

Legacy – The Hub of the Research Process

Helpful features often used during research (* means especially helpful features in Legacy not found in other programs)

1. Entering or editing data – keeps everything organized and easy to see and understand
2. Provides ways of preserving incidental but important facts
3. Alerts are provided when there are inconsistencies in your data
- * 4. Provides a way for you to see many hidden or unique facts at-a-glance (for examples, see the discussion about Tagging records)
- * 5. Compare two separate files for possible matches, and use Tags to locate records in each of the two files that were matches
6. Compare two files using Split Screen View, where data from one file can be added to the other, and merged
- * 7. Global sort of spouses and children – a new feature of Legacy 8
- * 8. View Trees – Includes features that are helpful at times when changes are made via merging or importing from other files
- * 9. Research Guidance – a lot of effort has been put into this to make it easy to use, and especially helpful, and up-to-date..

Example of a search setup to use when researching US records:

US WWI Draft Registration Search – Here are the settings you would use to search all records looking for men who were required to register for the US World War I Draft.

The “Detailed Search” tab on the Search window

1st Condition: Male – Birth Date – After – 11 Sep 1872

2nd Condition: Male – And – Birth Date – Before – 12 Sep 1900

3rd Condition: Male – And – Death Date – After – 1917

Note that there is a 1st (Primary) condition and two sub-conditions, with check boxes and radio buttons.

If you Save your search options with an appropriate name, you can Load them again at any time.

When you click on Create List, the program makes a list of the records that match the conditions you set. This would be called a results list or Search List. It's a view of the Name List window, showing only the records that matched your search criteria. If you click on the Options button, at the bottom of the list window, and select “Advanced Tagging.” you will see that you can apply a particular tag # to everyone on the list. After that, wherever you see a record with that Tag #, it means it is one of those that fit your search options.

Legacy has a utility called Legacy FamilySearch, which I will abbreviate as LegacyFS, which provides an interactive interface between your Legacy data and FamilySearch's Family Tree” (Let me call it FS FT or just FT). There is a link in LegacyFS that lets you jump from there to that person's record in FS FT. Moreover, you can jump from there (FS FT) to the part of FamilySearch's website called Historical Records. We can go from one resource to another by clicking on links they provide that lets us go from one to the other. Since I use the FS Historical Records for much of my research, I'm making a kind of circle between these resource centers and Legacy. My research starts with what I have already in Legacy, and I look for more information in Historical Records, which if successful, I enter into my Legacy file. I find it best to compare that with what is found in FS FT, so at some point I will synchronize my data with what is already in FT. Using LegacyFS, I can add any new data I find to FS FT, or download data from there that I want to add to my file. Oftentimes it happens that the data in FS FT is missing something that I have found, and/or there is something there that I know is correct, and want to add to my file. I can upload pieces of data (including source citations) from my file to FT, or download from FT to my file, by clicking on little arrow buttons. In the process, corrections can be made in

either place, and the data in both places is being improved. In this process, Legacy is the central manager of the data. It has superior capabilities that qualify it for this position, and, as it turns out, is the easiest to use!

The Joy of Tagging

To Tag means to choose for a special purpose

It is often necessary to do things like export, or delete, or correct, or print, or list, or include, or etc., with a group of records in your file. It is much easier to do these things when they are identified by a particular Tag #.

Tagging for a single purpose

I always use Tag 3 to mean that a person is blood related. Why would I do that? It's because it's one of the things I want to see at-a-glance. When I look at the Family View, I want it to show me as much as possible, without having to click on something, or change views or open a window to see more. Sometimes a person in my file might not be blood related, but is in a step-family, so I use Tag 8 for these, which lets me see that at-a-glance. Another Tag value that has a single purpose for me is Marriage Tag 9 (on the Marriage information bar). It always means that I searched for more children in the family, and determined that there are no more, or more couldn't be found at this time. If I didn't use this Marriage Tag 9, I might later in the week, go back and do it again. Decision-making is easier and quicker because I can see such things at-a-glance. Later in the week, when I come across this family again, I would see the marriage Tag 9, and not repeat my earlier experience.

Note: You might observe, that I could set relationships, which I do, so I can easily see the relationships anyway, of people blood-related, but since the parents of spouses are considered in a religious context to be the same as blood-related, I manually apply Tag 3 to all of these records. Then, if I see a couple with Tag 3 on, but no relationship is shown, I know at-a-glance that these are parents of the spouses of those who are.

Tag Descriptions		Counts
Tag 1	Temp use	0
Tag 2	Temp use	0
Tag 3	Blood Related and spouses and in-law	5008
Tag 4	improved -- needs sync with FS FT	61
Tag 5	Find more descendants -- A promising place to start	1
Tag 6	Parents already in FS FT - Okay	1
Tag 7	Temp use	0
Tag 8	Step Family	0
Tag 9	Descendants not found, or no possible descendants	11

Tags to Show on Name List...

Tagging for various temporary purposes

Tagging can be used for so many valuable purposes, it's no use trying to list them all. Whenever you search for a group of records (the possibilities are endless), you get a results list –. It's easy then to Tag everyone in the list.

If you're not going to do something with the group records as a whole, remember this, that with a group of records that are all tagged for the same reason or purpose, the arrow buttons (at the bottom right corner of the window), that let you go from one record to another in the list, provide an efficient way to work with each record separately, without ever having to leave the Family tab window.



Here are a few examples that you would naturally think of yourself (Search → Find → Detailed Search tab)

1. Search for those with a birth place name that Contains Maine, And with a birth date After 1790, And has a birth date Before 1900
2. Search for records that were added after 1 Feb 2016
3. Search for those with a surname of Snow, and has a wife with given name Lucy
4. Search for those with Research Notes that Contains the word Census
5. Search for records that were Modified on 5 Mar 2016
6. Search → Find → Miscellaneous tab → Individuals with multiple parents
7. – *et cetera* – (There are many more search ideas and possibilities, of course)

Note that you can narrow the search by changing the search terms and choosing to search only the Search List.

There are in the Legacy program a good number of tools, reports and utilities, which have windows that include the use of Tags. This adds considerable value to those features. For example, the Calendar Creator feature allows you to show birth-dates on the calendar, using information drawn from the data in your file, and you can choose a Tag # to use for those you want included. You would set a Tag # on the records of those you want to include, and when you print the calendar, the printout shows birth-dates for the individuals with that Tag #.

Another place in the program where Tagging is very helpful is the Potential Problems Report. You can let the program itself apply a Tag # to everyone it finds with a particular problem. You could then select a person from the results list, make a correction, and then go back to the list to select the next one, and so forth, but that would be doing it the hard way. Since each record is now Tagged, you can use the easy, built-in feature I call the Tag navigation buttons at the bottom right corner of the screen, as explained above, to work on the tagged records individually.

Another utility that takes advantage of the Tagging feature is the Tree finder (View menu → Trees). When you have two or more separate trees in your file, it lets you Tag the entire tree of the highlighted one. Now when you look at the Name List, you can see the names of those who are on one tree, and compare them with those on the other tree, because the Tag #'s appear (fortunately) in columns on the Name List. If you see two names that are the same, but part of a different tree, you could check to see if they are duplicates, and if so, you could merge them, thus connecting the two trees together. Moreover, lets suppose you realize you don't need or want the extra tree, and decide to delete it entirely. Since everyone in that tree has been given a unique Tag #, you could use the Advanced Deleting utility (Tools → Advanced Deleting) to delete everyone in the file whose record has that Tag #. This might be a laborious task, if trying to do the same thing without the Tagging feature. Does this not help you to see why Legacy is considered the easiest and best program to use?