

## Using Legacy to Research and to Synchronize with FamilySearch Family Tree

Joseph Leavitt, FH Fair, 18 April 2015

For my research, I will only be researching in the FamilySearch Historical Records. Legacy will provide aid during the process, managing the data I find, and later synchronizing with FS Family Tree. While I enter this data, Legacy will provide aid in various ways. Features built into Legacy come into play while entering data. For example, it helps get the source information saved in an efficient way. And, if I make a mistake in entering a date, which doesn't fit with other facts in the records, Legacy tells me about it. If I enter a new person that looks like a duplicate, it will let me know that too. There are many more ways it provides assistance, which I can't go into here, and anyway, these features are in play whether actively researching or not.

The couple shown on the Family View has a row of little boxes with numbers in them, above each of their names, which are used for "Tagging." You will want to know about these, for sure. There are nine Tag numbers available for each record (Deluxe Version). Another set of nine Tag boxes are on the "Marriage Information Bar" (Between the couple and the children).

I see these as essential. I use them to let me see at a glance, certain facts, and to indicate progress in gathering data about each person, and each marriage or family. I'll be explaining how this works during my presentation. Here are the Tag number settings I use for my current projects:

### PERSON Tag Settings

		Counts
<b>Tag 1</b>	Temp - used for small family exported - original records	42
<b>Tag 2</b>	Temp - used for duplicates in Master File	0
<b>Tag 3</b>	Related or spouses and In-laws	90
Tag 4	Needs sync with FS FT	0
Tag 5	Open research hole	0
Tag 6	Ancestors in FS FT - Clean	5
Tag 7	Temp	0
Tag 8	Step family	12
Tag 9	Search done without success	49

### MARRIAGE Tag Settings

		Counts
<b>Tag 1</b>	Temporary use only	0
<b>Tag 2</b>	Line worked over in FS FT -- clean	0
<b>Tag 3</b>	Research complete on descendants	9
Tag 4	Small file of descendants was at one time exported	1
Tag 5	Small file sent for processing	1
Tag 6	Small file of descendants was exported -- don't update	1
Tag 7	more descendants available in FS Historical Records	2
Tag 8		0
Tag 9	No more children found in FS Historical Records	19

A demonstration will be the best way to help you see why this is done, and what a great advantage it can be to you. My main interest is in expanding cousin descendants' lines, but the principles apply as well to other goals.

I should note here, for your information, that to access the Legacy-FamilySearch utility, be sure there is a check mark in the customization options under General Settings: – 1.8 (FamilySearch) "Integrate with FamilySearch."

Since I'm going to be comparing and synchronizing my data with that in the FS Tree, I should start by seeing what is there, so that, in my research, I don't find myself plowing ground that has already been worked over.

I'm especially interested in finding out if a particular line of descendants could possibly be improved by further research. When I see a place on the line that looks promising, I use that as a starting point.

To begin, I could start with a person in my Legacy data, and click on the FamilySearch Icon on the My Toolbar ribbon. This will open the Legacy FamilySearch utility, and once logged-in, will search the FS Family Tree database for this person, and any others the program thinks might be duplicates. If Legacy FS finds one or more records there that match my person, I could use a link that is provided, to open my Internet browser and jump out into FS Family Tree, where I will be shown the Details page for that person. The Details page provides a link to search the FS Historical Records for that person. When I use it, I'm beginning my research. First, I want to be sure that the FS Tree has correct information, and then I want to get an idea of how much more I should be able to find that would add to, or improve it.

When I do find more data, I don't put it into the FS Tree yet. I enter it into Legacy, because Legacy provides all the best features that aid in the process, such as easy and efficient source citation management, and a text editor feature when adding things such as Census Summaries, and notes, etc., and attaching pictures and documents. Legacy is central to managing the research process. Putting it all into Legacy is fast and efficient – entering it into FS FT is not fast by any means, it is cumbersome. And, if you put it into the FS Tree first, you can't get it back in the same form, or including everything, or that hasn't maybe been altered by someone else.

When I have expanded and improved my database, and want to add it to FS FT, I can do it with the Legacy-FamilySearch utility by clicking on buttons. When my records and theirs don't match, either there are conflicting original records, or someone has made a mistake. It might require further research to be sure which is right. Without Legacy-FS, you would be doing a lot of copying and pasting.

During the process of synchronizing with the FS Tree, if I see something in it that I know is good, and I want to add it to my file, I can do it in the same way, by clicking a button in Legacy-FamilySearch.

The value of working in this way should become clear when it is realized that after doing the necessary research, and afterwards synchronizing with the FS Tree, it very often (if not always) occurs, that duplicates and incorrect linkages, and other anomalies are found, that require correction. You're probably the best person to do that now because, having seen and cited the source records and laid out the evidences, you already know how it's all supposed to be!