

Improving Your Database Using Legacy Family Tree

By Joseph Leavitt 9 March 2013

In helping others with their genealogy files, I've seen very few of them that didn't have problems, or in other words, that didn't need improvement. They might be really good genealogists, but not know how to find, fix, or otherwise handle, some of the problems in their files. There might not even be an awareness that anomalies exist. To accomplish even a basic cleanup, a number of steps should be taken in a specific sequence. Having done this so many times myself, I've learned that this sequence can be quite important to ensure a quality outcome, and to save time. For a simple example, if you were to start by working on potential problems, you might be doing unnecessary work if you discover later that there was in your file a large unconnected tree that you would be deleting anyway. The time that would be used to fix problems in that tree would have been wasted.

If done properly, any genealogy file that has been taken through this improvement process could potentially have improved its credibility as well.

In the following steps you will see that I have included, in a minimal way, directions as to how to do it. If anything in these steps is hard to understand, the Legacy Help System might be the best place to turn for a further explanation. Use keyword searches on the Help window, using the Search tab.

Before you begin, be sure you have a couple of backups of your file in different places.

1. **Merge:** Tools menu → Merge → Find Duplicates. Be sure that there is enough information to assure that the match is definitely the same individual. Before clicking on "Merge Right Individual into Left Individual," use the Family tab on this window to see more information which will help to be sure that a mistake is not made. If any doubt exists, make a paper note and "Skip to Next." The Notes (see Notes tab) of the person on the right can be appended to the Notes for the person on the left. Notice that sometimes duplicate children are not discovered in a merge operation because of differences, especially with name spellings, so check for these in any families that are merged. Also, please note that this is a preliminary merge. After completing some of the following steps, it is possible that additional duplicate records will become apparent. (Be sure now to make a "quick backup" before continuing)
2. **Trees:** Find the unconnected trees with: View menu → Tree Finder. You might possibly choose to delete entire trees if unwanted. Be sure to notice and use the "Refresh" button on the Tree Finder window. It might be felt that looking for separate trees could be done first, but I have put it in second place as a precaution, since sometimes a merge operation will bring separate trees together into one. (Make a "quick backup" before continuing)
3. **Mixed Case Names:** It is best to have names in upper and lower case format instead of all upper case. Use Options → Customize → Data Format tab. It's not recommended, but if you desire it, surnames may afterwards be displayed on screens and reports in all upper case (See check box on the same Customize screen).
4. **Surnames:** View menu → Master List → Surname. Scan the list looking for incorrect spellings (not variations – variations in spelling can probably be found for all surnames). Make corrections by editing names. Combine surnames only if definitely appropriate. If you find the surname Margaret Anne in your Master Surname list, for example, you should know that it really represents female given names, and should be moved into the offending record's given name field. Likewise, if a title was entered as part of a surname, it will appear prominently in the Master Surname List. Be sure to edit the individual records involved and preserve the title by entering it into the proper field.
5. **Given names, genders and titles:** Open the Name List, and assure that given names in the list have correct gender (note color), and that titles are in the prefix or suffix fields only. Titles that are entered as the first part of a given name will show up prominently when the Name List is sorted by Given name (click in the middle box at the top of the Name List). Some of these corrections can

be made quickly without leaving the Name List, by using the Edit tab. Titles in surnames would probably have been corrected in a previous step. (Make a “quick backup” before continuing.)

6. **Multiple Parents:** Use Search Icon → Miscellaneous Searches tab → Multiple Parents → Create List. In the listing, use the Family tab to see parents’ information. Make sure that parents appear (at least) to be correct. You might need to merge or delete some. Merging here is best done with a “Manual Merge,” because the program will automatically display possible duplicates among the resulting family members – this is very helpful. (Make a “quick backup” before continuing)
7. **Multiple Spouses:** For various reasons, the Merge operation does not always find duplicate spouses, which makes this operation necessary. Use Search Icon → Miscellaneous Searches tab → Multiple Spouses. Create List. Step down this List while viewing the information on the Family tab, and check that the multiple spouses are not duplicates. (Make a “quick backup” before continuing)
8. **Unknown Spouses.** Use Search Icon → Miscellaneous Searches tab → Unknown Spouses. Create List. Step down the List while viewing the information on the Family tab, and check that the individuals with unknown spouses have children. For those in the list with an unknown spouse who have no children, click on the “Select” button to return to the Family View, and if you are sure that this is an incorrect entry, right-click on the Marriage Information Bar, and use the sub-menu to “Remove the Marriage Link”
9. **Bad Dates:** Use Search Icon → Miscellaneous Searches tab → Bad Dates → Create List. Correct errors one by one. Tip: If LDS data is used, the bad date might be found on the LDS tab.

In the following step, there is no way to go back and undo the changes, so it is essential that a backup of your data be made before starting it.

10. **Location Names:** From the View menu, click on Master Lists → Location. Scan the Location List. Combine or correct location names in order to comply with standards – or at least make the names consistent in your file. The deluxe version of Legacy includes the “Geo Location Database,” which is a time saving and hugely helpful feature. Other sources, besides the Geo Location Database in Legacy, that might be used to find correct location spellings, are: RootsWeb for county search, Google, Wikipedia, Epodunk, and (most helpful): labs.familysearch.org → Standard Finder.

Note: See “Master Lists Cleanup” in the Legacy Help file (Search tab) to see how to combine duplicates in all Master Lists.

11. **Set As Living or Dead:** Use Tools Menu → Advanced Set Living → set as dead if over 110 years.
12. **Merge:** Tools menu → Merge → Find Duplicates. Since any remaining duplicate records in the file might by now have become more apparent, it is necessary to run through the “Find Duplicates” process again.
13. **File Maintenance:** Backup file and then go to File → File Maintenance. Perform the top three operations.
14. **Potential Problems:** Use Reports Icon → Books/Other tab → Potential Problems button.

Records tab: Tag all problem records on tag #: (use tag 1 – Clear Tags First).

Warnings tab: My own usage suggestions for the most unlikely – not suspicious only:

- Warn If born when parents are under 13 years old
- Warn if married under: 13 years old
- Warn if death is after: 110 years old
- Warn if birth after 36 years of marriage
- Warn if born when mother is older than 54 years old
- Warn if the burial date is more than 30 days after death

Problems tab: These are real problems that must be fixed.

Tip 1: Check a group of various kinds of possible problems, or one kind at a time, Preview and create a PDF file, or create and work from a list showing Tag 1 only. Correct problems -- otherwise, make a note on paper for making corrections later, or click on the "To-Do" Icon and add a plan for future research.

Note – The following procedure can also be used in a similar way for other kinds of "Search Results Lists,"

Tip 2: When setting up your search on the Potential Problems – Records tab, click on the Clear Tags First button (use Tag 1). Put a check-mark in the box titled "Tag all problem records on tag #." Then after making a choice on one of the other tabs, click on the Preview button. There is no need to print the list. First, close the Print Preview window and get back to the main Family View screen. Now use the "**Indi. Tag**" arrow buttons at the bottom right of the screen to step through the resulting list of all records with a Tag 1. If you only select one kind of problem at a time, each record you go to will have the same problem.

Example:

On the Records tab of the Potential Problems window, check "Tag all problem records on tag #1. And, on the Warnings tab, check "Check sort order of children." Make sure all other check boxes are cleared. After the Preview is done, get back to the main Family View screen, and click on the **Indi. Tag 1** arrow button. To sort children, right-click on one of the children, and select "Children's Settings," and then click on the Sort button. To advance to the next problem record, click on the **Indi. Tag 1** arrow button again, and sort the children. Continue in this way until all these records have been processed.

Your database should now be very much improved

15. **Delete Old Files:** Make multiple new backups of the improved database, and delete or archive old files to avoid confusion.
16. **Personal Preferences:** If this is your own database, you will want to do these things (starting from a family member): Tools menu → Set Relationships. And also: Tools menu → Set Direct Line as Preferred. Another nicety would be: Tools menu → Apply Ancestor Colors.
17. **Customization:** Some consideration might have been given to the question of whether the program's customization options were set in a way that would facilitate the work on the database, but my recommendations on this topic will have to be covered at another time.
18. **Online Posting:** If important elements of your data are not already in FamilySearch Family Tree, Consider posting it online at FamilySearch.org (Genealogies), or RootsWeb.com's WorldConnect Project website, or a website of your own making.