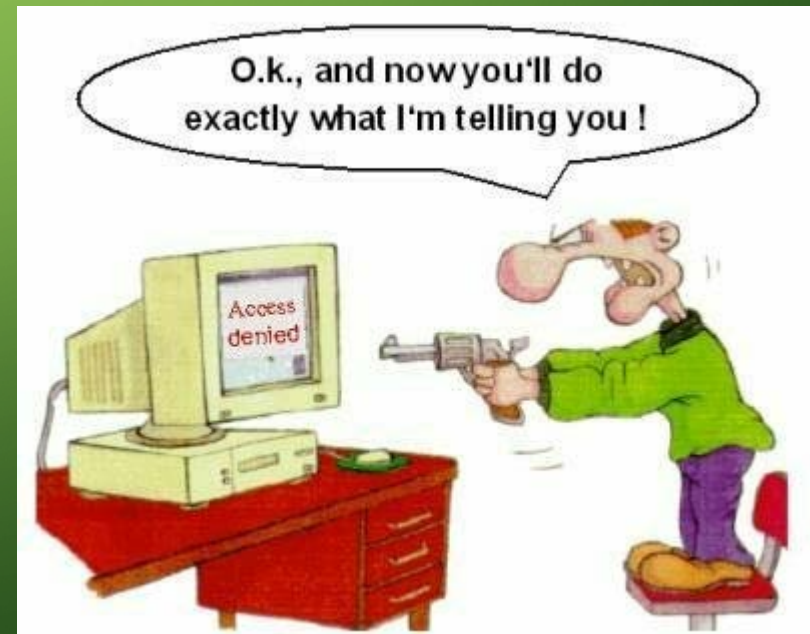


ROOTSMAGIC AND ANCESTRY

WORKING TOGETHER AT LAST!



WHAT I'LL COVER TODAY

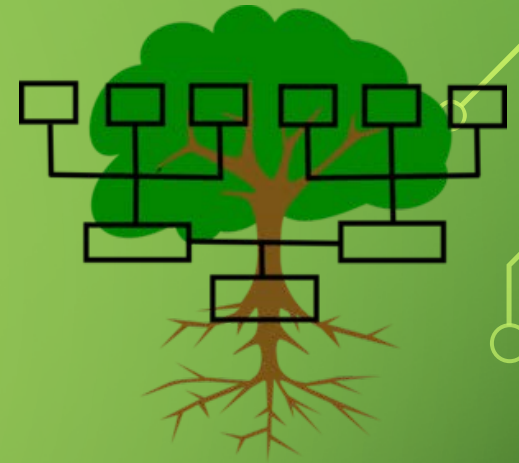
- Part I – RootsMagic and Ancestry Working Together
 - Why this is an important feature for RootsMagic Users
 - Some basics for setting up Ancestry and RootsMagic
 - Some helpful tips and hints to help with new TreeShare
 - Step by step guides to setting up RootsMagic to work with Ancestry
 - Examples of TreeShare working with Ancestry
 - Live demonstration – Depending on quality of Wi-Fi signal.
- Part II - PRIVACY & SECURITY OF FAMILY TREES ON LINE

WHAT'S THE BIG DEAL?



- Tree Share works with Ancestry family tree
 - Compares your RootsMagic tree/data with Ancestry family tree
 - Can upload/download to sync with each other
 - Safety features to help prevent accidental changes
 - Information found in Ancestry Webhints can be added directly to your RootsMagic database.
- INCLUDES Photos and Stories Hints
 - Caution on pictures. Image Size and changes by Ancestry to images and names

TREE SHARE



- MUST HAVE AN ANCESTRY.COM ACCOUNT!
- Must be an account you have a family tree on
- Limited access for some Ancestry search features UNLESS you have one of their more expensive plans.

ANCESTRY SUBSCRIPTION PLANS

www.ancestry.com/cs/offers/compare

ancestry

[Back to My Account](#)

We hope you're enjoying All Access.
If you would like to change your membership, please call member services.

	U.S. Discovery	World Explorer	All Access
Grow a family tree with exclusive search tools.	✓	✓	✓
Connect with fellow members to share questions and advice.	✓	✓	✓
Access 15+ billion records from all 50 U.S. states.	✓	✓	✓
Expand your search with 3+ billion worldwide records.		✓	✓
Find stories among 112+ million pages in the Newspapers.com Basic subscription.			✓
Explore 487+ million original military records on Fold3.com.			✓
Enjoy premium support with a dedicated 1-800 number.			✓

Choose your new plan:

U.S. Discovery \$99 World Explorer \$149 All Access \$199

[UPGRADE NOW](#)

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WEBSITES



- RootsMagic: <http://www.rootsmagic.com>
- Ancestry: <http://www.ancestry.com>

WHY I LIKE ROOTSMAGIC

- Easy to navigate
- Easy to add people, places, events and sources
- Easy to import from other genealogy software programs
 - Recently added direct import from Family Tree Maker
- Great help features
- Outstanding online tutorials
- Outstanding tech support
- Access to other resources
 - FamilySearch
 - MyHeritage
 - Ancestry
- More at: <http://www.rootsmagic.com/RootsMagic/Features.aspx>



WHAT DOES THIS MEAN FOR YOU?

- Search on Ancestry
- Sync with Ancestry
- Direct import from Family Tree Maker



STEP ONE – BACK UP! BACK UP! BACK UP!



STEP TWO



- Decide which tree will be your **MASTER TREE**.
 - Use it as your baseline tree and one for primary research, sources, pictures, etc.

STEP THREE – RENAME AND RESIZE PICTURES AND DOCUMENTS

- Only necessary if you have large images and documents
 - Scanned files, etc.
- Get an app that will let you easily resize, reshape and “save as” various file type.

STEP FOUR - FILE NAME AND LOCATION



- File Name is Very Important
 - Especially if you have several trees
- File Location – Some suggestion
 - Name each RootsMagic Data File with a Surname or Your First Name
 - Example – Gene Master 17-3
 - My name plus year (17) plus the file sequence (3) for the 3rd one created in 2017
 - Example – Pennington Master 18-1
 - My Surname plus year (18) plus the file sequence for the 1st one created in 2018

EXAMPLE – FILE NAME AND LOCATION

The screenshot shows a Windows File Explorer window titled 'Gene Master'. The address bar indicates the path: Libraries > Documents > RootsMagic Data > Gene Master. The left sidebar shows the navigation pane with 'Gene Master' selected. The main pane displays a list of files and folders with columns for Name, Date modified, Type, and Size. The file 'Gene Master 17-3.rmgc' is selected and highlighted in blue.

Name	Date modified	Type	Size
Gene Master 17-3_media	8/16/2017 12:41 PM	File folder	
Pennington	10/9/2016 4:14 PM	File folder	
Gene Master 16-2.rmgc	1/8/2017 10:02 PM	RootsMagic File	1,308 KB
Gene Master 17-1.rmgc	7/3/2017 2:31 PM	RootsMagic File	5,021 KB
Gene Master 17-3.rmgc	1/23/2018 11:31 A...	RootsMagic File	9,763 KB
GeneTest-15-2.rmgc	11/8/2016 2:04 PM	RootsMagic File	5,127 KB
ja65a7_348190ga1v636mt854aa87.LST	7/13/2016 3:36 PM	LST File	10,056 KB
Test-16-2.LST	12/3/2016 5:18 PM	LST File	273 KB
The Family of Harold E. PenningLST	12/1/2016 6:16 PM	LST File	273 KB
The Family of Harold E. Pennington 16...	11/27/2016 5:57 PM	LST File	1 KB
The Family of Harold E. Pennington 16...	4/28/2017 4:09 PM	LST File	1 KB

STEP FIVE - SETTING UP ROOTSMAGIC TO WORK WITH ANCESTRY

- First – Get you Ancestry.com account setup and working!
- Ancestry is expensive. Decide which type of subscription you want to buy. Look at the options. Subscriptions are based on how many different databases you can access.
 - I suggest one of the plans that let's you access databases outside the US if you have ancestors who migrated here from other countries.
 - Test it! If you're new to Ancestry, play with it a few days before you connect to RootsMagic. Check out the "hints" for each person. **[Learn how to read them and check the sources!](#)**
 - I suggest that if you have a "test" gedcom file upload it as a test for Ancestry. Use it to learn how Ancestry works. You can always delete it later.
 - If you don't have a test gedcom file, wait until you connect with Ancestry and upload your RootsMagic tree.
 - REMEMBER YOUR USER NAME AND PASSWORD!
 - You will need this for connecting RootsMagic to Ancestry
- Second – Go to TOOLS > FILE OPTIONS

TOOLS > FILE OPTIONS

File Options

File Options

General

Root person... Harold Eugene Pennington

Start person when opening this database
Root person above

Starting view when opening this database
Pedigree view

Starting side list view
Index

Nickname format
John "Jack" Kennedy

Number to display after name
None

Date format
10 Jan 1959

Display surnames uppercase

LDS support

Show LDS status on pedigree view

Show LDS status on family view

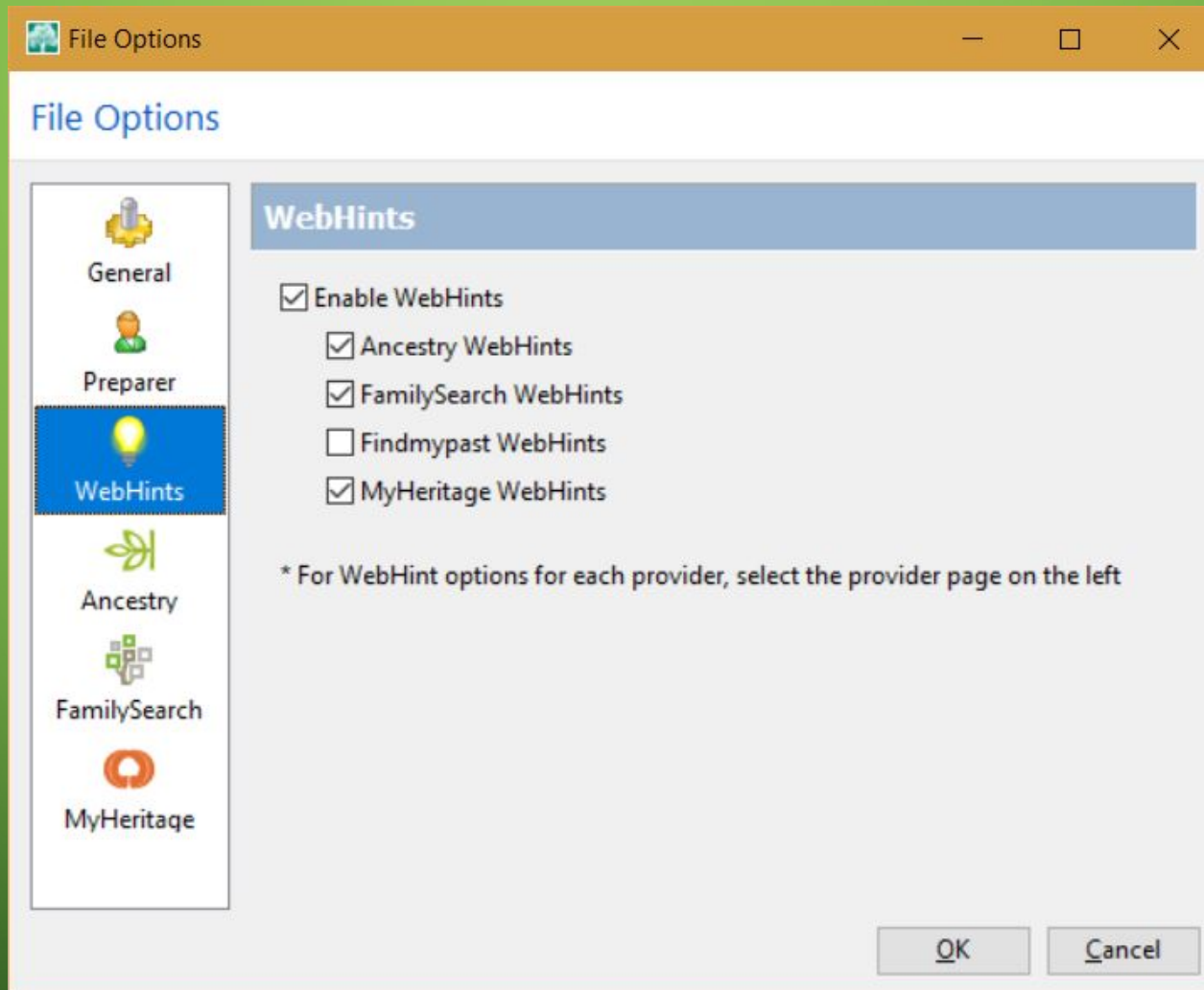
Show LDS status on descendant view

Problem Alerts

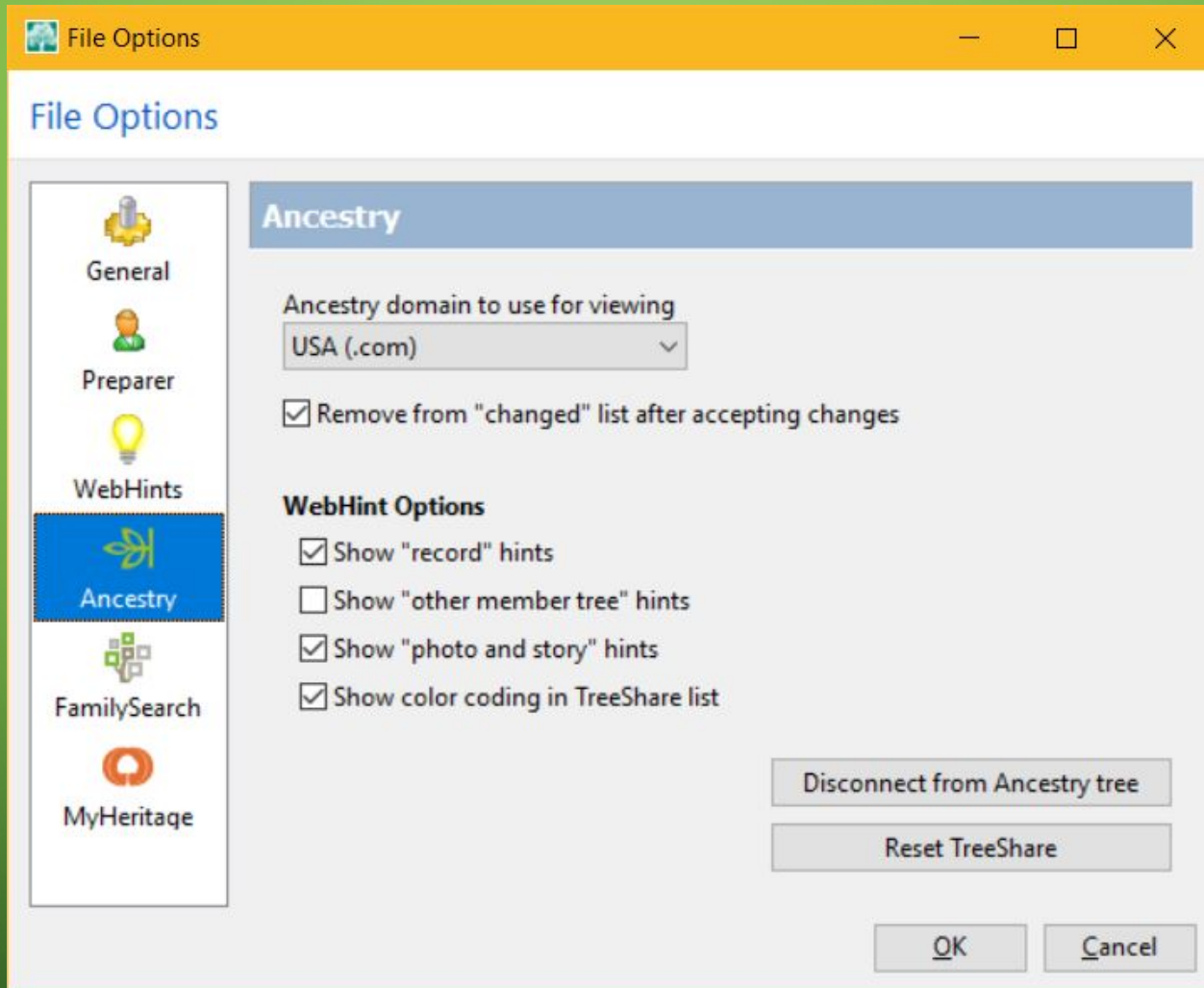
Problem options

OK Cancel

TOOLS > WEBHINTS



TOOLS > ANCESTRY



TOOLS > ANCESTRY

- Options are:
 - Show “record” hints
 - Show “other member tree hints”
 - Show “photo and story” hints
 - Show color coding in TreeShare list

INTERNET OPTION ON FILE MENU

RootsMagic 7 - (C:\Users\Gene\Documents\RootsMagic Data\Gene Master\Gene Master 17-3.mgc)

File Edit Lists Add View Search Reports Tools Internet Window Help

Benajah Pennington

Spouses: 1 b: 18 Aug 1770 in Grayson Co., VA
 Parents: 1 m: 26 Jul 1814 in Roane Co., TN (age 43)
 d: 12 Oct 1855 in Stockton, Cedar Co., MO (age 85)

Pedigree Family Descendants People WebSearch Timeline

Father: Benajah Pennington
 b: 18 Aug 1770, Grayson Co., VA
 m: 26 Jul 1814, Roane Co., TN
 d: 12 Oct 1855, Stockton, Cedar Co., MO

Father's Parents:
 Andrew Pennington
 Nancy Unknown Last Name

Mother: Matilda Hembree Emery
 b: 25 Jun 1779, Spartanburg Co., SC
 d: 20 Aug 1878, Stockton, Cedar Co., MO

Mother's Parents:
 Joel B. Hembree
 Hannah Caroline Pettit Hembree

Children	Sex	Born	Birth Place	Died	Death Place	Relation
1 Eber Pennington	M	abt 1814	Marion Co., TN	abt 1868		birth
2 Joel Harrison Pennington	M	13 May 1815	Roane Co., TN	24 Jun 1897	Jackson Co., AL	birth
3 Isaac W. Pennington	M	1816	Marion Co., TN			birth
4 Sarah Sallie Pennington	F	17 Jan 1817	Roane Co., TN	16 May 1892	Stockton, Cedar Co., MO	birth
5 John Barton Pennington	M	25 Apr 1820	Blue Springs, Roane Co., TN	4 Oct 1910	Fresno, Fresno Co., CA	birth
6 Jordan Pennington	M	1822	Marion Co., TN			birth
7 Andrew Jackson Monroe Pennington	M	30 Aug 1824	Marion Co, Tennessee, USA	20 Feb 1863	Battle Creek, Coffee Co., TN	birth
8 Newton Benaga Pennington	M	abt 1825	Marion Co., TN	abt 1875	Unknown Co., TN	birth

+ Click to add a child

CONNECTS TO ANCESTRY.COM TO YOUR ACCOUNT AND FAMILY TREE

TreeShare

TreeShare for Ancestry

Welcome GenePenn1! [Sign Out](#)

Connected to Tree: The Family of Harold E. Pennington 16-1

Show Everyone

Only show changed people

[Edit RootsMagic person](#) [Show on Ancestry](#) [Options](#)

RootsMagic

Person	Sarah or Sallie Anthony	
Name	Sarah or Sallie Anthony	
	Sarah Cooper	
	Sarah or Sallie Cooper	
Birth	15 Aug 1742 Unknown Co., VA	
	15 Aug 1742	
Death	abt 1797 Hancock Co., GA	
Marriage	6 Feb 1762	
Spouse	Thomas Cooper	
Child	Sarah or Sallie Cooper	
Father	Joseph Anthony	
Mother	Elizabeth Clark	
Child		

Ancestry

Person	Sarah or Sallie Anthony	
<input type="checkbox"/> Name	Sarah or Sallie Anthony	
	Sarah Cooper	
	Sarah or Sallie Cooper	
<input type="checkbox"/> Birth	15 Aug 1742 Unknown Co., VA	
	15 Aug 1742	
Death	abt 1797 Hancock Co., GA	
Marriage	6 Feb 1762	
Spouse	Thomas Cooper	
Child	Sarah or Sallie Cooper	
Father	Joseph Anthony	
Mother	Elizabeth Clark	
<input type="checkbox"/> Child	Penelope Cooper	

[View tutorial videos and help on using TreeShare and WebHints for Ancestry](#)

Close

NOW THE NITTY GRITTY! TREE SHARE

The screenshot displays the RootsMagic Genealogy Software interface. On the left, a search results pane shows a list of topics related to 'TreeShare for Ancestry'. The main window is titled 'TreeShare for Ancestry' and contains the following text:

Ancestry.com is a popular subscription website for finding records with genealogical significance and for creating and maintaining family trees. The records found on Ancestry.com can be linked as sources to people in online member trees. TreeShare for Ancestry enables you to download a tree from Ancestry.com into RootsMagic and upload a tree from RootsMagic to Ancestry.com. Images are included.

Accessing TreeShare Features

To access TreeShare for Ancestry features, go to "Internet" on the program's main menu and choose "TreeShare for Ancestry". This will place an Ancestry TreeShare icon on your menu bar for easy access.

The screenshot shows a menu bar with 'Internet' highlighted, and a sub-menu with 'TreeShare for Ancestry...' selected. Below the menu bar, a user profile for 'Arnold Corey-1' is visible.

Uploading to or Downloading from Ancestry

If your RootsMagic file is open, you will be given the option to upload it to a new Ancestry tree.

The screenshot shows a dialog box titled 'TreeShare for Ancestry' with two main sections: 'Upload and Connect' and 'Download and Connect'. The 'Upload and Connect' section has a button labeled 'Upload to Ancestry Tree' and the 'Download and Connect' section has a button labeled 'Download on Ancestry Tree'.

Downloading

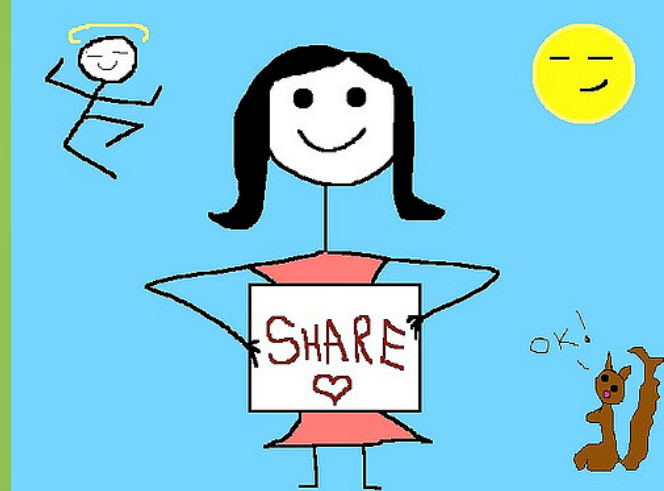
If you already have a tree on Ancestry, you will also be given the option to download it into a new, blank RootsMagic database. A list of trees that you own, as well as trees that have been shared with you with Editor rights will be displayed to select from. A dialog window will open if you need to create a new database for your download.

Uploading

If you choose to upload your RootsMagic file to a new Ancestry tree, you will see this screen.

At the bottom left of the screenshot, there are search options: 'Search previous results' (unchecked), 'Match similar words' (checked), and 'Search titles only' (unchecked).

MORE ON TREESHARE



- IF your RootsMagic file is open, you will be given the option to upload it to a new Ancestry tree.
- IF you already have a tree on Ancestry, you will also be given the option to download it into a new, blank RootsMagic database.
- If you choose to upload your RootsMagic file to a new Ancestry tree, you will see a new screen.
 - You'll have to enter the name for your new Ancestry tree plus an optional description.
 - BE SURE TO CHECK THE PRIVACY SETTINGS! **DANGER ALERT!**
 - BE SURE TO CHECK THE OTHER OPTIONS!

VIEWING ROOTSMAGIC AND ANCESTRY PERSONS SIDE BY SIDE

- IF you have connected RootsMagic to Ancestry correctly, you will see people online and in RootsMagic side by side and they should be the same.
- Changes can be made to your RootsMagic and/or your online tree.
- To compare and share the updates, click the TreeShare for Ancestry icon.
- Changes will be gathered and TreeShare will open

TREESHARE – CHANGES AND UPDATES

TreeShare

TreeShare for Ancestry
Connected to Tree: The Family of Harold E. Pennington 16-1

Welcome GenePenn! [Sign Out](#)

Show Everyone
 Only show changed people

[Edit RootsMagic person](#) [Show on Ancestry](#) [Options](#)

RootsMagic		Ancestry	
Person	Sarah or Sallie Anthony	<input type="checkbox"/> Person	Sarah or Sallie Anthony
Name	★ Sarah or Sallie Anthony	<input type="checkbox"/> Name	★ Sarah or Sallie Anthony
	Sarah Cooper		Sarah Cooper
	Sarah or Sallie Cooper		Sarah or Sallie Cooper
Birth	15 Aug 1742 Unknown Co., VA	<input type="checkbox"/> Birth	15 Aug 1742 Unknown Co., VA
	15 Aug 1742		15 Aug 1742
Death	abt 1797 Hancock Co., GA		abt 1797 Hancock Co., GA
Marriage	6 Feb 1762	Marriage	6 Feb 1762
Spouse	Thomas Cooper	Spouse	Thomas Cooper
Child	Sarah or Sallie Cooper	Child	Sarah or Sallie Cooper
Father	Joseph Anthony	Father	Joseph Anthony
Mother	Elizabeth Clark	Mother	Elizabeth Clark
Child		<input type="checkbox"/> Child	Penelope Cooper

[View original changes and history on using TreeShare and RootsMagic for Ancestry](#)

10/21/2018 [Close](#)

TREESHARE – WHAT NOW?



- Name of the tree you are connected to is displayed in the upper left corner.
- The name index appears in the far left panel of the TreeShare Window.
- Above the name index is a filter to “Only show changed people” Check this option to see a list of those people whose records have been changed or uncheck it to see a list of everyone in your database.
 - I strongly suggest you use the “only show changed people”.

TREESHARE – WHAT’S NEXT?

- Select a name to see a comparison of the RootsMagic and Ancestry records.
- Green highlighting indicates that the information is identical.
- Yellow highlighting means the information is similar but not identical.
- Pink highlighting means it is new or different.
- When desired, click the “Edit RootsMagic person” button to open their “Edit persona” window in RootsMagic.
- You can go directly to the person on your tree on Ancestry.com by clicking the “Show on Ancestry” button.

TREESHARE – WHAT’S NEXT?

- The process of sharing data is the same whether you are moving information from RootsMagic to your Ancestry Member Tree or vice versa. You have control over what facts to share and how to share them. Check the box by the data you want to share and an options list will appear, including options to add sources and media if applicable. After choosing to add a fact, it will appear in blue lettering in the other window to indicate that the update is pending. The choice to update existing events opens a new window where you can select the specific items to move. The selected facts will also appear in blue in the other window.

TREESHARE – CANCEL CHANGES

- If you change your mind about any of your pending changes, click the “Cancel changes” button. No change is finalized until you click the “Accept changes” button.

TREESHARE – MATCHING PEOPLE BETWEEN ROOTSMAGIC AND ANCESTRY

- If a person only appears on one tree, possible matches from the other tree will be displayed OR the window will be blank.
- The “Show all” link allows you to see **unmatched** records on that tree. The “Show best matches” link toggles you back to the list of best possible matches. To compare two records, click the information button (*i* in a blue circle). When there are no matches, you can add the person to the other tree by clicking the “Add...person to...” button. When there is a good match, you can select the matching person and click the “Link...person” button. If you feel that the person does not belong in the tree, you can click “Delete the person from...” button.
NOTE: There is NO UNDO button.
- The process works the same whether the new person is on Ancestry or in RootsMagic.

TREESHARE – LIVE LOOK

- IF Wi-Fi is working. May be a little slow.



PRIVACY & SECURITY OF FAMILY TREES ON LINE – **WARNING WILL ROBINSON!** **DANGER AHEAD!**

- Login to Ancestry.com
- Go to Trees in Upper Menu
- Click on Create and Manage Trees
- Select the tree you want to manage and look to the right for “Tools” heading .
- Click on “Manage Tree”
- Now click on “Privacy Settings”



ANCESTRY.COM PRIVACY SETTINGS

IF WI-FI IS WORKING – MAY BE A LITTLE
SLOW
LIVE DEMO

HELPFUL LINKS



- Open TreeShare screen (Internet > TreeShare for Ancestry) – click on the link at the bottom of the TreeShare screen
- RootsMagic TV: RootsMagic's TreeShare for Ancestry - <https://youtu.be/oDOlq7EFIWA>
- RootsMagic Guide: WebHints & TreeShare for Ancestry - [http://files.rootsmagic.com/guides/Magic Guide TreeShare Ancestry FAQ.pdf](http://files.rootsmagic.com/guides/Magic%20Guide%20TreeShare%20Ancestry%20FAQ.pdf)
- RootsMagic on Facebook: <https://www.facebook.com/groups/RootsMagicUsers/>

QUESTIONS?

