Legacy Family Tree – (Legacy)
Session III
Joseph V. Leavitt – FH Fair, April 2014

I will be using version 8 of the Legacy program in my presentations, but the actions are the same, or very similar, as in previous versions in most cases. In previous years of the FH Fair there have been attendees who had never used the program, and so I will accommodate them in the first session only, by covering, in my own way, the main features of Legacy, and some of the many advantages of using it.

One thing → it's important to preregister. Last year there were some who we couldn't fit in because the preregistration numbers didn't indicate that there would be so many wanting to attend, and therefore only a small classroom was set aside for my session. This year the <u>preregistration will be done online on our website</u>.

In this session, I will provide insights for the one or two of the top new features of the Legacy Program, and also "Search Lists" and Tagging, and a brief demonstration of the *Legacy-FamilySearch* utility, which connects to "FamilySearch Family Tree." This program and "Legacy Charting" are automatically included when either the Standard (free), or the Deluxe edition of the program is installed. I hope you have all learned by now that you can have the new version 8 and an older version of Legacy installed, and have them both open and running at the same time.

Notwithstanding the magnitude of the lecture material, I will leave time for questions at the end of each session. Please keep your questions applicable to clarification or instructional queries for the entire group. For those questions that are not answered, or topics not covered at these sessions, I make the following offers:

A monthly Legacy User Group meeting, every second Wednesday from 1:00pm – 2:00pm at the FS Library here in Orange. The User Group meetings provide a way for me to interact with those attending, on more of an individual basis, which helps to ensure that the time and effort they spend to be there will have been worthwhile. I would also be happy to help you individually at the Orange FamilySearch Library. I volunteer there every Wednesday morning from 9:00am – 1:00pm, and every Friday afternoon from 1:00pm – 5:00pm.

Customization and Multimedia Features

Most of you will want me to cover topics that are specific to the version 8 features of Legacy. Whether you are a new or experienced user, you will be interested in a discussion about customization choices in version 8, so I'll start there.
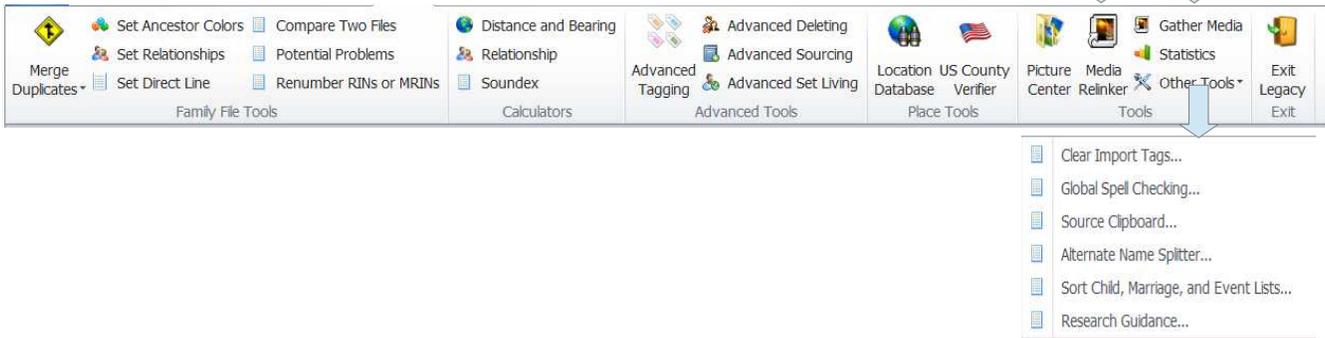
Customize Options (Options → Customize)

These settings are arranged by category and number now, so it is easier to make reference to particular settings. An important feature here, you might notice, is a button at the bottom of the "Customize Legacy" window, labeled "Options for Default Settings." The default settings are those that were thought to be what the average user might prefer, but I have changed many of them for reasons of my own, and you will probably want to do the same.

After you go through and set up all the customization options, you should know that some of them will only apply to the family file you currently have open. Did you notice the terms (glb) or (ff) next to each one? These are abbreviations for the words global and family file, and indicate which settings are meant to apply to all your family files (glb) or only to the current one (ff). If you, like me, want to save your customization settings, so they will be the default settings <u>for all of your files</u>, you can click on the **Options for Default Settings** button, and select **Save ALL current settings as User-Defaults**.

New Features on "Ribbon Bars"

The Tools Menu Ribbon
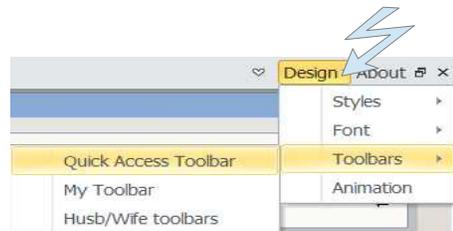

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The Options Menu Ribbon

QuikDup (Quick Duplicates) options are for a new feature in version 8. Legacy can check for possible duplicates as you are entering data, it follows certain rules that you can set and change. See Customize option 2.1 to turn on this feature.
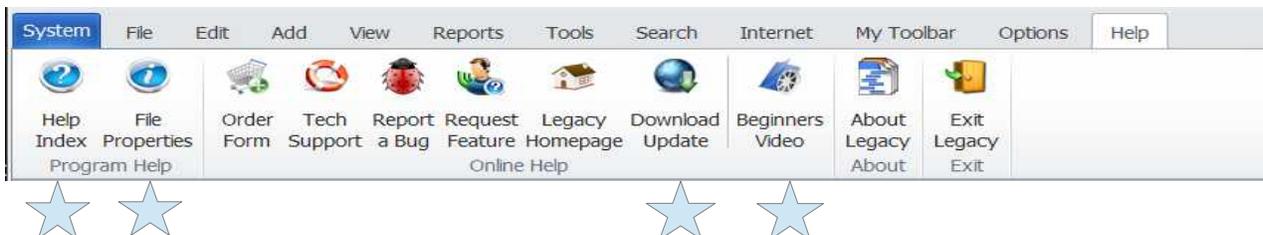
The Quick Access Toolbar (on the upper left corner of the Legacy window) can be customized with up to 10 buttons by clicking on the down arrow next to the word "Design" in the top right corner of the Legacy window. There is an option to start with the "Starting Ribbon Tab" minimized (Customize → 1.4 → My Toolbar → Start with ribbon minimized). This provides more "screen real estate" for what can be seen underneath. The Quick Access Toolbar provides small buttons that can be used without first clicking on the My Toolbar or other menu buttons.

Here is one that was set up with nine buttons:

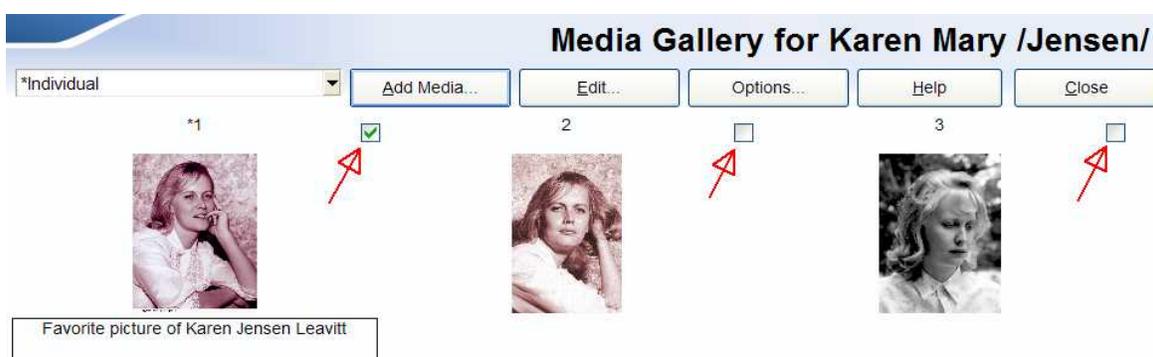~~~~~~~~~~~~~~~~~~~~~~~~~~~~

The Help Menu Ribbon:

It's easy to find various kinds of help. You will want to check out some of the buttons shown above, but I especially recommend the Help Index, and the Beginners Video. When you use the Help Index, note that it might be advantageous to switch between the "Index" and the "Search" tabs on the Help window, when searching for a particular word or words. Some prefer to use Legacy's Help feature rather than the printed manual, because finding answers can often be found more easily by simply typing in a search term.
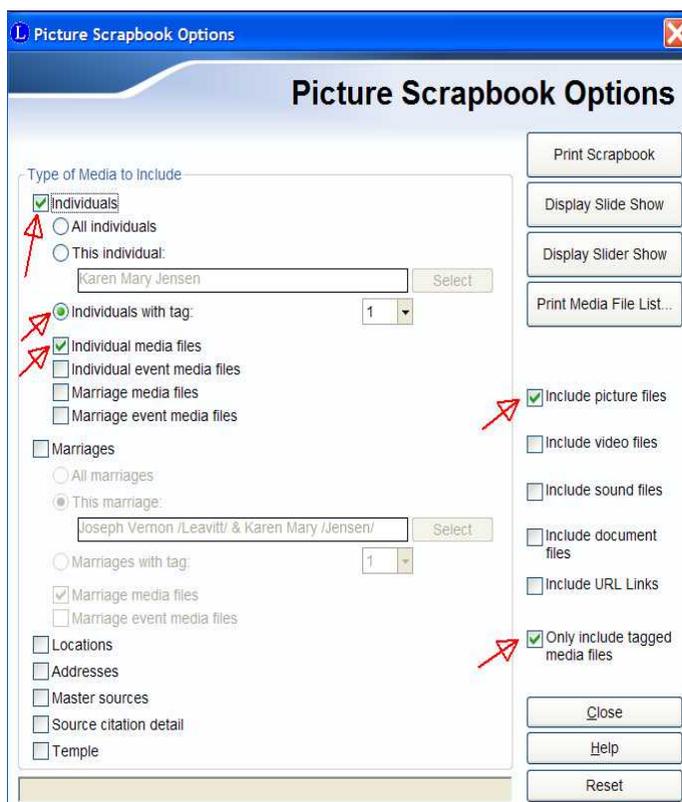
NOTE:
The Legacy Help File has the most up-to-date information. The Help button on some of the windows or dialog boxes get you to help that relates directly to the functions on that particular window.
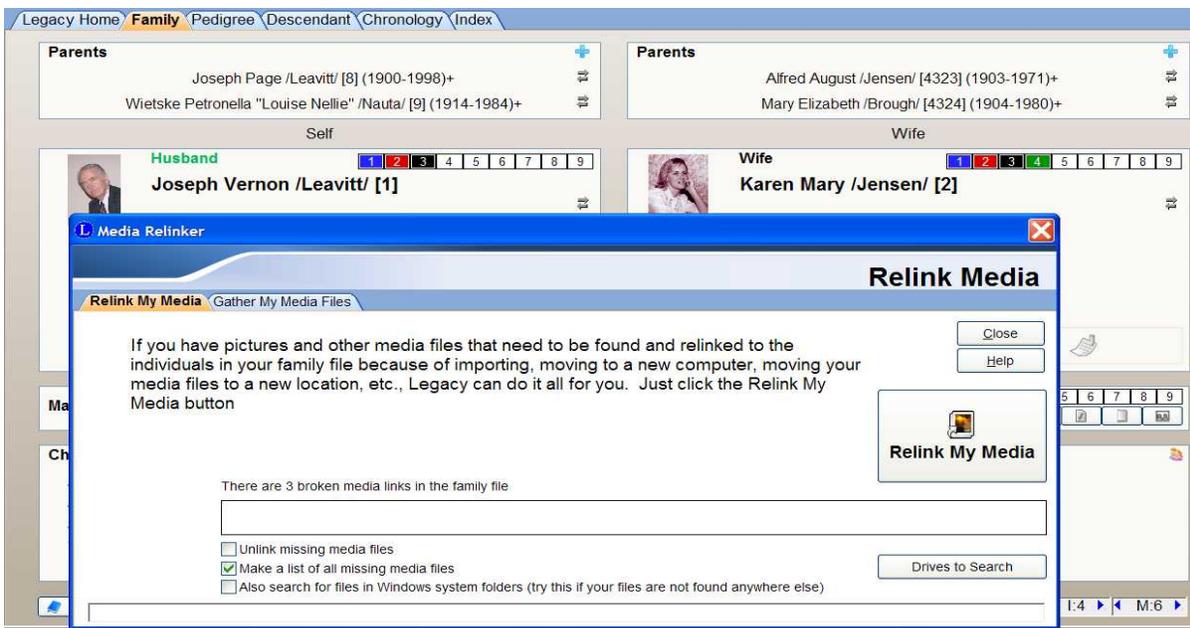
Multimedia Features

The multimedia files you have added to individuals, marriages, addresses, sources, and locations can be combined in various ways and presented as a printed scrapbook report, slide show display or a sliding screen-saver type of display. I set up an example Slider Show that only displays pictures for those I had given Tag 1, and excluded all the pictures that were not tagged, as shown below.

Here are the options I chose for my Slider Show:

Relink Media (Tools → Media Relinker)

This utility will first make a list of media files that are missing, and offer to let you see it in your text editor. Whether you say yes or no, the Relink Media window remains active, and, if needed, you would normally click on the button "Relink My Media." It will build a list of all the media files on the Drives you indicate should be searched (which might take a while, depending on how many media files you have on your computer). If links are missing because the files were put into different locations, then the program looks to see if there is a matching file name in the global media list that it built. If one is found, the link is changed to point to that location, and all is well. Sometimes things are not so straightforward, so options are offered for each step of the process, so you should take the time to consider them before continuing.
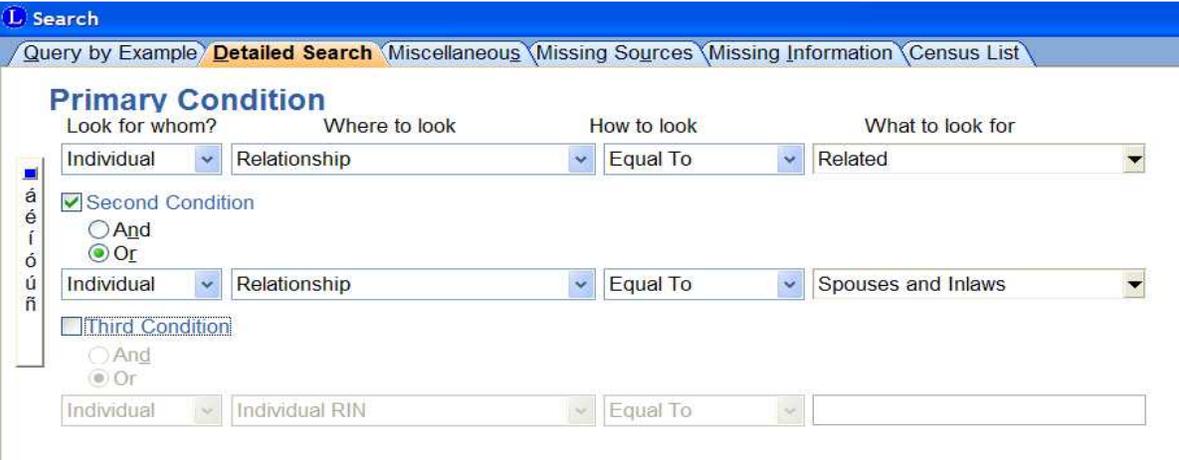
Backing Up Multimedia Files

When you add pictures or other media files to a person in your database, Legacy only keeps a link that tells the program where these files are located. Therefore, when you back-up your data file, the multimedia links are backed up, but not the media files themselves. However, Legacy provides a clever way for you to back-up the actual media files in a compressed (Zipped) format, so that when this multimedia back-up is **unzipped**, all the files will be placed in folder locations exactly like they were, <u>even if done on a different computer, and even if the folders had not yet been created on the other computer</u>. Most computers (Operating Systems) provide a way to unzip a compressed file (or you could use a program like *WinZip)* to accomplish this. Just remember that for this to work properly, you must choose the root location on your hard drive, which would be <u>C:\</u> on a Windows computer, as the starting place where the files will be extracted (unzipped) to. This is possible because Legacy includes information about the pathways to all these files in the multimedia backup, along with the files themselves. This makes it a simple matter to get them all put back into place, like they were at the time you backed them up.

Search Lists & Tagging

You might not be aware of how much the Tagging feature can be helpful in managing your work. In the Deluxe version of Legacy, you get 9 individual tags for each record, and 9 marriage tags for each marriage. You might be surprised at how often you could use a list of certain records in your file for one reason or another, and that being able to return to that list is sometimes needed, even if only temporarily. I use Tag 1

for temporary lists, and Tag 3, for example to identify all those in my files who are blood related. Since the Tags are displayed on the several Legacy windows, I can see at a glance those that are related, even if distantly so.

After setting relationships (Tools menu → Set Relationships), you could use this example of a search that will provide a list of everyone in your file who are blood related or are spouses or in-laws to the person you set relationships to:

There is quite a long list of things you can search on ("Where to look"). Note, though, that the possibilities will be different for a Marriage than for an Individual. In any case, I'm sure you can think of other kinds of things you might like to search on. If I thought I would be using the above search often, I would use the **Save** button, and give it a name. To use it again, I would click on the **Load** button, and select the name I saved. Once the search results are displayed, I can tag everyone in the list (explained further, below).

Tags – Here are some ways to use them:
I demonstrated, in last year's presentation, how to get a list of records with certain potential problems, with everyone involved being assigned a Tag number. Using the tag navigation arrows (mentioned below), you can skip to each record that has one of these potential problems (because they have been tagged), and make the correction, and then go on to the next, until you get a message that says you have reached the end of the list.

There are **many** other ways that tagging can be helpful, and it can save you scads of time, and aid you considerably when you are working with your database. You can type into the Tag Descriptions fields, anything that indicates what your own choice is for the way each Tag number will be used. They are not always associated with a search list. To illustrate this, here is an example list of Tag Descriptions:

My advice is to leave one tag number available at all times for temporary use. I reserve Tag 1 for this purpose, and whenever I make a list for some reason, I usually tag everyone in the list with Tag 1. If I continue to need this list, but need to make another temporary list later for some reason (and maybe tag these with Tag 2), I can, in any case, display a list of those with any tag. Here's how: Open the Name List, and, use the "Search" button at the bottom, and select: Show All Tagged → Tag 1 Individuals (or Tag 2 Individuals, or... etc.).
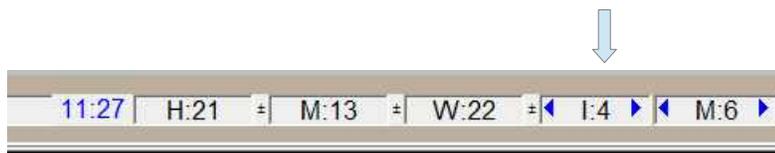
1. Here is a view of my Detailed Search (Search → Find → Detailed Search tab) settings for a list of those who would have been required to register for the WWI Draft. These Draft Registration Card images are available on the Internet (24 million) and often contain valuable genealogical information.

Once you have made a Search List, it opens in a separate window, and you have an opportunity to tag everyone in the list, by using the Options button at the bottom of the Search List window, and selecting Advanced Tagging: Select a Tag number and, first, Untag → Everyone, and then, Tag → Everyone in Search List.

To make best use of such a list, you should know how to use the Tag navigation arrows. These arrow buttons are at the bottom right of the main Legacy windows (Click on the number to select which Tag number to use):

   Using these arrow buttons, you can skip directly from one tagged record to the next or previous one in the search list, without going back to the search list to do it. Cool, huh?

Tagging – Related Tip: "Compare Two Files" Utility

   Suppose you have ancestor or cousin data in two separate files, and want to see how much of the data in one file overlaps what is in the other. Use the "Compare Two Files" utility (Tools → Compare Two Files) to find out. Using the Tagging features provided, you can Tag those that match, and when finished, compare the two files in a different way, that is, side-by-side, using the Split Screen View (from the View menu). In each file, you can identify the records involved since they are tagged. While comparing in this way, you could even drag and drop selected pieces of one file into the other, and then merge. Make backups first, of course, and before starting, decide which tag number you will be using, and understand that this tag number needs to be cleared in both files.

Legacy FamilySearch (*LegacyFS*)

One of the most popular websites for research is FamilySearch.org. It has two main components, Historical Records, and FamilySearch Family Tree (*FS Family Tree*). When you click on **Search**, on the Home Page, you enter a facility to search the Historical Records. This has become a truly massive resource because of the over 150 thousand active volunteer Indexers from all over the world. Millions of new records from their efforts are added every week – sometimes a million a day!

If you click on **Family Tree** on the Home page, you can have access to this huge database of linked genealogies by creating an account (free), and signing in. Maybe I don't need to explain the advantages of sharing some of your family records data online. There are other sites for this, but this one is free, and is another massive resource, even if you aren't sharing your own data at this time.

Legacy provides, bundled in with it's many other features, a wonderful utility for interfacing and synchronizing your own data with that which appears on the *FS Family Tree* website. Many people do the same work by typing in their data, bit by bit right on the website, where facilities are provided for many functions such as adding new individuals, editing, finding possible matches, linking or unlinking relationships, merging, adding photos and histories, correcting errors, and providing source citations. *LegacyFS* makes this much easier by allowing you to do most of the same work by merely clicking on little arrow buttons.

Data can be pushed up to *FS Family Tree*, or, if something you want is already there, it can be pulled down and into your own database. You might know that there was at one time a restriction that limited access to this facility to LDS Church members only. That was because of the considerable cleanup work needed, and it was thought to be mainly the result of many duplicate submissions by LDS members, and, therefore, it was hoped that they would help with that before opening it up to the public. You will see that there is obviously a good deal more cleanup to be done, some of it resulting from the addition also of some records from the output of indexing and extraction projects. Nevertheless, you will probably gain from what is there, one way or another, and others can benefit from your contributions in this regard. One of the advantages that you might see, is that where you have dead-end lines which match those of your distant cousins, you can have some confidence you will not be plowing research ground that has already been plowed by others, and that if others are interested, you have the opportunity to collaborate with them on

the area of inquiry each might pursue, thus increasing the chance for success, and providing a venue for an efficient approach to what can become a satisfying and fun adventure.

Just recently, a [webinar that covers this subject](#) was produced that you would enjoy watching if you are considering using *Legacy-FamilySearch* to interface with *FamilySearch Family Tree*.

Something I've noticed while working in *LegacyFS* for some time, is that it could happen that you will have in your file some individuals with duplicate FamilySearch ID numbers (*FSID*). No records in *FS Family Tree* have a duplicate *FSID* numbers, however, it could occur in your file if you have duplicate individuals, but aren't aware of it. They would have the same *FSID* number if they were each matched with the same person in *FS Family Tree*. How can you find out if you have any like this in your file? Do this: Go to My Toolbar → Merge → Find Duplicates → Special Duplicates Search → Find duplicates using only FamilySearch ID number → Continue. If any are found, you are presented with a Merge window where you given the opportunity to merge the two, if appropriate.