

The Basics

WHAT IS ROOTSMAGIC?

RootsMagic <www.rootsmagic.com> is one of the leading genealogy software programs, allowing you to easily create, edit and publish your family tree from the comfort of your desktop. The program, available for PCs (Windows 7 SP1+ and later), Macs (macOS 10.13 and later) and iOS and Android devices, boasts robust editing, citation and export options, as well as partnerships with Ancestry.com <www.ancestry.com> and FamilySearch <www.familysearch.org>.



PRODUCTS

VERSION	COST	FEATURES
RootsMagic Essentials < www.rootsmagic.com/try/rootsmagic >	free	<ul style="list-style-type: none"> • Family tree creation and editing • Unlimited storage capacity • Multimedia support: images, sound clips, videos, Word documents, PDFs • Predefined fact types: birth, marriage, death, etc. • Source-citation tools and data-error analysis • Printable reports, including pedigree charts and family group sheets • Sortable lists of people, places, dates, sources and repositories • Record hints for Ancestry.com, FamilySearch, MyHeritage and Findmypast (optional) • Compatibility with GEDCOM files, the FamilySearch Family Tree, files from Family Tree Maker and other software, and more • Backup and restore functions to preserve work
RootsMagic	\$39.95 (new license) \$29.95 (upgrade from previous version)	<ul style="list-style-type: none"> • All of the RootsMagic Essentials features • More-robust search functionality, including WebSearch tool for searching online records databases • Customizable fact types and source templates • Additional export options: saving as PDF or DOCX, publishing large-format charts • Additional family tree views • Direct syncing with Ancestry.com family trees (optional) • Tasks page containing: to-do lists, goals, research logs • Free technical support
RootsMagic mobile app < www.rootsmagic.com/app >	free	<ul style="list-style-type: none"> • Syncing capability with the desktop version via iTunes or Dropbox • Pedigree family, descendant, and individual views of your family tree

QUICK LINKS

RootsMagic home page <www.rootsmagic.com>

RootsMagic Blog <blog.rootsmagic.com>

RootsMagic Community <community.rootsmagic.com/c/rootsmagic/5>

RootsMagic Support <support.rootsmagic.com/hc/en-us>

RootsMagic Store <www.rootsmagic.com/store>

RootsMagic User Groups <www.rootsmagic.com/user-groups>

RootsMagic Users Facebook group
<www.facebook.com/groups/rootsmagicusers>

RootsMagic webinars <www.rootsmagic.com/webinars>

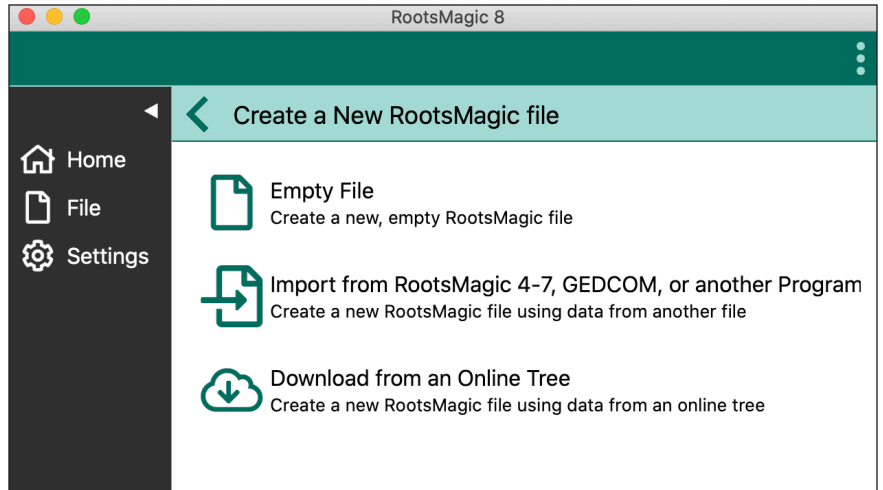
RootsMagic Wiki <wiki.rootsmagic.com/wiki/Main_Page>

GETTING STARTED

When you first open RootsMagic, you'll be presented with several options for starting a new tree: Create a new file from scratch, open an existing file, restore a backup, or RootsMagic To-Go (which allows you to install and run the software on a USB drive).

The options for "Create a New RootsMagic file" are at right. Using Empty File, you can build a new tree natively within RootsMagic. You also have the ability to import a tree from another software program or an online tree, and convert it to a RootsMagic file.

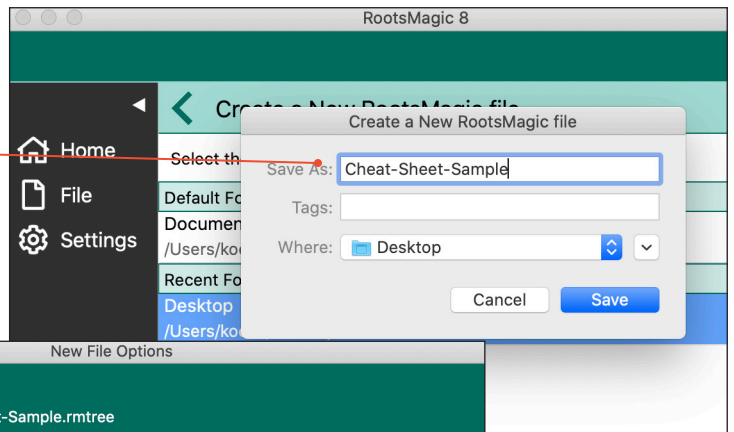
You can access these New File options at any time by clicking File from the main toolbar. Under File, you can also import or export data to/from that tree.



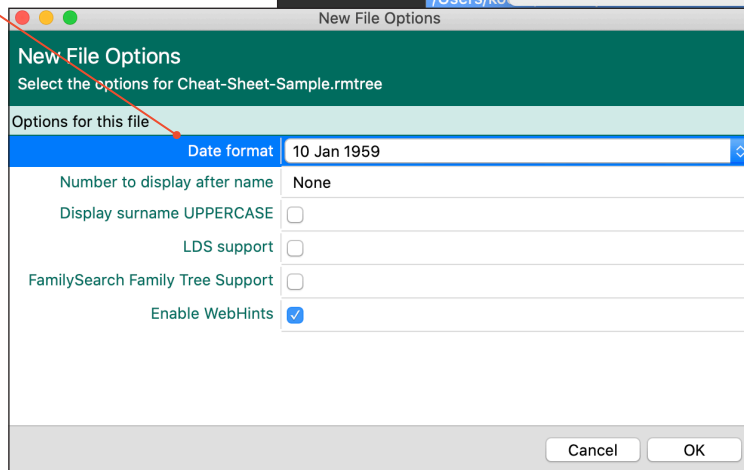
Create a New RootsMagic File screen

You can customize your file's settings, including how dates are formatted and whether you have help from the FamilySearch Family Tree. (Access these options in an existing tree under the Settings tab.)

Give your new file a meaningful name and note where you've saved it, so it's easy to find later.

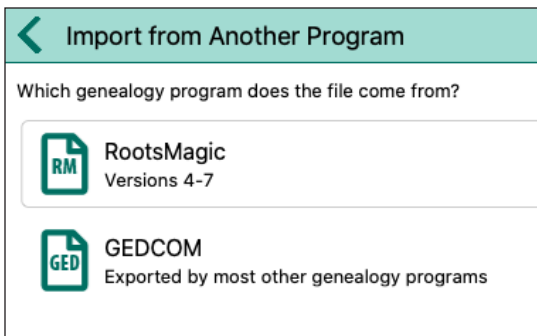


File name window for a new RootsMagic file



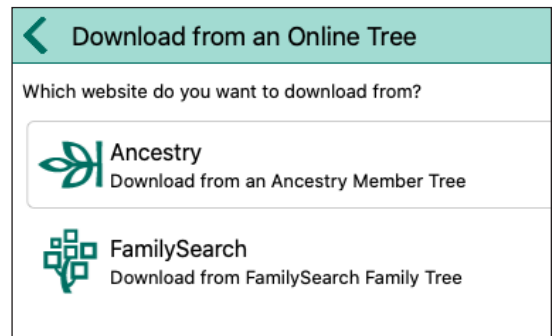
New File Options screen when creating a RootsMagic tree

You cannot directly open files from earlier versions of RootsMagic in RootsMagic 8. You must import and convert them using the Create a New RootsMagic File menu.



File > Create a New RootsMagic File > Import From RootsMagic 4-7, GEDCOM, or another Program

You can import existing family trees from previous versions of RootsMagic, GEDCOM files from other programs, or online trees at Ancestry.com or FamilySearch.



File > Create a New RootsMagic File > Download from an Online Tree

NAVIGATING ROOTSMAGIC

The Main Screen

Go to the People tab to view and edit your family tree. RootsMagic lets you view your tree in multiple ways via tabs for Pedigree (a multi-generational chart), Family (the person plus his or her spouse, parents, parents-in-law, and children), Descendants (a list of this person's children, grandchildren, etc.), People (where you can sort ancestors alphabetically) and Couple List (where you can see all married couples in your tree).

PEDIGREE VIEW

Click a person's name to view his or her life summary. Double-click the name to pull up and edit details.

A red triangle with an exclamation point indicates possible erroneous data in a person's profile.

The main toolbar allows you to create or open a RootsMagic file, add to or edit people in your tree, search the program for relatives, publish reports or a book, and edit information including sources, media, addresses and your to-do list.

This sidebar gives an at-a-glance view of your ancestors. The default, Index, sorts individuals by name. You can also see your viewing History, bookmark certain ancestors, and create custom Groups of ancestors.

An arrow indicates parts of the person's family tree aren't currently displayed. Click the arrow to view that part of the tree.

If you have WebHints enabled, a light bulb indicates RootsMagic has found a possible record match(es) for the person on Ancestry.com, FamilySearch, etc.

Increase your tree's font size by visiting **Settings > Display Settings**, then adjusting the **Font Scaling** slider.

FAMILY VIEW

Father: John Smith Sr. b: 17 Jun 1930 m: d:

Mother: Martha Johnson b: 5 Feb 1935 d: 19 Dec 2006

Father's Parents: Johann Schmidt 1910-1991 Josefina Weber 1906-1964

Mother's Parents: Marvin Johnson 1904-1976 Myrtle Miller 1906-1979

John Smith Jr. 1954-

+ Add Spouse

+ Add Child

DESCENDANTS VIEW

Name	Sex	Born	Birth place	Died	Death place
1 Peter Schmidt		1902		1993	
+ Katarina Meyer		1876		1951	
2 Johann Schmidt		3 Feb 1910		12 Dec 1991	
+ Josefina Weber		28 May 1906		1964	
3 John Smith Sr.		17 Jun 1930			
+ Martha Johnson		5 Feb 1935		19 Dec 2006	
4 John Smith Jr.		4 Apr 1954			
Unknown spouse					
5 John Smith III		13 Mar 1986			

CREATING REPORTS

RootsMagic has several export options that allow you to visualize your data and share it with others. Under the main toolbar, click Publish to view your options. The program highlights four report types:

A. Pedigree Chart: This traditional family tree can include four, five or six generations, similar to RootsMagic's Pedigree View.

B. Family Group Sheet: View individual groups of parents and their children, similar to Family View.

C. Narrative Report: Generate a written history of a person's life and ancestry, organized by generation and compiled from the Sentence fields of facts.

D. Fan Chart: A person's ancestors arch out in circles in this more-visual display, with color-coded names or lines.

From the Publish page, click All Reports and Charts for more options:

- **Ahnentafel:** A list of a person's ancestors numbered according to the Ahnentafel system, which assigns set numbers based on relationship

- **Box Chart:** An ornate family tree

- **Photo Tree:** A tree that includes photos of a person and their ancestors (photos must be designated "Primary" for a profile to appear)

- **Relationship Chart:** An annotated graph that shows the relationship between two people

- **Timeline List:** A chronological list of life events for just one person or for a whole group of people

By default, RootsMagic sorts reports alphabetically, but you can also filter by type (e.g., forms or large-sized charts).

Each report presents you with various customization options, such as which person to start with, who to include and what page size to use. (Note that some chart types, such as Ancestor Chart, are designed to be used as larger displays.) You can even include sources (e.g., endnotes) and edit fonts.

Click Generate Report to finish. You can save the report as various file types (such as PDF or Word document) or print directly from RootsMagic.

The Fan Chart is new to RootsMagic 8 and is ideal for determining what ancestral lines still need research. You can also customize its shape and colors.

A

Chart no. _____
No. 1 on this chart is the same as no. _____ on chart no. _____

4 Johann Schmidt b: 3 Feb 1910 p: m: p: d: 12 Dec 1991 p:		8 Peter Schmidt¹ b: 1902 ² p: m: p: d: 1993 p:	
2 John Smith Sr. b: 17 Jun 1930 p: m: p: d: p:		9 Katarina Meyer b: 1876 p: m: p: d: 1951 p:	
5 Josefina Weber b: 28 May 1906 p: d: 1964 p:		10 Karl Weber b: 1876 p: m: p: d: 1923 p:	
1 John Smith Jr. b: 4 Apr 1954 p: m:		11 Maria Heinz b: 1886 p: m: p: d: 1954 p:	

B

Family of Marvin Johnson and Myrtle Miller 17 March 2022

FATHER Marvin Johnson		
BIRTH	24 Aug 1904	
DEATH	14 Jan 1976	
BIRTH		
BIRTH		
BURIAL		
MARRIAGE		
FATHER	Thomas Johnson 1875-1917	
MOTHER	Mary Ann Keebler 1880-1925	
MOTHER Myrtle Miller		
BIRTH	6 Sep 1906	
DEATH	1979	
BURIAL		
FATHER	William Miller 1870-1910	
MOTHER	Katherine Thomas 1881-1942	
CHILDREN		
F Rosemary Johnson		
BIRTH	8 Aug 1932	
DEATH	14 Feb 2004	
BURIAL		
MARRIAGE		
F Martha Johnson		
BIRTH	5 Feb 1935	
DEATH	19 Dec 2006	

C

Narrative Report for Martha Johnson 18 March 2022

First Generation

1. **Martha Johnson** was born on 5 Feb 1935. She died on 19 Dec 2006 at the age of 71.

Second Generation

2. **Marvin Johnson** was born on 24 Aug 1904. He died on 14 Jan 1976 at the age of 71. He was born. Marvin was born. He was buried. Test
3. **Myrtle Miller** was born on 6 Sep 1906. She died in 1979 at the age of 73.

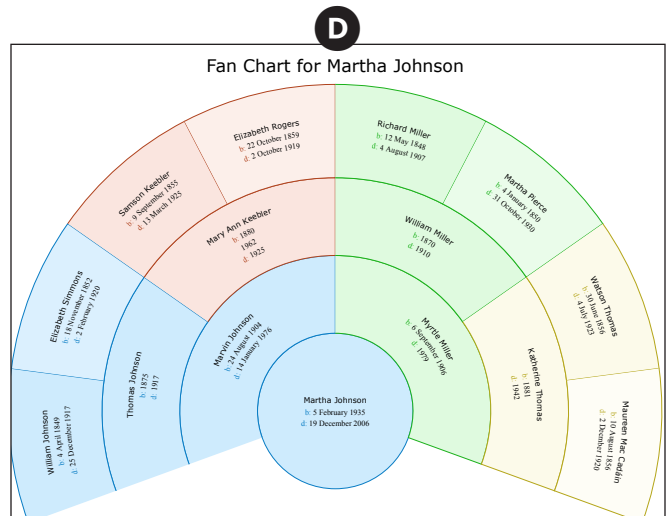
Marvin Johnson and Myrtle Miller had the following children:

- i. **Rosemary Johnson** was born on 8 Aug 1932. She died on 14 Feb 2004 at the age of 71.
- ii. **Martha Johnson**, born 5 Feb 1935; died 19 Dec 2006.
- iii. **Anthony Johnson** was born on 18 Jan 1940.

Third Generation

4. **Thomas Johnson** was born in 1875. He died in 1917 at the age of 42.
5. **Mary Ann Keebler** was born in 1880 in 1962. She died in 1925 at the age of 45.

Thomas Johnson and Mary Ann Keebler had the following child:



Adding a Person

The quickest way to add a person to your family tree is to click People tab of the main toolbar, then the + icon. Another way, when viewing your tree in Pedigree or Family views, is to click the appropriate box for “add father/mother/child.”

Next, you’ll fill out the “Add a new person” form (right). Enter as much information as you know. You can use the small calendar or calculator icon in the Birth, Death and Burial fields to select dates. To change the fields that appear here, click “Customize” at the bottom left.

For places, click the globe icon to select a place you’ve listed before or find a location in RootsMagic’s gazetteer.

Adding and Editing Facts and Media

1 View details. To bring up a person’s detailed profile page, double-click his or her name in the sidebar index or in any family tree view. Here you’ll see the information you’ve added about an ancestor in order of occurrence, with columns that indicate details about the event:

- **Age**, calculated from the person’s birth date
- **Facts** presented in chronological order by the person’s listed age, with a row for each event
- **Date**
- **Details:** Place, other person, or description associated with an event
- **Sticky note icon (Notes):** Add custom text to a person or a fact/life event. Clicking the Note bar will open up a kind of word processor.
- **Pen icon (Sources):** With a fact selected, click the Sources box to attach a citation. Under Add Source Citation, you can select a source from a directory of existing citations, or add a new one. (See all sources by clicking the Source tab in the main menu.)
- **Image icon (Media):** RootsMagic can attach images, files, videos or sounds to a fact. Click to view or add media. You can even drag and drop from your browser. (See all items by clicking the Media tab in the main menu.)

The last two columns indicate tasks associated with that event and what other person (if any) shares that event, respectively.

You can edit an existing event by selecting it from the list and making changes in the right column, or remove it by selecting it and clicking the trash can icon.

2 Select a fact type. To add a new fact, click the + sign. You’ll be presented with a list of pre-made fact types/life events to select from. (You can also design a new, custom fact type by clicking the button.) Edit a fact type’s settings by selecting the fact and clicking the Edit button. Once you’re satisfied with the fact’s settings, click OK.

3 Enter information. Next, you’ll see a form where you can enter details for the event you chose. The form fields differ based on the fact type.

You can take advantage of shortcuts to standardize your information. In date fields, you can calculate age based on birth date using the calculator icon or manually select a standardized date using the calendar icon. In the Place field, click the magnifying glass to select a place from RootsMagic’s gazetteer, or select a place name from your Place List of previously used locations. You can also add place details, such as an address or the name of a hospital or cemetery.

Remember to click the check icon to save changes.

4 Add media. You can add media either to a person (for example, a portrait) or to a fact (such as a record image or gravestone photo). Select the Media box with either the person or one of their facts selected. In the resulting menu, select “Add New Media” to upload a new file or “Selected Existing Media” to attach a file you’ve already uploaded.

1

Marvin Johnson
1904-1976

Show relative events

Fact	Details	📄	✎	🖼️	☰	✉️
Person	👤 Marvin Johnson					
Spouse	👤 Myrtle Miller					
Parents	Thomas Johnson and Mary Ann Keebler					
Groups	<No Groups>					
WebTags	<No WebTags>					

Age	Facts	Date	Details	📄	✎	🖼️	☰	👤
0	Birth	24 Aug 1904						-
71	Death	14 Jan 1976						-
-	Primary Name		Marvin Johnson					

Switch to a family member's profile by clicking the arrow next to their name and selecting that option from the drop-down.

Person: Marvin Johnson

Given: Marvin

Surname: Johnson

Prefix:

Suffix:

Nickname:

Sex: Male

Living:

Person Items

Note >

Sources 📄 0 >

Media 🖼️ 0 >

Tasks ☰ 0 >

Addresses ✉️ 0 >

2

Fact Types

Design new fact type Edit Delete

Adoption

Alternate name

Ancestral File Number

Annulment

Baptism

Bar Mitzvah

Bas Mitzvah

Birth

Blessing

Burial

Caste

Name: Birth
Abbrev: Birth
Fact type: Personal

Use
Date: Yes
Place: Yes
Description: No

Include
GEDCOM: Yes
Publish online / Create HTML: Yes
Group sheets: Yes
Narrative reports: Yes
Individual summary: Yes
Lists: Yes

Sentence template:
[person] was born< [Date]>< [PlaceDetails]>< [Place]>.

3

Burial: Marvin Johnson

Fact type: Burial >

Date 📅 🗓️

Place

Place details

Proof

Primary

Private

Sort date

Fact Items

Note >

Sources 📄 0 >

Media 🖼️ 0 >

Tasks ☰ 0 >

Shared 👤 0 >

Sentence [Customize](#)

Marvin Johnson was buried.


To add a new item, select the file type (Image, File, Sound or Video). In the File Name field, click the document icon to browse your device for a compatible file. Follow the prompts to locate the file, then edit the file's properties (caption, description, date taken and reference number). "Tags" refer to which family members are associated with the file. Click OK to upload.

You can double-click a media item to view and edit its details anywhere across the program.

4

View Image

Portrait c. 1900



Media

Media type: Image

Filename: /Users/kocha/Desktop/Online

• Caption: Portrait

Description >

Date: c. 1900 📅 🗓️

Refs

Other

Tags: 1 >

Cancel OK

Ancestry.com Syncing

The screenshot shows the 'TreeShare for Ancestry' interface. At the top, it says 'Connected to Tree: Sample-tree-RootsMagic'. Below that, there's a 'Welcome FamilyTreeMagazine!' message and a 'Log out' button. The main area is split into two columns: 'RootsMagic' on the left and 'Ancestry' on the right. Both columns show a profile for 'Person Maria Heinz'. The 'Name' is 'Maria Heinz', 'Birth' is '1886', 'Death' is '1954', 'Spouse' is 'Karl Weber', and 'Child' is 'Josefina Weber'. The interface includes search filters like 'Show Everyone' and 'Only show changed people', and a search bar for 'Search (Surname, Given)'. There are also buttons for 'Edit RootsMagic person', 'Show on Ancestry', and 'Options'.

TreeShare review page for a RootsMagic family tree that's synced with a tree on Ancestry.com

RootsMagic boasts TreeShare, a feature that allows changes made in a RootsMagic tree to be reflected in a tree on Ancestry.com <www.ancestry.com> (and vice versa). This allows the two trees to become synchronized, streamlining your research process.

To begin, open a RootsMagic tree, then click the Ancestry.com logo (a leaf) at the bottom of the main menu. Log in to your Ancestry.com account, and you'll see an option to either upload a RootsMagic file as a new Ancestry.com tree or download an

existing Ancestry.com tree as a new RootsMagic file. (Note that you can't sync an already-existing RootsMagic file with an already-existing Ancestry.com tree; one must have been created using the other.)

You can then create a new tree on one of the two programs. Those two trees will be linked, and you'll see a screen that compares facts in them (above). Facts in green are the same between the two trees. But facts in yellow have discrepancies, and have an arrow next to them. Click the arrow

on the RootsMagic side to update the event as written in that tree, and click the arrow on the Ancestry.com side to do the reverse.

From that screen, you can also edit the RootsMagic profile or show the person Ancestry.com. (The latter will open your computer's web browser.)

Note that you do not *need* to resolve inconsistencies between the two trees if you don't want to (for example, if you're still verifying information).

Finding Records using WebSearch

Through WebSearch, you can find online records for people in your RootsMagic tree from the comfort of your desktop software. Go to Search > WebSearch (the third icon), then select a person of interest and customize what details you want to use as search terms.

Select a provider from the dropdown. Current options include Ancestry.com, FamilySearch, Findmypast <www.findmypast.com>, Find a Grave <www.findagrave.com>, GenealogyBank <www.genealogybank.com> and Google <www.google.com>. You'll need to be signed in to a paid account to view restricted records on subscription sites.

The screenshot shows the 'WebSearch' interface on Ancestry.com. It features a search bar with 'Find' and 'Clear criteria' buttons. Below the search bar, there's a dropdown for 'Provider' set to 'Ancestry'. A list of providers is shown, including 'Heinz, Maria', 'Johnson, Anthony', 'Johnson, Martha', 'Johnson, Marvin', 'Johnson, Rosemary', 'Johnson, Thomas', 'Keebler, Mary Ann', 'Meyer, Katarina', 'Miller, Myrtle', 'Miller, William', 'Schmidt, Johann', 'Schmidt, Peter', and 'Smith, John Sr.'. The 'Johnson, Martha' entry is selected. To the right, there's a 'WebSearch' panel with 'All results for Martha Johnson' and '1-20 of 1,091,276' results. The search criteria are 'Martha Johnson', 'Born: 1935', and 'Death: 2006'. The focus is set to 'United States'. There are filters for 'Census & voter lists' (90,000+), 'Birth, marriage & death' (200,000+), and 'Military' (20,000+). A sidebar on the right shows details for 'Martha Ann Thompson [Martha Ann Johnson] [Martha Johnson]' with birth date '27 Sep 1935' and death date '31 May 2006'.

WebSearch results from Ancestry.com

FamilySearch Matching and Data Exchange

As with Ancestry.com, RootsMagic has some compatibility with family tree data on FamilySearch <www.familysearch.org>. However, because FamilySearch has one single Family Tree (rather than separate trees created by different account holders), users can't directly sync trees between the two programs in the same way.

Instead, you can link a person in your RootsMagic tree to a profile in the FamilySearch Family Tree. Then you can push out updates made in RootsMagic to FamilySearch, one profile at a time.

With a RootsMagic tree open, click the FamilySearch logo (the tree, bottom left). In the FamilySearch Central window, you have the option of finding matches between your RootsMagic file and the FamilySearch Family Tree or clicking AutoMatch (which does this work for you). The search function looks for FamilySearch profiles that have similar names and vital details to those in your RootsMagic tree; yellow boxes indicate any different information. Click Match to link.

Once you've connected them, you can click Share Data to compare details between the two programs' profiles.

The screenshot shows a side-by-side comparison of two profiles. The left profile is from RootsMagic, and the right is from FamilySearch. Both profiles are for Elizabeth Boves-Lyons, born 1900 and died 2002. The FamilySearch profile is identified as Queen Consort Elizabeth Bowes-Lyons. The FamilySearch profile has additional family members listed: George VI Windsor (b. 1895) as a spouse and Princess Margaret Rose Windsor as a child. The RootsMagic profile lists George Windsor-12 (b. 1895) as a spouse and Elizabeth Windsor-11 (b. 192) as a child. The interface includes buttons for 'Find matches', 'Share data', 'Discussions (0)', 'Sources (0)', 'Notes (0)', 'Changes', 'Edit RootsMagic person', 'Show on FamilyTree', and 'UnMatch'.

Share Data screen between a person in RootsMagic and a profile in the FamilySearch Family Tree

Again, yellow indicates fields with different information. Select what fields you want to change, then review. Approved changes will overwrite the information on FamilySearch. Add your reasoning in the box below Ok so other users will follow your line of reasoning. Click Changes to view recent edits to that FamilySearch profile—including those made by other FamilySearch users.

You can also import a portion of the Family Tree to RootsMagic. From the FamilySearch Central window, click Import, then enter the person's unique FamilySearch ID number and indicate how many generations you want to include. The FamilySearch profiles will be added to the RootsMagic database you have open, and they automatically match to the Family Tree.

BACKING UP YOUR DATA

RootsMagic automatically saves your work. However, to help prevent data loss, RootsMagic also automatically prompts you to save your data as a "backup file" every time you close a file or exit the program.

The Backup screen (right) allows you to select a place for an archived copy of your database. You can save either to your computer's hard drive or to Dropbox. The default file name is the current file name plus the date, allowing you to store multiple backups.

By default, RootsMagic copies the media links when creating the backup—but not the media files themselves (such as digitized photos and documents). Click the appropriate box if you also want to backup media files along with the data. You may want to hold off on doing so, however; media files can take up a lot of space, and saving another set on the

The screenshot shows the 'RootsMagic Backup' dialog box. It has a title bar 'RootsMagic Backup' and a subtitle 'Save an archived copy of your database'. There is a text field for 'Backup file name' containing 'Sample-tree-RootsMagic (2022-03-18).rmbbackup'. To the right is a checkbox for 'Backup media files'. Below are two radio button options: 'On my computer (floppy disk, USB, hard drive, etc.)' (selected) and 'To Dropbox'. Under the 'On my computer' option is a 'Browse...' button and the path '/Users/kocha/Documents'. At the bottom are three buttons: 'Skip backup', 'Cancel', and 'Backup'.

Backup data pop-up

same hard drive doesn't provide you with any extra security.

The window gives you the option to Skip Backup. To turn off the backup reminder, uncheck the box for "Ask for Backup" under Settings > Program Settings (the sliding bar icon).