Adding and Editing Sources – Roots Magic

The Citation Manager provides the commands to:

add new citation,

edit existing citations,

copy a master source and add it multiple people,

memorize an existing citation and add it to (paste) other people, families or facts

delete a citation from a person, family or fact

To access the Citation Manager window for a person, spouse, a set of parents, or one of the facts

√   Open a person's Edit Person window, and either

•   Highlight the person, a spouse, a set of parents, or one of the facts at the left, and click the "Sources" button in the right edit pane, or

•   Click the box in the "Sources" column to the right of the person, a spouse, a set of parents, or one of the facts

√   From one of the navigation views, highlight a person, then click the Sources icon in the toolbar, and select "Person" (for general sources), "Family" (for family sources) or "Source List" (to see the master source list)

√   Open the RootsMagic Explorer, highlight a person, then in the Individual Information pane click the box in the "Sources" column to the right of the person, a spouse, a set of parents, or one of the facts

√   Open the RootsMagic Explorer, highlight the person on the left, then, in the Individual Information pane, highlight the person, a spouse, a set of parents, or one of the facts, and click the down arrow (upper right corner) and select the "Sources" button from the drop down list.

Citation Manager

The Citation Manager provides a list of sources associated with a person, a family (couple), or a fact (any shared roles.) The Citation Manager window is resizable, and increasing the size allows you to see more information at one time. In addition, the bars between sections within the Citation Manager window can also be repositioned.

1 The buttons – The buttons provide access to the commands to manage sources associated with the person, family or fact.

2 The Master Source name list – The list of master sources associated with the person, family or fact.

3 The source Quality – The Quality settings you selected in the source Quality dialog are displayed here for each source used. If "Don't Know" was selected, the display here will be empty.

4 The source Citation – A preview of the three forms of source citation, (First) Footnote, Short (or subsequent) Footnote, and Bibliography, as they will appear in your reports are shown here.

5 The data entered in the More, Source Text and More, Source Comments are displayed here.

6 The data entered in the More, Details Text and More, Details Comments are displayed here.

From this window, you can:

· add a new source to a person, family or fact

· add an existing source to another person, family or fact

· edit an existing source for a person, family or fact

· delete an existing source attached to a person, family or fact

  copy an existing source citation from a person, family or fact to another person,
· family or fact (Memorize and Paste)

To add a new source to a person, family, or fact:

1. Click the "Add new source" button to open the Edit Source window.

2. Select a source type from the Select Source Type list, and click OK.

3. Enter a display list name for the Master Source, then add source information about this particular source in the Master Source and Source Details fields. Additional comments, the actual text of the source and/or a media image can also be added by clicking on the More button.

4. Click the OK button to save the new source.

To add an existing source to another person, family or fact:

1. Click the "Cite existing source" button to open the Master Source List

2. Select an existing source from the Master Source list, and click OK.

3. Enter specific information about this particular source citation in the Source Details fields and in the More button fields. Changes to the Master Source entry will affect all source citations using that Master Source. Only apply changes that are global to that Master Source. If they are not globally applicable, you should create a new master source, using the Copy command in Lists, Source Templates.

4. Click the OK button to save the source details.

To edit an existing source for a person, family or fact:

1. Highlight a source entry, then click the Edit button

2. In the Edit Source window, edit the data in the Master Source fields, if applicable.

3. Edit the data specific to this source citation in the Source Details fields.

   Click the OK button to save the changes.
4.

To delete an existing source attached to a person, family or fact:

1. To delete a source for a person, family or fact highlight the source and click the Delete button.

2. Click the Yes button to remove the citation from the source list, or No to cancel the delete command. Changes to the Master Source entry will affect all source citations using that Master Source. Only apply changes that are global to that Master Source. If they are not globally applicable, you should create a new master source, using the Copy command in Lists, Source Templates.

To copy an existing source citation attached to a person, family or fact:

1. To copy a source with details, highlight the source and click the Memorize button.

2. Move to any other source list for another person, family or fact, and click the Paste button to copy the most recently memorized citation (Master Source and Source Details) to add the new person, family or fact.