% identical text, but links to different media files or 3rd party website URLs (like Find-a-Grave)
         2. It is recommended that you review and edit the Citation Names for these Citations prior to any attempt to use the Merge All Duplicate Citations tool
   f. RM10.0.4 & On, Citations with all blank data fields, including Citation Name are no longer merged
   g. If running both tools, run the Merge All Duplicate Sources Tool first since it may create new duplicate Citations
2. When manually merging Sources or Citations:
   a. The comparison window only displays the Name and the Source Citations

   b. The data entered in the Master Source/Citation Detail text, media, etc sections is not displayed and therefore must be viewed prior to using the tool if there are concerns that the data may be different
   c. The links to Media, Repositories and WebTags are combined in the merged result

STYLE GUIDES

1. Refer to User Decision Worksheet decisions #18
2. RM12 & On, The style guide references found in the built-in Source Templates are based on EE4 - Elizabeth Shown Mills' Evidence Explained: Citing Family History Sources from Artifacts to Cyberspace (4th edition, 2024)
3. Pre-RM12, The style guide references found in the built-in Source Templates are based on the following publication editions:
   a. AQS - Elizabeth Shown Mills' QuickSheet: Citing Ancestry.com Databases & Images (1st edition, 2009)
   b. CYS - Richard S. Lackey's Cite Your Sources (1985)
   c. E! - Elizabeth Shown Mills' Evidence! Citation and Analysis for the Family Historian (1997)
   d. EE - Elizabeth Shown Mills' Evidence Explained: Citing Family History Sources from Artifacts to Cyberspace (1st edition, 2007)
   e. QC - QuickCheck Model, part of Elizabeth Shown Mills' Evidence Explained (1st edition, 2007)
   f. QS - Elizabeth Shown Mills' QuickSheet: Citing Online Historical Resources Evidence! Style (1st edition, 2007)

SOURCE TEMPLATES

1. Refer to User Decision Worksheet decisions #19, #20 & #21
2. Pre-RM12, The built-in Source Templates have not been modified or updated since their initial inclusion in RootsMagic v4, released in 2009
   a. There are over 400 built-in Source Templates to choose from
   b. Starting with the 4th edition of Evidence Explained, some of the built-in Source Templates based on EE ARE NOT fully compliant with the new guidance
3. RM12 & On, The built-in Source Templates were completely replaced with a new set of templates:
   a. There are 18 built-in Source Templates, all based on the 4th edition of Evidence Explained
   b. The "Ancestry Record" built-in Source Template, used by TreeShare when Ancestry Tree Source Citations are downloaded to a RootsMagic file is also included
   c. If a database file from an earlier version is converted to version 12, all of the Source Templates that were being used were re-identified as User Created Source Templates, and can now be edited
4. Built-In Source Templates cannot be edited. If changes are desired, you must:
   a. From the Source Template List, select and make a make a copy of the built-in Source Template, creating a new User Created Source Template
   b. Edit the new Source Template and modify:
      i. The Source Type name to make it unique

   ii. If converting existing Sources that use the built-in Source Template, do not edit anything else until after they have all been converted
  c. If converting an existing Source using the built-in Source Template, you must:
   i. Create a new, identical Source using the new User Created Source Template
   iii. Then manually merge the original Source into the newly created Source
   iv. All Citations created for the old Source will now be part of the new Source
5. There isn't a way to search for all the Sources that use the same Source Template
6. RM8 & On, A "Long Hint" can be defined for any data fields in a Source Template, but the "?" indicating one is present is not displayed when viewing the data entry fields. The ability to view Long Hints is expected to return in a future version of RootsMagic
7. Pre-RM12, The following Source Templates have errors in them that may result in data not appearing in the listed Source Citations:
  a. Book, Audio - Footnote
  d. Census, Canada (index, published) - Footnote
  e. Church Issued Certificates (collection) - Footnote & Bibliography
  f. Church Issued Certificates (family collection) - Footnote & Bibliography
  g. Church Issued Certificates (single item) - Footnote & Bibliography
  h. Estray (Ranger) Books, parties not identified (local or county) – Short Footnote
  i. Frakturs (certificate) (single item) – Footnote & Bibliography
  j. NA-LAC (Canada) LAC Microfilm - Bibliography
  k. Passenger Lists, Ship Image (online) - Footnote
  l. Podcasts – Short Footnote

CREATING A SOURCE TEMPLATE

1. RM12 & On, If you converted a RootsMagic file from an earlier version, all Source Citations that used a built-in Source Template still use the same Source Template. However, these "legacy" Source Templates are no longer treated as "built-in" templates, they are now treated as user created/custom Source Templates and can be edited, if desired
  a. Don't forget, there are 3 new data fields in each Source Template (Source Name, Citation Name and Keywords) to be defined
  b. The Sentence Template Language can be used in both the Source Name and Citation Name fields to tell RootsMagic how to construct the names when initially created
  c. Note: Once a Source and/or Citation is created, subsequent editing WILL NOT result in RootsMagic updating the Source and/or Citation Name. Updates must be done manually
2. If you create a Source Template to use instead of a built-in Source Template, make sure the Name assigned will ensure that the "correct" one is selected when adding new Sources since you cannot merge Source Templates and you cannot delete or rename built-in Templates
  a. Many users add a special character to the Template Name so they sort to the top of the Source Template List and are easily found when selecting a Source Type when adding a new Source. You can also designate it a Favorite while selecting a template for a new Source
  b. Don't edit data field names until AFTER you've moved all existing Sources that use the built-in Source Template over to the copied version. If the data field names don't match, any entered data will not be visible in the new template

3. If you want to include a Person's Name in the Source Template, you cannot use the pre-defined [Person] variable used in Fact Sentence Templates. You must identify a data field in the Source Template where the Person's Name must be entered in order to use it in the Source Citation
4. Source Templates created with all Master Source data in proper sequence "to the left" and all Citation Details data in proper sequence "to the right" and all Citation section non-Sentence Template Language text within Conditional Brackets (< & >) won't get garbled when transferred through the interfaces with Ancestry TreeShare, FamilySearch and GEDCOM files
5. To be added later:
    a. Clarify when existing Sources need to be "touched" when User created Source Templates are modified later

USING A SOURCE TEMPLATE

1. When Source Citations are transferred into RootsMagic through the interfaces with Ancestry TreeShare, FamilySearch and/or GEDCOM files, the data is saved as Sources using the following Source Types:
    a. Free-form – All FamilySearch and GEDCOM Source Citations~~, plus Ancestry TreeShare Sources not based on attached Ancestry records (appear as "Other Sources" in Ancestry tree)~~
    b. Ancestry Record – All Ancestry TreeShare Sources ~~based on attached Ancestry records~~
    ~~c. Ancestry Member Tree - All Ancestry TreeShare Sources based on Public Ancestry trees~~
2. When Source Citations created in RootsMagic are transferred through the interfaces with Ancestry TreeShare, FamilySearch and/or GEDCOM files, the following occurs:
    a. To be added later
        i. The sentence template up through the last Master Source data field is provided as the "Source" entry:
            - Complete with Citation punctuation for any Citation data fields in that portion of the sentence
            - All formatting is passed as well (as HTML characters (at least for Ancestry)
        ii. The Citation data fields, separated by commas, is provided as the Citation
            - Is there formatting characters here too?
    b. When a GEDCOM file is created and "Extra Details (RM Specific)" is included, Source Citation data is included two ways. Per the GEDCOM spec as described above AND the corresponding RootsMagic Source Templates, Master Source and Citation Details data.
        iii. If the destination site/software recognizes the RootsMagic specific data, it can recreate the Source Citations as originally created in RootsMagic
        iv. If the destination site/software doesn't recognize the RootsMagic specific data, it will result in Source Citations as described for GEDCOM files without RootsMagic specific data
3. When performing Drag & Drop operations between RootsMagic files and the data contains Source Citations based on User created Source Templates:
    a. RootsMagic DOES NOT check to see if the Source Template already exists and always creates a new copy of the User created Source Template in the destination file
    b. It is therefore important to remember to:

i. Clean up Sources using duplicate Source Templates
ii. Delete the duplicate Source Templates to prevent selecting the wrong Template in the future when adding new Sources

SOURCE TEMPLATE LANGUAGE

1. The Source Template Language shares a lot of commonalities with the Sentence Template Language addressed in the Working With Fact section:
   a. The pre-defined fields specific to Fact Sentence Templates DO NOT work in a Source Template. If needed, similar data fields must be defined as part of the specific Source Template
   b. Switches specific to a Person's attributes (Gender, Living, Plural) DO NOT work within a Source Template
   c. The Source Template Language specific elements are:
      i. All Source data field and their Names must be defined as part of each Source Template
      ii. RM12 & On, Source Name and Citation Name data fields can be populated with templates to auto-generate the Source and Citation names displayed in their corresponding lists
      iii. The Private Switch (!)
      iv. Abbreviation Options, separated by "||"
2. Source Citation specific examples of how to apply the Source Template Language can be found in the Creating a Source Template and Using a Source Template sections of the Online Help
3. My recommended X-step approach to crafting a Source Citation (Footnote, Short Footnote & Bibliography) Sentence Templates:
   a. To be added later

USER SOURCE TEMPLATES

1. User created Source Templates can be exported to individual Template files from the Source Template List window
2. Individual exported Source Template files can be imported into a RootsMagic database file from the Source Template List window
3. Reminder: Single or Multiple Source Templates can be directly imported from one RootsMagic file to another from FILE Page > IMPORT DATA > IMPORT LISTS
4. Access to all User created Source Templates that have been shared so other Users can use them are posted in the "User Source Templates" section of the Online Help. Information on how to submit your own User created Templates to share with other Users is also provided
5. RM12 & On, When User Source Templates exported from Pre-RM12 database files are imported, the Source Name, Citation Name and Keywords template fields will be blank. Before using these Source Templates, these template fields should be edited to:
   a. Add desired naming templates and Keywords
   b. This is also a good time to review the data field Names and Hints to ensure they clearly indicate the expected data to be entered

REPORTS AND CHARTS

TROUBLESHOOTING REPORTS AND CHARTS

1. If the error "The report could not be generated. Unable to fit report text at character 0 on a new page" is encountered, try clicking on the "Reset the settings on this tab" (curved arrow) icon

REPORT VIEWER

REPORT SETTINGS

1. Source Options:
   a. Endnotes – In reports, where Endnotes is selected, all "Reused Citations" will have a single Endnote, but Citations that are identical copies will have separate Endnote entries.

CHARTS (LARGE FORMAT)

1. RM12 & On, Bow-Tie Chart:
   a. 8 is the maximum number of generations that can be included
2. Fan Chart (Ancestor):
   a. Although this report will accept additional generations, the first 9 generations are the only ones that can fit names, with the proper settings
3. RM12 & On, Fan Chart (Descendant):
   a. 6 is the maximum number of generations that can be included
4. RM12 & On, Fan Chart (Hourglass):
   a. 5 is the maximum number of ancestral and 3 is the maximum number of descendant generations that can be included

CHARTS (REPORTS)

1. Relationship Chart:
   a. RM11 & On, When more than 1 relationship exists between 2 People, a chart for each relationship can be generated from the Relationship Calculator tool

FORM REPORT

1. RM10 & On, Leeds Method Report:
   a. The colored boxes in the report with the filled-in black dot are the Matches initially assigned that color
   b. When the report is saved to an Excel file, the colors are not included, but the filled-in and non-filled-in dots are included.
   c. When the report is saved to a CSV file, the colors are not included, but the filled-in and non-filled-in dots are represented by character strings, which will need to be replaced with a more recognizable symbol after importing into the destination software.

LABELS

LIST REPORTS

1. CountyCheck List:
   a. CountyCheck only evaluates the 1st three divisions of a Place Name

   b. This report is organized by Person and the Places used in their Facts; it's not a list that can be sorted by Place Name
   c. When "Everyone" is included, the report can take a long time to generate
   d. When included, the Matches option lists not just Places needing minor corrections, it also includes Places that require no correction
2. RM10 & On, DNA Kinship List:
   a. If relationship links have been added between People after initial entry of the People with DNA Matches to be included in the report, updating the Tree Relationship for each DNA Match that currently does not have a Tree Relationship should be done first in order to ensure the latest known information is reflected in the report.
   b. "Has DNA Match" checkbox: When this checkbox is checked, the report will include People that have a DNA Match with the selected Person. Unchecked, it will exclude People with DNA Matches
   c. "No DNA Match" checkbox: When this checkbox is checked, the report will include People that don't have a DNA Match, but do have a Tree Relationship. Unchecked, it will exclude everyone that doesn't have a DNA Match

TOOLS

MERGING DUPLICATE PEOPLE

PROBLEM SEARCH

DATACLEAN

1. The DataClean tools can make changes to multiple entries in the database. It's recommended that a Backup File be made prior to running these tools in case the results are not what is expected
2. The DataClean tools only make changes that have been "Approved" by the User. It's up to you to decide whether to review each proposed change, or have RootsMagic make all changes without reviewing each one.

NameClean

PlaceClean

1. Using accurate, properly spelled and consistent Place Names is a key housekeeping task that helps reduce having multiple Place Names for the same Historical Place in the database resulting from:
   a. Merging of duplicate People with the same Facts but differences in the Place data field
   b. Typos and other data entry errors introduced by not selecting an existing entry from the Place List suggestions while entering Facts
   c. Importing data from other sites or files that used different Place naming conventions
2. PlaceClean can be initiated from:
   a. The PLACES Page > PLACE LIST View > (RM11 & On) TOOLS/(Pre-RM11) MORE OPTIONS (3 dots) Icon and selecting "PlaceClean".
   b. It can also be initiated by selecting the "DataClean" tool from these locations:
      i. On the PEOPLE Page > Any View > TOOLS > DataClean
      ii. On the TOOLS Page > OTHER TOOLS > DataClean
      iii. COMMAND PALETTE > "dat"
3. The PlaceClean tool always runs on all the Places in the database file
4. The tool options are:
   a. Problem – Select as many, or as few Problems you want the tool to flag when it's run
      i. Misplaced Place Details: This option examines Place Names for a variety of signs that the smallest division in the Place Name should be a Place Detail instead. Some of the criteria it looks for are:
         (1) Are specific place-related words, like: cemetery, hospital, etc present?
         (2) Do the names of the first 3 divisions align with the Place Database that CountyCheck and/or the Gazetteer use?
         (3) Does the Place Name exceed 4 levels of divisions?
         (4) Each time the tool is run with this option selected, it may continue to suggest moving the smallest division level to a new Place Detail. Each time it's run, it only suggests moving the current smallest division to a Place Detail entry. Careful consideration must be made if moving a 2nd division of the same original Place

Name to a new, 2nd, Place Detail entry since the 1st & 2nd suggested Place Details were created from the original same Place Name entry and didn't originally represent two different locations

b. Add or Remove Country – Allows the modification of a specific country name entry each time the tool is run. Although "United States" & "USA" are pre-entered, any Country Name can be entered
    i. If you're adding a Country Name to Places and also use the Misplaced Place Details problem criteria, you'll need to re-run the PlaceName tool with the Misplaced Place Details option selected to review Places that it flags to create a suggested Place Detail as a result of adding the Country Name
c. Replace <Brackets> - Allows the modification of a specific section of a Place Name enclosed in brackets with other text
d. After the tool is run, the above settings are saved for the next time it's run. Therefore, always review these settings before running the tool

5. The tool results appear as follows:
    a. 4 Columns:
        i. Empty Checkboxes – Only rows that get checked ("approved") will be changed:
            (1) The "conservative approach" is to leave all boxes unchecked and, one-by-one, review and verify each suggested change to ensure they are "approved" before checking the boxes one-by-one
            (2) The "fast, but risky, approach" is to start by checking ("approve") all the boxes and "try to be rigorous" in evaluating the suggested changes and unchecking those few boxes where you don't want to make the suggested change ("disapproved"), which can be faster, but prone to skipping a suggestion
        ii. Original Place Name – This shows the "Current" Place Name entered in the database
        iii. Cleaned Place Name – This shows the "Suggested" Place Name after it has been "Cleaned"
        iv. Cleaned Place Details - This shows the suggested new Place Details entry that will be created as a result of "cleaning" the identified "Misplaced Place Detail"
            (1) Any Place Name that has more than 4 levels of geopolitical divisions will be identified as having a "Misplaced Place Detail" and PlaceClean will suggest moving the 5th (and lower) divisions to the Place Details data field
    b. Below the list of suggested changes are the 3 data fields for the selected Place. The suggested "Cleaned Place" and "Cleaned Place Details" data fields can be edited to something other than what was suggested by the PlaceClean tool
    c. At the bottom of the Window, the "Problems to Fix" area lists the types of Problems the tool has identified for the selected Place
        i. Any listed Problem can be unselected to see what the suggested Cleaned Place Name would be if that type of Problem is removed from consideration
    d. Make sure the checkbox of each reviewed Place "approved" to be changed is checked; and unchecked for each Place "not approved" to be changed before proceeding
        i. Remember, PlaceClean is making suggestions. It's up to you to decide whether the suggested change is appropriate

   e. If Place Detail Names are being created, it's recommended that the Places they are being added to are noted so they can be checked for duplicate Place Detail Names after running the tool
   f. To make the selected changes, click on the "Clean Checked Places" Button
6. The PlaceClean tool does not check for duplicate Place or Place Detail entries when cleaning up Place Names.
   a. After running the PlaceClean tool, I recommend reviewing the list of Places on the PLACES Page for duplicate Place entries that need to be merged using the "Merge Places" tool
   b. Also, if new Place Detail Names were created, there may be duplicates that need to be merged using the "Merge Place Details" tool

COUNTING TREES

CALCULATORS

RM11 & On, AI PROMPT BUILDER

1. RM12 & On, AI Prompt Builder
   a. Prompts can be built for a selected Person, Family, Place, Source, Citation or Media
   b. When starting with a pre-built prompt, the settings of the "Data to include" tend to be basic. Editing the prompt provides are ability to include additional information relevant to the type of prompt being developed
   c. This video demonstrates how the tool works: "AI Prompts in RootsMagic 12: Use Your Family Tree with ChatGPT, Claude, Gemini, or Any AI"
2. RM11, AI Prompt Builder:
   a. When Prompts are built for a selected Person in the database file, the data included is:
      i. Names: Given Name, Surname, Sex, Life Span (birth & death years)
      ii. Events: Event Name, Date, Place Detail and Place
      iii. Spouses, Children, Parents and Siblings: Relationship, Given Name, Surname and Life Span
   b. This video demonstrates how the tool works: "RootsMagic AI Prompt Builder: A Practical Review for Active Researchers"
3. Always review the prompt generated by RootsMagic for accuracy and completeness prior to copy/pasting into your AI tools

ONLINE FEATURES

CHECKING INFORMATION BEFORE SHARING

MYROOTSMAGIC

HTML WEBSITE

ANCESTRY TREESHARE

FAMILYSEARCH

1. FamilySearch Person Tools
    a. Share Data With FamilySearch:
        i. RM10 & On, When they exist, a Matched Person's FamilySearch "Brief Life History" can be shared with the Person in the RootsMagic database file.
            (1) When brought into the database, the information is placed in a "Life Sketch" Fact
            (2) The 1st time a Life Sketch Fact is added to the database, a new, Custom Fact Type (Life Sketch) is added to the file's Fact Type List
            (3) The information is placed in the Fact's Description field
                (a) Reminder: The Description field is recommended to contain no more than 100 characters
                (b) You may decide to move most, or all, of the Life Sketch Description entry to the Fact's Note. If you choose to do this to ensure no loss of data when exporting it, be aware that the FamilySearch Person Tool will show that the version in RootsMagic is different compared to the version at FamilySearch

LDS FEATURES

WEBTAGS

ENTERING INTERNATIONAL CHARACTERS

GENERAL INFORMATION

1. RootsMagic supports Unicode characters - "Wikipedia: List of Unicode characters"

EMOJIs

1. Emojis are a unique character set that can be inserted like International Characters anywhere that text can be entered.
2. However, Emojis are treated differently in RootsMagic:
   a. Emojis appear in RootsMagic Charts and Reports as blank spaces
   b. Emojis can be transferred via TreeShare to an Ancestry tree
   c. Saved searches that include Emojis do not work when re-used. RootsMagic Tech Support recommends not using them as search text
   d. Tech Support reports that some Emojis have been found to cause issues with some reports and may cause a GEDCOM export to fail
3. It's recommended that emojis not be inserted into a Person's Given or Surname data field because they could affect the results received back from any WebHint or Online Site searches that include them.
4. The operating system Emoji keyboard can be activated by pressing the "Windows key"+"."(period) on Windows, or Ctrl+Cmd+Space on Mac computers.
5. Another option is to find, copy & paste them from an emoji website, such as: "Getemoji"
6. Once entered, they can't be "turned on/off" for different activities. Therefore, careful consideration needs to be taken before deciding to add emojis into the database.
   a. If inserted in a Fact, inclusion of the Fact Type can be turned on/off by editing the "Include" settings for the Fact Type.
   b. If inserted in the "Reference No" Fact Type, they can be displayed after a Person's name in place of the RIN (Record ID Number) or FSID (FamilySearch Identification) by changing the setting at: SETTINGS Page> GENERAL Settings View> "Number To Display" to "REFN"

KEYBOARD SHORTCUTS

GENERAL INFORMATION

Note: The version references in this section indicate when the undocumented shortcut became available and/or when it was incorporated into the Online Help for Keyboard Shortcuts

1. Pre-RM12, Edit Person window:
   a. Alt+A (Option on Mac?) initiates the Add a Fact function when in the Edit Person window
   b. Alt+O (Option on Mac?) opens the Options popup window on the Edit Person window
2. Data Field Navigation:
   a. Tab key when cursor is in a data field, it will highlight the next data field
   b. Pre-RM12, Left & Right (Arrow) keys open the currently highlighted data field
   c. Spacebar opens the currently highlighted Note. If used on a non-Note data field with data already entered, it will clear the currently entered data
3. RM11~~ & On~~, Ctrl+Shift+Left(Arrow) and Ctrl+Shift+Right(Arrow) (Cmd on Mac) selects text field and Note words one word to the left/right at a time
4. Pre-RM12, Due to a bug in the software, when working in the Edit Person window, regardless of which View you're working in, if the Ctrl+Shift+D keyboard shortcut is used, the popup warning window correctly informs you that the Person will be deleted from the database rather than the data you currently have selected
5. RM12 & On, Notes:
   a. Ctrl+Y (Cmd+Y on Mac) Redo, reapplies an edit that was undone
   b. Ctrl+A (Cmd+A on Mac) Select All, selects all the text in the note editor
   c. Ctrl+H (Cmd+H on Mac) Replace, find text and replace it with different text
   d. Ctrl+Shift+= (Cmd+Shift+= on Mac) Superscript, raise smaller characters above the line
   e. Ctrl+= (Cmd+ = on Mac) Subscript, lower characters below the line
   f. Ctrl+Shift+K (Cmd+Shift+K on Mac) Small Caps, display lowercase letters as small capitals
   g. Ctrl+Space (Cmd+Space on Mac) Clear Formatting, removes the formatting from the selected text without removing the text itself

OTHER INFORMATION

RESOLVING KNOWN PROBLEMS:

1. If using a Mac and the "Unexpected Error Instance of "TabuImage" not created" error message appears, some users think it's caused by the presence of unacceptable special characters in 1 or more Media Filenames and/or folder paths. However, RootsMagic has not been able to confirm this is the "real" cause of the issue and therefore do not have a guaranteed fix yet. To see if special characters are causing the issue, the steps to try and recover are:
   a. Perform steps to Force Quit RootsMagic
   b. Rename the database if it's set up to open automatically when RootsMagic is started
   c. Start RootsMagic
   d. Open the renamed database
   e. Make a Backup File in case it's necessary to revert back
   f. Optional, creating a Multimedia List Report may help in identifying and tracking which files require modification
   g. MEDIA Page > Any View > (RM11 & On) TOOLS/(Pre-RM11) MORE OPTIONS (3 dots) Icon> select Search and Replace
   h. Search the Multimedia Filenames in the database for the following special characters and replace them, one at a time:
      i. #, $, commas, double spaces, (,), {, }, !, *, and any other unusual special character symbol, like a square box
   i. For each character found and replaced, perform the same to rename the Media Files using FINDER to highlight all names under the MEDIA directory:
      i. Choose RENAME from the FINDER File menu
      ii. Repeat finding and replacing each special character found in the database.
2. Pre-RM12, If a database file is moved between Mac and Windows computers, there is an index compatibility issue on initial use. The problem can be rectified by running the "Rebuild Indexes" Database Tool, found on the TOOLS Page.

TECHNICAL INFORMATION:

1. User Settings File:
   a. RootsMagicUser.xml – Each time RootsMagic is closed, all program-level setting information is written to this file for use the next time RootsMagic is started. The information includes: User set options, window sizes, screen divider bar position information and lists of recently used files & folders.
   b. Location:
      i. On a Windows PC, the file is located in the "Users > "yourusername" > AppData > Roaming > RootsMagic > Version "#" folder. Note that the AppData folder is hidden.
      ii. On a Mac, the file is located in the RootsMagic folder in the Home directory.
   c. This xml file can be viewed (but not edited) in any web browser.
   d. If for some reason you desire to edit the data, open the file in any text/word processor software. However, the file does not contain sufficient formatting information for these programs to present the information in an easy-to-read format. It's recommended to open

the file in a web browser for easy reading and location of specific data to be changed and a text editor to search for and edit the desired text without altering the xml coding.

e. All of your settings can be replicated onto another computer running the same version of RootsMagic by placing a copy of this file in the correct location prior to opening RootsMagic.

PROBLEM SOLVING INFORMATION:

1. Learning how a feature or tool works:
   a. The first step to learning about any new tool is to play with it along with your ideas for using it in a Test Database file to make sure you understand how everything works before using it with your main research database.
   b. There are 2 different ways to approach creating Test Databases:
      i. Create a small database, by Drag & Dropping a couple of generations of the main database into a new, empty, file. Use the small database to test and learn how a tool works, or doesn't.
         (1) FILE Page > CREATE A NEW ROOTSMAGIC FILE > EMPTY FILE
      ii. Or, just make a copy of the entire database and give it a new name that clearly identifies it as a Test Database:
         (1) FILE Page > TOOLS > COPY
         (2) Decide where to save it
         (3) Give it a name that makes it clear it's the Test Database and not the Main Research Database
         (4) I recommend changing the color displayed for the Test Database as well (SETTINGS > GENERAL > Database Color)
         (5) Save the file
         (6) Make a Backup of the Test Database file so that it can be Restored whenever it's necessary to reset the Test Database during testing
   c. Play with the tool and how it behaves using the Test Database first. Confirm your understanding of how it works. Additional sources of help are listed in the "Getting Started – General Information section"
      i. Links in the Help and Support Section on the software program's HOME Page
      ii. The RootsMagic Community, which is viewable by the public, even without an account. An account is required, if you want to post or keep track of which postings have read and which are new.
      iii. At our monthly SIG meetings, Open Q&A and SIG email (rootsmagic@gfo.org)
      iv. If you're a member of the Private RootsMagic Users Facebook Group administered by RootsMagic, there's always a lot of posts about new features recently added to the program and questions about how to do things
2. Complicated Searches and Filtering:
   a. RM11 & On, When performing complicated Searches and Filters, use the Enhanced Rules-Based Advanced Search and/or Group capability.
      i. Instead of using the Mark/Unmark filtering "By Data Fields" option in the ROOTSMAGIC EXPLORER Window, use the "Saved Searches" option to take advantage of the Enhanced Rules-Based Advanced Search which supports the creation of complicated Searches

b. Pre-RM11, Using the Rules-Based Search Criteria Window or the RootsMagic Explorer Mark/Unmark using Data Fields to create Boolean Logic filters is one of the more powerful tools in RootsMagic in terms of being able to find People that meet a specific set of criteria for a task or problem.
   i. But it can appear difficult to use if attempting to write and apply a series of conditions all at once and are surprised the resulting list of People isn't what was expected
   ii. The effect of using both the AND & OR connectors in the same filter criteria can sometimes create unexpected results
   iii. Understanding what the filter field criteria are actually looking at is important
   iv. Working out the complicated filters incrementally as a series of simpler, shorter, filters is a good technique to avoid some frustration and will usually help point to where things may not work as expected

3. Resolving "linking issues"
   a. Linking issues typically appear in one or more of the following forms:
      i. Duplicate People with same RIN (Record ID Number)
      ii. Children from same Family not linked to the same Parental Couple
      iii. Known Spouses shown as "Unknown Spouse" in the Descendant View.
   b. If it's determined the original cause was from data brought into the database file via the Ancestry TreeShare or the FamilySearch tool, it's recommended the issue get fixed at those sites and bring the changes into the file rather than fix it in RootsMagic and attempt to push the fix back to the Online Site that introduced the original problem.
   c. Most linking issues can be analyzed and corrected by performing the following steps in the order listed:
      i. Run the 4 Database Tools found on the TOOLS Page to ensure there are no internal database issues
      ii. If not already displayed, turn on the display of each Person's RIN:
         (1) SETTINGS Page> GENERAL Settings View > "Number To Display" = RIN
      iii. The same Person, with different RINs (Record ID Numbers), are duplicated People in the database that should be Manually Merged and then the merged information can be cleaned up
         (1) PEOPLE Page > Any View > TOOLS > "Manual Merge"
      iv. Select the Person of Interest, then switch to the DESCENDANT View and set the number of generations to display to "2"
         (1) There are 2 types of relationship links:
            (a) Parents (a Couple) to a Child
            (b) Spouse to Spouse.
      v. Analyze each "Family" currently defined in the database for this Person. Determine which People are shown in incorrect "Families." Look for these symptoms:
         (1) Is the same Couple listed more than once? If yes:
            (a) Potential Cause: Open the Person's EDIT PERSON Window and look for multiple Marriage Facts for the same Couple.
            (b) Solution: If Couple only married once, merge Marriage Fact data into a single Marriage Fact. If Couple did get married more than once, take no action.

(2) Is the same Child appearing under more than one Couple (Person and "Unknown Spouse" and/or Person and same Spouse)? If yes:
  (a) Cause: Child linked to more than 1 set of Parents
  (b) Solution: Unlink incorrect Parents from Child
(3) Some Children listed under one Couple entry and other Children born to the same Parents listed under a different Couple entry
  (a) Cause: Children were not linked to the same Couple (possibly the result of using the "+ Add Father/Mother" Buttons instead of "Add Parents" on the PEDIGREE View)
  (b) Solution: Link all Children to the same Couple in the database and Unlink them from the other sets of Parents (User preference whether to Link/Unlink or Unlink/Link).
(4) Couples you didn't expect to see, including having an "Unknown Spouse" and no Children
  (a) Cause: Either incorrect Spouse link applied, or a Child was previously linked, and subsequently unlinked
  (b) Solution: Unlink from Spouse

vi. Once the People and relationships needing correction have been determined, select one of the Parents and switch to the Family View to ensure both you and RootsMagic are focused on the same Family relationships before performing the appropriate solution:
(1) Link/Unlink relationships in this Family as necessary.
(2) Reminder: The "Unlink Family Members" choice can be used when it's desired to unlink all Children from their Parents and unlink the Parents from each other for the Family displayed in the Family View

vii. Repeat, starting at step iv, until all bad links have been corrected and the Family is properly depicted in the Descendant View.
(1) If there's a multi-generational issue, shift the Descendant View 1 generation up/down to analyze and correct bad links one Family at a time.

UPGRADING FROM EARLIER VERSIONS OF ROOTSMAGIC:

1. Upgrading from a Pre-RM8 version:
   a. Contact the GFO RootsMagic SIG facilitator (rootsmagic@gfo.org) for current recommendations
2. Upgrading from an RM8 & On version:
   a. Review the following before proceeding with the actual installation and conversion process:
      i. Each version of RootsMagic installs as a separate software program on the computer.
      ii. The installation program will ask whether the older version should be uninstalled as part of the installation process. You can:

Note: Leaving the older version installed, at least until the new version is set up, makes it easier to ensure the Settings entered on the SETTINGS Page in the older version are properly transferred to the new version (they're not automatically transferred by the installation software)

(1) Let the software uninstall the older version while installing the latest version.
(2) Leave the older version installed for now and use the Operating System Uninstall Program capability to remove the older version later
(3) Keep the older version installed

iii. When an RM8 & On database file is opened for the first time in a newer version, the file is "converted" to be compatible with the new version
(1) Once a file is "converted", it can no longer be opened using the older version
(2) If the capability to continue using a database file with the older version is desired, a copy of the older database file must be made and renamed to clearly identify the version it's intended to be used with and/or place it in a different folder before proceeding with the "conversion" of one of the 2 copies of the file
(3) Otherwise, make a Backup of the old version file before proceeding. Edit the Backup Filename to indicate it was the last Backup prior to converting to the newer version

b. Install the RootsMagic program, but do not open any files yet
c. Open the new version and go to the SETTINGS Page.

Note: If the older version was not uninstalled, open it and go to its SETTINGS Page in order to view the settings in the older version while setting up the new version

i. At a minimum, on the FOLDERS Settings View, set the "Data Folder" to point to where the database files for the new version (and the file to be "converted") is located.
ii. Normally, these Settings would be the same folder locations as the older version with the exception of the Data Folder, if you've decided to place the "converted" database file in a different folder than the old database file

d. Now open the database file to be "converted" to use with the new version
e. Return to the SETTINGS Page and set the remaining Settings for each View to the desired settings
i. If the older version is still installed, open it and manually transfer the Settings in the older version to the new version, ensuring the new version looks and behaves similar to the older version
f. Once the Settings have been transferred, if the older version is no longer desired to be installed, use the Operating System program uninstall function to remove the older version
g. Windows Only, During the installation of a new version, if you elected to have RootsMagic uninstall the older version, some Users get a message while using the program that the Place Database is "Missing". To reinstall the Place Database:
i. Select the version you are using on the RootsMagic Downloads webpage
ii. Click on the "Show Other Downloads" link below the blue Download Button
iii. Under "Optional Downloads," select "Place Database Installer"
iv. After it downloads, install it
h. Pre-RM12 to RM12 & On, The release of RM12 introduced a completely new set of built-in Source Templates. The conversion process preserves all "legacy" Source Templates, but they are now able to be edited. You may want to consider doing some, or all of the following after the file is converted:
i. Convert some/all Source Templates to the new built-in versions

ii. Enhance some/all “legacy” Source Templates by:
   (1) Entering Naming Templates for the Source Name and/or Citation Name fields in the templates
   (2) Entering Keywords for each template