

Folder Setup

Before starting, set up a local project folder outside of Program Files/RootsMagic; MS Vista requires that you do. I create a folder in My Documents on XP (Documents on Vista) called RM_Data, with six folders beneath it for program use. Within the Media folder, I add further sub-folders, as illustrated below. Within most other sub-folders, I create a surname folder for each family or client project, but these are not required if you have only one family project. (*Note:* You must remember to navigate to these sub-folders when creating reports, etc.)

```

RM_Data/
  Data_files/
    Bienia/
      Backups/      [see *2]
      Media/        [see *1]
        Bienia/
          Pics/     [photos]
          Docs/     [images & transcripts]
          AV/       [audio and video files & transcripts]
          Maps/     [generic items applicable to anyone]
  GEDCOM/
  Cust_rpts/
    Bienia/
  Printouts/
    Bienia/
    
```

Set the paths to the default first-level folders (shown in **bold**) through Tools > Options > Program Options > Folders.

- *1. If you have long file names, you may need to place the Media folder directly on your C: drive and call it RM_Media.
- *2. Copy backup files + image files onto external CD/DVD, & store disks outside your home, in case of disk crash or disaster.

Dates: Modifiers & Sort dates

| Modifier | abbreviations accepted | Sort date |
|---------------------|---|-------------|
| about, circa | about 12 Jan 1891, abt 12 Jan 1891, circa 12 Jan 1891, c 12 Jan 1891, ca 12 Jan 1891, cir 12 Jan 1891 <i>(note: you cannot use "a" as an abbreviation here)</i> | 12 Jan 1891 |
| estimated | est 23 Feb 1865, estimate 23 Feb 1865 | 23 Feb 1865 |
| between ... and ... | between 1 Jan 1895 and 13 Jun 1908, bet 1 Jan 1895 and 13 Jun 1908, 1 Jan 1895 - 13 Jun 1908 | 1 Jan 1895 |
| from ... | from 1964, frm 1964 | 1 Jul 1964 |
| from ... to ... | from 1880 to 1896, frm 1880 to 1896 <i>(note: 'from 1880-1896' results in 'bet 1880 and 1896')</i> | 1 Jul 1880 |
| before | bef 1 Jan 1900, b 1 Jan 1900, before 1 Jan 1900 | 31 Dec 1899 |
| after | aft 30 Nov 1843, a 30 Nov 1843, after 30 Nov 1843 | 1 Dec 1843 |
| or | 25 Sep 1902 or 29 Oct 1903 | 25 Sep 1902 |
| BC | 18 BC | 18 BC |

Sort Dates based on a partial, irregular or double date

| If you enter this date... | You get this sort date... |
|------------------------------|--|
| 1867 | 1 Jul 1867 |
| Mar 1867 | 15 Mar 1867 |
| 15 Jan 1743/44 (double date) | 15 Jan 1744 |
| an invalid date or no date | none – you must enter your own sort date |

Old Style vs. New Style Dates & Double Dates

When the Gregorian (New style) calendar replaced the Julian (Old style) calendar in 1582, the first day of the year moved from 25 Mar to 1 Jan. England and the American colonies didn't adopt this change until 1752. During the transition period prior to 1752, dates between 1 Jan and 24 Mar were sometimes written as 15 Jan 1743/44 to denote the old and new style. This notation is called **Double dates**. For further information, see: <http://www.genfair.com/dates.htm>

Global Sentence Construction

The variables below are used when creating or editing global sentence templates for Fact Types. The Date, Place and Description can be turned on or off. (*Note:* The Description cannot be turned on for some default fact types.) When the Place variable is enabled, you can also select a Place prefix from "in", "at", "from", "to", "on", "of" or <<none>>.

| | |
|----------|---|
| <name> | Name of person (or "He" or "She") [for individual facts] |
| <hisher> | "His" or "Her" [for individual facts] |
| <himher> | "Him" or "Her" [for individual facts] |
| <couple> | Name of subject and Name of spouse or "They" [for family facts] (There is no 'their') |
| <date> | Date of event |
| <place> | Location event took place |
| <value> | Description |
| <avalue> | Description (with leading "a" or "an") |

Notes

There is a set order in which the various individual fact notes, family fact notes and general notes appear in narrative reports. The following should help you visualize the point in the reports where these notes will appear:

- person's facts and associated fact notes
- person's general notes
- family facts (engagement, marriage, residence, census, divorce, etc.) and associated fact notes
- family general notes
- spouse's facts and associated fact notes
- spouse's general notes

This is then followed by the children sentence and child list.

Use the Enter key in a note (start, middle, or end) to force a new paragraph. One Enter starts next "paragraph" on new line; two inserts a blank line between "paragraphs". (Note that the next "paragraph" is indented 1 or 2 spaces. Issue reported.)

Shortcut Character Codes

| Character | Code | Character | Code |
|-----------|----------|-----------|----------|
| £ (pound) | Alt+0163 | é | Alt+0233 |
| ¢ | Alt+0162 | | |
| € (euro) | Alt+0128 | | |
| ‡ | Alt+0135 | | |

Privacy (suppress information from the output)

| To privatize... | You would... |
|---|---|
| Some or all of the text in a note | Add { } around the text – don't place { } within { } (<i>unexpected results</i>) |
| A fact | Use <input checked="" type="checkbox"/> Private fact checkbox |
| (suppress) living people from a GEDCOM file, or report, chart, book | Export a GEDCOM, setting Privacy options for Living people. For reports, etc., import privatized GEDCOM into a new file then create outputs |
| A web site | Set Privacy options in WebWizard |

Using Shortcut Keystrokes (not all shown)

TIP: In any screen, when you press the ALT key, one letter in the menu or button text will be underlined if the menu, sub-menu or button has an associated shortcut key. This allows you to visually see the shortcut key combinations available for the main menu, sub-menu and button selections to help you become accustomed to the shortcut key combinations.

Shortcut Keys available... In the main program window

| | |
|--------------|---|
| Ctrl+Home | Go to Root Person |
| Enter key | Edit the highlighted person |
| Ctrl+Enter | Edit the family of the highlighted person |
| Delete key | Delete the highlighted person |
| Ctrl+Delete | Delete the family of the highlighted person |
| Esc key | Exit any window without Saving |
| I key | Add an unlinked person |
| S key | Add spouse to highlighted person |
| P key | Add parents to highlighted person |
| C key | Add a child to highlighted person |
| Ctrl+ → ← | Traverse through the history list |
| Ctrl+B | Open Bookmark window |
| Ctrl+C | Color code people to highlight lines of descent |
| Ctrl+F | Open RootsMagic Explorer |
| Ctrl+Shift+F | Display a list of families in the database |
| Ctrl+I | Search Internet sites for a person in your database |
| Ctrl+H | Open the Search and Replace window |
| Ctrl+L | Enter or Edit LDS Ordinances for highlighted person |
| Ctrl+N | Create a new database |
| Ctrl+O | Open an existing database |
| Ctrl+P | Print a Report (Display a list of reports) |
| Ctrl+V | View immediate family of the highlighted person |
| F1 | List HELP Topics |
| F7 | Run Spell Check |

In the Add Person window

| | |
|-------|-------------------------------|
| Alt+G | Given name(s) field |
| Alt+S | Surname field |
| Alt+X | Sex field |
| Alt+P | Prefix field |
| Alt+F | Suffix field |
| Alt+N | Nickname field |
| Alt+B | Birth date field |
| Alt+I | Birth place field |
| Alt+D | Death date field |
| Alt+E | Death place field |
| Alt+U | Burial date field |
| Alt+R | Burial place field |
| Alt+O | OK |
| ESC | Cancel or exit without saving |

In the Edit person window – Common to all tabs

| | |
|-------|-----------------------------|
| Alt+G | Select General tab |
| Alt+I | Open Edit Multimedia window |
| Alt+L | Check/Uncheck Living? Flag |
| Alt+M | Select Multimedia tab |
| Alt+N | Select Notes tab |
| Alt+R | Select Address tab |
| Alt+S | Select Sources tab |
| Alt+T | Select To Do tab |
| Alt+U | Open Edit Sources window |

General tab – in the Edit person window

| | |
|-------|--|
| Alt+A | Add a new fact |
| Alt+D | Delete highlighted fact |
| Alt+E | Edit highlighted fact |
| Alt+F | Create or edit note for highlighted fact |
| Alt+S | Edit source of highlighted Fact |

In the Edit Fact window (from Edit Person)

| | |
|--------|------------------------------------|
| Alt+C | Calendar |
| Alt+D | Date calculator |
| Alt+P | Place list |
| Alt+T | Change fact type |
| Ctrl+H | Delete highlighted text in a field |
| Ctrl+X | Delete highlighted text in a field |

In most Edit windows with OK button

| | |
|-------|----|
| Alt+O | OK |
|-------|----|

General tab – in the Edit family window

| | |
|-------|---|
| Alt+A | Arrange (sort) children order |
| Alt+C | Edit (highlighted) child |
| Alt+E | Edit mother |
| Alt+F | Edit father |
| Alt+H | Sort husbands (Arrange order) |
| Alt+W | Sort wives (Arrange order) |
| Alt+L | Select relationship of child to parents displayed |

Notes tab – in the Edit person/family/fact windows

| | |
|----------------------------------|--|
| Ctrl+A | Select all Text in the Note |
| Ctrl+B | Toggle selected text to Bold or Bold to normal* |
| Ctrl+C | Copy selected text to clipboard |
| Ctrl+F | Open the Find window |
| Ctrl+H | Open the Find and Replace window |
| Ctrl+I | <i>Italicize</i> selected text or remove italics (<i>toggle</i>)* |
| Ctrl+J | Delete highlighted text |
| Ctrl+L | Left Justify highlighted text |
| Ctrl+M | Delete highlighted text |
| Ctrl+O | Open the "Text File to Import" window |
| Ctrl+R | Right Justify highlighted text |
| Ctrl+T | Open Character Map |
| Ctrl+U | <u>Underline</u> selected text or remove underline (<i>toggle</i>)* |
| Ctrl+V | Paste selected text from the clipboard |
| Ctrl+W | Word wrap selected text |
| Ctrl+X | Delete highlighted text and copy it to the clipboard |
| Ctrl+Z | Undo last action |
| Ctrl+[| Exit Edit person/family/fact window |
| Ctrl+ += or Alt+ Backspace | Toggle to increase/decrease font size from normal to a small font or vice versa (only applies while you are in the Notes tab.) (<i>Not with Keypad +.</i>) |
| Ctrl+5 | Set line spacing of selected text to double-space (only applies while you are in the applicable Edit person/family/fact window.) |

* Adding bold, italics or underline to the last word or phrase in a note may cause an undesirable blank line to follow. If this happens, select the space or punctuation after the last word and toggle the formatting off.

Sources tab – in the Edit person/family windows

| | |
|-------|---------------------|
| Alt+A | Add a new source |
| Alt+D | Delete Citation |
| Alt+E | Edit Source |
| Alt+I | Edit Details |
| Alt+P | Paste |
| Alt+X | Add existing source |
| Alt+Z | Memorize |

Repository tab – in Edit source window

| | | | |
|-------|-------------------------------------|-------|-------------------------------------|
| Alt+C | Clear repository (1 st) | Alt+A | Clear repository (2 nd) |
| Alt+E | Edit repository (1 st) | Alt+D | Edit repository (2 nd) |
| Alt+W | Write Email (1 st) | Alt+I | Write Email (2 nd) |
| Alt+V | Visit Website (1 st) | Alt+B | Visit Website (2 nd) |

Multimedia Tab – in Edit person/family/source/place

| | |
|-------|--------------------------------------|
| Alt+< | Scroll back thru multimedia items |
| Alt+> | Scroll forward thru multimedia items |
| Alt+A | Add a multimedia item |
| Alt+C | Copy multimedia item |
| Alt+D | Delete multimedia item |
| Alt+E | Properties |
| Alt+P | Print Photo |
| Alt+V | View/edit multimedia item |
| Alt+R | Rearrange multimedia items |

Edit Scrapbook Item window (from Add... or Properties... in Multimedia tab)

| | |
|-------|---------------|
| Alt+B | Browse Files |
| Alt+S | Scan an image |

Address tab – in Edit person/family windows

| | | | |
|-------|----------------------------------|-------|----------------------------------|
| Alt+C | Clear address (1 st) | Alt+A | Clear address (2 nd) |
| Alt+E | Edit address (1 st) | Alt+D | Edit address (2 nd) |
| Alt+W | Write Email (1 st) | Alt+I | Write Email (2 nd) |
| Alt+V | Visit Website (1 st) | Alt+B | Visit Website (2 nd) |

Edit Address/Edit Repository window

| | |
|-------|--|
| Alt+S | Send Email to address (create a new message) |
| Alt+V | Visit Website |