

GFO RootsMagic SIG Handout

Barry's v8 & v9 Recommendations/Wiki Supplement

ROOTSMAGIC v8 & v9 WIKI

v8(http://wiki.rootsmagic.com/wiki/RootsMagic_8:RootsMagic_8)

v9 (<https://help.rootsmagic.com/RM9/index.html>)

GENERAL

1. If the RootsMagic program “freezes” and nothing appears to work for some reason, but other programs continue to work as normal on your computer, you need to terminate the RootsMagic program, which can be done as follows:
 - a. For Window PCs:
 - i. Press Ctrl, Alt & Delete keys at the same time
 - ii. Select Task Manager
 - iii. On the Processes Tab, locate the program and select it
 - iv. At the bottom right, click on “End Task” to terminate the program
 - v. Close Task Manger
 - vi. Restart RootsMagic
 - b. For Macs:
 - i. Press Option, Command & Escape at the same time to open Force Quit, or select it from the menu
 - ii. Locate the program and select it
 - iii. Force Quit the program
 - iv. Close Force Quit
 - v. Restart RootsMagic
2. If you move a RootsMagic database file between Mac and Windows computers, the first thing you should do after opening the file is to run the Tools > Database Tools > Rebuild Indexes function.

THE ROOTSMAGIC INTERFACE

v8 (http://wiki.rootsmagic.com/wiki/RootsMagic_8:The_RootsMagic_Interface)

v9 (<https://help.rootsmagic.com/RM9/the-rootsmagic-interface.html>)

PEOPLE PAGE

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

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- g. In v9, if you start your surname search with a double quote ("), search results will only include surnames that start with the letters entered. This special character does not work for given name searches (letters entered after a comma).

SEARCH PAGE

1. The columns of information shown in the People and Advanced People search results are the ones selected to Customize the People List View on the PEOPLE Page
2. Person Search View:
 - a. Given Name or Nickname (partial or full) can be entered in Given name field
 - b. Surname or Married Surname can be entered in the Surname field
 - c. Partial names can be entered, and it does not have to start with the first letter
 - d. Wildcards and the (v9 only) double quote (") character DO NOT work for name searches
3. Advanced People Search:
 - a. Some have reported that RM is "slow" after performing an Advanced Search as long as the filtered results are present in the Results area of the SEARCH Page. It is recommended that once you are finished working with the results, that you click on the Clear Results button.
 - b. Wildcards and the (v9 only) double quote (") character DO NOT work for name searches
4. Web Search:
 - a. The list of people in the database can be searched, similar to the PEOPLE Page Index, using the format of: Surname, comma, First Name.
 - b. Partial names can be used too, ~~but Wild Card characters do not work on this Page~~
 - c. Wildcards and the (v9 only) double quote (") character work for name searches

TOOLS PAGE (v9 Only)

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.

SETTINGS PAGE

1. The Settings Views:
 - a. Program Level settings are set in: Program, Folder, & Display Views
 - b. File Level settings are set in: General, Preparer, WebHint and LDS Views
2. Program Settings View:
 - a. Ask for Backup when exiting RM – YES
 - b. Add date to backup – YES
 - c. Check for duplicates when adding people – YES
 - d. County Check – YES (unless you always use current day locations)
 - e. Date entry – USE SYSTEM SETTINGS
3. Folder Settings View:
 - a. Data Folder – This location should be set prior to using TreeShare with Ancestry or Restoring a Backup. This will enable RM to use "relative" paths for media files placed in the resulting media folders when performing these activities. Otherwise, RootsMagic will store "discrete" paths for media file links.

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- b. Backup Folder – set to its own folder location to keep backup files separate from all other file types
- c. Media Folder – Starting with RootsMagic 8, media files are linked using “relative” paths from several locations (despite displaying full path names, including drive letter, to the user; implying all links are “discrete”).
 - i. All media files added after a Media Folder location is specified in the Folder Settings View on the SETTINGS Page will be “relative” to the Media Folder location, if the media file is located in the folder or a subfolder. Therefore, it is recommended that the Media Folder specified should be the “top level” folder where most/all media files being added are located, or in sub-folders. Ideally, the Media Folder location should be specified prior to linking any media files to information in the RM database file.
 - ii. Changing the Media Folder location after already having linked media files will result in broken links that must be fixed after the change using the “Fix Broken Media Links” tool (MEDIA PAGE > 3 dots (more options)).
- 4. General Settings View:
 - a. Database Color – Recommend selecting a different color for each of your database files/groups of files, especially if you work with more than 1 open at a time. Remember you must switch Pages to reflect the newly selected color.
 - b. Problem Alerts – YES
 - c. Problem Options – Review to make sure they meet your expectations for Alerts
- 5. Display Settings View:
 - a. Font scaling – remember to close RootsMagic and re-open to ensure all fonts are set to the new settings. Also, take note of the setting prior to making a change so that you can reset it if you decide you don't like the new setting
- 6. Preparer Settings View:
 - a. Name, Address, Phone and E-Mail are the only entries that will be included in reports when Preparer Data is selected to be included. Cell, Fax and Website entries are not used in reports.
- 7. WebHint Settings View:
 - a. Ancestry:
 - i. For Ancestry Hints to work, you must be logged in and linked to a tree via RootsMagic Treeshare
 - ii. The “Clear on Accept” setting controls how TreeShare works, not WebHints. When selected and the “Only Show Changed People box 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 highlighted person is the first person in the list
 - 1. It is recommended that this combination of settings only be used when you work the TreeShare list from top to bottom to avoid having to scroll through the list to find where you were after each set of changes are accepted.
 - iii. Warning: DO NOT select “Disconnect from Ancestry Tree” unless you really want to permanently sever the Treeshare link between the Ancestry Tree and your RM

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file. THIS ACTION CANNOT BE UNDONE. If done in error, a recent Backup file from when Treeshare was still connecting to your tree must be restored, or a new Treeshare connection must be created with either a new Ancestry Tree or a new RM file. (You cannot "re-connect an existing Ancestry Tree to an existing RM database file).

- iv. Rather than "Disconnect from Ancestry Tree", use the "Reset Treeshare" function to force RM to rebuild the links between the connected Ancestry Tree and RM database file.
 - b. FamilySearch:
 - i. For FamilySearch, hints are provided for people regardless of whether you have matched them to their corresponding person in the FamilySearch Family Tree
 - c. FindMyPast:
 - i. Evaluating and dispositioning FindMyPast Hints is a completely manual process performed external to RootsMagic. Data from any Confirmed Hints must be manually entered into RootsMagic.
 - d. MyHeritage:
 - i. Evaluating and dispositioning MyHeritage Hints is a completely manual process performed external to RootsMagic. Data from any Confirmed Hints must be manually entered into RootsMagic.
8. LDS Settings View: No recommendations

DATABASES

v8 (http://wiki.rootsmagic.com/wiki/RootsMagic_8:Databases)

v9 (<https://help.rootsmagic.com/RM9/databases.html>)

GENERAL FILE INFORMATION:

1. The database engine used by RootsMagic is SQLite (www.sqlite.org). SQLite does not support multiple users. Therefore, it is important to only have one computer, with one computer program, accessing the database file at a time
2. RM Tech Support recommends not using ANY file syncing/sharing programs on your RootsMagic database file as it can cause database access errors and, worst case, there is the possibility that it can corrupt the file, making it unrecoverable. This recommendation is just for the database file itself and does not apply to media, backups, or any other type of file that RM uses/creates. They are aware of situations where people have used file syncing/sharing for extended periods of time with no issues and then one day their database file becomes corrupted and is unrecoverable.
3. When strange things occur that may be the result of a corrupted database file, the following 2 steps should be tried to see if either will fix the issue:
 - a. Run all of the Database Tools prior to reaching out for help: FILE Page > Tools (in v9, 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 with the database, the next step is to Drag & Drop the entire database contents into a new, empty, file. Don't delete the original file because you may need to reference it to manually migrate data that did not transfer (see end of this section)
4. File extensions:
 - a. ADP & ADP-journal– Interim files created by RootsMagic when the TreeShare window is open. File is normally deleted by the program when the TreeShare window is closed. It is 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. docx – Microsoft Word file (PUBLISH Page output format)
 - c. DUP & DUP-journal – Interim files created by RootsMagic when identifying duplicate entries and/or file compare. File is normally deleted by the program when complete. It is left behind when the program encounters a problem or the process was cancelled. These file types can be deleted
 - d. ged – GEDCOM file (used to transfer data between genealogy sites/software)
 - e. lst – RM list file (text file created when a GEDCOM file is imported into RootsMagic. It will list any issues encountered during the import process)
 - f. pdf – Adobe portable document format file (PUBLISH Page output format)
 - g. rmbakup – v8 or v9 backup file (compressed .zip file)
 - h. rmgb – RM7 backup file (compressed .zip file)
 - i. rmgc – RM7 database file (also RM8 file exported to Dropbox for use by RM IOS App)
 - j. rmtree – v8 or v9 database file

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- k. 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 Thumbnails. 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.
 - l. rmst – RM Custom Source Template file (Custom Source templates can be imported/exported from the Source Template List window)
 - m. svg – Scalable vector graphic file ((PUBLISH Page output format)
 - n. txt – Text file (PUBLISH Page output format)
 - o. 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 RM Backup, with media if desired) a copy if you believe you may want to resurrect/use the file in the future.
6. Importing post-2014 Family Tree Maker (FTM) data to RootsMagic cannot be done directly due to FTM's proprietary file format. RM Tech Support recommends trying all of the following and evaluate which process works best with your specific set of data:
- a. Sync FTM data to an Ancestry Tree and then download Ancestry Tree data (including media) to RM via Treeshare function
 - b. Export FTM data to a GEDCOM file and import into RM
 - c. Export FTM data to FTM v2014.0 or earlier and import into RM (Per RM Tech Support, the RM7 import FTM 2014 tool works better than the current RM8/RM9 FTM 2014 import tool, this will be fixed in a future update)
 - d. As you evaluate the results of the above options, in addition to looking at the file properties on the HOME Page and Enhanced Property List on the TOOLS Page, you may want to use the File Compare function to help identify differences between the imported files.
7. Direct import of Legacy data to RootsMagic can only be accomplished with the 32-bit version of RootsMagic installed on a Windows PC (v7 & 8 are 32-bit and v9 is available in both 32- & 64-bit versions).

CREATING A NEW DATABASE:

1. Before creating a new RootsMagic file, it is recommended that you first go to the Folder Settings View on the SETTINGS Page and specify at least the Data and Media folder locations because these are used by RootsMagic to determine whether "relative" or "discrete" path locations will be placed in the database to identify link paths to database and media files.
2. Create New, Empty, File:
 - a. After creating a new file, do the following:
 - i. Go to the SETTINGS Page and review all the File specific settings in the General, Preparer, WebHints & LDS Views
3. Create New File by Importing Data or Downloading from an Online Tree:
 - a. If importing data from a GEDCOM file exported from a RootsMagic file to create a new file, all limitations and cautions regarding using GEDCOM to exchange RootsMagic data (see end of this section) apply.

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- b. After creating new file by importing data or downloading from an Online Tree, do the following
 - i. Go to HOME Page and review the File Properties to confirm what you expected was imported
 - ii. Just like creating a new, empty file, go to the SETTINGS Page and review all the File specific settings in the General, Preparer, WebHints & LDS Views
 - iii. Be aware that imported/downloaded data may result in:
 - (1) New Custom Facts created for Fact Types that do not match existing RootsMagic Fact Types
 - (2) Sources and Citations created using the Free Form Template, rather than your preferred Source Template type.
 - (3) Place names and Place Details that do not conform to your naming and/or structure conventions.
 - iv. Depending on your intended use of this new file, you may need to clean up the imported/downloaded information to meet your standards/conventions.
- c. Consider "Archiving" a copy of the original file that was imported and a copy of the file after it was imported for future reference in case you need to determine whether some erroneous information originated in the original import, or was added later using RM. It can also help you figure out if data was "lost" during the import process that you didn't notice until later.

OPENING AN EXISTING DATABASE:

- 1. The "Recent Files" section lists up to the last 8 files opened
- 2. The "Found Files" section only lists files found in the folder and subfolders specified in the SETTINGS Page, Folders Settings View for the "Data Folder". The list will contain both RM8/9 (.rmtree) and RM7 (rmgc) files.
 - a. If looking for a "missing file" you are better off using the OS File Explorer/Search utilities and wildcard characters to try to locate where the file is located.

WORKING WITH MULTIPLE DATABASES

- 1. Up to 4 different files can be open at the same time (only 1 in the free version).
 - a. If you want to view information for different parts of your database, other than individual Person Edit screens; you must make a copy of your database file and assign a different name to it. Make sure you only make changes in your original file, not the copy. Recommend giving it a unique Database Color Assignment that reminds you that it's not your master file for making changes (SETTINGS Page > General Settings View).
- 2. If you have RootsMagic set to open the last file used, when working with multiple databases, close the database you believe you will want to use next time, last.
- 3. The 1st file opened behaves a little different compared to the 2nd to 4th files:
 - a. When the 1st file is minimized, all open file windows are minimized
 - b. As long as the 1st file is not minimized, the 2nd to 4th files can be minimized and they are placed in the lower left of the desktop

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- c. If you close the 1st file before any of the other open files, the behavior of the 1st open file transfers to the next file opened in the session that remains open
- d. Currently, there are a few popup windows that appear centered in the 1st file window, even if you are working in the 2nd to 4th file. Therefore, it is advised to NOT position the 1st file window so that the center of the window is not in the visible Desktop area. If you do, the Program appears to "freeze" because you cannot see/click the buttons on the Popup window, requiring the user to have to terminate the Program execution.
- e. Popsups I have identified (so far) that center on the 1st file window are:
 - i. The Spouse selection popup window when creating a Couple Fact (Marriage, Divorce, etc)
 - ii. The WebHint list for a Person

DRAGGING AND DROPPING PEOPLE

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

BACKING UP A DATABASE:

- 1. General Info:
 - a. 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 in the SETTINGS Page, Program Settings View. Closing a file from the FILE Page will not cause the Backup popup window to appear regardless of this setting.
 - ii. Selecting File Page, then Backup
 - iii. Selecting Tools Page, then Backup database
 - b. Can be set to include associated media files. However, this consumes a significant amount of storage space and adds considerable amount of time to perform each RootsMagic Backup

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- i. Primarily recommended when you want a complete set of information (database and linked media files) for the purpose of archiving a copy or perhaps sharing a copy of data and all linked media files
 - ii. All media files are placed in a single media folder inside the backup file. When restored, the media files are all restored in a single media folder, any file/folder structure used to organize media files prior to the backup is lost.
 - iii. If broken links exist in the database, the corresponding media files will not be backed up
 - iv. Regardless of what is selected, media files not linked to anything in the database WILL NOT be backed up
 - c. Are primarily intended to support "Undo" resurrection of corrupted database files, accidentally deleted data or files, view archived data to compare with current version of the database and/or to transfer a database to another computer
 - d. RootsMagic Backup files are actually "zip files." If necessary, you can change the file extension to ".zip" and then use separate Zip file software to extract the compressed information
2. When to back up a database file:
 - a. Anytime you have entered/changed data you would rather not re-enter should something unexpected occur to the file (for me, usually once per day of editing when closing the file)
 - b. Prior to performing a major change that can affect multiple records in one action (Examples: cleaning up Place Names, Sources & Citations, Merging Duplicates, Search & Replace, Drag & Drop people into existing tree, importing GEDCOM data, downloading data from online sites, etc)
 - c. Plus, prior to using any of the following Tools found on the Tools Page (version 9 & on): Rearrange children or spouses across the whole database, Delete everyone in a group, Change fact type for everyone, Remove a fact type from everyone
3. If creating a second (or more) Backup in the same day, add a differentiator (dash number or a, b, c...) to make the filename unique to prevent overwriting earlier Backups, and also order the files sequentially when sorted by filename

RESTORING A BACKUP

1. General Info:
 - a. If you have a RootsMagic 7 Backup file and do not have the corresponding database file, you can import the Backup file into RootsMagic 8/9 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 cannot be changed prior to restoring it. If you do not want your current version of the file to be overwritten, you must either restore the 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 file organization structure you are 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 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 window cannot be opened for the person's record in the other file being used.
 - 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 Compare function, if you expect to be moving a lot of information, or copying people between files using the Compare function, you may want to consider how you want to make 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 so that you can search and insert notes, etc and things to do after exiting the Compare function

IMPORTING LISTS

1. When importing a Fact Type list, RootsMagic imports all Fact Types, except the default 64 Fact Types included in every RootsMagic file.
 - a. Unlike the default 64 in a new file, these other Fact Types will be imported preserving all the settings as they are in the source file. This includes whether or not it will be exported to a GEDCOM file
 - b. If a Fact Type list is imported into a file that already has data in it, duplicate Fact Types may be created that should be cleaned up.

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

2. When importing a list of (Custom) Source Templates from a database file, if they already exist in the destination file, they will be duplicated.
3. A list of Custom Association Types cannot be imported at this time.

IMPORTING/EXPORTING DATA FROM AN EXISTING FILE VIA GEDCOM

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

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- a. GEDCOM files (pre-v7.0) are text files and do not contain media images or files. Only the drive, path and filenames pointing to where your linked media files reside can be included
- b. GEDCOM files exported from RootsMagic contain established TreeShare and/or FamilySearch ID mapping established in the source database. When imported back into a RootsMagic file (or transferred via Drag & Drop), this mapping is preserved.
- c. For reference, here 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 Drag & Drop: <https://sqlitetoolsforrootsmagic.com/gedcom-dnd-transfer-losses/?fbclid=IwAR3kychhZq7qo7UNM1xohUbsdZ0SRYMnj6C7XuWQdznYkFHd4pEGa5y8cn8>
- d. For reference, the GEDCOM website (specification can be found here, along with a list of "Validators") is: <https://www.gedcom.org>
- e. For Reference, the Family Tree Analyzer tool (Windows only) can be used to look at and analyze the data in GEDCOM files: <https://ftanalyzer.com>
2. The Drag & Drop function is actually an internal GEDCOM export and GEDCOM import of the selected data between 2 RootsMagic database files.
 - a. If you've made changes in the past regarding which Fact Types to not export via GEDCOM, you may want to review and change the settings back to have them included
 - b. Unlike an import of an external GEDCOM file, you are not given the option to add a Source Citation to the People and/or Facts "dropped" into the file.
3. When importing data using a GEDCOM file:
 - a. If you elect to add a GEDCOM Import Source Citation to added People and/or Facts, the information you enter will appear in reports in the following form:
 - i. Source Name: GEDCOM file imported on [DATE]
 - ii. Footnote and Short Footnote: GEDCOM file submitted by [NAME], [ADDRESS INFO]. Imported on [DATE]
 - iii. Bibliography: GEDCOM file, [NAME]
 - iv. The corresponding Citation will be given the same Name as the Source Name and applied as a "reuse" of the Citation (change 1 Citation and all get changed).
 - b. After performing a GEDCOM import, check the folder where the destination database file is located using a File Manager/Explorer program and open the LST file with the same name as the imported GEDCOM file (using a program that can read text files) and check for any issues encountered by the import tool
 - i. You may need to open the GEDCOM file itself (using a program that can read text files) to analyze what the data issue is tagged to/located within the imported data set that the LST file is referring to.
 - c. When a group of people are brought directly into an existing file via GEDCOM import (or 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

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- (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 Facts are created for Fact Types that do not 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.
- 4. When exporting data to a GEDCOM file, do the following first:
 - a. If you intend on privatizing living people, run an Advanced Search to identify all people currently identified as living in the Group you intend on Exporting first:
 - i. Go to SEARCH Page and select Advanced Search View
 - ii. Click on the Find button
 - iii. Select "Living Flag" in the first "Select field" box and "Is True" in the Logic box, and then click on "OK"
 - iv. The resulting list is all of the people in your Group that will be privatized. If you see people that should not be privatized, click on Edit button and make the necessary corrections
 - v. Repeat until review is complete
 - b. The initial default setting for each newly created RootsMagic file is set to export all (default) Fact Types. Decide whether you want all, or only some Fact Types to be exported. Confirm export settings for each Fact Type is set as you want, as follows:
 - i. Select PEOPLE Page, click on 3 dots icon on the People Menu Bar and select Fact Type List
 - ii. Note where the "Include GEDCOM: Yes/No" information is located on the Fact Type screen
 - iii. Scroll through the list of Fact Types to confirm the desired Fact Types you want to include are set to "Yes" and any Fact Types you do not want to include are set to "No"

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

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

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- c. If exporting a subset of people in your database and you have not created a Group yet, you may want to create a new Group prior to starting the process to export the GEDCOM file
 - i. Remember that Couple/Family Facts will only be included with the export if both people are included in the export
- d. If the data you want to export contains links to media files, check & fix broken media links (MEDIA Page > 3 dots > Fix broken media links).
- e. Now you are ready to export the GEDCOM file
- f. After exporting data to a GEDCOM, if you set some Fact Types to not export, you should decide whether to reset them to Yes now, or wait until the next time you perform a GEDCOM Export or Drag & Drop operation to review all their export settings.

WORKING WITH PEOPLE

v8 (http://wiki.rootsmagic.com/wiki/RootsMagic_8:Working_With_People)

v9 (<https://help.rootsmagic.com/RM9/working-with-people.html>)

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. To reset the Primary Name, create a new, temporary, name, 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 delete the temporary name created.
2. Sometimes you will discover a person has an unexpected "Unknown Spouse". This is not a record for a person in the database, it is an indication of a Family/Couple relationship created either by attaching a Child to just 1 parent or a Family Fact that requires a Couple (like Marriage) and only 1 person is associated with it. 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**
 - a. If caused by data brought in from another source, when possible, it is best to return to the source and 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 Blog: <https://www.dutchgenealogy.nl/ask-yvette-how-to-record-transgender-people/>
 - b. Stewart Traiman's website: <https://sixgen.org/>
4. General information on what and where to enter people's names can be found here:
 - a. Tamura Jones blog:
https://www.tamurajones.net/GenealogyNameBasics.xhtml?fbclid=IwAR2WpaawV8JtY51XDuAwVqLH_3OAE5d3WAShW7moC84EICfJ9nH9W8-0aHM

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 is a best practice to add People from a People View that ensures you are establishing the current relationship links:
 - a. When known, add Parents as a Couple. If the Couple has already been established, don't attach individual Father and Mother to a Child from the Pedigree View
 - b. Add Children to a Couple from the Family or Descendant View, where you can ensure you are linking to the correct Couple
3. People can be added by clicking on the Add a Person (+) icon; in the Pedigree & Family Views, clicking on the + Add Child, Spouse, Mother, Father boxes; hover over a person and right clicking; keyboard shortcuts, Command Palette; or from the selected person's sidebar info view.

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4. The minimum data that must be entered for a new Person to be added to the database is either their Given or Surname. All other information is optional.
5. If you know 2 people are siblings, but the parents are unknown, you can connect them by entering their Father as a new person with the same Surname as a placeholder. Once created, you can link the siblings to the Father to establish their relationship.
6. If desired, you can create a person with no name. First create the person with a temporary name, Save the new Person to create the database record for them. In the Edit Person window, delete their temporary name. It is highly recommended that you turn on RIN display to aid in differentiating multiple records with no name entered.

EDITING A PERSON

1. People can be edited by double clicking on their name in any People Page View; selecting the person and pressing Enter; hover over a person and right clicking; clicking on the Edit (pencil) icon; keyboard shortcuts, Command Palette; or from the selected person's sidebar info view.
2. You may want to position the Edit Window so that part of it is outside the area of the main window so that you can click on it to bring it to the front should it get hidden
3. You can have up to 3 open Edit windows and still switch between Pages and database files.
4. To close an Edit Window, click on the x in the corner
5. You can navigate to related family member's Edit windows by clicking on the down arrows in the upper area of the Fact section
6. You can change the labels used when referring to a Couple's by their Children (Spouse row) and/or the Parent's relationship to their Children (Parents row)

UNLINKING PEOPLE

1. People can be unlinked by hovering over the person and right clicking; clicking on the Edit (pencil) icon; Command Palette; or from the selected person's sidebar info view
2. Unlinking can be performed from any People Page View. However, it is 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. The best View to use is the Family 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.
3. 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 many cases, deleting a person is not the way to correct the problem you are seeing. Prior to proceeding with a deletion:
 - a. After confirming there are 2 instances of the same person, it is recommended you merge the 2 people and clean up their Facts, etc rather than deleting one of them to ensure no information is lost
 - b. When it appears you have a duplicate person, but they both have the same RIN number, this is an indication the problem is being caused by improper links. This can be sorted

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best by using the Family and Descendant Views to figure out what links currently exist and the correct the links from the Family View

ROOTSMAGIC EXPLORER

1. The Mark/Unmark capability allows very creative ways of defining a group of people
2. The following is a list of the "non-Fact specific" data fields available for filtering when

Marking/Unmarking "By Data Fields" in RootsMagic Explorer:

- | | |
|---------------------|-----------------------------|
| • Any Fact | • Number of children |
| • Color Coding | • Number of sets of parents |
| • Current Age | • Number of siblings |
| • Date Edited | • Number of spouses |
| • FamilySearch ID | • Prefix |
| • Given name(s) | • Record number |
| • Given or Nickname | • Sex |
| • Living flag | • Source (family) |
| • Married Surname | • Source (general) |
| • Nickname | • Suffix |
| • Note (family) | • Surname |
| • Note (general) | • Surname (Birth or Marr) |

GROUPS

1. Be careful when naming Groups. RootsMagic will allow you to create 2 different Groups with the same name
2. When large Groups (>1,000 people) are created using the Search Criteria capability and this Group is used to filter the list of People shown in the People List or Index, the performance of RootsMagic is known to slow down its response time to other actions.
3. Using Groups based on Custom Facts is a powerful way to define collections of People for work, reporting, etc. Remember, each Custom Fact can be privatized to prevent them from being included in reports, etc
4. Remember that Group membership is not updated as you change information about people, they only get updated when you decide to refresh them

COLOR CODING PEOPLE

1. When using v9, consider reserving one of the ten color sets for "temporary" color coding in case you need to use it to support as specific task you are working on.

SET RELATIONSHIPS

1. Set Relationships does not automatically update relationships when relationship links are changed or new people are added to the database. You will need to re-run the Set Relationships function to update the information displayed.

WEBHINTS

General Information:

1. WebHint Icon Legend:
 - a. v8 (http://wiki.rootsmagic.com/wiki/RootsMagic_8:WebHints)
 - b. v9 (<https://help.rootsmagic.com/RM9/webhints.html>)
2. Per RootsMagic Tech Support, each company decides when to update their WebHints which results in sending the latest data about each person in the database and waiting for the company to provide an updated set of Hints for each person. The number of WebHints for any person can change at any time due to:
 - a. Changes made to the Person's information in the RootsMagic database
 - b. The addition of new online records or a new catalog collection applicable to the Person
 - c. Other users finding and associating record information about the same person to their family tree
3. After changing the status of a WebHint, it will not be reflected in the WebHint summary count window until the WebHint summary window is closed and re-opened. This triggers sending the updated information back to the company's hinting system and waiting to receive updated Hints sent back to RootsMagic (in some cases, this can take several minutes).

Ancestry WebHints:

1. Ancestry generates Hints for the Ancestry Tree connected to your RootsMagic file and passes (mirrors) these as WebHints to RootsMagic via the TreeShare connection.
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 WebHints only results in changes to the RootsMagic database. If changes are desired to be made to the linked Ancestry Tree, TreeShare must be used to select which changes you want to be made to the connected Ancestry Tree.
4. Regardless of where you click on the Ancestry Hints row in the WebHints window, the Ancestry Hints window opens, showing all Hints grouped by type (Records, Other Member Trees & Photos and Stories) and sorted by status (Undecided, Accepted, Rejected).
5. Users without a 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 cannot tell which records are free from within RootsMagic, you may find it useful to look at each hint while looking at the detailed field information contained in the Hint compared to the information entered in your 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 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. Status changes made to RootsMagic WebHints are passed back to the connected Ancestry Tree list of 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

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- c. Decide whether sufficient information is available to decide:
 - i. Hint is applicable and should be Accepted
 - ii. Hint 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 hint to RootsMagic person and/or open Edit RootsMagic Person window to make changes manually
 - i. Data can be transferred from Ancestry 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. Decide whether changes resulting from the WebHint should be "pushed" back to Ancestry Tree using TreeShare

FamilySearch WebHints:

1. 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 you have matched the person to the corresponding person in the FSFT.
2. 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 Hints are provided (not sure if Rejected hints show in updated status or just disappear from the WebHints window).
 - i. Confirmed Hints 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, only Pending Hints are provided.
3. Evaluation and processing of each WebHint is performed starting at the FamilySearch webpage linked to the Hint entry in RootsMagic and using the established FamilySearch process for dispositioning FSFT Hints.
4. If you determine that an unmatched person's Hints have helped you identify the matching person in the FSFT, close the WebHints window and click on the FamilySearch Not Linked icon to open the FamilySearch Person Tools window (see Online Features-FamilySearch in Wiki) to match the person.
5. If after processing Hints in the FSFT you want to add data to the RootsMagic database from the FSFT, see the Online Features-FamilySearch section in the Wiki.

FindMyPast WebHints:

1. FindMyPast provides only Record Hints based on the information entered for the people in the RootsMagic database.
2. Regardless of where you click on the FindMyPast Hints row in the WebHints window, a browser window opens showing all the FindMyPast WebHints for the person.

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- a. Each listed Hint identifies the FindMyPast Record database, with very limited specific information about what the record contains
 - b. If you use a free account and log in, you cannot use the Review and Accept functions, but you can Reject a Hint
 - i. In some cases, you may still be able to go into the FindMyPast site and search for the person and locate the Record Hint and see the complete database index transcription
 - c. If you have a paid subscription and log in, you can Review, Accept and/or Reject each Hint
 - i. The ability to change the status of a Hint is done from within FindMyPast and cannot be done from RootsMagic.
3. Since there is no data exchange capability between RootsMagic and FindMyPast, any valid Hint information must be manually entered into the RootsMagic database, regardless of whether you have a subscription or not.

MyHeritage WebHints:

1. MyHeritage provides Record and Smart Match (Member Tree) Hints based on the information entered for the people in the RootsMagic database.
2. Regardless of where you click on the MyHeritage Hints row in the WebHints window, a browser window opens showing all MyHeritage Hints for the person, grouped by hint type (Records and Smart Matches).
 - a. Each listed Hint identifies some, but not necessarily all information contained in the Hint.
 - b. If you have a free account and log in, you cannot use the Review and Accept functions, but you can Reject a Hint
 - i. If the Record dataset containing the Hint is marked as "Free", you can Review and Accept the Hint
 - ii. Similar to FindMyPast, you may find that you can access and review some Hint Record datasets by logging into the MyHeritage account, searching for the person, locate the Record Hint dataset and see the complete database index transcription entry.
 - c. If you have a paid subscription and log in, you can Review, Accept and/or Reject each Hint.
 - i. Tracking of Accepted and Rejected Hints is done within your MyHeritage account.
 - ii. The ability to change the status of a Hint is done from within MyHeritage and cannot be done from RootsMagic.
3. MyHeritage can suppress Hints that you have already attached to your MyHeritage family tree associated with the e-mail account entered in WebHint Settings. If activated, once a Hint 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 WebHints listed will be Pending in RootsMagic.
4. Since there is no data exchange capability between RootsMagic and MyHeritage, any valid Hint information must be manually entered into the RootsMagic database, regardless of whether you have a subscription or not.

ENTERING INTERNATIONAL CHARACTERS

EMOJIS

1. Emojis are a unique character set that can be inserted like International Characters. However, they are treated slightly different in RootsMagic. Currently, saved searches that include emojis do not work when re-used and RootsMagic Tech Support recommends not using them as a search filter.
2. It is recommended that you refrain from inserting emojis into a Person's Given or Surname because they will affect the results received back from any WebHint or online site searches that include them.
3. Your operating system Emoji keyboard can be activated by pressing Windows key+“(period) on Windows, or Ctrl+Cmd+Space on Mac computers.
4. Another option is to find, copy & paste them in from an emoji website, such as:
<https://getemoji.com>
5. Once entered, they cannot be turned on/off for different activities. Therefore, careful consideration needs to be taken before deciding to add emojis into your database

OTHER INFORMATION:

Resolving known problems:

1. If you are using a Mac and get the "Unexpected Error Instance of "TabulImage" not created" error message, some users think it is caused by the presence of unacceptable special characters in 1 or more media file names 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 your issue, the steps to try and recover are:
 - a. Perform steps above to Force Quit RootsMagic
 - b. Rename the database if it is set up to open automatically when RootsMagic is started
 - c. Start RootsMagic
 - d. Open the renamed database
 - e. Make a backup in case you want to revert back
 - f. Go to the Media Page
 - g. Optional, you may want to create a Multimedia List report to track which files require modification
 - h. Under More Options (3 dot icon), select Search and Replace
 - i. 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
 - j. 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. If you share a database file between Mac and Windows computers, you may experience a compatibility issue on initial use. Running the Test Integrity Database Tool reports errors. The problem can be rectified by running either the Rebuild Indexes or Compact Database Tool.

Upgrading from RootsMagic v8 to v9:

1. If you are transitioning from RootsMagic v8 to v9, the following steps are recommended:
 - a. RootsMagic v9 installs on your computer as a different software program. When ready, you uninstall version 8 as a separate action
 - b. When you initially open a v8 database file, it is "converted" to be compatible with v9. Once a file is "converted", it can no longer be opened using RootsMagic 8. If it is desired, you must make a copy of the v8 database file and rename it or place it in a different folder in order to keep a v8 file that can be used with RootsMagic 8.
 - c. If you have used Color Coding in your v8 file, it has been assigned "Color Code Set 1" in the "converted" v9 file. You should assign the Color Code a meaningful name and review the colors used and consider giving them labels where appropriate

Technical Information:

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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. If set to remember them, Ancestry and FamilySearch UserNames and Passwords are stored in encrypted form too.
- b. Location:
 - i. On a Windows PC, the file is located in the “Users > “yourusername” > AppData > Roaming > RootsMagic > Version 8 (or Version 9)” folder. Note that the AppData folder is hidden.
 - ii. On a Mac, a search of the hard drive should locate this filename.
- 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, you can open it 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 is recommended to open the file in a web browser for easy reading and location of specific data to be changed and a word processor to search for and edit the desired text.
- e. At this time, the information stored in this file are the last settings of the various window/form locations and sizes, selected settings, recent files & folders, etc just prior to closing the program
- f. You can replicate all of your settings onto another computer by placing a copy of this file in the correct location prior to opening RootsMagic.