

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

This guide is for those who—for whatever reason—have chosen to make the move from Family TreeMaker (FTM) to RootsMagic (RM). My goal is to make it as painless as possible and to share with you what I learned in order to ease your own transition. *This transition guide is based on moving from FTM v16 to RootsMagic 3.4.2.*

### Table of Contents:

- ✓ Converting your FTM File to RM
  - GEDCOM vs. Direct Import
  - Place / Description Differences
  - How RM Maps FTM Facts
  - Other Fact Type Considerations
- ✓ First Steps Post-Conversion
  - Verify your import thoroughly
  - TOOLS: OPTIONS
  - Create sentence structures for user-defined facts
  - Edit your sources with Source Wizard
  - Enter marriage facts for married couples without marriage facts
- ✓ Changes to Adjust To
  - Reports & Lists
    - Order of Facts in Genealogy / Narrative Reports
    - Customizability
    - Descendancy Outline
    - Miscellaneous
  - Fact Types
    - Data Entry
    - Reference Numbers
    - Description Fields
  - Alternate names vs. Nickname
  - Definition of Family
    - "Family" Facts
    - Adoptions
    - Same-Sex Relationships
    - Gender Reassignment / Sex Changes
    - Unmarried Heterosexual Relationships
  - Get used to the differences & benefits
  - Hot Keys
- ✓ Outstanding Questions
- ✓ RM Wishlist Compilation

### Introduction

Before anything else, I recommend you get ready to practice patience and acceptance. RootsMagic *is* different from FamilyTreeMaker. It has a lot of benefits over FTM (which is why I – and probably you—chose it), but it *is* different, so prepare yourself for change.

This document focuses on those aspects of RootsMagic that compare to Family Treemaker, attempting to help former FTM users get the most out of RM. But this document does not cover all of RM's functionality. I strongly recommend that you

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

spend a few extra dollars and get the *printed* user guide for RootsMagic. It's well-written, and while it doesn't cover EVERYTHING you can do in RM, it's definitely worth purchasing and reading—a few times, even! You can buy the book and/or the software here:

[http://www.rootsmagic.com/orders\\_rm.htm](http://www.rootsmagic.com/orders_rm.htm) (cheaper if you buy both together).

### I. Converting your FTM file to RM

#### A. GEDCOM vs. Direct Import

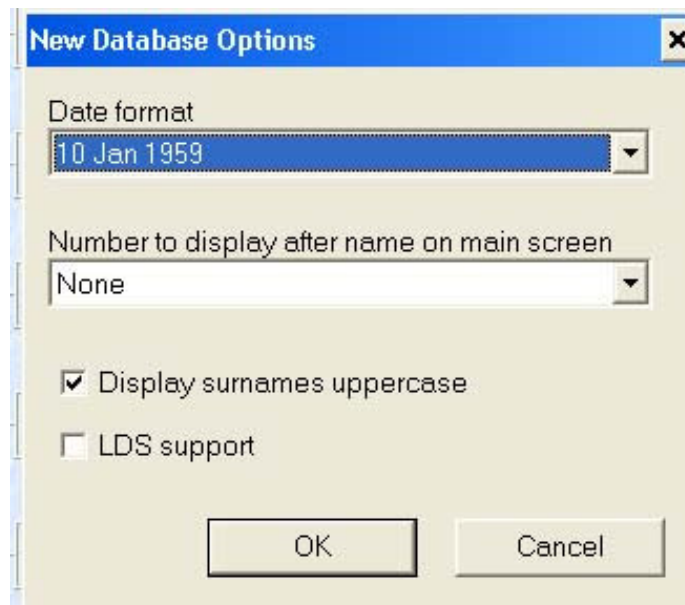
When making a transition from one program to another, one usually has to first export to GEDCOM then import into the new program. This would result in the loss of any media files/ photos, etc. that you have in FTM. But RM supports the ability to import *directly* from your FTM file without the need for first exporting to GEDCOM.

WARNING: If for any reason you decide to go back to FTM, you will need to generate a GEDCOM from RM and then import that GEDCOM into FTM. FTM *will* generate errors. Detailed instructions for converting back are outside the scope of this document. I'll leave that for someone else to create. That said...

Download the small, free program, "Note Tab Light". [DO NOT USE MS WORD FOR THIS.] Open that GEDCOM file with it. Highlight the whole document by pressing [Ctrl]-[a]. Go to the "MODIFY" menu and select lines-Choose number (from 1). You can then see which people or items those line numbers in the error listing are referring to so that you can edit the facts in Family Tree Maker.

To convert your FTM file...

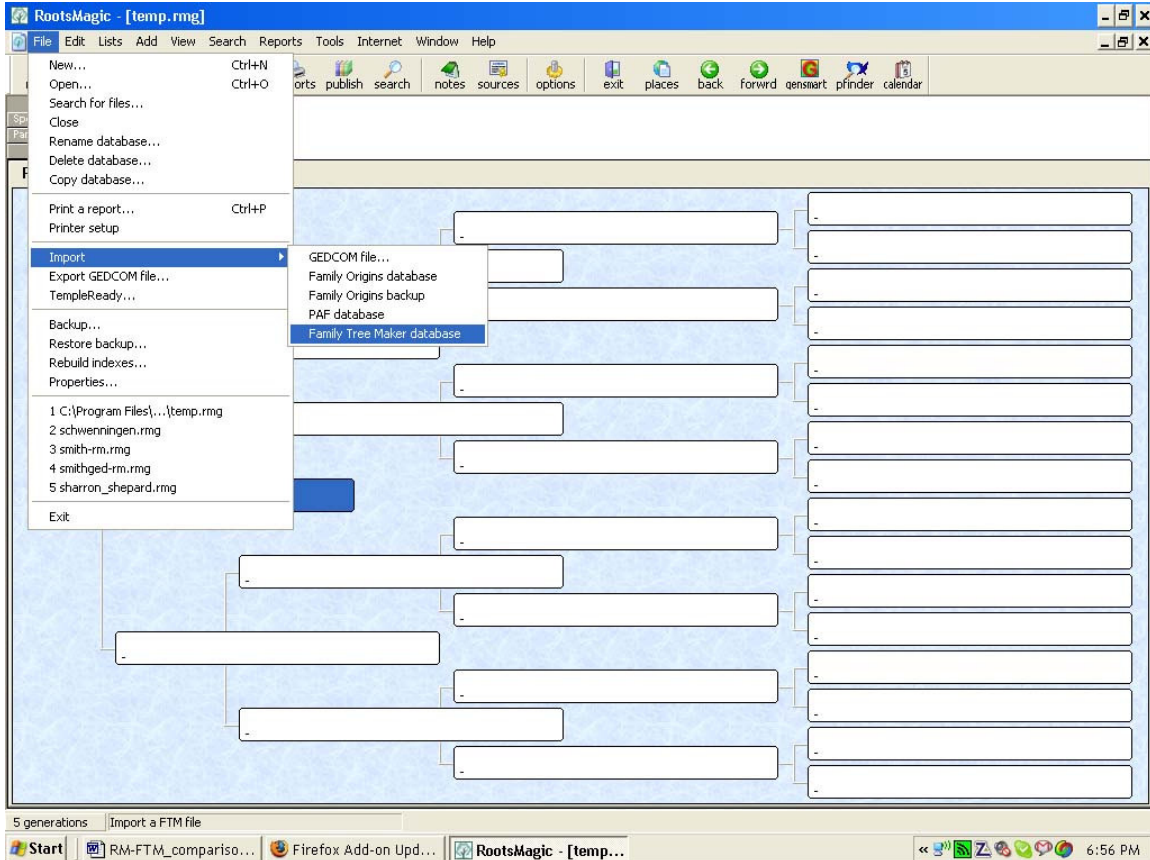
First, launch RootsMagic, then select NEW file. Name the file. After that, you'll be asked how you want to treat dates, surnames (all caps or not):



## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

Make the changes you prefer.

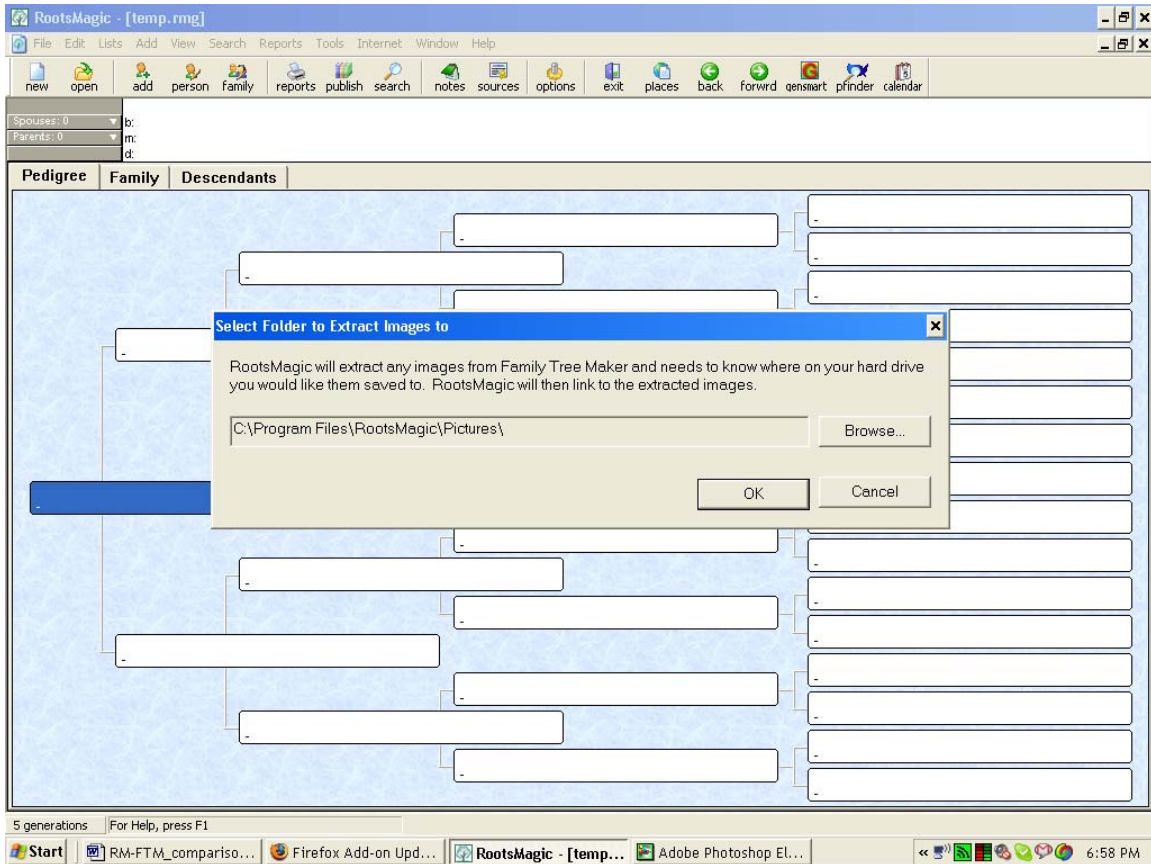
Then select File:Import:FamilyTreemaker:



A significant advantage of this direct import (vs. importing a GEDCOM) is that any graphics you've imbedded into your FTM file will be appropriately converted. RM recognizes them, extracts them, places them in a designated folder and *links* to them. This is a far more efficient use of space and will keep your main RM file from becoming too large.

Related to that, the next thing that RM asks you is where you want your images stored:

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)



Decide where you want to store your image files.

### Speaking of Files...

While FTM keeps EVERYTHING in one file (filename.ftw), RootsMagic uses a variety of files to organize your files. So don't be surprised to see multiples of the following in your Rootsmagic folder (or wherever you've chosen to save your files):

- filename\_A.cdx through filename\_T.cdx [WHAT ARE CDX FILES?]
- filename\_A.dbf through filename\_T.dbf [WHAT ARE DBF FILES?]
- filename\_A.fpt through filename\_T.fpt [WHAT ARE FPT FILES?]

What's all that mean? I found two answers:

1. The Non-Tech Answer (supplied by Alfred)

"They are all needed in each database. It is just the way that the C++ programming language does databases. Multiple files rather than everything crammed together into one file."

2. The Techie Answer (supplied by Kevin Benson)

*"Those three together complete the structure of the dataset "portion" of the RootsMagic database:*

**DBF - FoxPro/FoxBase Database Files** (contain the actual data for your dataset except for data which is or may be rather large in size such as certain

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

narrative data )

**FPT - FoxPro/FoxBase Memo Files** (large-size textual data is stored in the FPT files)

**CDX - FoxPro/FoxBase Structural Compound Index Files** (Each DBF file will have a corresponding CDX file and possibly a corresponding FPT file)

Actually, I think the RootsMagic program executable is written in C++ and uses a C++ class library for manipulating Xbase type datafiles and indices (of which the above extensions are used for backward and external compatibility). The Xbase "framework" is an updated collection of specifications, programs and utilities compatible with the database formats of Bruce's programs and those of many competitors."

### B. PLACE / DESCRIPTION Differences

The next thing you'll be asked is how you want RM to handle user-defined facts—or rather, any fact that RM does not recognize as standard. This will include custom facts you created in FTM as well as FTM-created facts that RM doesn't recognize.

Before telling RM how to handle these, it's important to understand how the two programs deal with facts. (And reminder, this is about FTM v16 and earlier versions, NOT FTM 2008 which handles things differently.)

FTM combines place+description into one field. For example, you may have a birth fact where the date is "Abt. 1821" and the place+description field reads "based on age at death".

But RM uses *three* fields for user-defined facts—place, description and notes. You will come to appreciate this separation later then RM gives you options to:

- a) make consistent your use of place names; and
- b) search for all events that occurred in a particular location.

So while you will have *some* data clean up to do, RM's direct import tool makes it less painful. At the time you conduct a direct import, you will be asked how you want RM to handle data found in user-defined fields. RM displays a list of user-defined fields, then asks where you want the field stored in RM:

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

Fact/Event	Place	Desc	Notes
Godparents Are		✓	
Intention		✓	
Naturalization Witnesses		✓	
City Directory	✓		
Godparent of		✓	
Email		✓	
Phone number		✓	
Godparents of		✓	
Funeral	✓		
Witness		✓	
Personality/Intrst		✓	
Member		✓	
Arrival		✓	

Go through the fact type list and think about you how typically use that fact type. If you know it contains predominantly PLACE information, select PLACE. If you know it contains only descriptive information (shoemaker, civil war, John & Miriam Smith), select DESCRIPTION. If in doubt, or if you know you combined both place and description (e.g., "New York on the ship 'Fanny' with mother and siblings"), select PLACE. The reason for this is that RM enables you to easily generate a list of PLACES that you can use later to clean up your data.

### C. How RM Maps FTM Facts (Individual & Marriage/Family Facts)

Both FTM and RM distinguish Individual Facts from those associated with a couple/family. In the latter case, FTM calls these *marriage* facts. RM calls them *family* facts. The chart below maps how RM interprets FTM facts – both Individual and Marriage/Family. In cases where there is no fact in the RM column, your FTM fact will be converted to a custom fact type. [Is this true in all cases?]

**Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

**Fact List**

<b>These fact types in Family Treemaker</b>	<b>Get mapped to these RootsMagic fact types</b>
<u>Individual Facts:</u> Adoption [Aka] (doesn't list as an indiv fact)  [only a marriage fact in FTM] Baptism Baptism (LDS) Bar Mitzvah Bat Mitzvah Blessing Born Burial Caste Census Christening ??? Confirmation Confirmation (LDS) Cremation Degree Died Education Elected Emigration Endowment (LDS) Excommunicated First Communion Graduation  Immigration          Military service  Mission (LDS) Name Namesake Nationality Naturalization Occupation Ordination Probate Property	<u>Individual Facts:</u> Adoption Nickname  Ancestral File Number [listed twice] Annulment Baptisms LDS Baptism Bar Mitzvah Bas Mitzvah Blessing Birth Burial Caste Census (individual) Christen Christen (adult) Confirmation ??? Cremation Degree Death Education Election Emigration LDS Endowment Excommunication First Communion Graduated Illness Immigration LDS Seal to spouse [exists in both Indiv and Family; why? In FTM, this is a marriage fact] Living Marriage Notice [why is this in individual facts?] Medical Military Miscellaneous Mission [name] Namesake Nationality Naturalization Occupation Ordination Probate Property

**Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

<b>These fact types in Family Treemaker</b>	<b>Get mapped to these RootsMagic fact types</b>
[not manually controllable] Religion Residence Retirement Sealed to parents (LDS) Social Security number ?? ?? Temple ?? Will	Record Change (individual) Religion Residence Retirement LDS Seal to Parents Soc Sec No Stillborn Taxation [user-defined?] Suffix Will Wounded
<u>Marriage Facts:</u> Annulment (no equivalent) Death of one spouse Divorce Divorce filed Engagement Friends Marriage Marriage bann  Marriage contract Marriage Fact Marriage license Marriage settlement None-ending Ongoing-ending Other-begin Other-ending Partners Pastor's Residence Place of Marriage Private-begin Private-Ending  Sealed to spouse (LDS) Separation Single Unknown-begin Unknown-ending	<u>Family Facts:</u> Annulment Census (family) [user-defined?] Divorce Divorce filed Engagement [user-defined] Marriage Marriage Bann Marriage Bond Marriage Contract [I have no idea what this is!] Marriage License Marriage Settlement [user-defined] [user-defined] [user-defined] [user-defined] [user-defined] [user-defined] [family place?] [user-defined] [user-defined] Record Change (family)  Residence (family) LDS Seal to spouse Separation Unmarried ?? [user-defined?] [user-defined?]

- If you have multiple NAMES in FTM, RM will convert subsequent names to the ALTERNATE NAME field.
- RM has both a CENSUS (Individual fact) and a CENSUS (Family fact). RM converts FTM's census fact as an individual census fact.

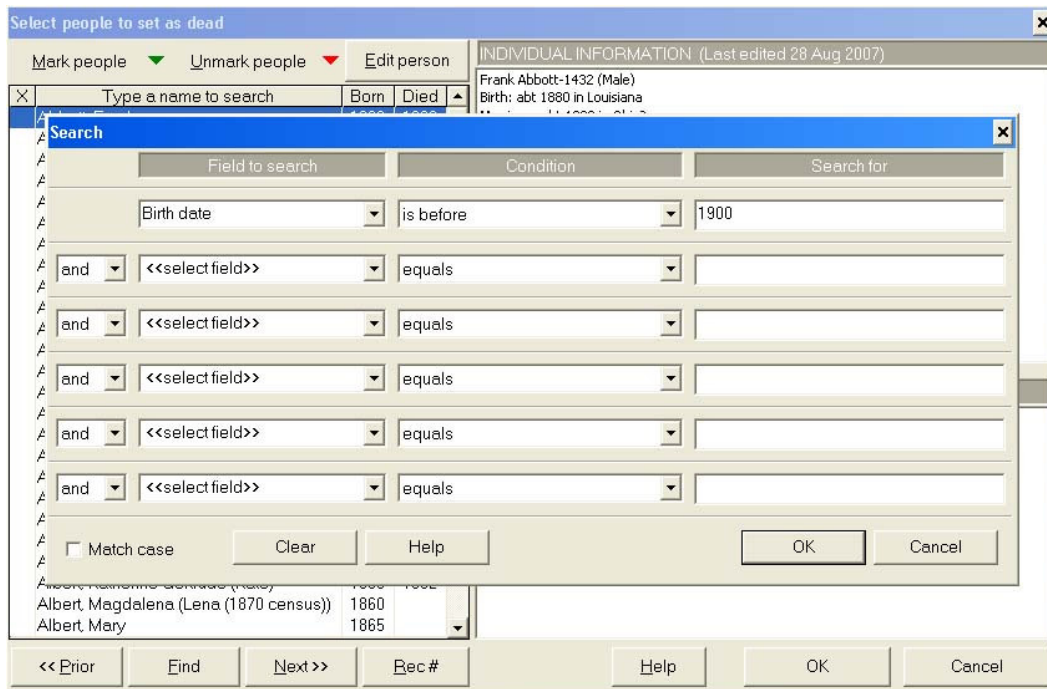


## II. First Steps Post-Conversion

### A. Verify your import thoroughly!

Be sure to check a variety of things before beginning substantial updates. Some suggestions of data to verify include:

1. Check individuals with name aliases, prefixes and suffixes to see if they transferred correctly.
2. RM marks as "Living" *anyone* without a death date unless they were *manually* entered as born before 1901. Therefore, if your imported data includes empty death fields, even for people born before 1901, those individuals will be marked as living. The good news is that you can easily "de-living" these individuals with a global search and replace in RM.
  - a. Tools:
  - b. Set Living
  - c. Set living to "FALSE" for a selected group of people
  - d. On RM Explorer window, click on MARK PEOPLE in order to display the drop-down menu.
  - e. Select SELECT PEOPLE BY DATA FIELDS.
  - f. Select the fields you want in order to identify all those people to mark not living. Click on OKAY.
  - g. RM marks all those that match your criteria; click OKAY again to finalize setting living=false for this group.

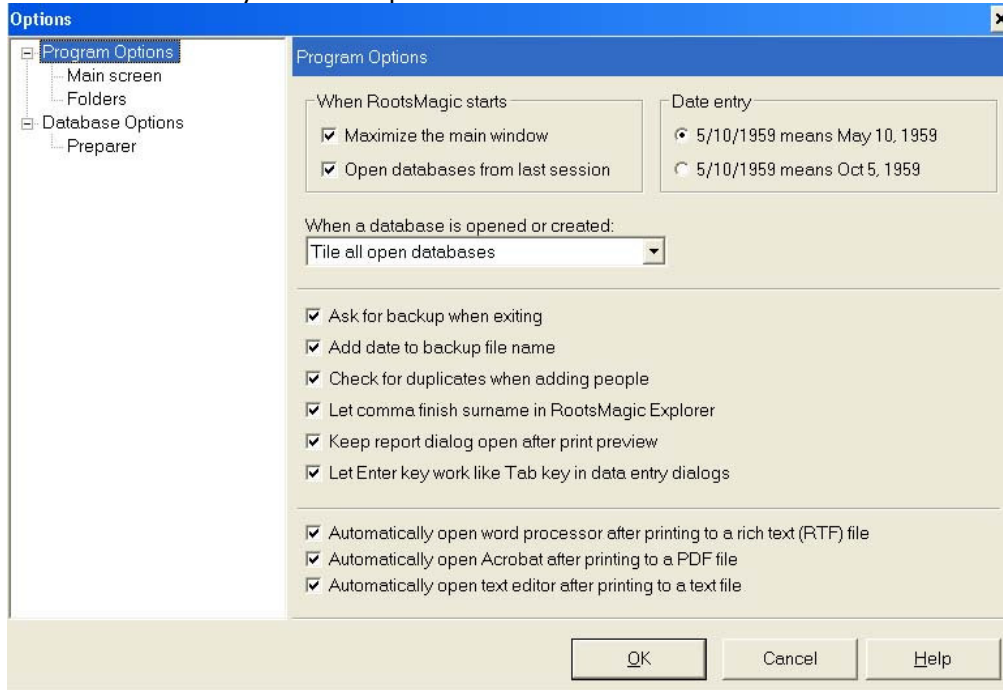


# Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

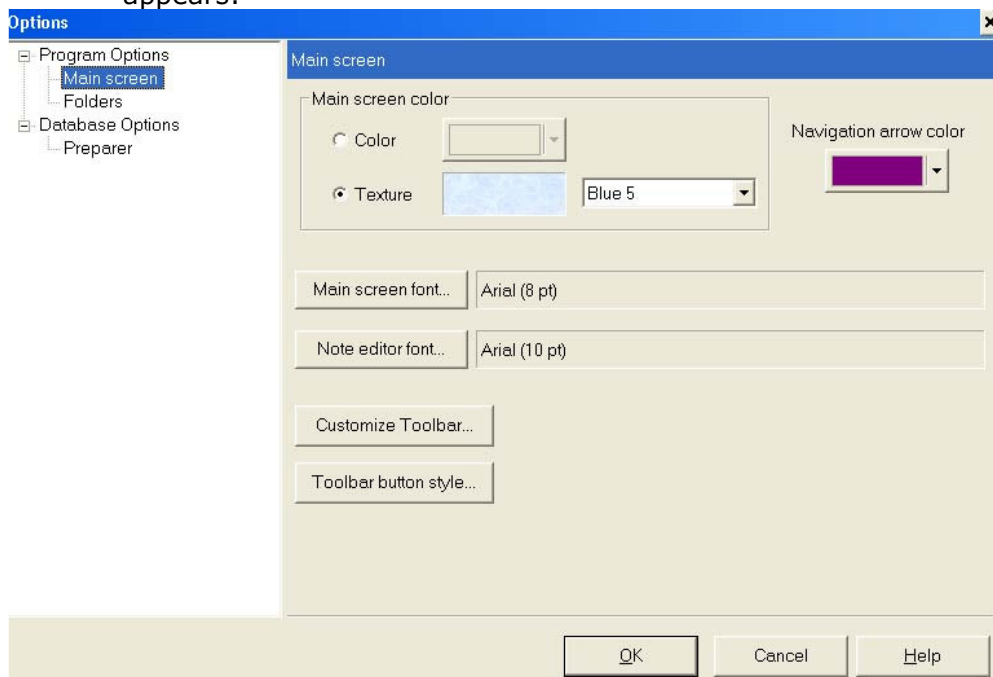
## B. Get to know TOOLS: OPTIONS

You have a lot of options under TOOLS:OPTIONS, so be sure to familiarize yourself with this part of RM. I summarize them here:

1. **Program Options** affect the entire program, no matter which family tree file you have open.

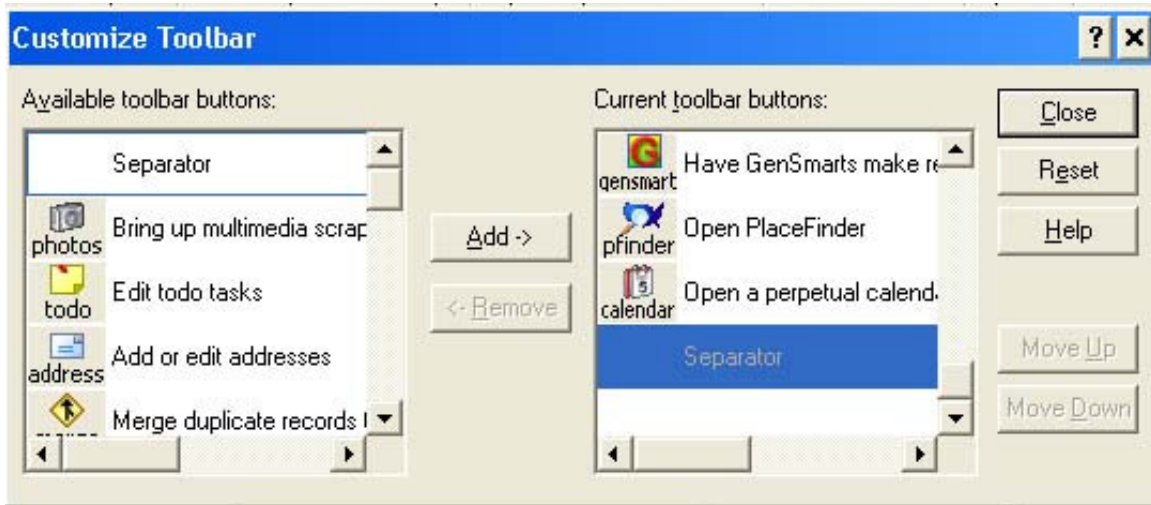


2. **Main Screen Options** allow you to change how the main screen appears:

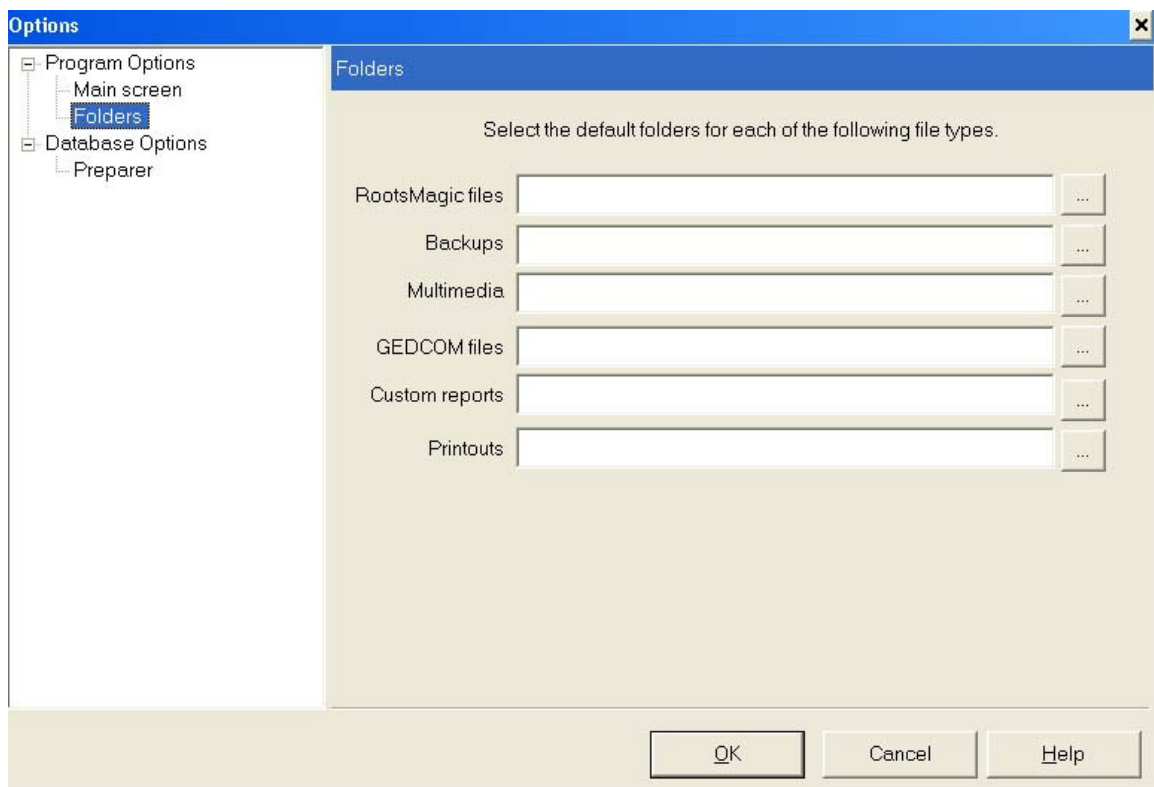


## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

Be sure to examine your options under CUSTOMIZE TOOLBAR:

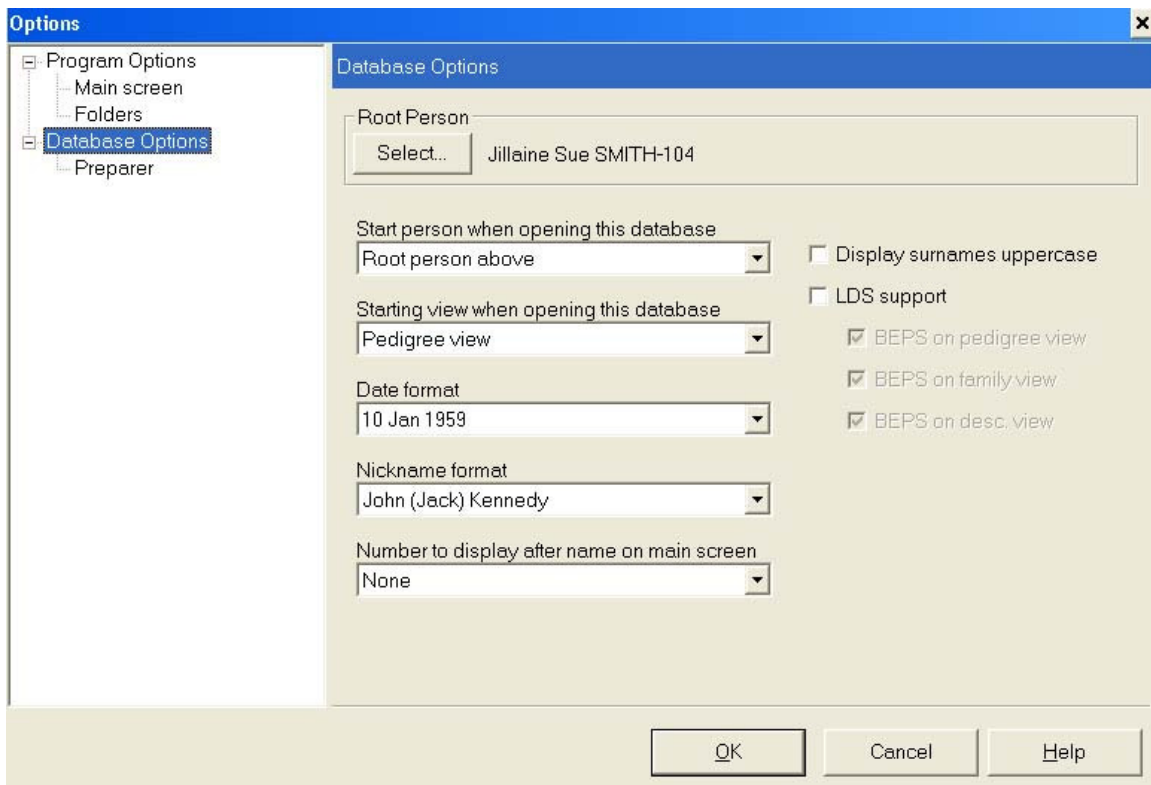


3. **Folder options** allow you to determine where on your computer the different files are stored that Rootsmagic uses—including main Rootsmagic files, backups, multimedia files, gedcoms, custom reports and printouts.



## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

4. **Database Options** refer to the specific file you have open. Things you can control here include:
- the "root" person. (FTM doesn't have an equivalent. RM, however, defines many reports based on the root person.)
  - the person who should be displayed each time you open the file (either the root person, or the last person displayed)
  - Your preferred date format (21 January 1959 or January 21, 1959, etc.)
  - How you want nicknames displayed.
  - Number to display after the name on the main screen (none, record number, reference number (REFN)). NOTE: This is the only place you can display record or reference numbers. Unlike in FTM, you can't display record or reference numbers in reports.
  - How to display surnames (in upper case or not)
  - Specific LDS support, including BEPS on pedigree, family or descendant view. (I'm not Mormon, so I have no idea what that means.)



## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

5. **Preparer Options.** What you enter here will appear on various reports when you select "Display Preparer Information."

The screenshot shows a software window titled "Options" with a close button (X) in the top right corner. On the left is a tree view with the following structure:

- Program Options
  - Main screen
  - Folders
- Database Options
  - Preparer**

The "Preparer" tab is active, showing a form with the following fields:

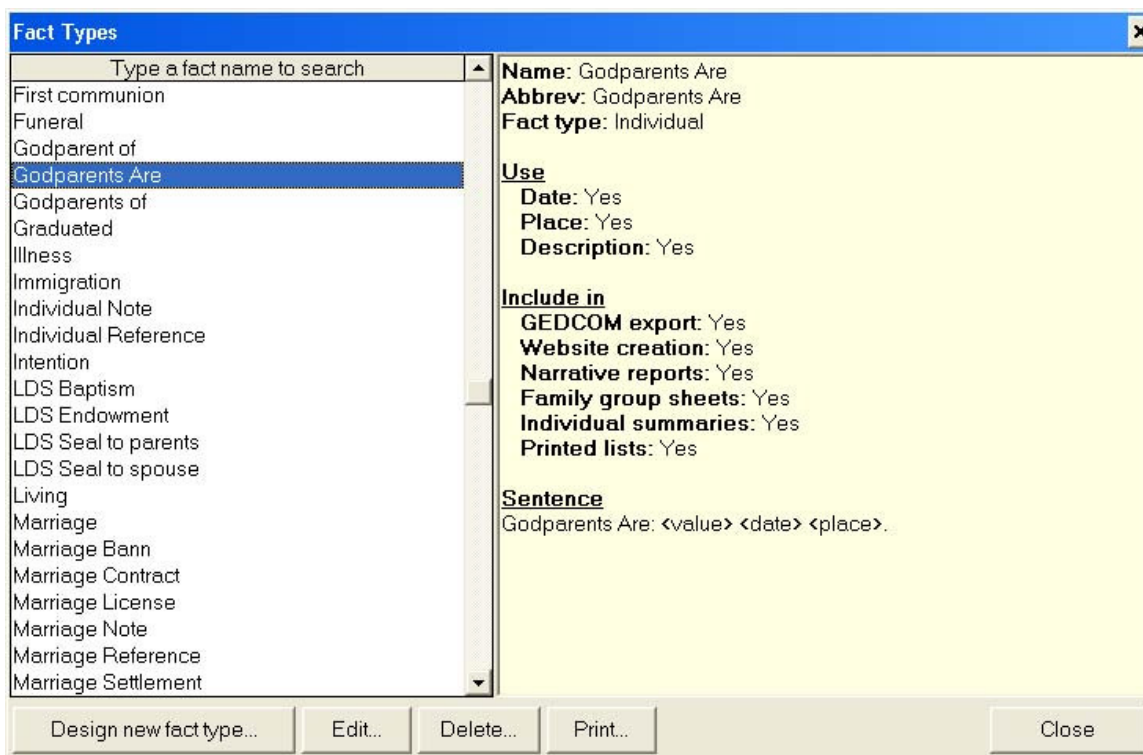
- Name
- Address
- Phone
- Email
- Fax
- Website

At the bottom of the window are three buttons: "OK", "Cancel", and "Help".

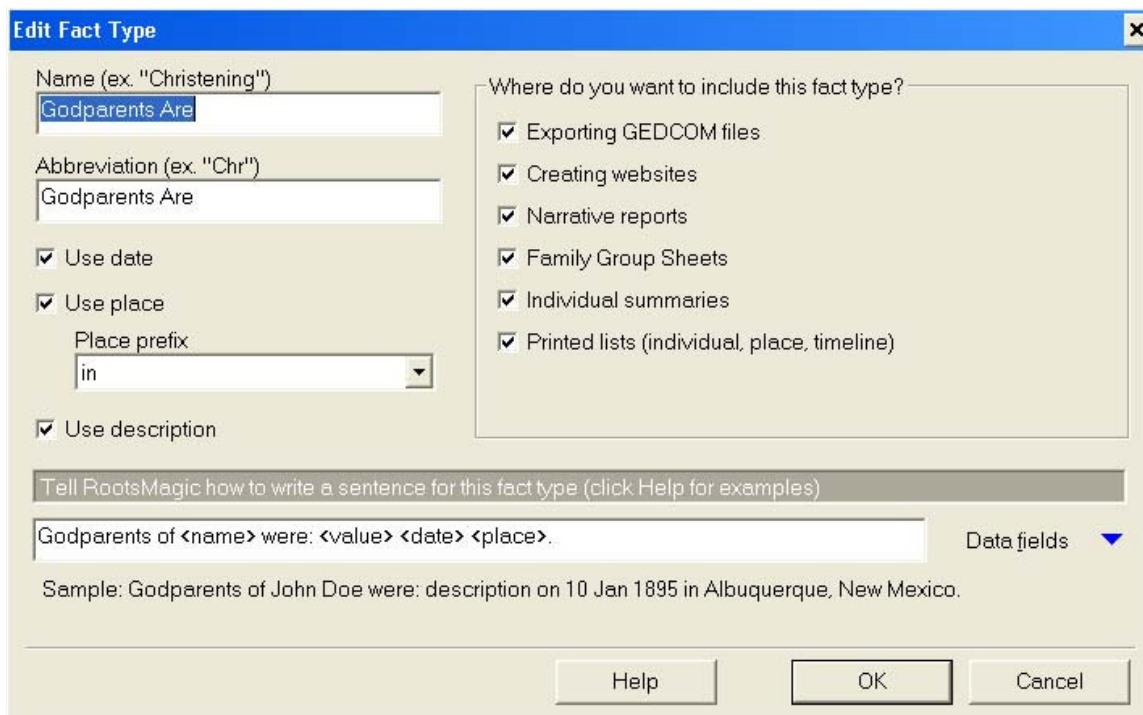
### C. Create sentence structures for your user-defined facts (and see how sentence structures work for other facts)

One of the cool things about RootsMagic—and a feature superior to FTM—is the ability to have greater control over how facts are described in narrative reports. Whether using a pre-defined fact (like birth or baptism), or using one of your user-defined facts, you can control—for the most part—how that fact appears in a sentence. To do this, select **LISTS → FILE TYPES**. The following window appears. In this example, you'll see a user-defined fact called "Godparents Are". (I found that if I recorded the Godparents of children, especially those born in the 1800s and earlier, I could find relationships between the Godparents and the parents of the child.)

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)



There are a number of things you can do here (including control if this fact gets exported to a GEDCOM), but let's focus on the sentence structure piece. Right now, the sentence structure is "[FACT TYPE]: <value> <date> <place>". "Value" in RM is the same as Description. You can move things around, by clicking on the EDIT button.



## **Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

In this example, the sentence structure now includes the name. When you print a report, and the person has a Godparent recorded, the sentence in the report will display as, for example:

Godparents of Elisabeth Betz were: Adam Christmann and his wife, Elisabeth on 1820 in Feilbingert, Rheinpfalz, Germany.

NOTE: the DATE value automatically includes "on" and the PLACE value automatically adds "in". So there are some limitations to the control that RootsMagic gives you.

### **D. Edit your Sources with Source Wizard**

After you import/convert your FTM file to RM, you will need to clean up your sources.

In RootsMagic, go to LISTS -> SOURCE LISTS

Then highlight the first source and click SOURCE WIZARD. Fill out each of the fields.

From Alfred D. Eller

In Source Wizard and source editor there are three fields to fill in, besides the pick name and personal file number. The first one is the source, the second is the short version, for the second citing of the same source on a page, and the third is for use in the bibliography, for when you use that instead of individual sources.

Some programs have no idea what to do with the short version or bibliography, so there isn't much reason for exporting them for those programs. (Most other programs, but don't ask me WHICH ONES) If you are exporting a GEDCOM for someone who is using RootsMagic, you should probably include them, if you have bothered to fill them in.

[draft instructions for how to use, including how different from FTM. Map source fields from FTM to RM. Include advice for cleaning up your sources. Describe how wizard comes with pre-set source TYPES that are not changeable by the user, and how to use.]

It is important to understand that RM distinguishes a SOURCE from a CITATION.

### **E. Enter Marriage Facts for Married Couples Without Such Marriage Facts**

As long as a couple in RM has no marriage fact, RM does not treat them as married. Therefore, if you have a married couple but never entered a date in FTM's married field, RM won't show them as married. You'll need to enter an estimated date in the marriage fact in order for various reports to identify them as married.

To generate a list of all couples without a marriage fact:

1. Reports->Lists->Marriage Lists
2. In right-half side of widow, select "Print couples with NO marriage event".
3. Print to anything other than Screen/Printer. Save as FILENAME
4. Open FILENAME and use this as a check against the data cleanup you'll need to do.

### III. Changes to Adjust To

#### A. Reports & Lists

##### a. Order of Facts in Genealogy/Narrative Reports

<b>Family TreeMaker Genealogy Report:</b>	<b>Rootsmagic Narrative Report:</b>
Initial Birth, Parents, Death and Marriage information – for both husband and wife - in first paragraph. FTM allows no control over order or sentence structure.	Initial paragraph describes all of primary person's non-marriage facts in chronological order. (This order may be modified by using RM's SORT field for each fact.) RM allows modification of how each sentence is structured.
Individual Notes for primary person	Individual notes [for primary or both?]
Individual Facts <i>other</i> than birth and death for primary person	Narrative paragraph compiling all family-related facts
Individual notes for spouse of primary	Family Notes...
Individual facts other than birth and death of spouse of primary person	Followed immediately (without break) by facts and individual notes about spouse, format the same as for primary person, as above.
Marriage notes for the couple (if any).	Followed immediately (without break) by children of husband and wife.
Marriage facts for the couple	
After a couple of line breaks, the list of children of this couple.	
List of children includes only birth and death of those children who have more details below. For those without further details below, all facts and notes are included in the list.	List of children includes birth, marriage and death information for all children, whether or not further details listed below. For those without further details below, all facts and notes are included in list.

##### b. Customizability

RM is not as strong as FTM when it comes to the customizability of different reports. FTM's "Items to include" is a powerful feature that allows you to include pretty much any type of fact (except notes) into almost any report. RM does not as yet have this flexibility. A good example is the descendency report (outline descendency in FTM):

##### c. Descendency Outline

<b>Feature / Option</b>	<b>FTM</b>	<b>RM</b>
Control what character to use to indent	Any char.	Dots only (y/n)
Control how much to indent each generation	By inches	By spaces
Option to place a generation # before each descendant's name	Yes	No
Control which generation # to start with	Yes	No



## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

Control maximum height (in rows) for each individual	Yes	No
Control # of blank lines between each individual	Yes	No
Choose whether or not always one page wide	Yes	No
Allows you to select which fact (of <i>all</i> fact types) to include	Yes	No (ltd options)
For most fact types, includes additional options, including:	Yes	No
* Include Mr./Mrs.	Yes	No
* Use married names for females	Yes	No
* Use aka if available (instead of/in between first/middle)	Yes	No
* Last name in all caps	Yes	No
* Include reference # with name	Yes	No
* Include source	Yes	No
* Include source label: full, abbrev.,	Yes	No
* Include labels of empty fields	Yes	No
Include all descendants of [PERSON]	Yes	Yes
Include direct descendants only from [PERSON] to [selectable person]	Yes	No
If above chosen, option to include siblings of direct descendants	Yes	No
Select # of generations to show	Yes	Yes
Highest # of generations to include	250	200
Control text font, style, color & size	Yes	Yes
" " of four different aspects of desc. list (body, title, footnote, page #s)	Yes	No
Option to include spouses	Yes	Yes
Option to include duplicate children of intermarriages	Yes	No
Option to mark individuals with multiple spouses	Yes	??
Print an index	No	Yes
Print duplicates only once	??	Yes
Print color coding	N/a	Yes
Print private facts	n/a	Yes
Print preparer's name/address	No	Yes
Layout control	Page setup	DL options
Ability to save user-selected settings for future use	Yes	No
Use Auto-title or custom title	Yes	No?
Control whether or not title printed on every page	Yes	No
Include page #	Yes	No?
Control starting page #	Yes	No
Include date of printing	Yes	No?
Include time of printing	Yes	No
Include footnote (open text box)	Yes	No

### d. Miscellaneous

Apparently you can not display reports on a computer that has no printer driver installed.

If no birthdate, RM will display the CHRISTENING date (not the BAPTISM date) on most reports.

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

There is no "display siblings" in pedigrees and descendant reports.

### B. Fact Types

#### 1. Data Entry

Perhaps the primary difference that FTM users will note in RM is the number of clicks required to edit a fact or enter text. In FTM, you can enter a number of facts directly on the family view page—simply click on the field and start typing.

The screenshot shows the Family Tree Maker interface for a marriage record. The window title is "20060110.FTW - Family Tree Maker". The menu bar includes File, Edit, View, Books, People, Picture/Object, Contents, Format, Tools, Internet, and Help. The toolbar contains various icons for navigation and editing.

The main area is divided into sections for "Parents of Ludwig" (Andreas & Rosina) and "Parents of Paulina" (Casper & Christina Rosina). Below these are fields for "Husband" and "Wife".

**Husband:**  
Name: Ludwig JAUCH  
Birth date: 19 Jul 1839  
Birth place: Schweningen, Wurttemberg, Germany?  
Death date: 20 Sep 1912  
Death place: Buffalo, NY

**Wife:**  
Name: Paulina GLUNZ  
Birth date: 17 Jun 1847  
Birth place: Cannstadt, Wurttemberg, Germany  
Death date: 16 Nov 1930  
Death place: Buffalo, NY

**Marriage:**  
Date: 29 Sep 1867  
Place: St. Peters Church, Buffalo, NY

**Children(12):**

Name	Sex	Birth date	Birth place	Death date	Death place
Louis Wilhelm Jauch	M	20 Jun 1868	Buffalo, NY	14 Jan 1913	Buffalo, NY
Katherine Jauch	F	09 Aug 1870	Buffalo, NY	Aft. 1930	
Carl Frederick Jauch	M	09 Nov 1871	Buffalo, Erie Co, NY	22 Jun 1908	Buffalo, Erie Co, NY
Michael J. Jauch	M	18 Mar 1873	Buffalo, NY	16 Apr 1918	Buffalo, NY
William Walter Jauch	M	28 May 1875	Buffalo, Erie Co, NY	18 Dec 1931	Buffalo, Erie Co, NY
Johann Albert Jauch	M	01 Sep 1876	Buffalo, NY	07 Dec 1931	Buffalo, Erie Co, NY
Edward Friedrich Jauch	M	01 Mar 1879	Buffalo, NY	22 Feb 1915	Derby, Erie Co, NY
Gottlieb Albert Jauch	M	19 May 1880	Buffalo, Erie Co, NY	1961	

At the bottom, a status bar shows: Parents: Rosina JAECKLE and Andreas JAUCH | Children: 12 | Spouses: 1 | Highlight Results: 3 stars and better | NUM

On the RootsMagic equivalent, you have to double-click on the person, then add a fact, before you can enter, for example, a birth date.

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

The screenshot shows the RootsMagic software interface. The main window displays a pedigree report for Ludwig (Louis Jauch) JAUCH. The report is organized into several sections: Father, Mother, Father's Parents, and Mother's Parents. Below these sections is a table of children.

**Father:**  
Ludwig (Louis Jauch) JAUCH  
b: 19 Jul 1839, Schweningen, Württemberg, Germany?  
m: 29 Sep 1867, St. Peters Church, Buffalo, NY (age 28)  
d: 20 Sep 1912, Buffalo, NY

**Mother:**  
Paulina (Pauline) GLLINZ  
b: 17 Jun 1847, Cannstadt, Württemberg, Germany  
d: 16 Nov 1930, Buffalo, NY

**Father's Parents:**  
Andreas JAUCH  
Rosina JAECKLE

**Mother's Parents:**  
Casper GLLINZ Sr.  
Christina Rosina SCHWEIZER

Children	Sex	Birth	Death
1 Louis Wilhelm Jauch	M	20 Jun 1868	14 Jan 1913
2 Katherine (Katharina (per marriage and birth r) Jauch	F	9 Aug 1870	aft 1930
3 Carl Frederick (Friederich Fred) Jauch	M	9 Nov 1871	22 Jun 1908
4 Michael J. (Mike (per Mildred Smith Heffley)) Jauch	M	18 Mar 1873	16 Apr 1918
5 William Walter (Bill, Wilhelm) Jauch	M	28 May 1875	18 Dec 1931
6 Johann Albert (Bert) Jauch	M	1 Sep 1876	7 Dec 1931
7 Edward Friedrich Jauch	M	1 Mar 1879	22 Feb 1915
8 Gottlieb Albert Jauch	M	19 May 1880	1961
9 Elizabeth Pauline Rosine (Lizzie) Jauch	F	5 Feb 1882	aft 1930
10 Pauline Carolina (Lena) JAUCH	F	27 Mar 1884	10 Jan 1963
11 Genevieve (Jennie (baptism), Johanna (marriage) Jauch	F	11 Sep 1885	1 Sep 1929
12 Heinrich Ludwig (Henry or Harry) Jauch	M	16 May 1889	22 Jun 1936

Related to this, when you generate a report to the screen from inside of FTM, you can then double-click on any line or piece of information in the report and go to a screen where you can edit that information. Not so in RM.

This may make RM unwieldy for those users entering a lot of *new* information, but be less an issue for people who are converting *existing* data from FTM to RM.

A better data-entry option has been requested by many people, and hopefully such will be incorporated into a future upgrade.

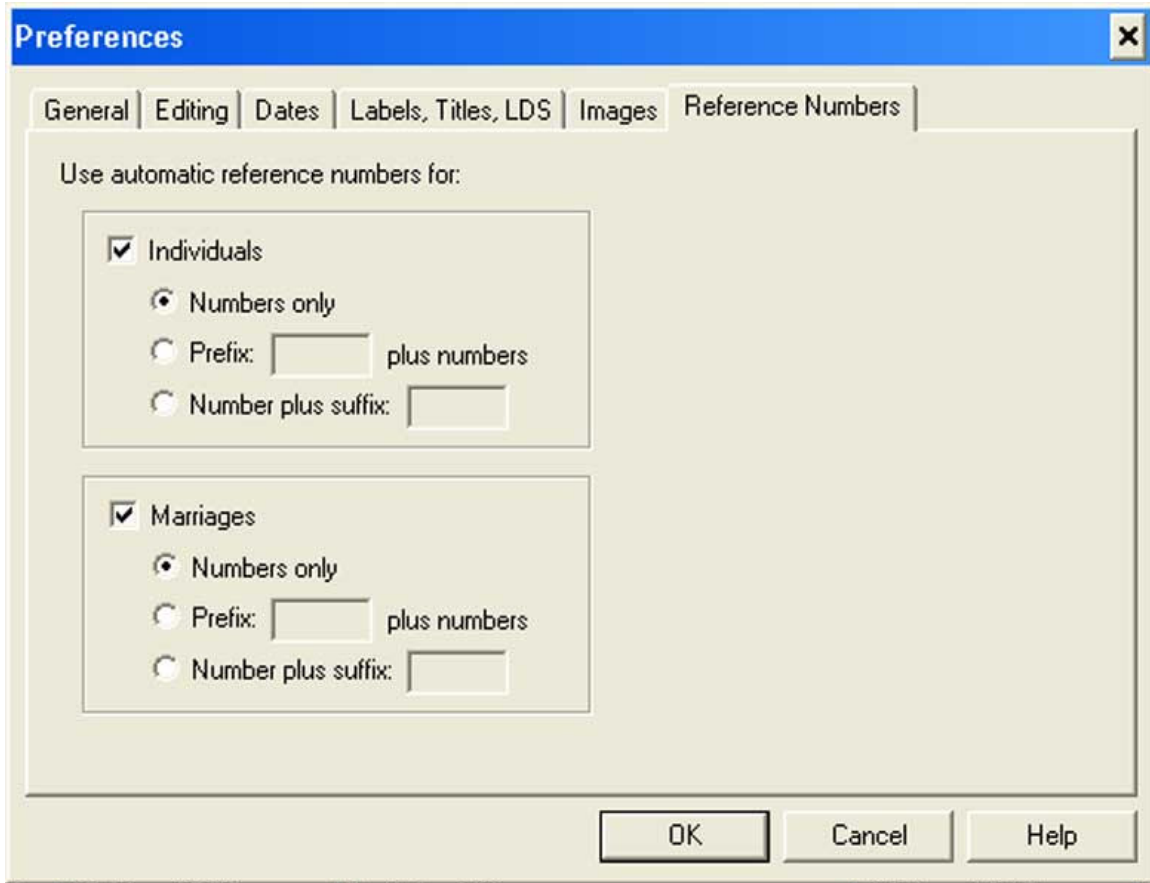
Additional tricks to know:

- right-click on toolbar in order to customize it
- ctrl-left arrow takes you back a page
- ctrl-right arrow takes you forward a page

## 2. Reference Numbers

FTM has a feature that when selected automatically generates reference numbers for each individual and/or marriage.

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)



RM has no such feature, unfortunately. But you can manually add numbers to the REFNO field for an individual. RootsMagic does not display the *family* reference number in the program for us to use, but it does use it within the database to link the family members together.

### 3. Description Fields

The other key difference between FTM and RM is the use of DESCRIPTION fields. FTM (through version 16) combined place and descriptions into one field. RM distinguishes PLACE and DESCRIPTION for a number of fact types:

- any user-defined fact (optional)
- Adultery
- Alias
- AFN
- Arrival
- Caste
- Death
- Degree
- Description (individual)
- Education
- Election
- Illness
- Intention
- Military
- Miscellaneous
- Mission
- Namesake
- Nationality
- Occupation
- Property
- Reference No
- Religion
- Residence
- Residence (family)
- Soc Sec No
- Taxation

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

The PLACE field is for the *location* of the event; the DESCRIPTION of the event/fact can hold information that is neither about a date nor a place.

It is not clear to me what happens to this data (in each of these fact NOTES) when exported into GEDCOMs and then imported back into other family tree programs, including FTM.<sup>1</sup>

### F. Alternate Name vs. Nickname

If you put the nickname in the Alternate Name fact instead of the Nickname box (the latter which is always included with names in all reports) after the name on the Fact edit screen, it doesn't show up on the screen and it only prints once in a narrative report.

If you put the last name in that fact the report reads: 'He was also known as "James" Lewis.' Or it uses (James) Lewis depending on how you have selected to have the nickname printed in Tools>Options>Database Options>Nickname format.

You can go to Lists?Fact type list>Alternate Name and uncheck the Narrative report if you don't want that fact to print at all.

### G. The Definition of FAMILY

#### 1. "Family" Facts

RM defines a family with the presence of one of the following of the following conditions:

- a) two individuals (one male, one female) have a marriage fact assigned to them
- b) at least one child is attached to at least one parent

When there are two individuals connected with a marriage fact, any other "family" fact type is associated to *both* individuals. This is different from FTM. The only way to see any marriage-related fact is through the marriage section, *not* through each individual.

#### 2. Adoptions

FTM and RM handle Adoptions very differently. FTM applies an adopted child to an individual parent or at least one at a time. RM applies an adopted child to a COUPLE even if only one of the couple is the adopter and the other is the natural parent. This has driven many RM users crazy for years, and they have requested this be fixed. Hopefully it will be in an upcoming upgrade.

#### 3. Same-Sex Relationships

Probably no genealogy software is perfect at recording and displaying same-sex partnerships. Genealogy software's initial purpose was to track GENEalogy, which is

---

<sup>1</sup> Exporting FROM RootsMagic TO other programs, including FTM, is beyond the scope of this document; I leave it to others to document *that* experience!

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

distinct from *family history*. In addition, the initial genealogy software (PAF) and the GEDCOM standard used by pretty much every other genealogy software was developed by a religious institution, the Church of Latter Day Saints (Mormons). Their interest in genealogy is a religious one—they believe in the posthumous conversion of one's ancestors. They (and many other people) are not interested in documenting your lesbian life partner and co-parent of your child.

That said, it is at least possible in FTM to record same-sex unions. That is not the case in RM. ***Unless a same-sex relationship was already identified in your FTM file prior to conversion***, you will not be able to add a same-sex union to your RM file. If you try to add an existing male person as a spouse to another existing male person, RM will say "The person you select must be female." And if you attempt to add a new person as a female spouse to an existing female person, RM automatically enters the male gender to the new record and you cannot change it.

There are two work-arounds:

- a. Import an existing same-sex relationship from an existing GEDCOM or other format that RM supports. RM, however, does not support such unions and having them in your database might create data problems down the line.
- b. Only in cases where one of the partners does not already have a heterosexual relationship already entered, if you later add a heterosexual relationship to the 2nd partner, RM won't show "Spouses: 2" in the upper left, or have the "Other Spouses" button; but if you go into the search screen, it will list the 2 spouses in the lower right pane.

For example, to create a lesbian relationship:

- Highlight the woman who had both the homosexual and heterosexual relationships.
- Add spouse.
- Add NEW person
- Fill in as much info as you want on "Add spouse to " screen, then click ok.
- ***Most important step***: On the "Edit Person" screen, the Sex defaults to male but it is **changeable** so change it to Female. If this was a heterosexual relationship, once you click OK the Sex would grey out, but for this partner, it will always be changeable.

If you had the spouse previously entered, you will not be able to merge it so copy and paste the data from the old record to the new.

*Warning: Many people have requested better support of recording same-sex unions within RM. Just search the RM forum for "same sex" and you'll see a lot of heated debate on the topic. Such debate has not resulted in any change; RM remains as it is, not supporting same-sex unions. Use the NOTES field or the workaround described above if you wish to include same-sex unions in your RM file.*

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

### 4. Gender Reassignment / Sex Changes

Similarly, RM does not support gender reassignment. Once genders are entered in RM, they cannot be changed (except as described above). You could, however, create a custom field in order to document the date the reassignment took place and use the notes field of that custom fact to record which direction the assignment took (male to female; female to male).

### 5. Unmarried Heterosexual Relationships

FTM offers a couple of preset ways for documenting an unmarried union, including "Friends" and "Partner." (RM converts these to custom facts.) RM has no *preset* field for unmarried unions, although many people have created custom facts including "Unmarried Couple". Even if you use no marriage fact in RM, RM will still refer to them as "spouses" in various reports. [check this; really?]

### H. Get used to the Differences & Benefits

Things you may miss from FTM	RM features that make up for it
- No all-in-one tree	+ Web page generation to your own web site (not reliant on ONE commercial service)
- No non-English versions	+ ability to control which facts and sources get exported
- No tracking of medical conditions	+ ability to include private notes that don't get included in reports or exported gedcoms
- No direct support of same-sex unions	+ generates a sharable CD with free run-time version of RM
- No auto-generated reference numbers	+ Books will export many report types to RTF
- Can't edit directly on the family page	+ You can draft your own way of wording facts in reports (i.e., greater control over how facts are displayed in reports)
- No direct download, or upload relationship with ancestry.com	+ Internet-searching no limited to ancestry.com only; integration with familysearch.org
- Less control over what's displayed in a descendancy outline and how (no word wrap)	+ greater control over how to display facts in reports through user-defined sentence structure
- easier-to-use custom report generator	+ A full set of right-click options for most options
	+ To-do's for each person
	+ Easy-to-generate missing info list.
	+ Automatically calculates age of person at the time of a fact/event.
	+ Re-uses duplicate citations
	+ greater control over source display
	+ multiple copies of the same file can be open at once.
	+ Multiple title options for displaying

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

Things you may miss from FTM	RM features that make up for it
	source information.
	+ Print all events that took place in a given place.
	+ Create list of people without parents
	+ GEDCOM import option to add details about where the GEDCOM came from (at the time of import)
	+ Counts unique trees in a given database (so you can know how many broken branches you have)
	+ You can add bold, italics, and underlining to notes. The notes editor has buttons for word wrap and spell check.
	+ Source wizard will write citations for you once you select a source type, and complete the requested fields.
	+ Three citation types are generated (source 1st reference, source subsequent references, bibliography).
	+ Friendly source names (e.g. Elam, Joe - sdi) can be assigned to sources rather than having the source name forced from the source title.
	+ Extensive list of preconfigured, customizable and useful reports.

### I. HOT KEYS

*[compiled by Allan Plucinik]*

Ctrl+B Bookmark people  
 Ctrl+F Bring up the RootsMagic Explorer  
 Ctrl+Shift+F Bring up a list of families in the database  
 Ctrl+I Search Internet sites for a person in your database  
 Ctrl+HOME Go to Root Person  
 Ctrl+H Bring up the search and replace dialog box  
 Ctrl+N Create a new database  
 Ctrl+O Open an existing database  
 Ctrl+P Print a Report (Bring up a list of available reports)  
 Ctrl+V View immediate family of highlighted person  
 ENTER key Edit the highlighted person  
 Ctrl+ENTER Edit the highlighted family  
 Del Delete the highlighted person  
 Ctrl+Del Delete the highlighted family from the database  
 Ctrl+L Enter or edit LDS Ordinances for the highlighted person

I Key Add an unlinked person  
 S Key Add spouse to highlighted person  
 P Key Add parents to highlighted person



## **Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

C Key Add a child to highlighted person

F1 List HELP Topics

F7 Run Spell Check

ESC Exit any dialog box without Saving

### **IN EDIT PERSON WINDOW**

Alt+G Open General Tab

Alt+I Edit Fact Multimedia

Alt+L Checkmark/Unmark Living Flag

Alt+M Open Multimedia Tab

Alt+N Open Notes Tab

Alt+R Open Address Tab

Alt+T Open To Do Tab

Alt+U Edit Fact sources

Ctrl+H Delete highlighted text in a field

Ctrl+X Delete highlighted text in a field

### **EDIT PERSON -- NOTES TAB**

Ctrl+[ Exit Edit Notes Window

Ctrl+ + or Ctrl+ - Key Toggle to increase/decrease font size from normal to very very small font or vice versa. (ALT+Backspace does the same thing)

Ctrl+5 Set line spacing of selected text to double-space

Ctrl+A Select all Text in the Note

Ctrl+B Convert selected text to BOLD or convert BOLD text to normal

Ctrl+C Copy selected text to clipboard

Ctrl+F Bring up FIND dialog Box

Ctrl+H Find and Replace Dialog Box

Ctrl+I Italicize selected text

Ctrl+J Delete highlighted text

Ctrl+L Left-Justify highlighted text

Ctrl+M Delete highlighted text

Ctrl+O Bring up "Text File to Import" dialog box

Ctrl+R Right Justify highlighted text

Ctrl+T Bring up character Map

Ctrl+U Underline selected text

Ctrl+V Paste selected text from the clipboard

Ctrl+W Wordrap selected text

Ctrl+X Delete highlighted text and copy it to the clipboard

Ctrl+Z Undo last action

### **IN EDIT PERSON -- GENERAL TAB**

Alt+A Add a Fact Type

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

## **Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

### **IN EDIT PERSON -- SOURCES TAB**

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

### **IN EDIT PERSON -- MULTIMEDIA TAB**

Alt+A Add scrapbook item  
Alt+B Scroll back thru scrapbook items  
Alt+D Delete scrapbook item  
Alt+M Scroll forward through scrapbook items

Alt+O Due to a bug, this hot key has two possible functions which conflict with one another:

Same as OK button

Alt+P Print Photo  
Alt+V View/edit scrapbook item  
Alt+R Rearrange Scrapbook items

In Edit Scrapbook Item box:

Alt+B Browse Files  
Alt+S Scan an image

### **IN EDIT PERSON -- ADDRESS TAB**

Alt+O Same as OK Button  
Alt+S Send Email  
Alt+V Visit Website

## **V. Outstanding Questions**

FTM has a "General" tab with. It's not clear to me what happens to this information; Facts I'm uncertain about include:

- Title

FTM has a "Medical" information tab. It's not clear to me what happens to this information. Facts included here include:

- Height feet
- Height inches
- Weight pounds
- Weight ounces
- Cause of Death
- Information

FTM has an "Address" tab. It's not clear to me what happens to THIS information. Facts included here include:

## **Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

- Street 1
- Street 2
- City
- State or province
- Zip or postal code
- Country
- Phone
- Email [is this the email Fact?]

### **VI. RM Wishlist Compilation**

In order to better understand the differences between FTM and RM, I compiled the following from examining the "wishlist" discussion forum ([www.rootsmagic.com/forums](http://www.rootsmagic.com/forums)) since the last major upgrade of RootsMagic (more or less; I did not catch them ALL). If "ftm" appears in the left-hand column, it means that FTM (prior to FTM 2008) supports this item requested in future versions of RM.

#### **Family Group Sheet Report**

- Option to move the "Preparer's Name and address info" to the bottom of the last page of the FGS report.
- Option to move the "Comments" section of the FGS to the bottom of the report so it doesn't always look like it's attached to the last child.
- Option to be able to turn off the Comments section but yet still display the preparer's info.
- Option to have FGS start with wife
- Option to print full birth dates of spouses of children, not just the year
- Option to display more than one photo per person.
- Option to display "age" at time of each event

#### **Descendant List Report**

- ftm - Support line-wrap and better sentence structure (have b,m,d, (and DIVORCE) fields print on the 'same' line like the 'birth-death' style does)
- ftm - Allow user choice of which facts to include
- ftm - Ability to control spacing of report and other formatting options.
- ftm - Ability to print "blank" data fields for people to write in info when at a family reunion, etc.
- ftm - Ability to change the "dot leader" character used to user-defined.

#### **Narrative Report**

- Ftm - include FGS Quarterly report option.
- Allow greater user control over order of facts (esp. chronologic order of ALL facts, whether individual or family)
- heading on subsequent pages needs blank line after it
- Correctly display adoption info (i.e., name of adoptive parent)
- include age of person at time of event
- when couple had only one child, change language of sentence from "John Smith and Mary Doe had the following children" to "John Smith and Mary Doe had the following child"

#### **Printing / Display**

- ftm - All-in-one tree
- ftm - Fan style charts
- ftm - Include siblings in pedigree, ancestry & descendency charts and wall charts
- ftm - Clip art as background; tile backgrounding in charting

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

- ftm - allow greater formatting control in reports
- ftm - allow display of reference number in any report (individual *and* family refno)
- ftm - user-selectable depth of generations beyond 2-7
- ftm - include option to display relationship to primary individual
- ftm - ability to save customized reports for future use
- ftm - allow reports to be sorted by any field.
- ftm - Offer "Facts to Include" option for all reports, GEDCOM, web page generation
- ftm - Ability to include "siblings" in Pedigree, Ancestor & Descendant charts. (i.e. - a single ancestor report that shows a set of siblings as the starting individual.)
- ftm - Ability to create a true bibliography
- ftm - Within the RM Charting program, ability to "tile" the background image.
- Add location to the index on reports
- Support printing of pedigree, descendant, ancestry charts to single page for large format printing
- Allow printing directly from pedigree screen (or make the printable version match the screen display version)
- include side families in ancestry report (e.g., ancestor's children by a different spouse)
- add "contains" option to Place Name Report
- add maiden and last married name to Place List
- Add memorize option to to-do lists
- ability to generate a report that includes NOTES
- ability to include NOTES in sentence structure
- Add to Fact List ability to display/print each fact TYPE with associated sentence structure, etc.
- Ability to print Pedigree and Descendant/Ancestor "charts" to a "single page" .PDF file to allow for large format printing to hang the chart on wall for family reunions or viewing in home.
- Option to "only" print the Preparers Info on the "last" page of the Pedigree Chart instead of having it show up on every page.
- ftm? - Ability to include "all" siblings in all Wall Charts.
- Ability to print Family Group Sheet report to .RTF or Word format.
- Ability to include 'clip art' as backgrounds in reports to enhance published books and/or reports. (RM wall charts have this ability, but the other reports in RM do not.)
- Include more genealogy related clipart to use in reports, etc.
- print all tasks associated with a given address

### Merging

- ftm - After auto-merge, display results of merge process (# of individuals merged, etc.)
- When merging sources manually, once merge is complete, default back to remaining merged source in list.
- merge duplicate event listings
- provide more information in manual merge to help user determine whether or not to merge
- include an automatic merge for places

### Export / Backup

- ftm - Allow the exportation and deletion of particular branches
- support CSV export of specified fields
- When backing up my RM data file, add an option to include all multimedia files/images, etc. into this backup.
- Backup prompt displays when you close a database, not just when you exit the program
- don't force uppercase filenames
- All reports, including FGS, exportable to RTF, HTML, etc.
- when exporting to GEDCOM, preselect the current highlighted person in the "Select People" window

## **Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

- allow deselection of specific facts including RM-specific tags
- allow export to CSV of ALL fields, including notes.

### **Shareable CD**

- Allow privatize at time of creating shareable CD
- Ability to choose where to save shareable CD files.
- Include a helpfile on the CD to help people use the read-only (runtime) RM
- Support clickable URLs in shareable CDs (everywhere, really)
- Allow generation of problem report by recipient of shareable CD
- when same photo used for multiple individuals, don't make that # of copies of graphic file

### **Website Generation**

- Whatever you allow exportable to Shareable CD, allow exportable to web pages
- Ability to include divorce info in the Pedigree report in the website.
- Ability to include the divorce info "for the children" in the Family Group Sheet reports in the website.
- Ability to set font size
- On the web pages created that contain the primary photo, I would like the "description" of the primary photo included instead of just seeing a plain photo.
- The Name Index Page needs the alphabet across the top so you can click on a letter and hyperlink down to the names beginning with that letter.
- include description text on photos
- Include notes
- Option to include inline photos
- ability to save in PHP format
- Support of CSS
- Names on FGS (and other reports) should be clickable
- Ability to generate pages for all reports (i.e., have HTML has a save as option)
- ability to change project directory where web site is created on hard drive
- page generation not tied to a specific individual
- make W3C compliant
- Recognize HTML code imbedded in text, including sources
- allow user to decide which photos to include
- generate meta tags
- allow saving settings for particular "trees" or web site sections
- allow marriage dates to be privatized

### **Search**

- Ability to save search criteria for later use
- When searching for women by married name, just search those women who are married to a man by that surname (speed up search time)
- allow color data sets to be applied to searches
- allow search for soundex name
- allow search of ALL source fields
- have family page change to the person being searched
- Search results should indicate what record the results found in (don't they?)
- Include refno as field to display in results
- include Alternate name in RM Explorer
- allow search / replace for date field
- one-click global search (and search/replace) that works on EVERY field including notes
- display # of replacements conducted after completion of a search / replace (including zero)

## **Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)**

- find people with more than one instance of a fact
- search Family List: allow sort by Marriage Date; also allow print to screen, file, export to csv
- search on any word contained in sources

### **Sources**

- List / Source list: highlight source, choose "include citations"
- Reports / lists/ source list to get list of multimedia linked to a source
- Support HTML links within sources
- allow me to generate a report of facts that displays whether or not they are sourced
- when more than one source exists for a particular fact, allow sources to be displayed in chronological order (now displayed in order entered)
- enable user to modify/edit/add to the source type list
- enable FIND inside of sources to help people find the source they're looking for
- when a fact has multiple sources, allow option to print/display those sources in chronological order, not just the order in which they were entered

### **Publish / Books**

- don't include instances of repeats, but refer to first location
- FGS for all individuals, not just primary
- allow book-wide control over fonts and other formatting
- Support ability to generate an "Appendix" where data about places listed can be included
- allow user to see how sentences would be structured before the fact (and allow changing)
- Allow sub chapters

### **Place Lists & Address Facts**

- Include Canadian town, province, etc. in place finder
- Add "New Place" button to place list so we can add places directly there
- enable importation of other country / regional place databases
- allow sorting by zip code (in addresses)
- support tags on the City (csz:), Phone (ph:), and Note (note:) fields similar to those on the Email, Fax, and URL fields, to identify the data in the RTF and TXT address files, no matter which address fields do or do not have data.

### **Multi-Media**

- More than one multimedia event per individual in reports and on web pages generated
- Allow photos attached to places such that any event/fact taking place at that place can display the foto.
- rearrange all multimedia files in scrapbook-- not just photos Ability t
- Add "more info/description" symbol to multimedia that then displays info about graphic
- Allow two "preferred" photos-- one for an adult, one for a child to be displayed when person is listed as a child of parents
- Enable relationship between a country and its flag.

### **Facts - All**

- Add an auto-updated last-edit field (and a report to generate list of same)
- recognize 5may1893 as 5 May 1893
- ability to change an individual fact type to a family fact (and vice versa)
- ability to apply family facts to children
- allow fact list to be edited (i.e., remove those fact types we don't want to see)
- certain facts (like burial, marriages, baptisms, christenings) should have Description fields plus Location fields

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

### Facts - Individual

- Apply same fact (e.g., census) to multiple people at one time
- If an individual has a 'death fact', the "Living" checkbox should automatically be unchecked
- Add status fact type and include in pedigree display (status of research)
- Ability to copy/paste a fact (and/or drag a fact from one person to another)
- Allow gender field to be editable no matter what
- Add "as of date" field to Address set of facts
- When no birth date for an individual, RM automatically enters estimate based on birth of first child or marriage date
- add field "verified" to addresses

### Facts - Family / Marriage

- ftm - "Add Marriage" offers "add new" and "add existing" options when two spouses not present
- ftm - Allow marriage to accept two individuals of same gender
- ftm - Support display of marriage / family refno
- ftm - Ability to distinguish specific relationship of individual parents to child (step, adopted, natural)
- ftm - support unlinking multiple / all children from a family group.
- add fact field to distinguish church location from geographical location

### New functionality

- Add a "popup" calendar like Legacy has-- a calendar that sits on the main toolbar as a button that simply pops up and lets me scroll through dates to see what day of the week a particular date falls on. Currently the calendar in RM only is available if you actually "add" a new event or "edit" an existing event. I shouldn't have to edit an event to simply popup a calendar.
- Generate a map with place list data (incl Log/lat) to visualize family settlements, migration, etc.
- Create multiple color coding "filters" in RM that I could create, save, & apply at a whim, such as the ability to set a filter based on gender. (i.e. - all male individuals are blue with females pink and unknown sex is black.
- Ability to compare two files
- Linux version / port
- ftm - Validate database (like FTM's check for and correct errors)
- Upgrades should not over-write user-defined settings (e.g., spell-check)
- Add "delete tree" from the "count unlinked trees" window.
- Archive to-do's
- ftm - Translate to other languages or provide text files so others could translate for you.
- Potetential Problem List should update after correction made or include 'update' button
- Add "move to to-do list" button to Problem Search feature.
- After editing a "problem" be able to go to the next "problem"
- "Not a problem" list order should be the same as the "Problem List" order: lastname, firstname
- when two dbs open, allow two RM explorers open at same time, as well
- ftm? - support unicode
- allow importation of addresses from such programs as outlook, etc.
- overhaul of custom report writer
- allow display/reporting of addresses grouped by zip code
- relationship calculator should identify step, half and adopted relationships.
- enable ability to print all to-do tasks associated with a particular repository or location

## Jillaine's UNofficial Guide to Making the Switch (DRAFT!!!)

### Interface

- Allow option for RM Explorer to sort by Soundex
- Add Person List to main lists button (along with Fact and Place lists)
- Add merge button to the Person List that functions like the merge button on the place list
- Ability to turn on a 2nd toolbar you can customize.
- Ability to browse and select/set a custom texture of my own to display on the main screen's background.
- Allow direct editing from reports, lists; or at least allow double-click to person's fact page (especially from To-Do list!)
- ftm - No data field should be active unless clicked on
- keep cursor where you left it when alt-tabbing between programs
- In Descendants view, including column that marks whether living or not
- Enable different background views by database, not program-wide
- Make various windows resizable by users (such as text entry in book publishing)
- mouse-over contextual help
- allow page up and page down keys to work in multi-page report displays (instead of having to click on next/previous)
- When adding an existing person as a parent, have RM explorer start at surname of child
- when adding a second/subsequent spouse, add "Sort spouses?" before returning to family page.
- add more fields to the RM Explorer screen.

### Family Page

- display *current* age of ANY individual
- ftm - Allow editing of facts directly on the page
- ftm - improve layout; display more information (e.g., birth & death places of children)
- longer fields for names
- ability of user to control column widths
- allow user to customize what fields show on this page

### Program-wide User-definable options / Settings

- ftm - Option to auto-generate reference numbers (both individual and marriage)
- ftm - Ability to display dates in different formats (including yyyy-mm-dd)
- Support other options besides "abt" and "btw" (e.g., 'ca')
- ftm - Option to select between metric and inches
- Option to select (and launch) default browser, wordprocessor, photo editor, etc. within RM
- ability to define my own criteria for / definition of "living"
- option to display or not display "unknown spouse" ???
- ability to choose your own delimiter for private information
- ability to choose how LIVING box is displayed (display whether or not death date is entered, eg)