

## Using RootsMagic Basics Workshop 1

### *Entering Sources, Individuals and Families*

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Computer Interest Group  
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## Using RootsMagic – Basics Overview Getting Started

- Navigation
- Setting program defaults
- RootsMagic Explorer
  - view alphabetical list of all individuals, their facts and families)
- Source List
  - view alphabetical list of all sources)
- Add Person window and fields
  - father, mother, child, unlinked individual
- Edit Person window, fields and tabs
- Edit Source window, fields and tabs
- Adding multimedia

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## Navigation

Three Main Views

- Pedigree view
- Family view
- Descendant view

Navigating the Screens and Fields

- By keyboard or mouse
  - views, windows, screens, fields, menus, buttons,
  - pull-down menus, toolbar buttons
- Select buttons, fields and functions with mouse, or
- Keyboard your way to screens, fields and data entry using hot-keys (see handout), arrows and Enter key

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## Setting Up Program and Database Options

*Getting Started on the Right Foot*

Program Options

- Main screen: color, texture, fonts, toolbar
- Default Folders: database, backups, multimedia, gedcoms, custom reports, printouts (important to set up)

Database Options

- Defaults: start person and view format for dates and nicknames, number to display
- Preparer information

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## Begin Data Entry by Processing a Source

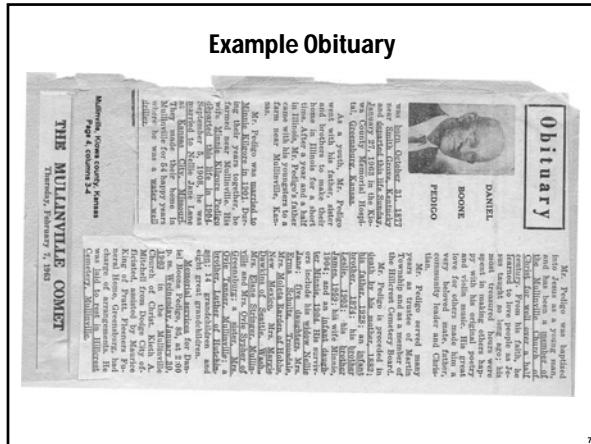
- Using the SourceWizard to enter the source
- Scouring the source to find referenced individuals and every usable fact
- Adding individuals, parents, children, spouses (and create families from the source)
- Entering every usable stated fact
- Entering source citations for people and facts (memorize and paste)
- Entering citation detail as appropriate

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## Example: Adding Individuals & Creating a Family Using an Obituary

- Enter the obituary as a source
- Enter the individual and his facts from the given information
- Add parents, children and their facts from the given information
- Cite the source for all referenced individuals and facts (memorize and paste)

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### Extract and Enter Facts from Example Obituary

<p><b>Individual</b></p> <ul style="list-style-type: none"> <li>• Birthdate and location</li> <li>• Death date and location</li> <li>• Burial date &amp; cemetery</li> <li>• Occupation</li> <li>• States where he lived</li> <li>• Church membership</li> <li>• Interests</li> <li>• Photo</li> </ul> <p><b>Spouse</b></p> <ul style="list-style-type: none"> <li>• 2 wives and their names</li> <li>• Years of both marriages</li> </ul>	<p><b>Siblings</b></p> <ul style="list-style-type: none"> <li>• Names of 4</li> <li>• Death dates of 3</li> <li>• Residences of those living</li> </ul> <p><b>Children</b></p> <ul style="list-style-type: none"> <li>• Names of 5 daughters</li> <li>• Last names of husbands</li> <li>• Current residences</li> </ul> <p><b>Parents (not named)</b></p> <ul style="list-style-type: none"> <li>• Death years</li> </ul>
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### Using the SourceWizard

Automatically formats sources to conform to genealogical standard in Elizabeth Shown Mills' book, *Evidence! Citation & Analysis for the Family Historian*

- Access from main screen: Lists > Source List... > New
- Select SourceWizard button
- Select desired source type from those available on the drop-down list
- Fill in the fields per the "hints" visible in fields
- Select "OK" to have the SourceWizard write it for you

### Tip: Options Handling Census Images

- **Attach to source (scrapbook)**
  - Can publish as stand-alone Source Scrapbook (prints all attached census images unless others are turned off)
  - Can be included and printed in RootsMagic Publisher file
  - May not be readable unless printed 1-2 images per page
  - Practicality depends on how sources are setup and number of images attached to source
- **Attach to family scrapbook**
  - Can publish as stand-alone Family Scrapbook (prints all included family images)
  - Can be included and printed in RootsMagic Publisher file
  - Depending on cropping, may not be readable unless printed 1-2 images per page (scrapbook layout applies to entire scrapbook)

### Options Handling Census Images - cont.

- **Attach to individual scrapbook**
  - Can publish as stand-alone Family Scrapbook (prints all included family images)
  - Depending on cropping, may not be readable unless printed 1-2 images per page (scrapbook layout applies to entire scrapbook)
- **Summary**
  - If publishing census images is desired, process is most clearcut and straightforward when:
    - One family for one census year is one source (as in SourceWizard)
    - Attach appropriate one or two images per source
    - Name in "Name of Source" field will be name of scrapbook
    - Include in Publisher file as Source Scrapbook
    - Still have option to print as stand-alone Source Scrapbook

### Tip: Importing a Gedcom

- Keep original database untouched (back it up before you do anything)
- Import gedcom into new empty database first
- Examine new gedcom import thoroughly to see what you want and clean it up
- Open the two databases at once (original and gedcom)
- Scroll through both and compare to see what you want
- Prune small twigs and branches from gedcom import; drag and drop them into original database, merging individuals in twigs at a time as necessary

### Merging Data from Imported Gedcom

- **Duplicate Search / Merge** – searches for duplicates and allows user final say over what's a duplicate and what isn't
- **ShareMerge** – share a copy of your database with another, they edit and add, you merge it back with yours
- **SmartMerge** – analyzes names, dates, parents, information and automatically merges without user intervention
- **Manual Merge** – user selects matches and merges individually, makes data edits on the fly and goes on to next manual merge

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### Help with RootsMagic

- **Subscribe to RootsMagic Mail List**
  - Send email to: [rootsmagic-users-L-request@rootsweb.com](mailto:rootsmagic-users-L-request@rootsweb.com) with the subject, "subscribe", with only the command "subscribe" in the body
- **RootsMagic Message Forum**
  - Post a request for help to <http://www.rootsmagic.com/forums/> with a detailed description of the problem
  - Response usually within a few hours (sometimes minutes)

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### Topics for August 13 Workshop

- **Reporting options** (if not covered July 9<sup>th</sup>)
- **RootsMagic Publisher** (if not covered July 9<sup>th</sup>)
- **Timeline charts**
- **Timeline lists**
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