



By David Winkler

RootsMagic is the award-winning genealogy software which makes researching, organizing, and sharing your family history easy! Whether you're a beginner or an experienced professional, RootsMagic is the perfect tool for you!

RootsMagic is a full featured genealogy program that may be used to maintain your personal family history database as well as interacting with new FamilySearch.



Why RootsMagic

Why use RootsMagic? The main reason is the fact that PAF never gets updated and many more features exist now than when PAF was developed. We need to take advantage of those features as well as interact with new FamilySearch, which PAF cannot do. PAF has outlived its purpose and we should look to finding another program to meet our needs. One excellent option is RootsMagic. Either embrace new technology or get left behind.

Where

Where do I get RootsMagic? Simply go to www.rootsmagic.com. Put your mouse on "Products" and then click on "RootsMagic." You can either purchase the full program for \$29.95 or download the FREE version called RootsMagic Essentials. RootsMagic Essentials does just as its name implies; it does all the essential tasks but does not have all the features of the full program. To see a chart of comparisons of the two programs, go to <http://www.rootsmagic.com/RootsMagic/Features.aspx>. This document is for the full version.

Bonus

As a bonus RootsMagic includes a full featured program that can be installed on your flash drive so that you can take it with you wherever you go. This is a portable copy of the program.



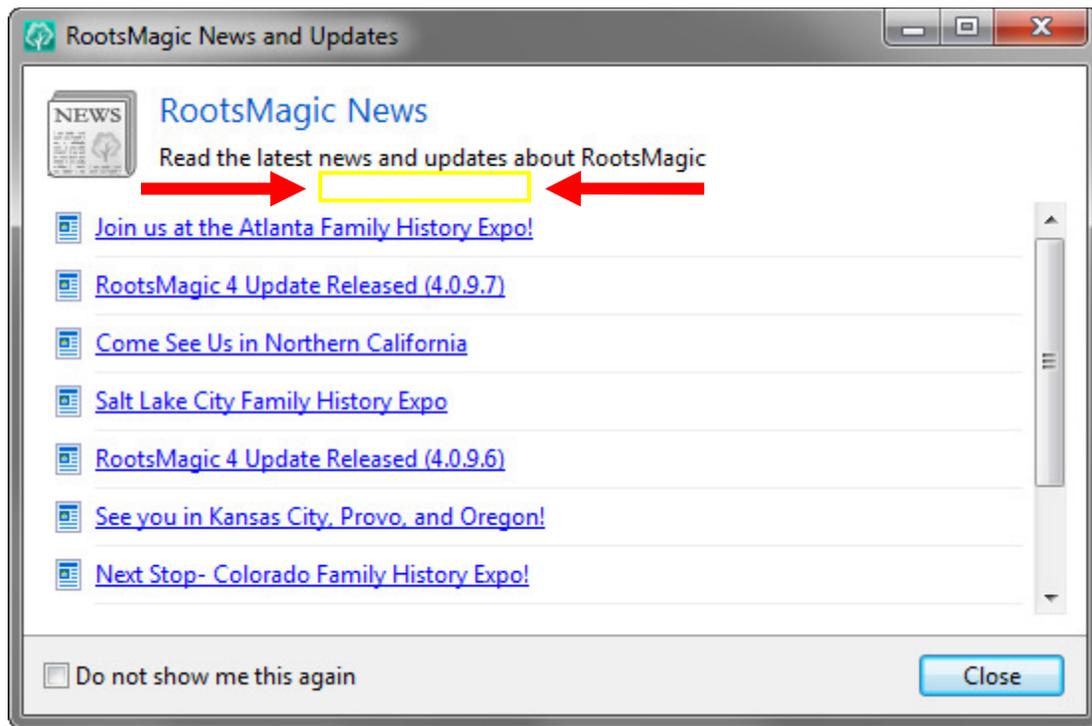
How Do I Use RootsMagic

Webinars & Tutorials

RootsMagic has created webinars (online seminars), to teach you how to use the program. These webinars are available at <http://www.rootsmagic.com/Webinars/> and are perhaps the best method of understanding the program. Watch them!

Go to <http://www.rootsmagic.com/RootsMagic/Tutorials/> to view tutorials for the program.

Go to <http://www.rootsmagic.com/FamilySearch/Tutorials/> for more tutorials using RootsMagic with new FamilySearch.



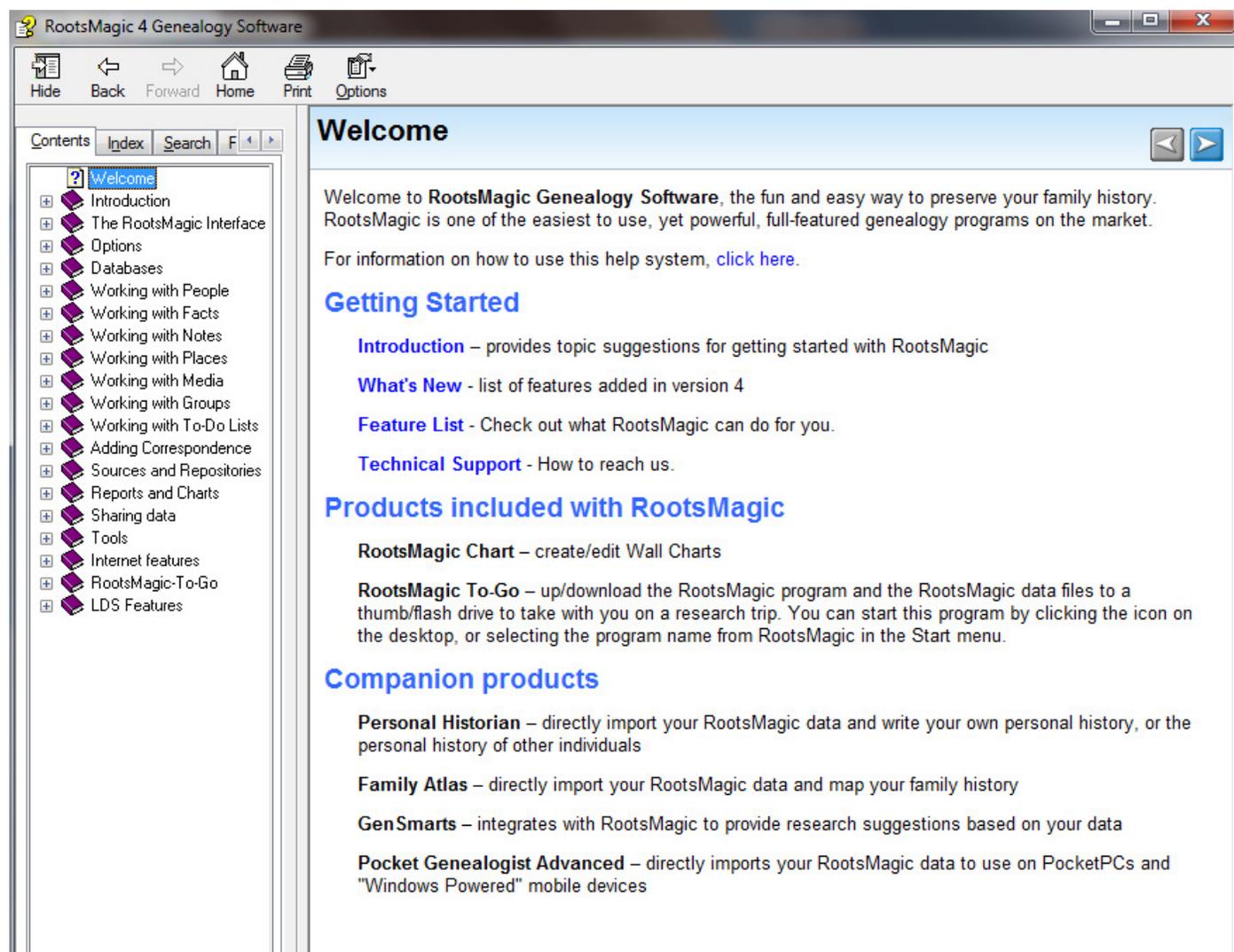
When you first open the program the RootsMagic News and Updates window opens. You will be tempted to click the box that says “Do not show me this again.” However, this window is the one that tells you when you have an update to the program. That update notification will appear between where the two red arrows are located. I suggest that you let this window come up every time you open the program so that you will see when an update is available.



The first time you open the program (after you close the news & updates window) you will see a window similar to the one above. You can select to create a new file, open an existing file or import a file from a different program. This is a good place to select what you want to do. If you pass this screen all of these options are still available in the program. If you close the program when you have a database open, then that database will automatically open the next time you open the program. If no database is open when you close the program, then when you open the program again you will see this same window, as above.

Getting Started

I have basically eliminated how to use the program from this handout because RootsMagic provides a much better help section than I could ever do; plus it is always up to date. After you open RootsMagic please just go to the help file by pressing the F1 key (or help) and read through the help section under contents. You will find what you need. Just start at the top and go down through the topics. Example of help section below, click the little + signs to open up a category. All of these help topics may also be printed out if you so wish.



Data Rules

These are not always included in help menus. But if you follow them it will save you a lot of grief later on. Remember that it is important that the computer understands it not that you understand it. The computer will work for you and save you a lot of time but it must understand what you enter.

Name Fields – When you enter a name, you enter the full name (maiden name if female). Never use a period in the name field, or any other field for that matter. Make sure the names are entered into the correct fields. Prefix is like Dr (no period remember), suffix is like Jr (no period), and if you wish to enter a nickname, make sure it goes in the nickname field and not in the name fields. Don't ever use special characters in the name field such as () or “ ”.

Sex Field – Enter either M or F. A sex must be listed in order to do temple work.



Date Fields – When entering information in the date field the standard format is 27 Jul 1879. RootsMagic will often times expand the month out to its non abbreviated form, but you will still enter dates this way. You do not need to put in leading 0's such as 04 Sep 1921. Put as much of the date in as you have: 7 Jul 1868, Jul 1868, 1868 etc. Never put two dates in a field such as 1884/1885, 1884 or 1885, etc. Computers cannot understand this method and it is the same as the field being blank.

Place Fields – When entering a place field do not abbreviate anything. Place fields need to be in the standardized form that the church uses. The gazetteer, place list and geocoding will assist you to get your places correct. Never put anything in a place field except City, County, State, or Country. Never put a cemetery, address, hospital, or like terms in your place fields. Rather underneath the place field is an extra field for filling in that type of information. Ordinarily place names such as Mt. and St. should be listed as Mount and Saint, respectively. However, in some parts of the world, St is the complete form of the location. (Still don't use periods). Use a space after you commas or geocoding (excellent feature) will not work. Use as much of the place field as you know: Logan, Cache, Utah, United States, Cache, Utah, United States, Utah, United States, United States etc. There is no longer a need to use a leading comma(s) in your place name.

Note: Use the help that the RootsMagic people have given you, it is terrific!