

## Working with Repositories in RootsMagic (V.2)

A repository is a place where sources are kept or stored. In RootsMagic, you can enter up to two repositories (primary and secondary) for each source in your database. Once the data is entered for a repository, that repository can be linked to unlimited sources and ToDo tasks.

You can add a new repository:

1. To an existing source – (Repository will be linked to source automatically.)
2. To the repository list directly – (Repository will exist, but no sources or ToDo tasks will be linked until you link them.)
3. To a ToDo task – (Repository will be linked to ToDo task automatically.)

All three methods will result in the repository being added to the repository list.

### To add a repository to an existing source:

1. Click the "Repository" tab on the top of the Edit Source window. (This will take you to the source's repository window where you will see a place to include both a primary and a secondary repository.)

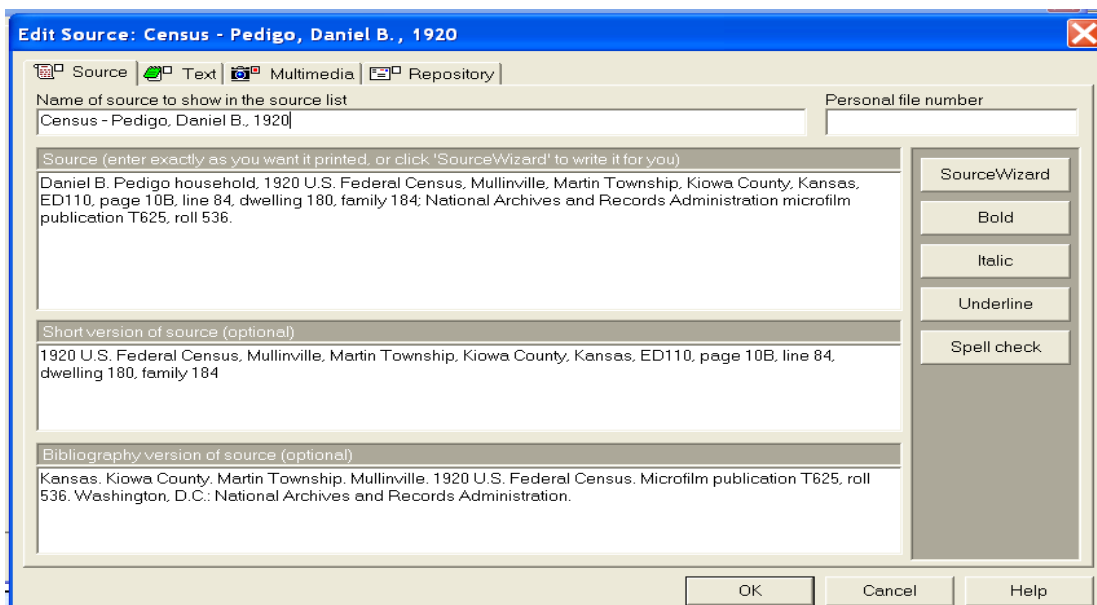
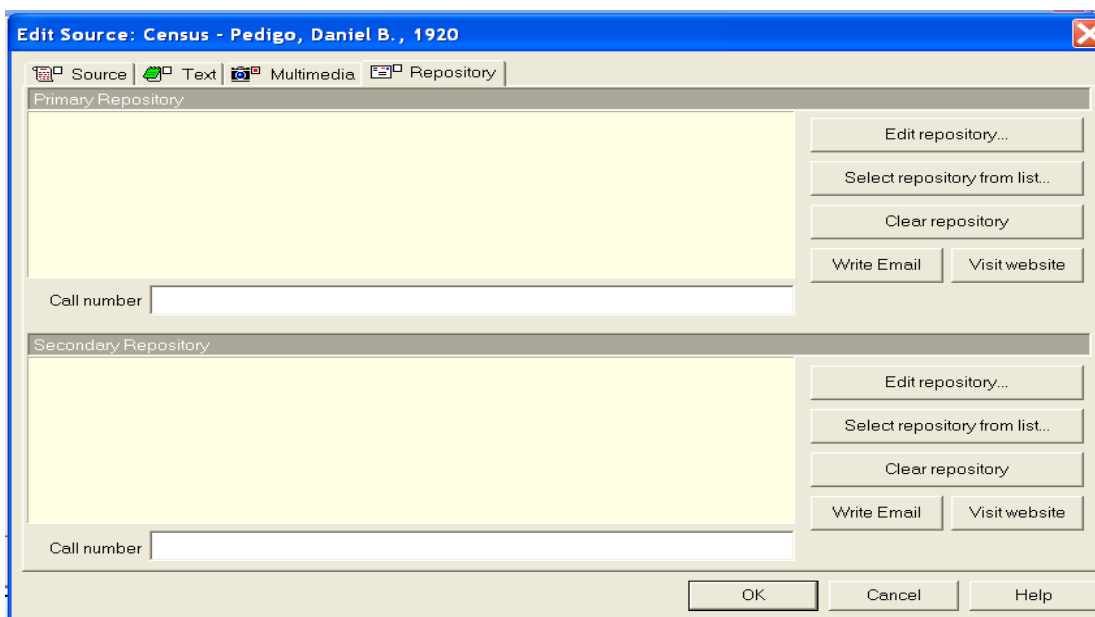


Figure 1. Click on the source repository tab to begin adding a repository to a source.



**Figure 2. Source Repository Tab Window**  
 You may also include a call number for the source at that repository.

Options include:

- a. Edit repository – Click this button to either add or edit the repository. You can enter the basic repository information, including name, street, city, state, postal code, and country. You can also enter phone and fax numbers, as well as email addresses and website URL’s. There is even an area for notes. Here you might want to add driving directions, days and hours the repository is open, etc.
  - b. Select repository from list – This button opens up the repository list to select a repository you have already entered.
  - c. Clear repository – Clears the currently entered repository.
  - d. Send Email – If you have an email address entered, this button opens your email program and prepares to send an email to that repository.
  - e. Visit website – If you have a website URL entered, this button opens that website in your browser.
2. To add a new repository, select “Edit repository”, or
  3. To add a repository from an existing list, choose “Select repository from list” to link an existing one to the source.

**TIP:** If you don’t know whether or not the repository has been added to your list, choose “Select repository from list” and review your list first. If it has not yet been added, you can add it from that screen by selecting the “New” button.

4. If adding a new repository, select “OK” when all information is entered.

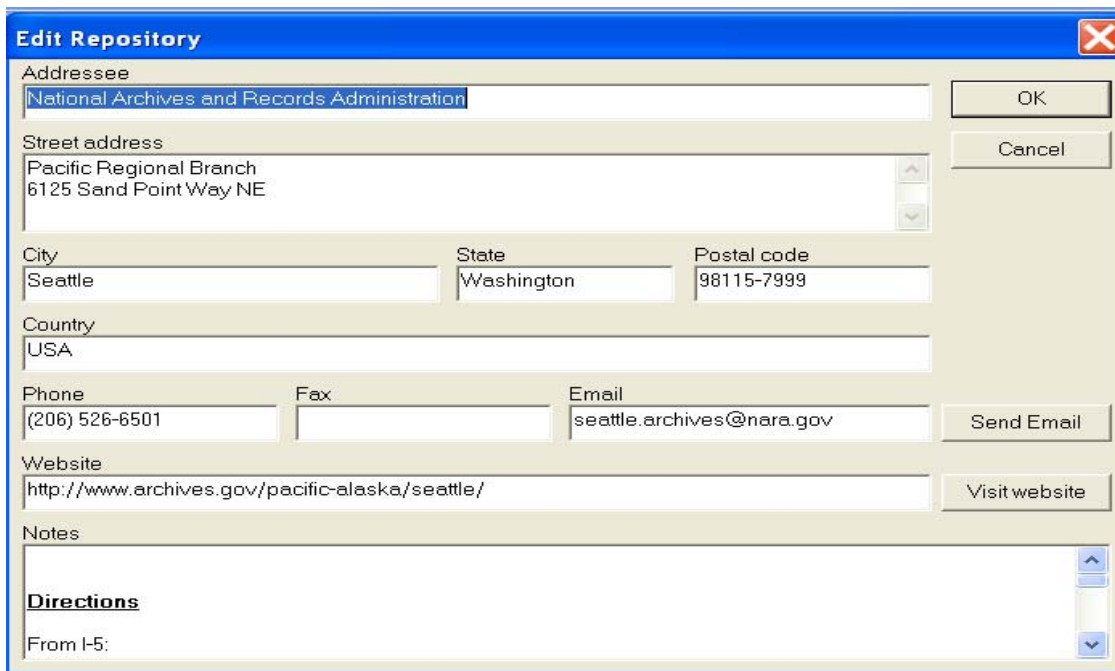


Figure 3. Edit repository window where you add information for a new repository or edit information for an existing one.

5. If selecting repository from a list, highlight the repository name and choose “Select”.

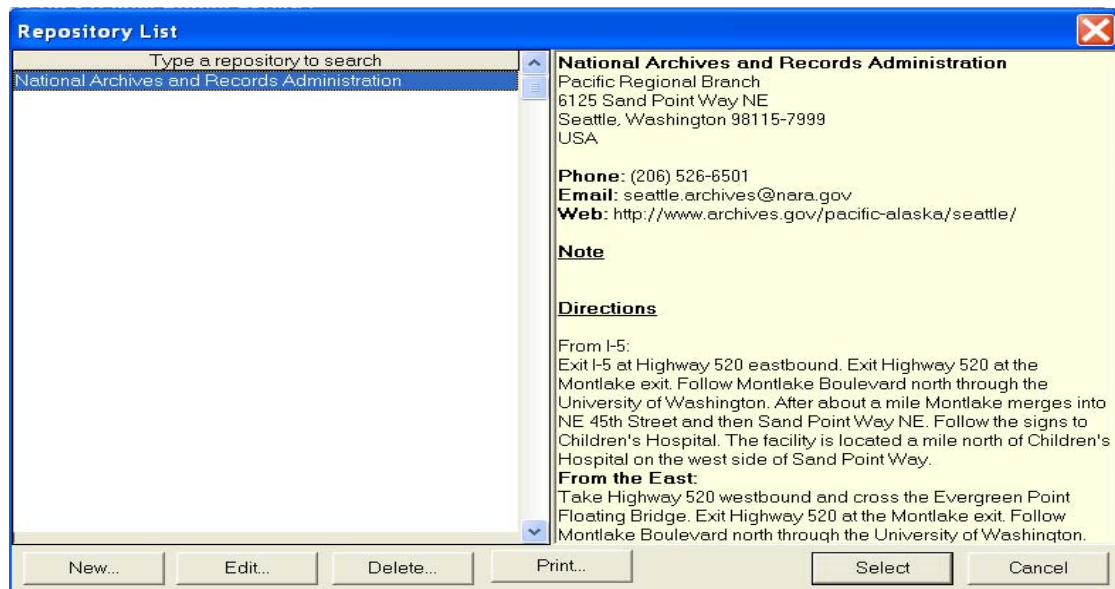


Figure 4. Select existing repository from a list

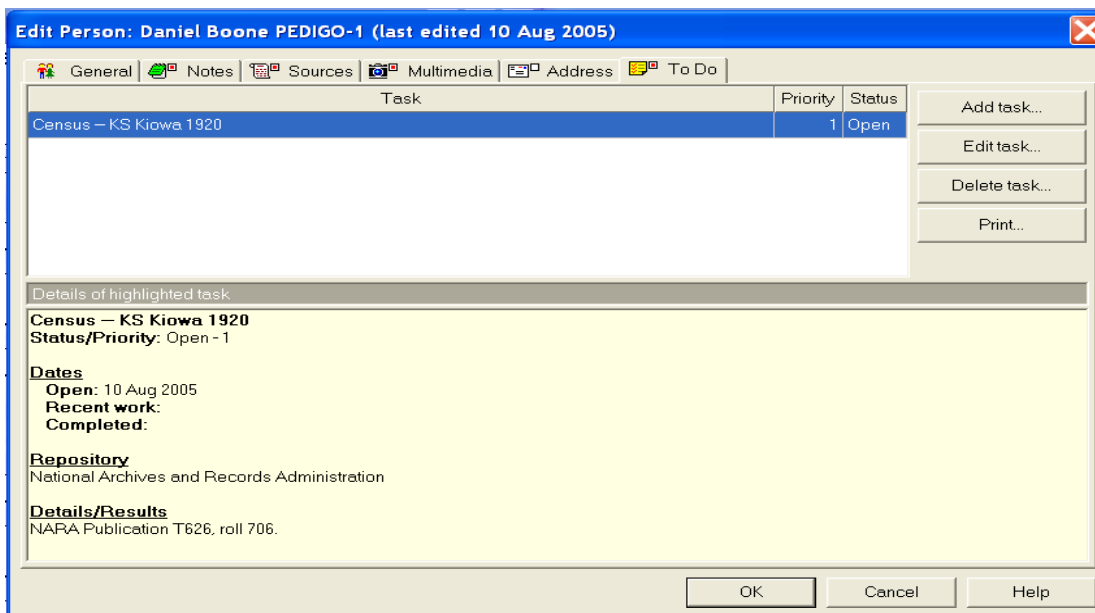
6. Then select “OK” on each of the next two screens. Repository will be linked to the source.

**To add a new repository (from the repository list):**

1. Select "Lists, Repository list" from the main menu. The repository list will open.
2. Click the "New" button on the repository list (see Figure 4 above). An empty Edit repository window will open.
3. Enter the repository name, address, phone numbers, etc., then click the OK button to save the repository. In the notes field, you may also choose to enter miscellaneous information about the repository such as driving directions, repository hours, days open, etc. (see Figure 3 above).

**To add a repository to an existing ToDo task:**

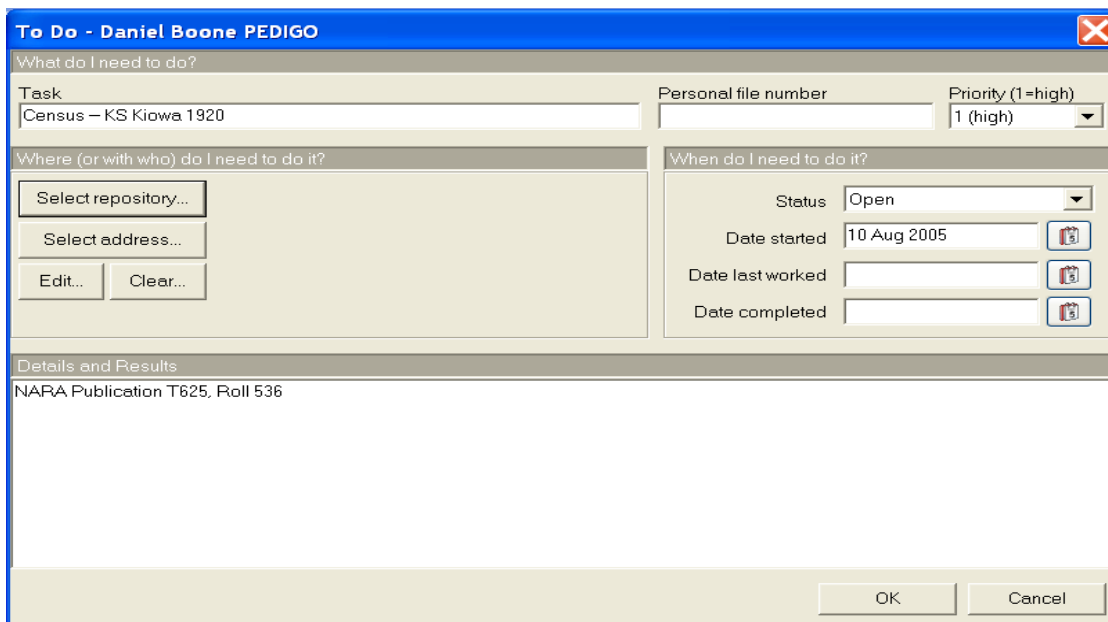
1. Start from the "ToDo" task window on the ToDo tab. Highlight the task to which you wish to add a repository and select the "Edit Task" button. The individual ToDo task item window will open.



**Figure 5. ToDo Tasks Window .**

*All tasks will appear in this window. When you have multiple tasks listed, the details of each task will appear in the lower half of the window as you scroll through the tasks.*

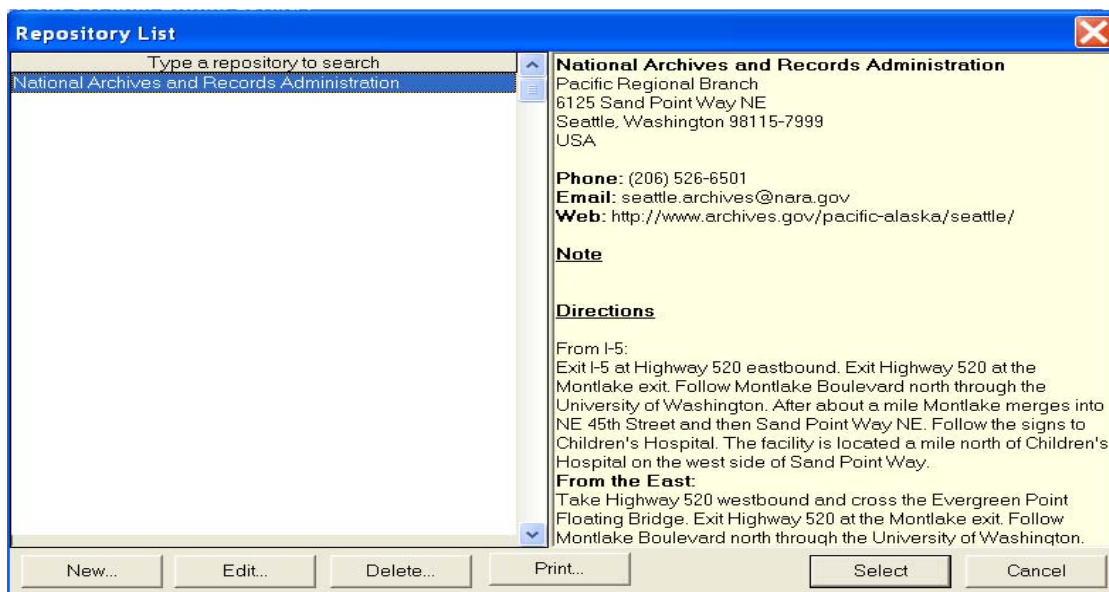
2. Select the “Select repository” button. The repository list will open.



**Figure 6. ToDo Task Item Window.**

This is the individual ToDo task window. You can prioritize the task, track it’s status, the date you last worked on it, the date it was completed, and include a personal file number if you are using a numbering system in your research.

3. Highlight the repository from the list and then click on the “Select” button.



**Figure 7. Repository List.**

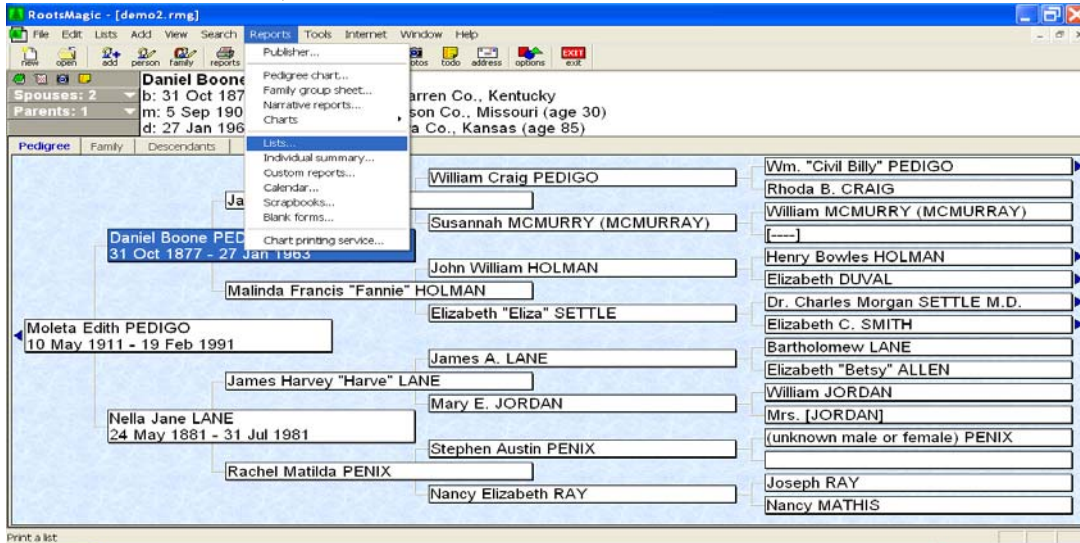
4. Then select “OK” on each of the next two screens. Repository will be linked to the ToDo task.

## Printing Repository Lists

*(Lists the repositories and items linked to each repository)*

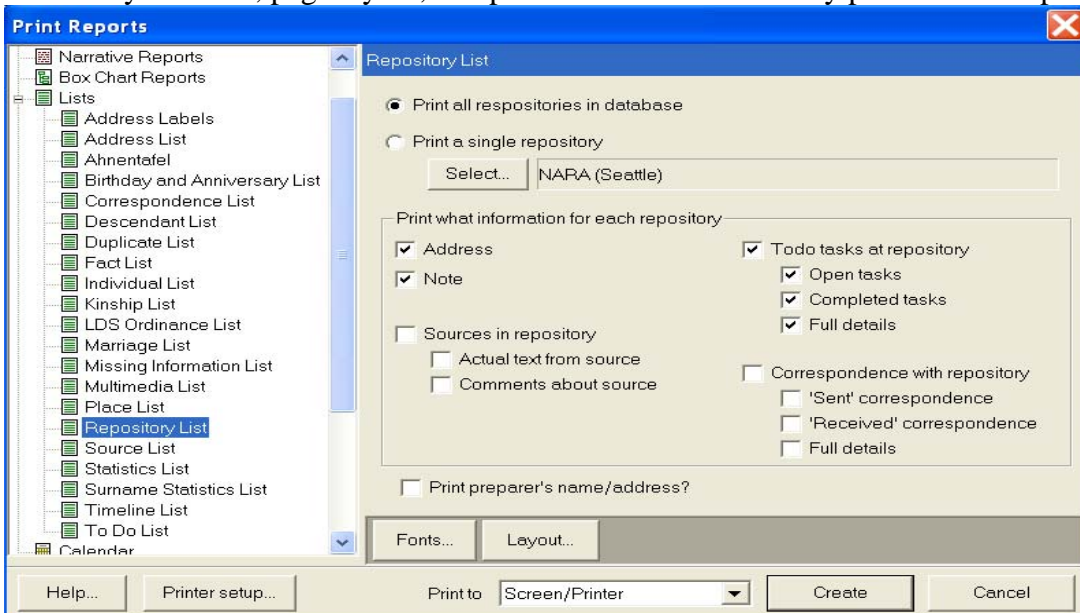
### To print a repository list:

1. Open the Reports dialog by selecting "File, Print a report" from the main menu, or by clicking the printer button on the toolbar, or by pressing Ctrl+P. Or choose "Reports, Lists" from the main menu, as shown below.



*Figure 8. Opening the Reports Dialog*

2. Choose "Repository List" (under the "Lists" item) from the list on the left side of the Reports dialog. If you don't see the list, click the plus sign in front of the word "Lists" on the report dialog to display all the available lists.
3. Choose your fonts, page layout, and print destination. You may print to screen/printer or file.



*Figure 9. Report Dialog for Repository List*

4. Select your options from the repository report dialog (see Figure 9 above):
  - a. Print all repositories in database – Select this option to print a list of all the repositories in the database. (NOTE: The “all repositories” report can become quite lengthy, so it is suggested that you may wish to include no more than repository addresses and notes.)
  - b. Print a single repository – Select this option to print a single repository. Click the "Select" button to choose the repository.
  - c. Address – Mark this to print the full address for each repository.
  - d. Note – Mark this to print the notes for each repository.
  - e. Sources in repository – Mark this to print the sources in each repository.
    - i. Actual text from source – Mark this to print the actual text from each source.
    - ii. Comments about source – Mark this to print the comments about each source.
  - f. ToDo tasks at repository – Mark this to print all the ToDo tasks for each repository.
    - i. Open tasks – Print open todo tasks.
    - ii. Completed tasks – Print completed tasks.
    - iii. Full details – Print the full details about each ToDo task.
  - g. Correspondence with repository – Mark this to print all correspondence with this repository.
    - i. Sent – Mark this to print correspondence you sent to the repository.
    - ii. Received – Mark this to print correspondence you received from the repository.
    - iii. Full details – Print the full details about correspondence with the repository.
  - h. Print preparer's name/address - Mark this checkbox to print the preparer's name and address at the end of the list. You enter the preparer's name and address from the options dialog.
5. Click the "Create" button to generate the printout to screen or file. If you print to screen, you can send the report to your printer from the Print Preview.
  - a. Print to: screen/printer, \*.PDF file, \*.RTF file, or \*.TXT file.

NOTE: Repository figures are original with the author. Portions of the text are original with the author who, for this presentation, expanded on portions of text that appears in the RootsMagic Online Help file. The RootsMagic Online Help file itself, and that portion of it which has been used here, is Copyright © 2000-05 RootsMagic, Inc. All rights reserved.

## Repositories – Some Tips and Ideas



Use repositories in conjunction with and linked to sources and detailed ToDo lists. Then, before a research trip to a given repository, you can print all the open tasks for that repository and have a complete list of everything you want to do while you are there. It is especially helpful to have included the address, days and hours open, any driving directions, the name of any contact person, etc. in the repository notes field.



Sync a file copy of the repository ToDo List Repository to your Pocket PC. It will automatically reformat to the appropriate screen size for the PPC and its Word or Acrobat Reader software.



One of the best ways to get the appearance and have only the specific data you want in the report is to check and uncheck options, and to keep experimenting and printing to screen before you commit to paper or to a file.



A cemetery can also be a repository. A gravestone is an original source of information. A cemetery is a place, however it is also a repository of gravestones. In addition to entering a cemetery as a place, you may also enter it also as a repository. If you wish to do this, you must enter it separately in both places.

Sometimes you know a person is buried within a specific cemetery, and you want to visit there to photograph the gravestone. Create a ToDo task for each person and link it to the cemetery repository. Then when you are ready to visit the cemetery, you can print a repository ToDo list for that cemetery and have a complete list of the names and gravestones you want to photograph. This especially works well if you have made detailed notes on the ToDo list regarding such things as the woman's married name, burial plot locations if you have found them, etc.



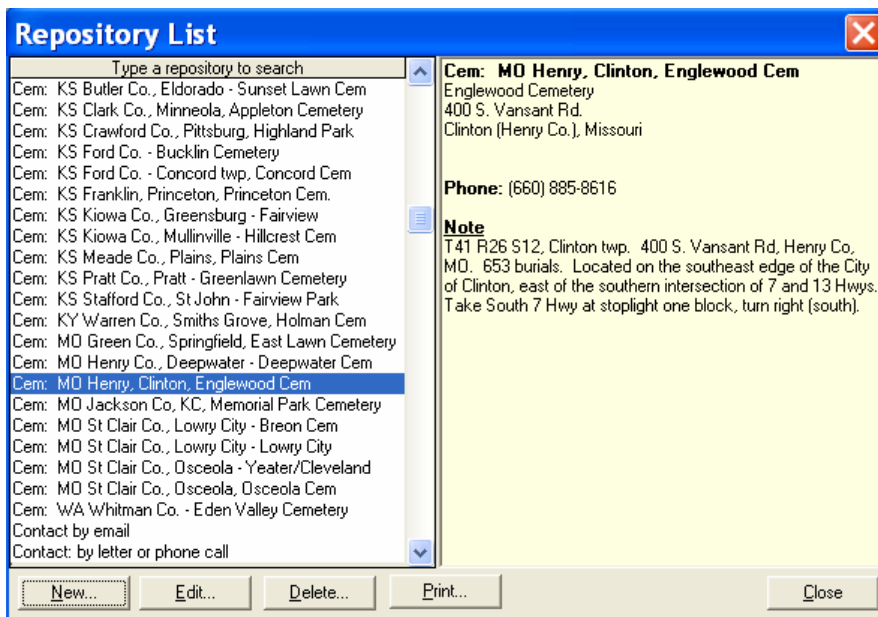
In addition to standard repository examples such as libraries, archives and courthouses, some sources might also be construed to be repositories, such as collections and/or family files. As such, other examples of additional repositories might be:

Clipping Collections (Example: "Myrtie Bickford Pedigo Clipping Collection")  
Family File Collections (Example: "Elane Pedigo Stringer Family Files")

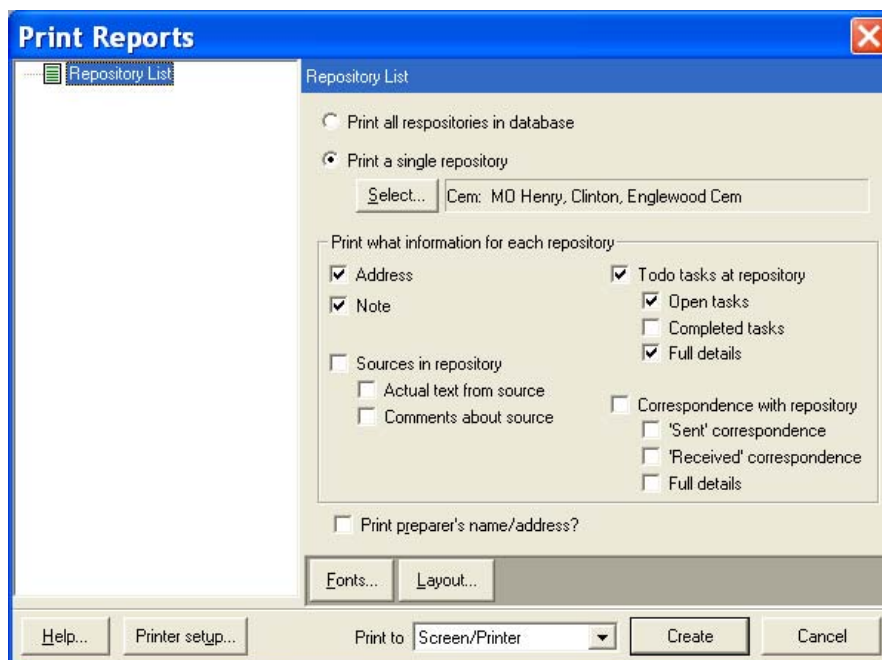
Individual sources from the collection, such as uncited obituaries, etc., can then still be cited as sources and linked to the repository collection.

## Print a ToDo Task List for a Single Repository

ToDo tasks must be previously entered and linked to a repository. The example report uses a cemetery as a repository.



1. Select a repository from Repository List and select “Print” button.



2. Print single repository
3. Check “Address”, “Note”, “ToDo tasks at repository”, “Open tasks”, and “Full details”.
4. Select “Create” button.

## Repository Report

**Cem: MO Henry, Clinton, Englewood Cem**

Englewood Cemetery, 400 S. Vasant Rd., Clinton (Henry Co.), Missouri, Phone: (660) 885-8616

**Note:** T41 R26 S12, Clinton twp. 400 S. Vasant Rd, Henry Co, MO. 653 burials. Located on the southeast edge of the City of Clinton, east of the southern intersection of 7 and 13 Hwys. Take South 7 Hwy at stoplight one block, turn right (south).

**To Do:**

1. Photograph gravestone (priority 1, open)  
**For:** Cora Bertha LANE-869 (L500).  
**Dates:** started 20 Mar 2002.  
**Details:** Cora Bertha BAKER, Englewood Cemetery, Clinton, Henry Co., Missouri  
 Blk:108.5 Lot:0235.75 Gr:02
2. Photograph gravestone (priority 1, open)  
**For:** Isaac Wesley BAKER-13481 (B260).  
**Dates:** started 20 Mar 2002.  
**Details:** Englewood Cemetery, Clinton, Henry Co., Missouri  
 Blk:108.5 Lot:0235.75 Gr:01
3. Photograph gravestone (priority 1, open)  
**For:** Opal BAKER-13483 (B260).  
**Dates:** started 20 Mar 2002.  
**Details:** Opal KRATZER - Englewood Cemetery, Clinton, Henry Co., Missouri  
 Blk:211 Lot:0133 Gr:04
4. Photograph gravestone (priority 1, open)  
**For:** Belmont G. BAKER-13484 (B260).  
**Dates:** started 20 Mar 2002.  
**Details:** Englewood Cemetery, Clinton, Henry Co., Missouri  
 Blk:108.5 Lot:0235.75 Gr:03
5. Photograph Gravestone (priority 1, open)  
**For:** William Thomas KRATZER Sr.-14981 (K632).  
**Dates:** started 20 Mar 2002.  
**Details:** Englewood Cemetery, Clinton, Henry Co., Missouri  
 Blk:211 Lot:0133 Gr:05

Check for any additional KRATZERS in the cemetery and photograph stones if any are found. Known KRATZERS (with currently unknown relationships) are:

KRATZER, John - b: Jun 4 1837 - d: Nov 29 1915 - sp: Margaret YOUNG - bur: Blk:514 Lot:0369 Gr:01

KRATZER, Margaret YOUNG - b: Dec 16 1845 - d: Apr 8 1918 - sp: John KRATZER - bur: Blk:514 Lot:0369 Gr:03